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Tameside Retail & Leisure Study (TRLS) 2018

Volume 1 - Main Report

Tameside Metropolitan Borough Council

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FINAL REPORT



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Contents

1	THE COUNCIL'S BRIEF AND OUTLINE OF REPORT	1
	Introduction	1
	The Council's Brief	1
	Empirical Survey Evidence.....	3
	Outline of Report.....	3
	Price Base	4
2	NATIONAL PLANNING POLICY CONTEXT	5
	Introduction	5
	Sustainable Development	5
	The Presumption in Favour of Sustainable Development.....	6
	Plan-Making.....	6
	Examining Plans.....	9
	The Planning Practice Guidance (the PPG).....	9
3	RECENT AND ANTICIPATED CHANGES IN THE RETAIL AND LEISURE SECTORS	12
	Introduction	12
	Historic, Recent and Projected Changes in Retail and Leisure Expenditure.....	13
	E-Commerce and Multi-Channel Retailing.....	19
	Consequences of Recession and the Growth in E-Commerce.....	24
	Leisure Trends.....	34
	Influential Town Centre Reports.....	39
	Implications for Tameside's Town Centres	42
4	ASSESSMENT OF THE HEALTH OF TAMESIDE'S CENTRES	45
	Introduction	45
	Ashton-under-Lyne Principal Town Centre	45
	Hyde Town Centre.....	63
	Denton Town Centre.....	72
	Stalybridge District Centre.....	80
	Droylsden District Centre.....	89
	Hattersley District Centre.....	96
	Mossley Local Centre	96
	Summary Table of Health Checks.....	97
5	PATTERNS OF RETAIL SPENDING AND LEISURE VISITS	98
	Survey Area	98
	Survey Questionnaire	98
	Population and Expenditure	99
	Comparison Goods Spending Patterns.....	100
	Convenience Goods Spending Patterns	105
	Pattern of Leisure Visits.....	111
	Conclusions in Relation to Retail and Leisure Spending Patterns.....	114
6	QUANTITATIVE AND QUALITATIVE RETAIL & LEISURE NEEDS	119
	Introduction	119
	Methodology for Assessing Quantitative Need in the Retail Sector	120
	Quantitative Need in the Comparison Goods Sector	123
	Quantitative Need in the Convenience Goods Sector.....	126
	Distribution of Quantitative Need in the Comparison Goods Sector	129
	Qualitative Need in the Retail and Leisure Sectors.....	134
	Overall Conclusions in Relation to Retail and Leisure Needs.....	143

7	RECOMMENDATIONS FOR OVERALL TOWN CENTRE BOUNDARIES AND PRIMARY SHOPPING AREAS	147
	Introduction	147
	NPPF Definitions	148
	Ashton-under-Lyne Town Centre	148
	Hyde Town Centre	152
	Denton District Centre	155
	Droylsden District Centre	158
	Stalybridge District Centre	161
	Mossley Local Centre	164
	Hattersley District Centre	166
8	OTHER RECOMMENDATIONS	168
	Introduction	168
	Network, Hierarchy and Role of Centres	168
	Local Impact Thresholds for Retail and Leisure Assessments	170
	Policy Mechanisms for A5 and Other Non-A1 Uses in Town Centres	172
	Policy Mechanisms for A5 Uses Outside Town Centres	176

1 THE COUNCIL'S BRIEF AND OUTLINE OF REPORT

Introduction

- 1.1 In June 2017, Tameside Metropolitan Borough Council instructed HollissVincent to prepare a borough-wide Retail and Leisure Study that is compliant with the National Planning Policy Framework (the NPPF). Thus, the Study is intended to provide a robust evidence base to underpin the retail and town centre policies in the emerging local plan. The previous Tameside Retail Study, prepared by WYG, was published in May 2010, in the context of the Government's earlier Planning Policy Statement 4 (PPS4) of December 2009. However, PPS4 was superseded by the NPPF, which was originally published in March 2012, but replaced by the revised NPPF of July 2018. Moreover, much of the empirical work that underpinned the WYG study, including a telephone survey of shopping patterns, dates from 2009; hence the urgent need for this new Study.

The Council's Brief

- 1.2 The full Specification for the Tameside Retail & Leisure Study (TRLS) is reproduced as Item 1 in Volume 2, but the key requirements, as set out in Section 2 of the Council's Brief, were:
- a) to provide a résumé of recent and projected changes in the structure of the retail and leisure industry, including e-commerce and multi-channel retailing and the potential consequences for the retail and leisure function of the hierarchy of centres identified in Policy S1 of the Tameside Unitary Development Plan (the UDP), namely Ashton-under-Lyne, Hyde, Denton, Droylsden, Stalybridge, Hattersley and Mossley;
 - b) to identify the overall catchment area of the Borough and provide an analysis of shopping patterns and leisure visits within and beyond the catchment area, using the findings of a bespoke telephone survey;
 - c) to assess the quantitative and qualitative need for retail floorspace in the convenience and comparison goods sectors at regular intervals, up to 2035, and to consider how existing leisure provision meets residents' needs and future

- requirements, having regard to the implications of the housing and jobs growth proposed in the Draft Greater Manchester Spatial Framework (the Draft GMSF);
- d) to review the Borough's currently defined centres as set out within the UDP and, in the context of the Draft GMSF, their identified role, and confirm whether or not these provide an appropriate network and hierarchy that is resilient to anticipated future economic changes and identify the realistic role and function of these and advise on potential policy wording/approaches;
 - e) to assess the overall health and vitality and viability of existing centres, taking account of relevant market signals and the ten indicators identified in Paragraph 2b-005 of the Planning Practice Guidance (the PPG), including the capturing of customer views in relation to the centres' retail, leisure and services offer; in relation to environmental and personal safety issues; and in relation to accessibility of the centres by various modes of travel and ease of movement around the centres on foot;
 - f) to define the geographical extent of the Borough's centres, identifying the need/scope for expansion, or contraction;
 - g) to define the extent of primary shopping areas of centres, based on a clear definition of primary and secondary frontages and advise on draft policy wording/approaches which make clear which uses will be permitted in such locations;
 - h) to assess whether there are any parts of identified centres where the concentration of non-retail uses is adversely affecting vitality and viability, and suggest draft policy wording/mechanisms for remedying this;
 - i) to identify a range of sites which are likely to be suitable for accommodating new, or refurbished, or redeveloped retail and leisure developments within, or on the edge of the centres, and areas where diversification of uses are potentially needed most, so as to enhance vitality and viability, or support regeneration; and
 - j) to identify whether, when assessing applications for retail, leisure and office developments outside town centres, there is a need to consider a local threshold for impact assessments that is lower than the 2,500 sq.m threshold set out in Paragraph 26 of the NPPF and advise on draft policy wording/mechanisms.

Empirical Survey Evidence

1.3 The main elements of the new empirical survey evidence incorporated into the present study are as follows:

- a telephone survey of 1,500 households resident throughout the administrative area of Tameside and in parts of the neighbouring authorities of Oldham, High Peak, Stockport and Manchester, which was undertaken by NEMS Market Research in July and August 2017;
- a survey of 200 pedestrians in Ashton-under-Lyne Town Centre, and 100 pedestrians in each of the Town Centres of Hyde, Denton, Stalybridge, and Droylsden, all undertaken by NEMS Market Research in July and August 2017;
- face-to-face consultations with key stakeholders, including owners of shopping and leisure centres, real estate agents, Tameside College, Active Tameside, and officers in various departments of the Council, including those responsible for the operation of the Markets in Ashton and Hyde;
- Experian Goad survey data for Ashton-under-Lyne, Hyde, Denton, Stalybridge and Droylsden Town Centres; and
- fieldwork undertaken in July, August and September 2017 in each of Tameside's defined centres, including Mossley Local Centre and the emerging replacement centre in Hattersley.

Outline of Report

1.4 The remainder of our report is structured as follows:

- **Section 2** sets out a résumé of national policy for town centres, in the plan making context, as set out in the National Planning Policy Framework (the NPPF) and in the Planning Practice Guidance (the PPG).
- **Section 3** provides an assessment of recent national trends in the retail and leisure sectors and the implications for planning for retail and leisure development in the hierarchy of centres set out in Policy S1 of the UDP.

- **Section 4** provides an assessment of the health of Ashton, Hyde, Denton, Droylsden and Stalybridge Town Centres, utilising the 10 health check indicators set out in the PPG, and taking into account our fieldwork and the findings of the surveys of pedestrians in these centres. Section 4 also provides some qualitative commentary in relation to Mossley Local Centre and in relation to the emerging District Centre in Hattersley.
- **Section 5** sets out current patterns of shopping in the comparison and convenience sectors, and the pattern of leisure visits, utilising the results of the telephone survey of 1,500 households undertaken by NEMS Market Research in July and August 2017.
- **Section 6** provides our assessment of the quantitative and qualitative need for further retail and leisure development in the period up to 2036.
- **Section 7** sets out our recommendations in relation to overall town centre boundaries and primary shopping areas (PSAs), and it identifies development opportunity areas and/or areas in need of diversification and improvement.
- **Section 8** sets out our other recommendations to the Council in relation to the hierarchy of centres, local impact thresholds, and policy for non-retail uses.

1.5 Our main report is accompanied by:

- **Volume 2**, which comprises the Specification for the Study, the List of Consultees, the Household Telephone Survey and Pedestrian Survey Questionnaires and raw results, the Figures referred to in Volume 1 and the Spreadsheet Tables; and
- **Volume 3**, which comprises a more detailed analysis of the findings of the surveys of pedestrians in Ashton, Denton, Hyde, Droylsden and Stalybridge.

Price Base

1.6 All monetary figures in this report are expressed in constant year 2016 prices, unless otherwise specified.

2 NATIONAL PLANNING POLICY CONTEXT

Introduction

- 2.1 The new National Planning Policy Framework (the NPPF, or the Framework) was published in July 2018 and replaces the former NPPF of March 2012; it sets out the Government's planning policies for England and how these should be applied. The NPPF forms the basis for plan-making and decision-taking. Thus, Paragraphs 2, 12 and 47 of the new NPPF continue to emphasise that planning law requires that applications for planning permission must be determined in accordance with the development plan, unless material considerations indicate otherwise. Likewise, Paragraph 2 emphasises that the NPPF must be taken into account in preparing the development plan and that it is a material consideration in planning decisions.

Sustainable Development

- 2.2 Paragraph 7 of the NPPF explains that the purpose of the planning system is to contribute to the achievement of sustainable development, and that: *'At a very high level, the objective of sustainable development can be summarised as meeting the needs of the present without compromising the ability of future generations to meet their own needs'*.
- 2.3 Paragraph 8 then states that: *'Achieving sustainable development means that the planning system has three overarching objectives, which are interdependent and need to be pursued in mutually supportive ways, so that opportunities can be taken to secure net gains across each of the different objectives'*. Thus, the three overarching objectives are:
- an **economic** objective, to help build a strong, responsive and competitive economy;
 - a **social** objective to support strong, vibrant and healthy communities; and
 - an **environmental** objective to contribute to protecting and enhancing the natural, built and historic environment.

The Presumption in Favour of Sustainable Development

2.4 Paragraph 10 of the NPPF confirms that ‘...at the heart of the Framework is a presumption in favour of sustainable development’. Paragraph 11 states that:

*‘For **plan-making** this means that:*

- a) plans should positively seek opportunities to meet the development needs of their area, and be sufficiently flexible to adapt to rapid change;*
- b) strategic policies should, as a minimum, provide for objectively assessed needs for housing and other uses, as well as any needs that cannot be met within neighbouring areas, unless:
 - i) the application of policies in this Framework that protect areas or assets of particular importance provides a strong reason for restricting the overall scale, type or distribution of development in the plan area; or*
 - ii) any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole.’**

2.5 However, Paragraph 12 makes it clear that: ‘The presumption in favour of sustainable development does not change the statutory status of the development plan as the starting point for decision making’.

Plan-Making

2.6 Section 3 of the new NPPF then sets out the principal requirements for plan-making. Paragraph 15 urges the need for succinct, up-to-date plans which provide a positive vision and a framework for addressing housing needs and other economic, social and environmental priorities. Paragraph 17 emphasises that: ‘The development plan must include strategic policies to address each Local Planning Authority’s priorities for the development and use of land in its area’.

2.7 Thus, Paragraph 20 of the new NPPF requires that strategic policies set out an overall strategy for the pattern and scale of development and make sufficient provision for retail,

leisure, residential and other commercial uses. In Greater Manchester, some of these strategic policies are likely to be set out in the forthcoming Greater Manchester Spatial Framework (GMSF). Paragraph 22 of the NPPF requires that strategic policies should look ahead over a minimum 15 year period. Nevertheless, the footnote to Paragraph 22 cross-refers to Section 7 of the NPPF, in which Paragraph 85(d) requires the allocation of a range of suitable sites in town centres to meet the scale and type of development likely to be needed *'...looking at least ten years ahead'*.

- 2.8 Paragraph 28 of the new NPPF also makes it plain that the development plan is to contain non-strategic policies, which set out more detailed provisions for specific areas, neighbourhoods or types of development. However, Paragraph 29 emphasises that *'Neighbourhood plans should not promote less development than set out in the strategic policies for the area, or undermine those strategic policies'*.
- 2.9 The importance of studies such as the TRLS is reinforced by Paragraph 31 of the NPPF, which requires that the preparation and review of all policies *'...should be underpinned by relevant and up-to-date evidence'*, which is to be *'...adequate and proportionate'* and *'...focused tightly on supporting and justifying the policies concerned, and take into account relevant market signals'*. Moreover, Paragraph 33 suggests that: *'Reviews should be completed no later than five years from the adoption date of a plan and should take into account changing circumstances affecting the area, or any relevant changes in national policy'*.
- 2.10 Further advice in relation to plan-making in the specific context of ensuring the vitality of town centres is provided in Section 7 of the new NPPF. Paragraph 85 urges that planning policies and decisions *'...should support the role that town centres play at the heart of local communities, by taking a positive approach to their growth, management and adaptation'*. Thus, planning policies should:
- define a network and hierarchy of town centres and promote their long term vitality and viability by allowing them to grow and diversify in a way that can respond to changes in the retail and leisure industries and allow for a suitable mix of uses, including housing;

- define the extent of town centres and primary shopping areas and make clear the range of uses permitted in such locations;
- retain and enhance existing markets;
- allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead, with a stipulation that *'...meeting anticipated needs for retail, leisure, office and other main town centre uses over this period [ten years] should not be compromised by limited site availability, so [that] town centre boundaries should be kept under review...'*;
- allocate appropriate edge of centre sites, if suitable and viable town centre sites are not available and, if such edge of centre sites can't be identified, policies should explain how identified needs can be met in other accessible locations that are well-connected to the town centre; and
- recognise that residential development often plays an important role in ensuring the vitality of centres.

2.11 Section 8 of the NPPF then deals with the need to promote healthy, inclusive and safe places which:

- promote social interaction – for example, through mixed-use developments and strong neighbourhood centres;
- are safe and accessible; and
- enable and support healthy lifestyles – for example, through provision of local shops and access to healthier food.

2.12 Moreover, Paragraph 92 emphasises the need to provide the social, recreational and cultural services and facilities that the community needs, through policies which:

- plan positively for the provision and use of shared spaces, community facilities (such as local shops) and other local services;
- support the delivery of local strategies to improve health, social and cultural wellbeing;

- guard against the unnecessary loss of valued facilities and services, particularly where this would reduce the ability of the community to meet its day-to-day needs;
- ensure that established shops, facilities and services are able to develop and modernise; and
- ensure an integrated approach to the location of housing, economic uses and community facilities and services.

Examining Plans

2.13 Finally, we would emphasise that Paragraph 35 of the new NPPF requires that local plans and spatial development strategies are examined [presumably by an independent Inspector] to assess whether they have been prepared in accordance with legal and procedural requirements and whether they are sound. Plans are ‘sound’ if they are:

- a) ‘**Positively prepared** – providing a strategy which, as a minimum, seeks to meet the area’s objectively assessed needs; and is informed by agreements with other authorities, so that unmet need from neighbouring areas is accommodated where it is practical to do so and is consistent with achieving sustainable development;*
- b) **Justified** – an appropriate strategy, taking into account the reasonable alternatives, and based on proportionate evidence;*
- c) **Effective** – deliverable over the plan period, and based on effective joint working on cross-boundary strategic matters that have been dealt with rather than deferred, as evidenced by the statement of common ground; and*
- d) **Consistent with national policy** – enabling the delivery of sustainable development in accordance with the policies in this Framework.’*

The Planning Practice Guidance (the PPG)

2.14 The Planning Practice Guidance (the PPG) also urges Local Authorities to plan positively, so as to support town centres and promote beneficial competition within and between centres. The PPG states (Paragraph 2b-001) that: ‘*Local planning authorities should assess and plan to meet the needs of main town centre uses in full...adopting a “town centre*

first” approach and taking account of specific town centre policy’. The positive approach is to include improvements to the quality and quantity of car parking in town centres and adoption of appropriate parking charges.

- 2.15 The PPG then stresses the importance of having a strategic vision for town centres, articulated through the Local Plan, which will assist in supporting sustainable economic growth and provide a wide range of social and environmental benefits (Paragraph 2b – 002). Paragraph 2b-003 advises that any strategy should be based on evidence of the current state of town centres and opportunities to meet development needs which will support their vitality and viability; strategies should answer the following questions:
- What is the appropriate and realistic role, function and hierarchy of town centres in the area over the plan period? This will require an audit of their vitality and viability and their potential to accommodate different types of development?
 - What is the vision for the future of each town centre, and what would be the most appropriate mix of uses to enhance the town centre’s overall vitality and viability?
 - Can the town centre accommodate the scale of assessed need for main town centre uses, which will involve an assessment of the scope for expansion, new development, redevelopment of existing under-utilised space and evaluation of different policy options (for example in relation to the market share of a particular centre)?
 - In what timeframe should new retail floorspace be provided?
 - What complementary strategies are necessary to enhance the town centre and how can these be delivered?
 - How can parking provision be enhanced, including the need to make parking charges and enforcement proportionate?
- 2.16 Strategies should also identify changes in the hierarchy of centres; where a town centre is in decline, the local planning authority should seek to manage its decline positively.
- 2.17 The PPG then goes on to emphasise the need for local planning authorities to address market signals and keep retail land allocations under regular review. A range of health

check indicators are set out in Paragraph 2b-005, as follows: diversity of uses; proportion of vacant street level property; commercial yields; customer views and behaviour; retailer representation and intentions to change representation; commercial rents; pedestrian flows; accessibility; perception of safety and occurrence of crime; and the state of town centre's environmental quality.

- 2.18 Paragraph 2b-005 states that: *'Not all successful town centre regeneration projects have been retail led or involve significant new development. Improvements to public realm, transport (including parking) and accessibility as well as other measures promoted through partnership can also play important roles'*. The strategy should identify relevant sites, actions and timescales and be articulated in the Local Plan, so as to enable it to be considered by residents and investors; and it should be regularly reviewed to assess the change in the role and function of different parts of the town centre over time.
- 2.19 In the event that required development cannot be accommodated in the town centre to meet the forecast needs – because of physical or other constraints – authorities are required to plan positively to identify the most appropriate alternative strategy for meeting the need, having regard to the sequential and impact tests.
- 2.20 In the plan making process, the sequential approach requires a thorough assessment of the suitability, viability and availability of locations for main town centre uses *'...with particular regard to the nature of the need that is to be addressed'* (Paragraph 2b-009). This requires an assessment of the type of land needed and the demand for land for main town centre uses, through reference to recent take-up.
- 2.21 We can confirm that we have had full regard to the requirements of the new NPPF and the advice in the PPG in framing our advice and recommendations to the Council.

3 RECENT AND ANTICIPATED CHANGES IN THE RETAIL AND LEISURE SECTORS

Introduction

- 3.1 The global recession, which started in 2008 and continued in the UK until the first quarter of 2010, together with the substantial growth in e-commerce and the evolution of multi-channel retailing, have had a very significant effect on town centres over the last decade. From 2010 to 2013, there was a marked reduction in disposable income as a result of relatively high levels of unemployment, low growth in incomes, and high housing costs. The drop in disposable income in this period had a significant impact on the rate of growth of retail and leisure expenditure per capita, particularly in the non-food comparison goods retail sector and in the restaurant/café/bars leisure sub-sector, which accounts for approximately 54 per cent of total expenditure on leisure services.
- 3.2 As a consequence, many well-known retail and service businesses shut down, pub closures reached a peak of 52 per week by mid-2009, town centre vacancy rates increased, and there was a rise in the representation of charity shops, discount retailers, betting shops and payday loan businesses.
- 3.3 In light of these changing circumstances, the Taskforce report '*Beyond Retail*', published in November 2013, reached a conclusion that many town centres now have too much retail floorspace, and that their functions need to be rebalanced, so as to provide for a wider range of alternative uses. The Taskforce report followed the Secretary of State's Statement, in the foreword to the Department for Communities and Local Government's July 2012 publication, 'Re-imagining Urban Spaces to Help Revitalise our High Streets', in which he stated that:

'There is no point in simply chasing the traditional model of the high street – a place where people come together to shop. Retail is an important element of a thriving town centre, but it is not sufficient. Instead you need to re-imagine your high street and

town centre, and drive towards a new future where people come together for many different reasons’.

3.4 In the following sub-sections of this report, therefore, we:

- outline the effects that the recession has had on recent and projected changes in expenditure for various types of retail and leisure services, and the potential effects of the UK’s referendum decision to leave the EU;
- provide a summary of recent and anticipated trends in e-commerce and multi-channel retailing and assess the potential consequences for retailing and town centres;
- assess recent and projected changes in the key commercial leisure sectors;
- summarise the recommendations for town centres arising from three influential reports that were published in the aftermath of the recession – these reports being the Mary Portas Review (December 2011), the Grimsey Review (September 2013), and the aforementioned Taskforce report (November 2013); and
- summarise the more recent findings of the Grimsey Review 2, published in July 2018, which outlines trends in retail store closures and retail job losses since 2012.

3.5 We conclude the section with an assessment of the potential implications of these structural changes in the retail and leisure sectors for the hierarchy of ‘town centres’ within Tameside.

Historic, Recent and Projected Changes in Retail and Leisure Expenditure

Retail Expenditure

3.6 There are two authoritative sources of information on retail expenditure change, these being Pitney Bowes/Oxford Economics and Experian. For historic information, both Experian and Pitney Bowes draw on a range of government data provided by the Office for National Statistics (the ONS), and particularly its Consumer Trends dataset.

Long-term Past Trends in Retail Expenditure, Per Capita

- 3.7 **Table 3.1** summarises the long-term past trends in retail expenditure derived from the Pitney Bowes and Experian databases.

Table 3.1: Long-term Past Trends in Retail Expenditure Growth, Per Capita, Per Annum

	Pitney Bowes (1964 to 2016)	Experian (1973 to 2013)
Comparison goods	4.5 % pc pa	4.5 % pc pa
Convenience goods	0.3 % pc pa	0.2 % pc pa

Sources

Pitney Bowes' Retail Expenditure Guide for 2017/18, Table 3.2

Experian's Retail Planner Briefing Note 12.1 of October 2014, Figure 1a

- 3.8 Thus, Pitney Bowes' Retail Expenditure Guide for 2017/18 shows that comparison goods expenditure growth, in the 52-year period from 1964 to 2016, averaged 4.5 per cent, per capita, per annum, and that convenience expenditure growth over the same 52-year period was just 0.3 per cent, per capita, per annum. Similarly, Experian's information on 'ultra-long term' trends, which covered the 40 year period from 1973 to 2013, revealed growth rates over this period of 4.5 per cent, per capita, per annum in the comparison goods sector and 0.2 per cent, per capita, per annum in the convenience goods sector.

More Recent Past Trends in Retail Expenditure, Per Capita

- 3.9 In the latest edition of its Retail Planner Briefing Note, of December 2017, Experian moves away from a focus on ultra long-term past trends and assesses historic growth rates over three more recent time periods, these being: 1997 to 2007 (the pre-recession period); 2008 to 2011 (the recession and its immediate aftermath) and 2012 to 2016 (the recovery). Experian's findings are summarised in **Table 3.2**, which reveals respective growth rates in the comparison goods sector of:

- 8.3 per cent, per capita, per annum in the pre-recession period;
- 0.7 per cent, per capita, per annum during the recession and its immediate aftermath;
- 3.9 per cent, per capita, per annum in the recovery period; and

- an overall comparison goods growth rate from 1997 to 2016 of 5.6 per cent, per capita, per annum.

Table 3.2: Experian's Analysis of More Recent Trends in Retail Expenditure, Per Capita

	1997 to 2007	2008 to 2011	2012 to 2016	1997 to 2016
	Pre-recession	Recession	Recovery	Whole Period
Comparison goods	8.3 % pc pa	0.7 % pc pa	3.9 % pc pa	5.6 % pc pa
Convenience goods	0.0 % pc pa	-3.1 % pc pa	-0.2 % pc pa	-0.6 % pc pa

Source

Experian's Retail Planner Briefing Note 15 of December 2017, Figure 1a

- 3.10 In the convenience goods sector, however, Table 3.2 shows that there has been a zero or negative per capita expenditure change in each of these three periods, at 0.0 per cent, per capita, per annum (pre-recession), at minus 3.1 per cent, per annum (during the recession) and at minus 0.2 per cent, per annum (in the recovery). As a consequence, the negative change in convenience goods expenditure in the overall period from 1997 to 2016 has averaged minus 0.6 per cent, per capita, per annum.
- 3.11 Indeed, Figure 1b of Experian's Briefing Note 15 show eight consecutive years of negative change in per capita convenience expenditure from 2008 to 2015, with particularly sharp falls in 2008, 2009 and 2011. In 2016, however, Experian's data suggest that there was a return to a positive convenience goods growth rate of 1.0 per cent, per capita. Likewise, Pitney Bowes' Retail Expenditure Guide for 2017/2018 confirms negative change in convenience goods expenditure, per capita, in the period 2008 to 2015, but with a growth in 2016 of 1.5 per cent, per capita.

Future Forecasts in Retail Expenditure, Per Capita

- 3.12 The changes in per capita expenditure that have occurred since the recession commenced in 2008 have had a substantial impact on current forecasts of future retail expenditure growth, particularly in the comparison goods sector. Thus, Pitney Bowes' forecasts, for the period from 2016 to 2030, envisage growth rates of 2.4 per cent, per capita, per annum in the comparison goods sector and 0.4 per cent, per capita, per annum in the convenience goods sector, as set out in **Table 3.3**. Similarly, Experian's

forecasts for the same period suggest growth rates of 2.9 per cent, per capita, per annum in the comparison goods sector. In the convenience goods sector, however, Experian projects zero growth in the period 2016 to 2030.

Table 3.3: Forecasts of Growth in Retail Expenditure, Per Capita, Per Annum

	Pitney Bowes (2016 to 2030)	Experian (2016 to 2030)
Comparison goods	2.4 % pc pa	2.9 % pc pa
Convenience goods	0.4 % pc pa	0.0 % pc pa

Sources

Pitney Bowes' Retail Expenditure Guide for 2017/18

Experian's Retail Planner Briefing Note 15 of December 2017

- 3.13 Thus, the projected retail expenditure growth rates put forward by Experian and Pitney Bowes in the period up to 2030 are much lower than in the past 50 years. This is particularly so in the comparison goods sector, where the forecast growth is in the range 2.4 per cent to 2.9 per cent, per capita, per annum, compared to the historic long-term past trends growth rate of 4.5 per cent, per capita, per annum.

Potential Impact of UK Referendum Decision to Leave the EU

- 3.14 Furthermore, both Experian and Pitney Bowes suggest that the UK's referendum decision to leave the EU will have a dampening effect on growth in GDP and consumer spending, particularly in the period up to 2020. Pitney Bowes envisages a transitional period lasting for up to three years, followed by a free-trade agreement, that results in a period of more restrained spending growth. Likewise, Experian suggests that the uncertainty over the Brexit negotiations will result in a fall in GDP growth, to 1.5 per cent, per annum in 2017 and 2018, from 2.0 per cent, per annum in 2015 and 2016. Experian assumes that the transition process will conclude with continued access to the European single market, and that revisions to consumer spending are likely to be less marked. Nevertheless, Experian's Retail Planner Briefing Note 15 projects that consumer spending will be at a much lower growth rate than in the past, averaging just 1.7 per cent, per capita, per annum in the

period from 2020 up to 2036, compared to a rate of growth of consumer spending in the period 1997 to 2007 of 3.0 per cent, per capita, per annum.

- 3.15 Moreover, the effects of the lower rate of growth in retail spending in the future are likely to be exacerbated by the growth in the share of retail expenditure that will be absorbed by e-commerce and various forms of multi-channel retailing.

Leisure Expenditure

- 3.16 The recession also had an impact, albeit short-term, on the growth in spending on leisure services. **Item 10** in **Volume 2** provides an analysis of change in spending on various categories of leisure services in the UK from 1997 to 2016, as derived from Consumer Trends data published by the ONS.¹ **Item 10** shows that:

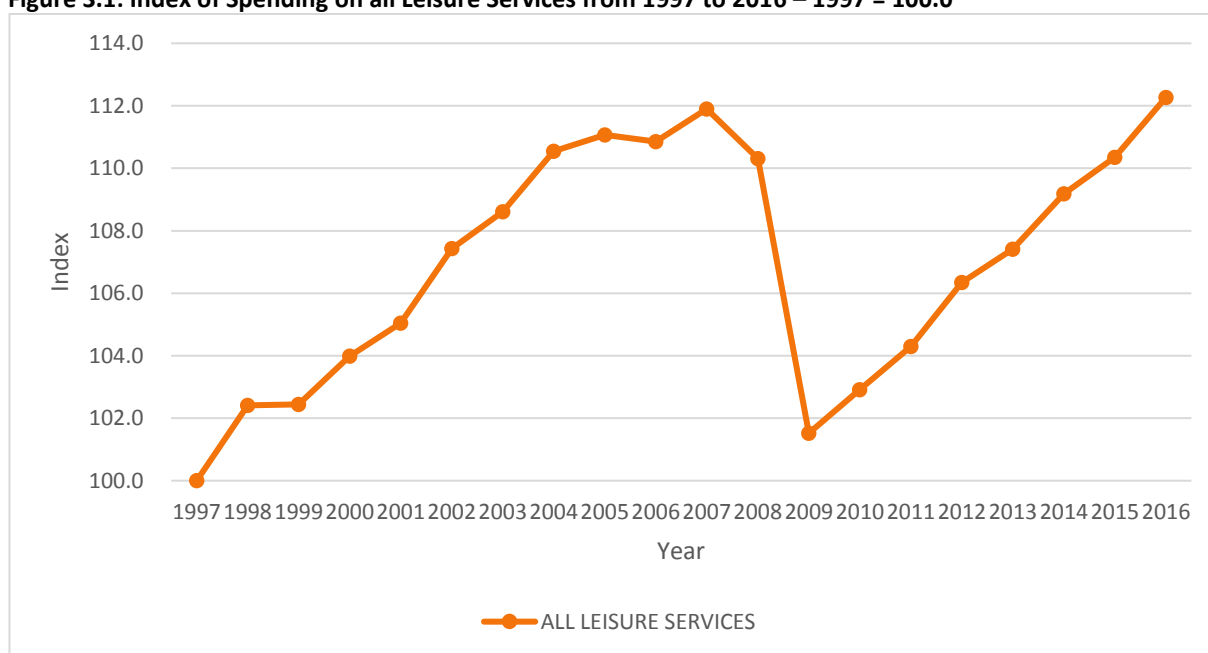
- consumer expenditure on leisure services (ONS COICOP categories 9.4.1, 9.4.2, 9.4.3, 11.1.1, 11.2, and 12.1.1) has grown by 12.3 per cent since 1997, at an average annual growth rate of 0.6 per cent, per annum;
- the highest rates of growth of spend, since 1997, have been on ‘*cultural services*’, (which includes cinemas, theatres and concerts), at 35.2 per cent overall, which equates to 1.6 per cent, per annum, and on ‘*accommodation*’ (which includes hotels, B&Bs and youth hostels), which grew by 25.9 per cent overall, equating to 1.2 per cent, per annum;
- contrary to popular belief, there has been a reduction in expenditure since 1997 on ‘*games of chance*’ (which includes lotteries, scratchcards and all forms of betting, including online betting with UK-registered operators), amounting to 13.4 per cent;
- by far the most important category of spending on leisure services is the ‘*restaurants, cafes etc.*’ sector (including pubs), which has consistently accounted for 53 to 56 per cent of total spend on leisure services over the past 20 years; and that

¹ We use the chained volume, seasonally adjusted data, which strips out the impact of inflation, so that the data in **Spreadsheet Table 12** are in constant 2015 prices.

- as a result of the recession, there was a marked decline in expenditure from 2008 to 2010 in the ‘games of chance’, ‘restaurants, cafes etc.’ and ‘recreational and sporting services’ sub-sectors.

3.17 Indeed, Figure 3.1 illustrates the sharp drop in the spending on all leisure services that occurred between 2007 and 2009, on an index basis, at constant prices. It is interesting to note, however, that the total expenditure on leisure services in the UK in 2016 had recovered to £149.1bn, which matches the pre-recession level in 2007, of £148.6bn.

Figure 3.1: Index of Spending on all Leisure Services from 1997 to 2016 – 1997 = 100.0



Source: ONS Consumer Trends, March 2018

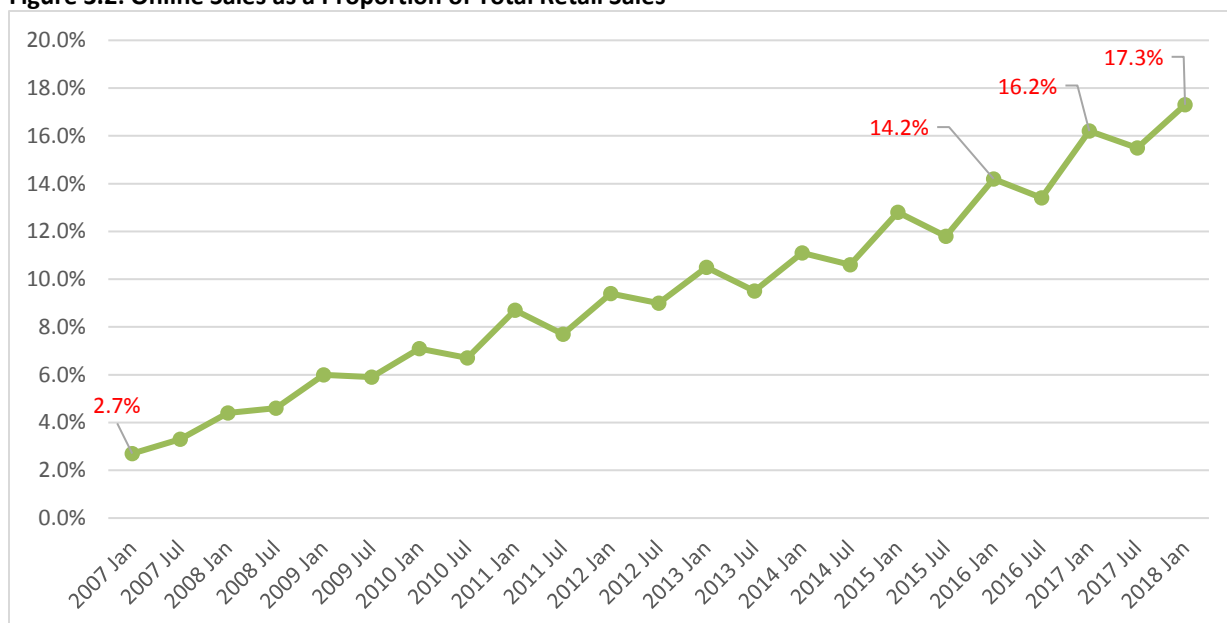
3.18 The most recent source of information we have for the likely rate of growth in expenditure on leisure services is provided by Experian, in its Retail Planner Briefing Note 15, of December 2017; this suggests an annual growth rate for leisure services in the period from 2017 to 2036 of 1.1 per cent, per capita, per annum. This is much lower than Experian’s projected rate of growth in comparison goods expenditure for this period, of 3.0 per cent, per capita, per annum, but much faster than Experian’s projected rate of growth in per capita convenience goods expenditure, which is zero.

- 3.19 Thus, given that the ONS Consumer Trends data in Item 10 in Volume 2 reveal that the ‘restaurants, cafes, bars etc.’ sub-sector has consistently accounted for around 53 to 56 per cent of total spend on leisure services over the past 20 years, it seems clear that this leisure sub-sector will continue to be critical to both the day-time and evening economies in town centres.

E-Commerce and Multi-Channel Retailing

- 3.20 Data provided by the Office for National Statistics (the ONS) reveal that online shopping (also known as e-commerce) has seen rapid growth in the UK in the past decade, with online sales reaching 17.3 per cent of all retailing in January 2018, compared with just 2.7 per cent of all retailing in January 2007 (Figure 3.2). Thus, since 2007, there has been a substantial growth in purchases via ‘Click and Collect’ and ‘home delivery’ mechanisms, with a corresponding substantial reduction in ‘in-store’ purchases.

Figure 3.2: Online Sales as a Proportion of Total Retail Sales

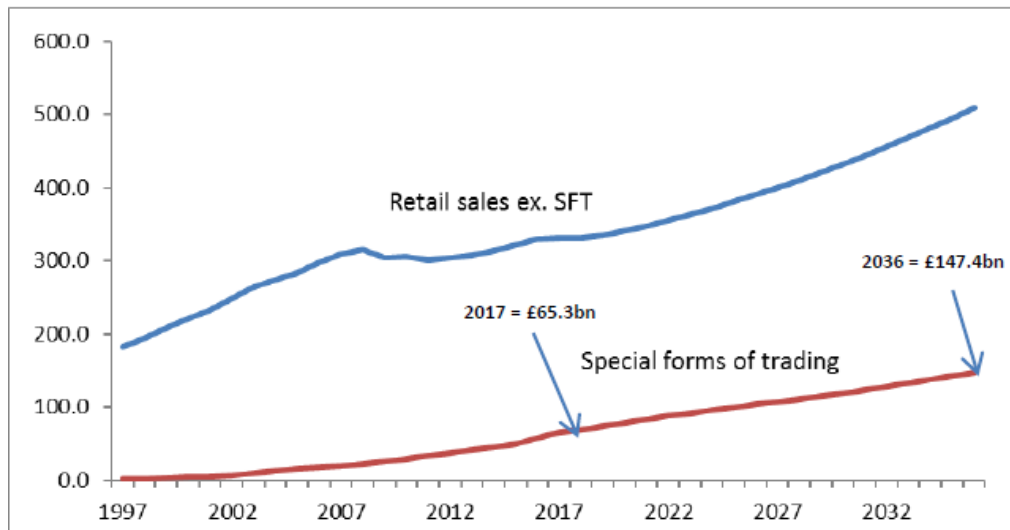


Source: Office for National Statistics Statistical Bulletin - Retail Sales, February 2018

- 3.21 Figure 5 of Experian’s Retail Planner Briefing Note 15, of December 2017, anticipates that ‘non-store retail sales’ (or Special Forms of Trading) will continue to grow, at least until the mid-2030s, albeit that the rate of growth is projected to slow after 2021 (Figure 3.3).

Indeed, Experian projects that non-store retail sales will reach 19.8 per cent of all retail sales by 2022, and reach 22.5 per cent of all retail sales by 2036. It is important to emphasise, however, that when goods bought over the internet that are actually taken from store shelves are excluded, these adjusted proportions of Special Forms of Trading are lower, at 12.8 per cent in 2022, and at 14.9 per cent by 2036.

Figure 3.3: Retail Sales Volumes and Special Forms of Trading, in £bn, at 2013 Prices, from 1997 to 2036



Source: Chart 1 of Experian Retail Planner Briefing Note 15, December 2017

- 3.22 Thus, although page 19 of Experian's Retail Planner Briefing Note 15 identifies 'Click & Collect' as the key driver of current and future internet growth, Experian anticipates that Click & Collect will be '*...largely space demand neutral,*' because this method of retailing requires a bricks and mortar presence in easily accessible locations. Nevertheless, the growth in the proportion of retailers providing a 'Click & Collect' service is not surprising, given that research by eDelivery has found that '*...65 per cent of consumers make additional purchases when picking up click-and-collect items in-store.*'²
- 3.23 The top ten performing online retailers, according to *Interactive Media in Retail Group's* (IMRG's) Top 50 Online Retailer Rankings of December 2016,³ are Amazon, Apple, Argos,

² <http://edelivery.net/2016/03/72-of-uk-shoppers-now-using-click-and-collect-but-in-store-experience-lets-things-down/>

³ Interactive Media in Retail Group (IMRG): Top 50 Retailer Ranking, <https://www.imrg.org/media-and-comment/imrg-comscore-top-50-retailer-ranking/dec-2016/>

Tesco, Netflix, Asda, M&S, EE, Boots and Next. These top ten are followed by the likes of John Lewis, Currys, Debenhams, Three, Sainsbury's, Sports Direct and Ikea. In the online clothing/fashion sector, other retailers within the Top 50 include Very, Asos, New Look, House of Fraser and River Island. Indeed, one recent development has been Sainsbury's acquisition of Argos in 2016, which will allow for Sainsbury's to retail its Tu clothing range through the Argos home delivery service, whilst also allowing for Argos customers to pick up goods ordered online at the Argos concessions that are now housed within 200 Sainsbury's stores.

3.24 Clearly, the way people shop has changed dramatically. Indeed, a report by the Javelin Group⁴, as early as 2011, identified various forms of multi-channel retailing, which it defined as being '*...sales in which at least two channels, including the store, have played a part in the customer journey*'. Thus, the Javelin Group report divides the retail market into five segments, as follows:

- **Store Only** – in which the online channel plays no significant part;
- **Research Online and Purchase Offline/In-store** – in which research takes place online, but the product is purchased in-store;
- **'Click & Collect'** – in which the customer buys or orders goods online from a store's website, but collects them from a local branch;
- **Store to Direct** – in which the online purchase is made at the store and then delivered to the purchaser's home; and
- **Home Delivery** – in which the customer buys or orders goods online from a store's website, but where the goods are delivered to the purchaser's home and where the store plays no significant part.

3.25 In 2014, Tensator identified another form of retailing known as '**showrooming**', whereby a customer visits a store to view an item before purchasing it online.⁵ Indeed, Tensator's

⁴ Javelin Group: How Many Stores Will We Really Need?, October 2011

⁵ Tensator Group: Survey Reveals Customers Disenchanted by High Street Shopping Experience, November 2014

survey found that 86 per cent of respondents had experience of using this method. The survey also found that 68 per cent of respondents *'...admitted to using their phone to check the price of an item online before deciding whether to purchase in-store.'*

- 3.26 However, *'showrooming'* can also work in reverse, via a process known as **'webrooming'**, whereby consumers go online to research products, but then head to a bricks-and-mortar store to complete their purchase. According to Koeppel Direct, *'webrooming'* works best with products such as appliances, electronics and clothing, while *'showrooming'* works best with products such as entertainment, electronics and toys/games.⁶
- 3.27 Another key phenomenon that has had an impact on shopping habits in the past decade is the rise of the 'smart phone'. Indeed, the Centre for Retail Research has confirmed that *'mobile retailing is the fastest-growing retail sector'*⁷. It is not surprising, therefore, that by February 2016, IMRG reported that a major digital tipping point had been reached *'...with the percentage of UK online retail sales made through mobile devices (smartphones and tablets) exceeding 50 per cent for the first time...'*⁸
- 3.28 Thus, it is clear that shoppers are readily adapting to the technological and structural changes in retailing and that they are using these changes to their benefit to ensure that they make informed purchase decisions and seek out bargains. The changing ways in which people shop, is highlighted in Figures 3.4 and 3.5⁹, which help to further illustrate how shoppers use the internet before and during a town centre visit.

6 <http://www.koeppeldirect.com/business/webrooming-vs-showrooming-retail-marketing-guide/>

7 Centre for Retail Research: Mobile Retailing, 2015 - <http://www.retailresearch.org/mobileretailing.php>

8 <https://www.imrg.org/media-and-comment/press-releases/over-half-of-online-sales-now-made-through-mobile-devices/>

9 Hart C, Shadow G, Rafiq M and Laing A: The Customer Experience of Town Centres - Project Report Loughborough University, 2014

Figure 3.4: Internet Usage before a Town Centre Visit (% of respondents)

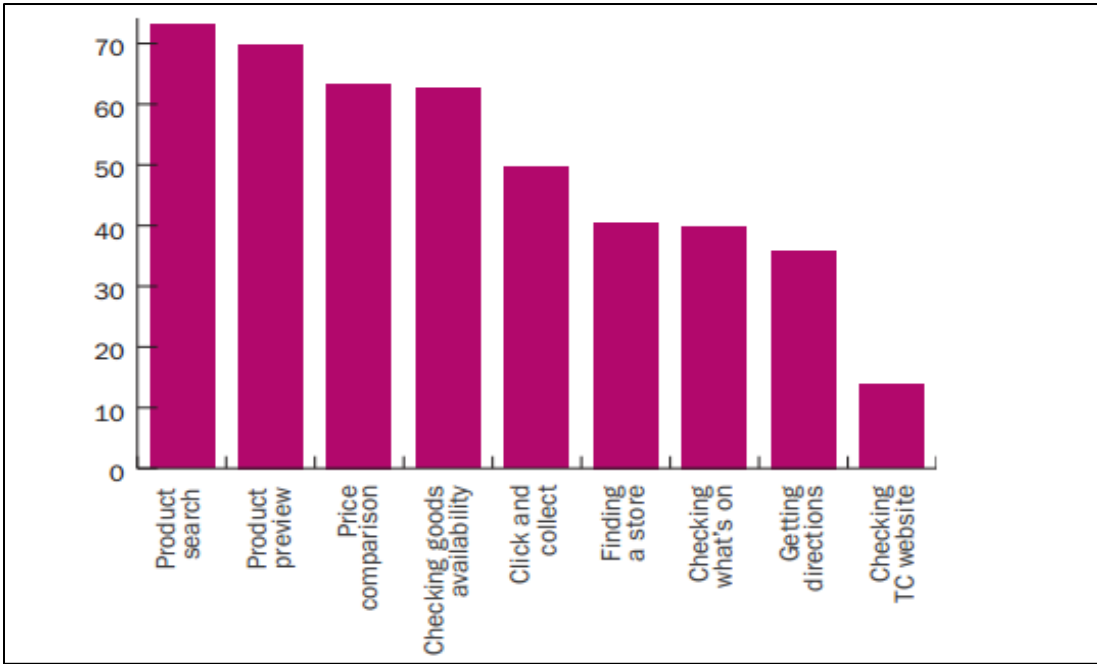
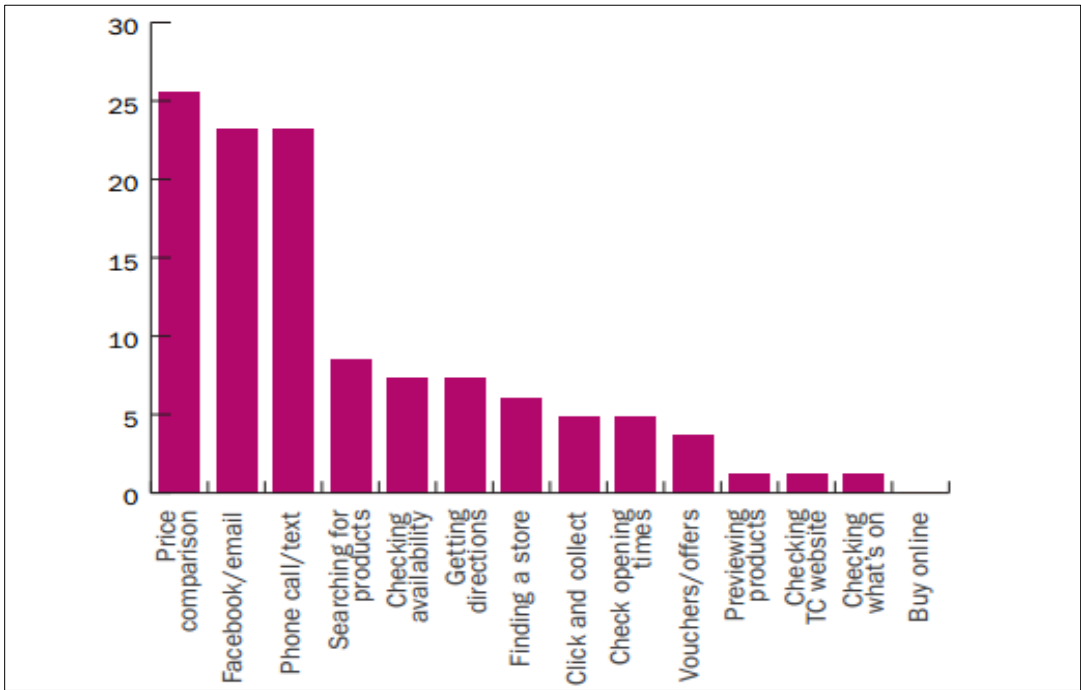


Figure 3.5: Internet Usage during a Town Centre Visit (% of respondents)



Consequences of Recession and the Growth in E-Commerce

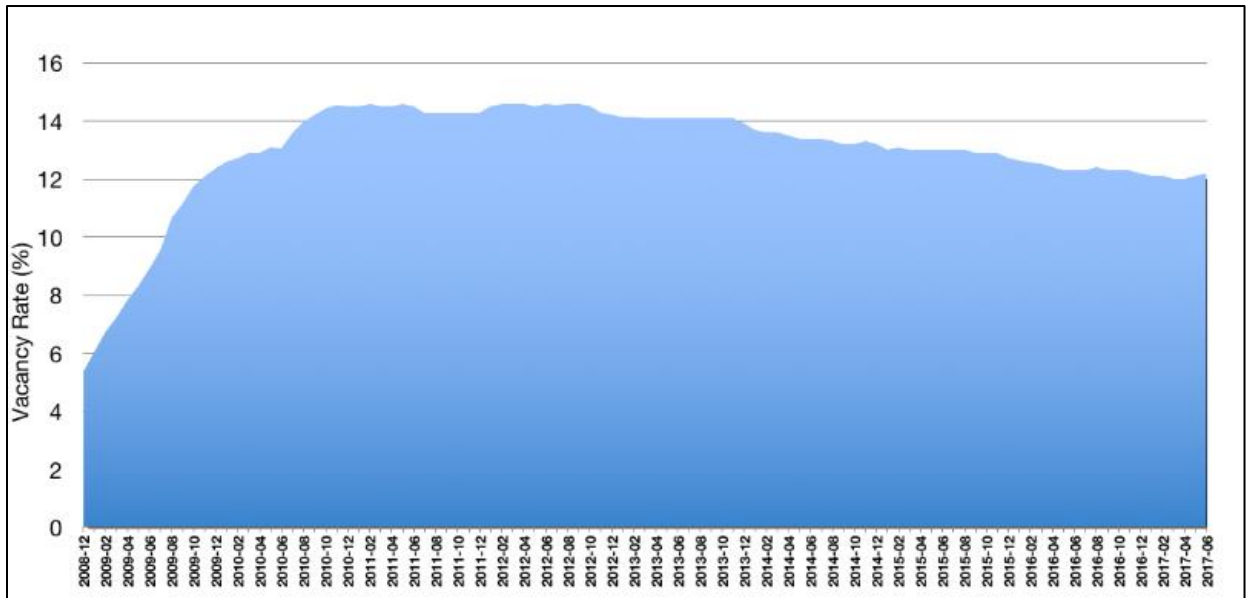
Retail Business Closures

- 3.29 The reduction in levels of disposable income that occurred from 2010 to 2013, and the growth of e-commerce, led to a significant rise in vacancies in town centres, and a growth in the number of premises occupied by charity shops, betting shops, payday loan shops and pound shops. Indeed, a number of major well-known retailers failed during the recession, including Blockbuster, Clinton Cards, Comet, Focus DIY, Habitat, Jane Norman, Jessops, JJB Sports, TJ Hughes and Woolworths.
- 3.30 More recent, post-recession, failures include Austin Reed, BHS, East, Brantano, Staples, Warren Evans, Jaeger, Maplin and Toys R Us. Furthermore, M&S has closed 25 stores since November 2016, including its store in Stockport Town Centre and the M&S Outlet store at Crown Point Retail Park in Denton. A more recent announcement from M&S, in May 2018, announced a further 14 closures, alongside relocations, conversions, downsizes and the introduction of concessions. More recently, it has been announced that Mike Ashley's Sports Direct has acquired all 59 of the House of Fraser stores, but with the stated intention of keeping 47 open. Other retailers reporting recent trading difficulties and store closure/downsizing programmes include Mothercare, Debenhams, B&Q and Claire's.

Shop Vacancies

- 3.31 The Local Data Company's (LDC's) blog post of 14th September 2017 shows that shop vacancies in Great Britain grew from 5.4 per cent, in December 2008, to reach a peak of 14.6 per cent, in August 2012.¹⁰ However, the LDC's blog reveals a slow but steady improvement in the shop vacancy rate in Great Britain since 2012, with the vacancy rate at 12.2 per cent in June 2017, as shown in Figure 3.6.

¹⁰ LDC, Sharp slowdown in shop openings in second quarter of 2017, <http://blog.localdatacompany.com/sharp-slowdown-in-shop-openings-in-second-quarter-of-2017>

Figure 3.6: Great Britain Retail (Shop) Vacancy Rates from 2008 to the First Half of 2017

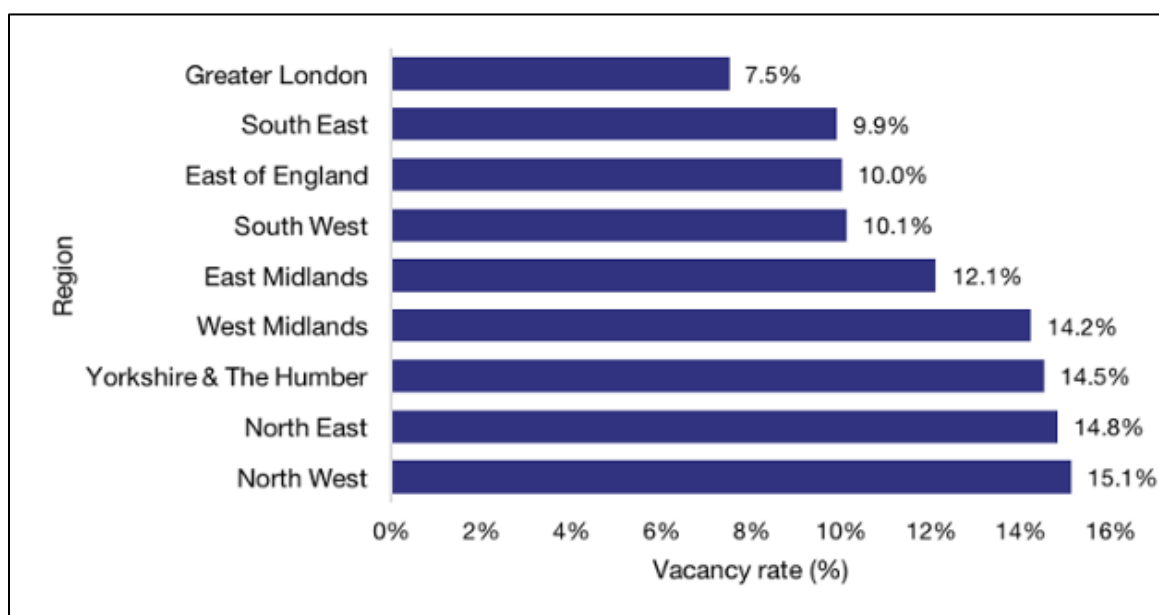
Source: The Local Data Company – September 2017

- 3.32 Nevertheless, LDC's Retail and Leisure Trends Report of September 2017 shows a very slight upturn in the vacancy level in June 2017, with shop closures exceeding shop openings for the first time in nine months.¹¹ LDC warns that this rise in the vacancy rate in the second quarter of 2017 is likely to continue, if the current uncertainty regarding the Brexit negotiations continues. The highest rates of net closures include pubs, women's clothes shops, newsagents, bookmakers, shoe shops and estate agents. Conversely, the highest net rates of openings are accounted for by barbers, beauty salons, cafes and tearooms, convenience stores, vaping shops, restaurants and bars, mobile phone shops and coffee shops.
- 3.33 It is also noteworthy that there are substantial regional variations in the retail and leisure vacancy rates. Indeed, the aforementioned LDC blog reveals that the North-West had the highest combined retail and leisure vacancy rate in the first half of 2017, at 15.1 per cent, with vacancy rates in the North of England substantially greater than the vacancy rates in the South-East and South-West regions, as shown in Figure 3.7. Also of concern is LDC's earlier 2016 finding that the North-West had the second highest level of '*persistent*

¹¹ LDC, Retail and Leisure Trends Report Summary H1 2017: Turning Point

vacancies' (defined as vacant for more than three years), with the persistent vacancy rate being 7.0 per cent in the North-West, compared to an average for Great Britain of 4.5 per cent.¹² LDC's somewhat sombre conclusion, therefore, is that *'...we cannot shy away from the vast numbers of empty shops that are never likely to be reoccupied again'*.

Figure 3.7: Retail and Leisure Vacancy Rate by Region of England in H1 2017



Source: The Local Data Company – September 2017

- 3.34 The persistently high level of vacancy from 2012 onwards reflects a number of factors, the most important of which would appear to be the growth in e-commerce, and the high cost of business rates and shop rents in town centres, compared to the lower operating costs of online retailers. Indeed, the Portas Review reported a reduction in town centre retail spending from 49.4 per cent in the year 2000, to 42.5 per cent in 2011, and the report anticipated a further fall to 39.8 per cent by 2014.¹³

¹² LDC, Current persistent vacancy rates across Great Britain: <http://www.localdatacompany.com/what-are-the-current-persistent-vacancy-rates-across-great-britain>

¹³ The Portas Review: An Independent Review into the Future of our High Streets, December 2011

The Comparison Goods Sector

- 3.35 As early as October 2011, a Report by Javelin was suggesting that the proportion of retail sales through stores, including those researched online but transacted in-store, in the four largest comparison goods sectors would fall from 86 per cent, in 2010, to just 66 per cent by 2020.¹⁴ The report anticipated, correctly, that comparison retailers would face falling gross margins, as customers seek out the best prices online, and that this would be likely to result in a reduction in store space requirements and more efficient store formats. Indeed, Javelin predicted that store space requirements in the four largest of the comparison goods sectors – electrical; clothing and footwear; furniture and floor-coverings; and health and beauty – would fall by 20 per cent in the ten-year period 2010 to 2020.
- 3.36 Although the rate of growth in e-commerce will vary depending on the type of goods being sold, a common theme for comparison goods retailers seems to be that they will require fewer stores. Thus, many commentators expect that there will be further polarisation in the comparison sector, whereby the larger retailers seek fewer outlets, with more of a focus on larger, flagship stores in prime locations within the higher order centres in the top 100 rankings.
- 3.37 We note, however, that Javelin Venuescore data, as cited in the GMSF Town Centres Topic Paper of October 2016, confirm that none of the town centres located within Tameside are within the UK's top 100. The nearest centres in the top 100, apart from Manchester City Centre (which, excluding London's West End, is ranked 2 behind Glasgow), are Bury (ranked 90), Stockport (ranked 94) and Bolton (ranked 98). In contrast, the highest ranking centre within Tameside in Venuescore's index was Ashton, which was placed at 215.
- 3.38 There has also been a growth in demand from High Street comparison traders for units in out-of-centre retail parks, in response to the growth in 'Click & Collect' and the associated demands for car parking. As a consequence, the biggest source of demand for floorspace

¹⁴ Javelin Group: How Many Stores Will We Really Need?, October 2011

in the comparison goods sector in recent years has come from discount traders such as Primark, TK Maxx, Poundland, Poundworld, Poundstretcher, Wilkos, B&M Bargains and Home Bargains. Other traders increasingly taking space in edge and out-of-centre retail parks are Sofology, JD Sports, Arcadia, Gap, River Island, H&M, Fatface and Decathlon.

The Convenience Goods Sector

- 3.39 In June 2017, the Institute of Grocery Distribution (IGD) reported¹⁵ that the UK grocery market was worth £184.5bn and that it was made up as set out in Figure 3.8. Thus, the large supermarkets and hypermarkets are estimated to account for 55.4 per cent of the value of the grocery market in 2017, with convenience retailers such as McColls, Londis, Spar, Costcutter, One Stop, Nisa, Best One and Budgens accounting for 21.7 percent of the market in 2017. However, IGD forecasts that the deep discounters – notably Aldi and Lidl – will increase their market share, to 14.1 per cent by 2022, mainly at the expense of the large supermarket operators.

Figure 3.8 – The Size and Makeup of the Grocery Market in 2017 and Projected Makeup in 2022

	2017 value (£bn)	Market share in 2017 (%)	2022 value (£bn)	Market share in 2022 (%)
Hypermarkets	16.2	8.8	16.3	7.7
Supermarkets	86.0	46.6	91.1	42.8
Convenience	40.0	21.7	47.1	22.1
Discounters	20.1	10.9	30.1	14.1
Online	10.4	5.6	16.0	7.5
Other Retailers	11.8	6.4	12.2	5.7
TOTAL	184.5	100.0	212.8	100.0

Source: Institute of Grocery Distribution - June 2017

- 3.40 It seems clear, therefore, that the negative impacts of the recession, and the associated rise in unemployment and reduction in levels of disposable income, have caused shoppers to increasingly seek value for money in the convenience goods sector. As a result, the deep discounters such as Aldi and Lidl have secured a growth in their market

¹⁵ Institute of Grocery Distribution: UK food and grocery forecast to grow by 15% by 2022, June 2017

share at the expense of the 'big-four' operators (i.e. Tesco, ASDA, Sainsbury's and Morrisons). Indeed, Aldi and Lidl's combined market share has doubled since 2012¹⁶. According to Kantar World Panel¹⁷, Aldi now accounts for 7.3 per cent of the UK's convenience goods market and Lidl now accounts for 5.3 per cent of the UK's convenience goods market.

- 3.41 However, the success of the deep discounters is not solely due to the change in shopper attitudes brought about by the need to secure value; rather, the discounters have broadened their fresh product ranges, are sourcing more British produce and are promoting more high quality products, such as premium steak, ham and lobster. As such, they have been successful in '*...providing an offering which is currently appealing to a wide spectrum of British grocery shoppers*'.¹⁸ Aldi and Lidl are also gaining reputation in the quality of their wines and spirits offers.
- 3.42 Thus, whilst the big four food operators have substantially cut back on their development programme, Aldi and Lidl are keen to secure further floorspace in their search for even more market share. The leading operators have cut back, particularly, on their very large store formats and Tesco and Sainsbury's are increasingly seeking to focus their supermarket portfolio on stores of between 3,000 sq.m gross and 5,000 sq.m gross. ASDA has also cut back on its interest in hypermarkets, and is seeking to increase its representation in stores of between 1,000 sq.m gross and 3,000 sq.m gross. It is interesting to note, however, that detailed discussions have taken place between Sainsbury's and Asda in relation to a potential merger, which would increase the combined market share if these retailers to 31.4 per cent. However, the merger is the subject of an investigation by the Competition and Markets Authority (CMA).
- 3.43 Perhaps the biggest change in the convenience goods sector in recent years, however, is the proliferation of smaller format, local convenience stores operated by the leading operators. Indeed, Tesco now has 1,740 Express format stores and Sainsbury's has 807

16 <http://www.theguardian.com/business/2015/nov/17/soaring-sales-at-aldi-and-lidl-drive-market-share-to-10-percent>

17 <http://www.kantarworldpanel.com/en/grocery-market-share/great-britain>

18 Institute of Grocery Distribution: Shopper Vista Channel Focus Guide, Discount Shoppers - Top Trends, 2014

Local stores. It is noteworthy, however, that by 2016 the competitive nature of the convenience store sector had caused KPMG (as administrators) to close many of the My Local stores that Greybull Capital had purchased from Morrisons in October 2015.

- 3.44 Data from IGD and Kantar World Panel suggest, however, that unaffiliated independents and symbol groups such as Spar and Londis continue to account for over two thirds of the nation's convenience stores (typically under 280 sq.m in size).¹⁹ Indeed, IGD's Press Release of 22nd May 2017 reveals that there were 46,980 convenience stores in 2017, which represents a small increase from the 46,000 convenience stores that existed in 2015. However, IGD also predicts that '*...after years of rapid advances, sales growth in convenience will be more measured over the next five years*'.²⁰ Furthermore, the Local Data Company continues to identify a net decline in the number of independent newsagents, greengrocers and fruit sellers, bakeries, delicatessens, grocers, butchers and confectioners.²¹
- 3.45 IGD anticipates further growth in online convenience sales, which it suggests will account for 7.5 per cent of the grocery market by 2022, from 5.6 per cent in 2017.²² Nevertheless, Experian's forecasts suggest that the convenience goods sector as a whole will be much less affected by the growth in e-commerce than the comparison goods sector, because much of the grocery produce sourced online actually comes off the shelves of existing supermarkets, whether through 'Click & Collect', or home delivery.

The Shopping Centre Development Pipeline

- 3.46 A recent report by Cushman & Wakefield (C&W)²³ suggests that the uncertain consumer backdrop (arising, in part, through concerns on the outcome of the Brexit negotiations), together with rising operating costs, and the continued growth of e-commerce, all

19 IGD, Convenience store numbers driven by symbol and multiple operators : <https://www.igd.com/about-us/media/press-releases/press-release/t/convenience-store-numbers-driven-by-symbol-and-multiple-operators/i/16832>

20 Institute of Grocery Distribution: IGD Launches New UK Market and Channel Forecasts, June 2015

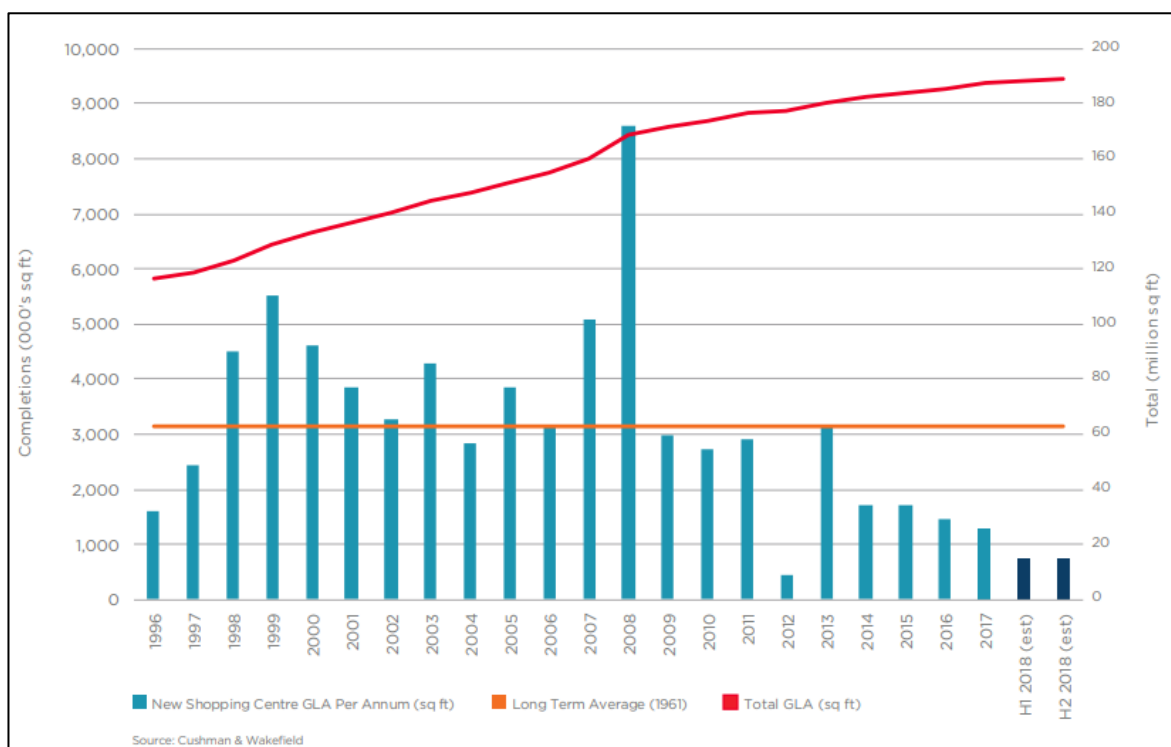
21 Local Data Company, *Supermarkets, Discounters and Convenience Stores*, March 2018, page 22.

22 Institute of Grocery Distribution: UK food and grocery forecast to grow by 15% by 2022, June 2017

23 Cushman & Wakefield, UK Shopping Centres: The Development Story, January 2018.

represent headwinds currently facing the retail sector. The report suggests that retail sales are weak, that footfall levels have fallen as a result of the structural changes that have taken place and that, as we have already pointed out, vacancy levels remain stubbornly high. It is not surprising, therefore, that the report identifies a substantial fall in the quantum of new shopping centre development in the period 2009 to 2017, compared to the quantum of shopping centre development undertaken in the period 1998 to 2008 (Figure 3.9).

Figure 3.9: UK Shopping Centre Development from 1996 to 2017



Source: Cushman & Wakefield, *UK Shopping Centres: The Development Story* (January 2018)

- 3.47 Thus, whilst Figure 3.9 reveals that the mean level of shopping centre development undertaken in the UK in the 22-year period from 1996 to 2017 (inclusive) was approximately 290,000 sq.m of Gross Lettable Area (GLA) per annum, this mean was matched or exceeded in ten of the eleven years between 1998 and 2008, reaching a peak of around 799,000 sq.m (GLA) in 2008, reflecting the lag between pre-investment decisions on the shopping centre developments and their completion in 2008, just at the start of the recession. Conversely, Figure 3.9 reveals that in only one of the last nine years

has the quantum of shopping centre development reached the mean average, that being 2013, following a negligible amount of shopping centre development in 2012, again reflecting the lag between decisions not to invest made during the actual recession, which, in the UK, ended in the first quarter of 2010, and the halt in the flow of shopping centre completions in 2012.

- 3.48 In 2017, the quantum of shopping centre development amounted to 121,000 sq.m GLA, with notable completions including Westgate Oxford (anchored by John Lewis and including 25 restaurants and a Curzon cinema) and the Lexicon development in Bracknell (which is anchored by a Fenwick Department Store and incorporates a substantial leisure offer, in the form of Cineworld and a number of quality eateries). However, extensions accounted for just over half of the shopping centre floorspace delivered in 2017, including an extension for leisure uses at the White Rose Shopping Centre in Leeds (to include a Cineworld and various branded restaurants).
- 3.49 C&W suggests that the low quantum of shopping centre development is likely to continue into 2018, and that most development will be in the form of extensions to, or redevelopments of, existing centres. These ongoing developments include the Westfield extension in London, the Charter Place extension in Watford and the Lakeside extension in Kent. In addition, C&W anticipates a start to the redevelopment of the Broadmarsh Centre in Nottingham in the first half of 2018, and an extension to the Brent Cross Shopping Centre in the second half of 2018.
- 3.50 It is noteworthy, however, that Colliers International suggests that over 900,000 sq.m of shopping centre developments planned for construction during the next five years are *'unlikely to be built'*, as developers and investors curtail their expansion plans in light of the continuing onslaught from online retailing, lower rents and lower commercial returns.²⁴

²⁴ Colliers International, Shopping Centre Plans Ditched as UK Retailing Scene Reshapes: <http://www.colliers.com/en-gb/uk/about/media/2016/0622-shopping-centre-plans-ditched-as-uk-retailing-scene-reshapes>

- 3.51 Indeed, the reduced amount of shopping centre development that has taken place in recent years reflects viability challenges and the fact that there has been very limited development finance for real estate. Indeed, Taskforce's Beyond Retail report of November 2013 states that *'Old funding models for retail development, relying on investment from commercial banks, pension funds, life insurance funds or Real Estate Investment Trusts [REITs], sometimes supported by public sector contributions, are no longer fit for purpose'*. Thus, in recent years, it seems that many institutions have lost their appetite for risky, large-scale town centre developments that can take around ten years to deliver. Moreover, there are relatively few active UK developers of shopping centres, with Intu, Hammerson, British Land and Land Securities dominating the market, along with international investors such as Westfield Corporation.
- 3.52 C&W accepts that town centre shopping development remains challenging, with long lead-in times and high levels of upfront capital expenditure. However, in an earlier report, published in September 2015, C&W concluded that: *'Many of the towns and cities that are starting to see development progress, are places where local authorities have taken a more creative approach, challenging traditional ideas of the role of the public sector in delivering development.'*²⁵ This earlier report suggests that Councils are becoming increasingly aware of a need for a proactive role, that has resulted in *'...an increasing number of local authorities taking a direct role in promoting development, stepping in to address market failure and enable sites.'*
- 3.53 Likewise, Mark Philipson, of Colliers International, commented, in June 2016, that *'In dysfunctional town centres, local authorities must play a growing part in grasping the nettle and exerting co-ordinated control that can bring change. The market alone cannot sort out the legacy of problems that we face. There must be a broader policy which brings vision and takes hard decisions.'*

25 Cushman & Wakefield, Shopping Centre Development Report, September 2015.

The Out-of-Centre Development Market

- 3.54 The out-of-centre development market is reported to have received a boost from the growth of e-commerce, particularly through 'Click & Collect', which generates high demand for parking. Indeed, CBRE's Year 2017 Property Perspective report suggests that retail parks have been buoyant over the past three years, with prime rents for all retail warehouses increasing by 0.5 per cent, per annum.²⁶
- 3.55 Indeed, CBRE has noted that retail parks are moving away from their traditional offer of home-related and bulky goods to an increased fashion and leisure offer. CBRE cites Global Data as predicting that clothing and footwear will grow to account for almost 14 per cent of the retail park market by 2022. Many retail parks are also attracting interest from discount foodstores, such as Aldi, Lidl, Iceland and Farmfoods, and also from M&S Simply Food. There is also strong demand in retail parks from comparison discounters such as Home Bargains, B&M, Poundland and TK Maxx.
- 3.56 Thus, whilst CBRE reports a continued slowdown in the retail park development pipeline, it emphasises that vacancy rates in retail parks, at 5.3 per cent, are the lowest in over 15 years. Indeed, there is a sharp contrast in vacancy levels between retail parks and shopping centres, with the Local Data Company's Retail and Leisure Trends Report of September 2017 reporting a 5.1 per cent vacancy rate for retail parks, compared to a 12.6 per cent vacancy rate for shopping centres.

Leisure Trends

- 3.57 Over the past fifteen to twenty years, it has become increasingly clear that a good provision and choice of leisure facilities can help to sustain the vitality and viability of town centres by increasing dwell times, footfall and turnover, with significant benefits for both the daytime and evening economies. We have already referred to past trends in leisure expenditure and the impact of the recession on these past trends. In this sub-

²⁶ CBRE, United Kingdom Retail - The Property Perspective, H2 2017

section, therefore, we provide more of a qualitative overview of the changes taking place in different commercial leisure sectors.

Food and Beverage

- 3.58 The food and beverage sub-sector has consistently accounted for around 53 to 56 per cent of total leisure spending over the past twenty years, as confirmed in **item 10** of **Volume 2** of our report. Thus, a town centre's food and beverage offer is important both to its evening and to its daytime economies, complementing other retail, leisure and office functions. Although the recession caused a substantial reduction in spending in the food and beverage sector, there has, nevertheless, been a 9.1 per cent growth in such expenditure over the past 19 years, with spending in the food and beverage sector in 2016 almost matching pre-recession levels.
- 3.59 In the restaurant sector, there has been a growth in the market share of branded restaurants, such as Pizza Hut, Nandos and Pizza Express, but it is also clear that fine dining has become more accessible and informal, with restaurants operated by famous chefs such as Gino D'Acampo, Gordon Ramsey, Heston Blumenthal and Michel Roux. There has also been substantial growth as a result of a pub-based food renaissance, led by the likes of Wetherspoons, Hungry Horse and Harvester.
- 3.60 Although research by PwC has shown that the frequency of eating out has increased substantially since 1989, it is also clear that consumers are facing pressure on their real incomes from rising inflation and high housing costs. Similarly, the restaurant operators themselves are facing increasing cost pressures as a result of the introduction of the national minimum wage, the depreciation in sterling and the reduction in the supply of foreign labour, following the referendum decision on Brexit.²⁷ As a consequence, there have been some casualties in the casual dining sector, including Handmade Burger Co, Viva Brazil Steakhouse, and Millcliffe and CPL Foods (independent franchisee operators, mainly of Burger King restaurants), which all entered into administration in 2017.

27 PwC, Restaurants 2017 - Food for Thought: <https://www.pwc.co.uk/services/business-recovery/insights/restructuring-trends/restaurants-2017-food-for-thought.html>

- 3.61 Nevertheless, successes in the restaurant sector and the rise of gastropubs has been one of the factors behind the substantial fall in the number of pubs in the UK. Indeed, research by CAMRA suggests that around 1 in 3 pubs have closed down since the 1970s, so that the total number of pubs in the UK is now estimated to be fewer than 50,000, compared to 75,000 in the 1970s. Other reasons for the decline in the number of traditional pubs include competition from supermarkets, the introduction of the ban on smoking, rating re-evaluation, rising taxes on alcohol, the rise of branded pubs, cafés and bars, and the growing potential for conversion of pubs to other uses.
- 3.62 One of the most significant trends in the food and beverage sector has been the phenomenal growth in coffee shops. Indeed, this sector now accounts for an aggregate turnover in the UK of £7.9bn, spread across over 22,000 outlets, whereas in 1999 the Allegra World Coffee Portal estimated just 5,000 coffee shop outlets in the UK. Moreover, branded coffee chains now account for almost 30 per cent of the outlets, with Costa Coffee, Starbucks Coffee and Caffè Nero being the UK's leading brands, with a combined 53 per cent share of the branded chain market.
- 3.63 The spectacular growth in coffee shop representation is expected to continue into the future and Allegra predicts that the UK coffee shop market will comfortably exceed 30,000 outlets and £15bn turnover by 2025. Allegra suggests that this growth will be driven by branded coffee chain expansion and non-specialist operator growth, such as coffee shops within large retail stores, in response to increasing consumer participation and the desire for premium quality coffee, anywhere, at any time.

Cinemas

- 3.64 The British Film Institute's Statistical Yearbook for 2017 reports that the number of cinema sites in the UK has grown from 727 in the year 2007 to 766 in the year 2016. This growth reflects the fact that the increase in number of multiplex cinemas more than offsets the decline in the number of traditional and mixed-use sites.²⁸ The number of

28 British Film Institute, Statistical Yearbook 2017: <http://www.bfi.org.uk/education-research/film-industry-statistics-research/statistical-yearbook>; Multiplex cinemas are purpose-built complexes with five or more screens

screens in the UK has grown at a faster rate than the number of sites, from 3,514 in 2007, to 4,150 in 2016. This reflects the fact that the proportion of screens accounted for by multiplex cinemas has grown from 73.4 per cent, in 2007, to 77.3 per cent, in 2016. The proportion of screens in edge and out-of-centre locations has grown, but only marginally, from 49.6 per cent in 2007 to 51.5 per cent in 2016. Thus, around half of the UK's cinema screens are located within town and city centres.

- 3.65 There is, however, a slight regional variation in cinema screen density, from 4.2 screens per 100,000 people in the East of England, to 7.3 screens per 100,000 people in London. The screen density in the North-West, at 6.6 per 100,000 people, is marginally above the UK average of 6.4 screens per 100,000 people. Nevertheless, screen density in the UK is significantly lower than in other major film territories, such as the USA (12.5 screens per 100,000 people), France (9.0 screens per 100,000 people), Australia (8.6 screens per 100,000 people) and Spain (7.6 screens per 100,000 people). Indeed, the only major film territory, with a screen density lower than the UK is Germany, which has a density of 5.3 screens per 100,000 people.
- 3.66 The UK's three leading cinema operators are Cineworld (with 23.0 per cent of the UK's screens), Odeon (with 21.4 per cent of the UK's screens) and Vue (with 19.2 per cent of the UK's screens). These three operators, together, control almost two thirds of the UK's cinema market.

Health and Fitness

- 3.67 Another growing sector for leisure expenditure is the health and fitness market. Indeed, Leisure DB (formerly the Leisure Database Company) estimates that the UK now has 9.7m members of fitness clubs, which has boosted the penetration rate to an all-time high of 14.9 per cent, so that 1 in every 7 persons in the UK is a member of a gym.²⁹ Indeed, Leisure DB estimates that the year 2017 witnessed a 4.6 per cent increase in the number of fitness facilities (which now total 6,728), a 5.1 per cent increase in the number of

29 Leisure DB, 2017 State of the UK Fitness Industry Report: <http://www.leisuredb.com/blog/2017/5/5/2017-state-of-the-uk-fitness-industry-report-out-now>

members and a 6.3 per cent increase in market value. However, it is the low cost market that is now the main driving force, with the UK leading operators including Pure Gym, The Gym, Fitness 4 Less, Fitness First and Nuffield Health.

Games of Chance

- 3.68 One sector that has been in decline is '*games of chance*', which includes the lottery, all forms of betting, scratch cards and bingo. Spending in this sub-sector has declined by 13.4 per cent over the past 19 years, according to the ONS Consumer Trends data. This decline in spending on games of chance is reflected by the fact that the number of bingo halls in the UK has reduced from 653, in 2014, to 599, in 2015, with Gala Leisure and Mecca Bingo being the leading operators. Alongside the economic downturn, the bingo industry has also experienced a fall in revenues as a result of the ban on smoking in public places and the growth of online gaming. Thus, in response to falling admissions, bingo operators are embracing smart phone technology as part of a wider trend and growth in remote/online gambling. Thus, operators are seeking to diversify their customer profile, including a younger, predominantly female, audience.
- 3.69 Similarly, there has been a fall in the number of betting shops, as a result of regulatory changes in 2015, and as a reflection of gambling activities shifting to online channels, so that demand for physical outlets is dampening. Nevertheless, there remain 9,000 betting shops in the UK, half of which are operated by Ladbrokes and William Hill, and their presence in the high street continues to be a contentious issue, particularly in deprived areas. Indeed, the reclassification of betting shops from A2 to *sui generis* was aimed at giving local authorities greater control over managing the number of betting shops in town centres. Overall, however, it is clear that gambling is not a major leisure activity and that participation rates are very low.

Other Commercial Leisure Facilities

- 3.70 Other commercial leisure activities can be grouped together under family entertainment venues, which include ten pin bowling, roller skating, ice skating, trampolining and so on. Ten pin bowling is the most established, and Mintel found that there were 321 bowling

centres in the UK in November 2012. Such facilities benefitted from a period of growth from the mid-1990s, fuelled by the development of large entertainment boxes at retail and leisure parks. The most successful bowling centres are those which form part of larger leisure complexes that include a multiplex cinema and restaurants, so that there is a critical mass of leisure activity in one park. Standalone ten pin bowling centres are increasingly unviable. However, one type of commercial facility that is proving to be growing in popularity, particularly in Greater Manchester, is trampoline parks, which can be successful on a standalone basis.

Influential Town Centre Reports

The Portas Review

- 3.71 The adverse impact on town centres caused by the recession and the growth of e-commerce led to a series of influential reports on the future of town centres in the early part of the decade. The first was the Portas Review, commissioned by the Government and published in December 2011. This report contains 28 recommendations, including, amongst others:
- the need to put in place a ‘Town Team’, which Portas defines as being a visionary, strategic and strong operational management team for High Streets;
 - making it easier for people to become market traders by removing unnecessary regulation, so that anyone can trade on the high street, unless there is a valid reason why not;
 - the need for Government to consider whether business rates can better support small businesses and independent retailers;
 - the need for Local Authorities to use their discretionary powers to give business rate concessions to new local businesses;
 - amendments to the Use Classes system, so as to make it easier to change the use of key properties on the High Street, including a recommendation that betting shops should have a separate Use Class;

- the need for measures to discourage landlords from keeping property vacant;
- the need for Local Authorities to make more proactive use of Compulsory Purchase Order powers; and
- support for imaginative community use of empty properties through 'Community Right to Buy', 'Meanwhile Use' and a new 'Community Right to Try'.

The Taskforce Report 'Beyond Retail'

- 3.72 The Taskforce Report, which is entitled Beyond Retail, was published in November 2013; it states that: *'Town centres of the future need to move beyond retail and be a vibrant centre for living, culture, entertainment, leisure, shopping, business and civic activity'* and that: *'Successful town centres in the future will have a clear understanding of their primary functions within the local and regional economy'*.
- 3.73 The report goes on to suggest that increasing polarisation will result in three broad types of town centre offer, these being:
- *'Strong, dominant centres offering the widest range of retail, leisure and food and beverage... to provide consumers with an experience, and provide shop units commensurate with retailer demand'*;
 - *'Convenience food and service based centres with an element of fashion and comparison goods... an improved leisure and evening offer, more residential and community support'*; and
 - *'Localised convenience and every day needs focused centres'*, reflecting trends for more regular top-up shopping, more single occupancy living, better quality convenience store provision and the ageing population profile.
- 3.74 The Taskforce report also envisages that there will be active intervention on the part of Local Authorities, who will need to have a clear vision of the role and function of town centres, and their respective positions in the regional retail hierarchy.

- 3.75 Other key observations include: the need for a re-basing of occupational costs in terms of rents and rates; a need for more residential development near town centres; more accessible and safe parking facilities; and a flexible approach to car park pricing.
- 3.76 Thus, the 13 principal recommendations put forward by the Taskforce include, amongst others, the need for:
- greater cross-border co-operation between Local Authorities to better understand the impact of broader existing shopping patterns;
 - long-term master planning to *'strengthen the retail core, re-configure town centre space and re-use obsolete areas by defining new uses'*;
 - *'proactive use of Compulsory Purchase Orders (CPOs) to bring about the scale required for major reconfiguration and regeneration within towns alongside an urgent review of the complexity and costs associated with CPO'*;
 - a cap on inflationary business rate increases; and
 - the need for a review of the quality, quantity and cost of town centre car parking.

The 2013 Grimsey Review

- 3.77 The Grimsey Review: An Alternative Future for the High Street was published in September 2013. Many of the 31 recommendations put forward in the Grimsey Review echo, or complement, those of Portas and the Taskforce. Indeed, there are, a number of common themes in all three reports, including:
- a recognition that there is a need to diversify town centres so as to encompass other non-retail functions such as housing, arts, office space, healthcare facilities and leisure activities;
 - a recognition of the need for a review of the business rates system, so as to reduce occupational costs for town centre businesses;
 - the need for further reforms to permitted changes of use and to the General Permitted Development Order;

- a need for Local Authorities to be more proactive in the use of their CPO powers and for simplification of the CPO procedures; and
- a need for enhancement of secure car parking facilities and a review of pricing and management practices.

The Grimsey Review 2 (July 2018)

3.78 Following the spate of reports that occurred in the post-recession period from 2011 to 2013, there has been less recent analytical commentary on factors affecting the health of town centres. One exception, however, is the very recent publication of the Grimsey Review 2, published in July 2018, which reports four key findings that underpin the subsequent 25 recommendations made in the Grimsey Review 2. The four key findings are that:

- i) There is a need for all towns to develop plans that focus on transforming the place into a community hub, incorporating health, housing, arts, education, entertainment, leisure, and business/office space, as well as some shops, while developing a unique selling proposition (our emphasis).
- ii) The key to success is outstanding and committed leadership, whether this is through elected mayors, or through local government.
- iii) The curating of the “offer” a place should be based on its distinct heritage and identify why people should want to live, work, play, visit and invest in the “place”.
- iv) There is a need to share best practice in high street innovation, with too many agencies alleged to be remaining in silos.

3.79 We consider, however, that the recommendations that flow from these four findings do not add, substantially, to those put forward in the Portas and Taskforce reports.

Implications for Tameside’s Town Centres

3.80 The main implications for Tameside’s Town Centres, of the recent and anticipated changes in the retail and leisure sectors outlined in this section, would seem to relate to:

- i) The need for strong local authority leadership in developing appropriate visions for the role and functions of centres at different levels in the hierarchy, building on the work of the established Town Teams that remain operational in Ashton, Droylsden, Hyde, Mossley and Stalybridge. The vision for each centre should enable it to restructure in the face of changing consumer choices and demands and reflect its own particular set of strengths and challenges.
- ii) The need for further diversification of town centre uses, particularly outside of the Primary Shopping Areas, so as to reflect lower levels of projected growth in retail expenditure, the need for the re-occupation of empty premises and the need for more healthy night time economies, so as to consolidate the town centre as a whole. In short, town centres need to strengthen their role as focal points for commerce, public services, transport, education, leisure, culture and many other activities. For example, Ashton and Hyde, in particular, would benefit from enhanced levels of office-based employment to help both the daytime and night-time economies.
- iii) The need to recognise the benefits for retailers of improvements to the food and beverage and wider leisure offers of the various centres, which will improve dwell times throughout the day and enhance the evening economy, taking advantage of increases in footfall arising from new educational facilities in town centres, such as the Advanced Learning Centre known as Clarendon College, the Advanced Technology Centre on the Beaufort Road campus of Tameside College and the Advanced Skills Centre, which is being developed alongside a new joint service centre for Tameside Council.
- iv) The need for proactive approaches to public realm improvements aimed at increasing safety, footfall and dwell time, and so as to increase investor confidence.
- v) The need for a review of the geographical extent of the overall Town Centre Boundaries, which, for the reasons set out later in this report, applies in particular to Ashton and Hyde Town Centres, so as to encourage investment in main town centre uses to become more concentrated and to improve the operation of the sequential test for all main town centre uses.

- vi) The need to define Primary Shopping Areas in Denton, Droylsden and Stalybridge, and to review the extent of the Primary Shopping Areas in Hyde and Ashton, so as to provide for the retail needs that have been identified and improve the effectiveness of the sequential approach.
- vii) The need to build on partnership approaches, such as Vision Tameside, in seeking to widen and improve the range of civic, education, health and cultural functions of the town centres, and the need for public-private sector investment vehicles, so as to take some of the risk away from proposed major mixed-use commercial developments.
- viii) The need to promote significantly enhanced levels of housing within and in close proximity to the various centres, and to recognise the link between housing and retail and leisure spending.
- ix) The need to draw more people into the town centres, particularly in the evenings, by making the centres feel safer and more accessible, and through building on the successes of the special markets, live music and cultural events that have already been promoted in recent years.

4 ASSESSMENT OF THE HEALTH OF TAMESIDE'S CENTRES

Introduction

4.1 In this Section, we provide our assessment of the current health of the Town and District Centres of Ashton, Hyde, Denton, Droylsden and Stalybridge. We also provide some qualitative commentary in relation to Mossley and the emerging District Centre in Hattersley. We have regard, in particular, to the ten health check indicators set out in paragraph 2b-005 of the Government's Planning Policy Guidance (the PPG), which are:

- diversity of uses;
- proportion of vacant street level property;
- commercial yields on non-domestic property;
- customers' views and behaviour;
- retailer representation and intentions to change representation;
- commercial rents;
- pedestrian flows;
- accessibility;
- perception of safety and occurrence of crime; and
- state of the town centre environmental quality.

4.2 However, information on some of these indicators is not always available, and so we have sought to concentrate on an assessment of the strengths and weaknesses of each of the centres, in reaching a conclusion on their overall health.

Ashton-under-Lyne Principal Town Centre

4.3 In undertaking our appraisal of Ashton-under-Lyne Town Centre, which is the Principal Town Centre in Tameside, we have had regard, in particular, to the following:

- i) the Ashton-under-Lyne Town Centre Strategy Supplementary Planning Document, adopted by the Council in January 2010;
- ii) the findings from WYG's Tameside Retail Study of May 2010;
- iii) the Ashton Town Centre Development Prospectus 2012;
- iv) the report prepared by Javelin Group in September 2012 on behalf of AGMA, entitled Greater Manchester Towns: Data Analysis;

- v) the Greater Manchester Combined Authority (GMCA), GM Town Centres Project: Concluding Report of March 2013;
- vi) the report commissioned by the National Association of British Market Authorities (NABMA), prepared by the ROI Team in May 2015;
- vii) Lambert Smith Hampton's Greater Manchester Retail Intelligence Study: Over-arching Report, of June 2015;
- viii) the Greater Manchester Spatial Framework Background Paper: Town Centres Topic Paper of October 2016;
- ix) the findings of the pedestrian surveys, carried out by NEMS Market Research in July 2017, specifically for the purposes of this present study;
- x) an analysis of representation in Ashton Town Centre in October 2017 from a basket of 100 multiple comparison retail and service operators typically found in principal town centres such as Ashton;
- xi) the findings from our consultations with key stakeholders, which were undertaken between August and October 2017, with the names of the stakeholder organisations listed in Item 2 of Volume 2; and
- xii) the findings and observations from our own extensive fieldwork undertaken in the period July 2017 to November 2017.

The Contextual Position of Ashton-under-Lyne Town Centre

4.4 The Greater Manchester Combined Authority's (GMCA's) *GM Town Centres Project: Concluding Report* defines Ashton as one of the eight Principal Town Centres in Greater Manchester, the others being Altrincham, Bolton, Bury, Oldham, Rochdale, Stockport and Wigan.³⁰ The Town Centres Project builds on the Business Leadership Council's Town Centre Study of 2010, with the latter concluding that the eight Principal Town Centres have been making a diminishing contribution to the Greater Manchester economy as a result of a number of factors, including:

- the continued development of out-of-town office, retail and leisure facilities;
- the increasing prominence of Manchester City Centre as the regional centre; and

30 https://www.greatermanchester-ca.gov.uk/download/downloads/id/16/greater_manchester_town_centre_review.doc

- increasing dependence on the public sector for investment in offices and housing, and for the development of new retail and leisure facilities.

4.5 The key conclusions of the GM Town Centres Project are that:

- each of the eight Principal Town Centres has its own set of characteristic strengths and challenges, with each operating from different starting points; and that
- the growth of e-commerce and multi-channel retailing means that all face unprecedented challenge in terms of their retail role and will need to restructure in the face of changing consumer choices and demands.

4.6 The Town Centres Project report then turns to the results of the reviews of individual town centres. It concludes that Ashton-under-Lyne should *‘...seek to maintain its role in serving the primary catchment area, providing a focus for shopping, access to transport, education and skills, so enhancing local quality of life.’* It then refers to the 2012 Development Prospectus, which it describes as being *‘rightly ambitious, identifying the transformative impact that relocating Tameside College within the Town Centre could have.’* Thus, it suggests that the key issues for Ashton Town Centre include:

- the need to consolidate activity and investment, focussing on the successful Markets, the two managed shopping centres and the Northern Core;
- the need to maximise the beneficial impact of the relocated Tameside College students;
- the competition from the nearby Snipe Retail Park and Ashton Leisure Park;
- the reliance, in the short term, on public sector investment in the Transport Interchange, Tameside College and take-up of offices in St Petersfield; and
- the need to improve the public realm, particularly in the area around the Metrolink terminus, where the current bus station creates a poor gateway to the town centre.

4.7 Thus, having set out some of the contextual position, we now turn to our review of Ashton against the indicators set out in the PPG.

The Planning Policy Guidance Indicators

Diversity of Uses

- 4.8 The overall Town Centre Boundary for Ashton-under-Lyne and its Primary Shopping Area is defined on the Proposals Map of the Tameside Unitary Development Plan (the UDP), adopted in November 2004. Within the Primary Shopping Area (the PSA), Policy S4 of the UDP seeks to discourage the change of use of retail premises to non-retail uses, where this would create an imbalance or dominant grouping of non-retail uses in any particular area. However, outside the PSA, Policy S4 suggests that the Council will permit a diversity of uses, where these contribute to the appeal of the town centre, help to minimise empty properties and improve the appearance of the centre.
- 4.9 Much of the retail activity within Ashton Town Centre is concentrated within the Primary Shopping Area, which incorporates the Arcades and Ladysmith Shopping Centres; the Indoor and Outdoor Markets; and parts of Old Street, Wellington Street, Wood Street and Stamford Street Central, which collectively are known as the 'Old Town' area of Ashton. There is, however, quite a substantial quantum of retail activity in large units to the north of Wellington Road, including M&S, Sainsbury's and Ikea, and at Ashton Retail Park.
- 4.10 Representation of independent traders is concentrated in Stamford Street Central, which is overwhelmingly outside the Primary Shopping Area, but was historically the main shopping street in Ashton. Thus, the Old Town area, which contains a number of important listed buildings, provides for a mix of uses that includes independent retailers, financial and personal service uses, offices, residential accommodation (particularly above ground floor level) and a number of cafes and hot food takeaways.
- 4.11 It is noteworthy that all of the main foodstores – Asda, Lidl, Aldi, Sainsbury's and M&S – are outside the Primary Shopping Area, albeit that they are within the currently defined Town Centre Boundary in the UDP.
- 4.12 Other important uses within or close to the overall Town Centre Boundary include an increasingly important education function, in the form of: the Clarendon Sixth Form College, which opened in October 2015; the Advanced Technologies Centre, which

opened in September 2016 at the Beaufort Road campus of Tameside College; and the Advanced Skills Centre, which is currently under construction at Market Square, as part of Phase 2 of Vision Tameside, which will simultaneously deliver new accommodation for Tameside Council. Moreover, St Petersfield, within the western part of the town centre, is becoming increasingly important as an office location, whereas most of Ashton's cultural facilities are found in the Delamere area, between St Petersfield and the PSA.

- 4.13 The viability and vitality of a town centre and its potential growth can also be influenced through residential redevelopment within and adjacent to it. In recent years, residential redevelopment within Ashton has predominantly been limited to those cleared sites within the ownership of the Council that have been brought forward through partnership initiatives. For example, in St Petersfield, a development known as Brookdale was completed in 2013, as a result of a partnership initiative between New Charter Group, the HCA and the Council. Brookdale is a development aimed at the affordable rental market, and provides for 22 family homes and 9 apartments. Similarly, the former Moss Street car park was redeveloped through partnership work between the Council, New Charter and the HCA to redevelop the site for 10 houses and 11 apartments for affordable rent.
- 4.14 What is perhaps more difficult to quantify is the number of residential dwellings above commercial businesses in the town centre as a result of permitted development rights, such as the conversion of offices to residential use, given that such changes of use are not necessarily subject to the development management process.

Diversity of Retail Uses

- 4.15 Thus, having identified some of the wider non-retail functions in the Town Centre, our assessment of the diversity of retail uses in Ashton draws on Experian's Goad survey of 27th September 2016, updated with the findings of our own fieldwork survey in August 2017. Please note that Experian does not include car parks, leisure uses, offices, libraries, religious institutions, entrances, and so on within its listing of categorised units.
- 4.16 **Table 4.1** provides an analysis of the Goad survey area by broad sector, as at August 2017. It shows that representation in the convenience and comparison goods sectors in Ashton is very similar to the UK average, but that Ashton has a significantly higher

proportion of vacant units (17.3 per cent) than does the UK (12.2 per cent). Conversely, Ashton has a lower proportion of units in the services sector, compared to the UK average. However, the Markets have been excluded from the analysis in Table 4.1.

Table 4.1 – Broad Breakdown of the Number and Proportion Retail and Service Units in the Goad Area of Ashton Town Centre in August 2017

HV Survey of Ashton in August 2017, Compared to UK Average in September 2017			
Broad Sector	Ashton (no. of units)	Ashton (% of units)	UK Average (% of units)
Convenience	32	8.4	9.6
Comparison	158	41.5	38.5
Services	123	32.3	38.5
Vacant	66	17.3	12.2
Miscellaneous	2	0.5	1.2
TOTAL	381	100.0	100.0

Source: HV Survey of August 2017 and Experian data for UK in September 2017

Note: The Markets have been removed from this table because it is not possible to provide a breakdown between convenience stalls and comparison stalls

Note: The above table does not include Sainsbury's and M&S since these are outside the Goad survey area

4.17 **Table 4.2** provides a corresponding analysis to Table 4.1, but in terms of floorspace provision. It shows that Ashton has a significantly higher proportion of floorspace which is vacant compared to the UK average (14.6 per cent, compared to 11.1 per cent), and a lower proportion of floorspace accounted for by services (20.3 per cent, compared to 26.0 per cent). However, the proportion of floorspace accounted for by convenience and comparison traders in Ashton Town Centre is very similar to the UK average.

Table 4.2 – Broad Breakdown of the Amount and Proportion Retail and Service Floorspace in the Goad Area of Ashton Town Centre in August 2017

HV Survey of Ashton in August 2017, Compared to UK Average in September 2017			
Broad Sector	Ashton (floorspace in sq.m)	Ashton (% of floorspace)	UK Average (% of floorspace)
Convenience	15,540	21.4	18.4
Comparison	31,580	43.4	43.6
Services	14,780	20.3	26.0
Vacant	10,660	14.6	11.1
Miscellaneous	210	0.3	0.9
TOTAL	72,770	100.0	100.0

Source: HV Survey of August 2017 and Experian data for UK in September 2017

Note: The Markets have been removed from this table because it is not possible to provide a breakdown between convenience stalls and comparison stalls

Note: The above table does not include Sainsbury's and M&S since these are outside the Goad survey area

- 4.18 The Asda store on Cavendish Street is single largest convenience store within the Goad area, at 10,060 sq.m gross. The only other convenience stores within the Goad survey area of over 500 sq.m gross are the Lidl and Iceland stores. However, outside the Goad survey area, but within the overall Town Centre Boundary, as defined in the UDP, there is representation by Sainsbury's (in the form of a superstore), M&S and Aldi.
- 4.19 In the comparison goods sector, representation is generally focused on the lower and middle end of the market, with the main national multiples including Wilko, Boots, B&M Bargains, New Look, Next, JD Sports, WH Smiths, Superdrug and Argos (within Sainsbury's). Many of the larger comparison retail units are located in the Arcades and Ladysmith Shopping Centres, or to the north of Wellington Road, in Ashton Retail Park. It is important to note, however, that Ikea is located just outside the Experian/Goad survey area and is not included in the analysis in Tables 4.1 and 4.2.
- 4.20 **Table 4.3** provides a more detailed breakdown of retail and service sector representation in Ashton Town Centre in August 2017. There are 46 shops in the all-important clothing and footwear sectors (Goad categories G2A, G2B, G2C and G2D) and representation in this sector is higher than the UK average in terms of units (12.1 per cent in Ashton compared to 9.4 per cent nationally), but marginally lower in terms of floorspace (10.0 per cent in Ashton compared to 11.2 per cent nationally). The marginal under-representation in the clothing and footwear sector, in terms of floorspace, is attributable to the significant under-representation in the '*mixed and general clothing*' sub-sector.
- 4.21 There is also significant under-representation in Ashton, in terms of floorspace, in the '*variety, department & catalogue showrooms*' sub-sector. Indeed, there is no department store in Ashton, which is a critical weakness for a Principal Town Centre.
- 4.22 Conversely, Table 4.3 indicates that the most significant over-representation in the comparison goods sector in Ashton, compared to the UK, is in the '*charity shops, pets and other comparison*' and '*DIY, hardware & household goods*' sub-sectors, particularly in terms of floorspace.

Table 4.3 – Detailed Breakdown of Retail and Service Uses in Ashton-under-Lyne Town Centre in August 2017 (excluding the Markets)

Ashton-under-Lyne Town Centre Uses Summary							
		Units			Floorspace		
GOAD Code	GOAD Categorisation of Operator	No. of Units	% of Total Units	UK Average %	Amount of Floorspace (sq m)	% of Total Floorspace	UK Average %
	Convenience Goods						
G1A	Bakers	8	2.1%	2.1%	670	0.9%	1.1%
G1B	Butchers	1	0.3%	0.7%	140	0.2%	0.4%
G1C	Greengrocers & fishmongers	0	0.0%	0.6%	0	0.0%	1.3%
G1D	Grocery and frozen foods	11	2.9%	2.9%	13,640	18.7%	12.7%
G1E	Off-licences and home brew	2	0.5%	0.5%	240	0.3%	0.3%
G1F	Confectioners, tobacconists, newsagents	10	2.6%	2.5%	850	1.2%	2.6%
	TOTAL	32	8.4%	9.4%	15,540	21.4%	18.3%
	Comparison Goods						
G2A	Footwear & repair	6	1.6%	1.6%	1,120	1.5%	1.2%
G2B	Men's & boys' wear	6	1.6%	0.9%	730	1.0%	0.8%
G2C	Women's, girls, children's clothing	19	5.0%	2.9%	2,660	3.7%	2.6%
G2D	Mixed and general clothing	15	3.9%	4.1%	2,800	3.8%	6.7%
G2E	Furniture, carpets & textiles	12	3.1%	3.3%	2,740	3.8%	3.6%
G2F	Booksellers, arts/crafts, stationers/copy bureaux	14	3.7%	4.1%	2,660	3.7%	3.0%
G2G	Electrical, home entertainment, telephones and video	17	4.5%	3.5%	1,720	2.4%	2.4%
G2H	DIY, hardware & household goods	10	2.6%	2.3%	4,690	6.4%	4.3%
G2I	Gifts, china, glass and leather goods	3	0.8%	1.7%	180	0.2%	0.9%
G2J	Cars, motorcycles & motor accessories	2	0.5%	1.1%	600	0.8%	1.7%
G2K	Chemists, toiletries & opticians	11	2.9%	3.9%	2,850	3.9%	3.9%
G2L	Variety, department & catalogue showrooms	3	0.8%	0.6%	2,690	3.7%	6.3%
G2M	Florists and gardens	2	0.5%	0.8%	320	0.4%	0.4%
G2N	Sports, toys, cycles and hobbies	9	2.4%	2.0%	1,180	1.6%	2.3%
G2O	Jewellers, clocks & repair	8	2.1%	1.9%	690	0.9%	0.9%
G2P	Charity shops, pets and other comparison	21	5.5%	4.4%	3,950	5.4%	3.1%
	TOTAL	158	41.5%	39.0%	31,580	43.4%	44.1%
	Service Uses						
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	35	9.2%	17.5%	4,150	5.7%	13.1%
G3B	Hairdressers, beauty parlours & health centres	50	13.1%	10.7%	4,640	6.4%	5.2%
G3C	Laundries & drycleaners	0	0.0%	0.9%	0	0.0%	0.4%
G3D	Travel agents	4	1.0%	1.0%	480	0.7%	0.6%
G3E	Banks & financial services (incl. accountants)	18	4.7%	3.7%	3,780	5.2%	4.0%
G3F	Building societies	2	0.5%	0.5%	250	0.3%	0.4%
G3G	Estate agents & auctioneers	14	3.7%	4.0%	1,480	2.0%	2.2%
	TOTAL	123	32.3%	38.3%	14,780	20.3%	25.9%
	Miscellaneous Uses						
G4A	Employment, careers, Post Offices and information	2	0.5%	1.2%	210	0.3%	0.9%
G4B	Vacant units (all categories)	66	17.3%	12.1%	10,660	14.6%	10.8%
	TOTAL	68	17.8%	13.3%	10,870	14.9%	11.7%
	GRAND TOTAL FOR CATEGORISED UNITS	381	100.0%	100.0%	72,770	100.0%	100.0%
(blank)	GOAD Uncategorised Units	102			22,380		
	GRAND TOTAL INCLUDING UNCATEGORISED UNITS	483			95,150		

GOAD uncategorised units include the following: car parks, entrances, offices, schools, religious institutions, etc

Source: HV Survey (August 2017) and Experian National Averages (June 2017)

Note: Table 4.3 excludes the Indoor and Outdoor Markets

4.23 In terms of service uses, the Goad sub-sector with the highest degree of under-representation in Ashton, compared to the UK, is 'restaurants, cafes, coffee bars, fast food & takeaways'. However, it is important to note that the Markets have been excluded

from the analysis in Table 4.3. Moreover, it is the restaurants and coffee bar components of this sub-sector that are under-represented in Ashton, not the fast food and takeaway outlets, of which there are at least 20. Indeed, officers in Public Health have emphasised the need for an increase in the presence of restaurants and cafes that provide for a more healthy and sustainable food offer, in order to strengthen the overall vitality and diversity of Ashton's food scene.

- 4.24 An important part of the retail offer in Ashton is performed by the Markets, with the Council being responsible for the management of both the historic Indoor Market and the outdoor Market. The Indoor Market, which opens six days a week consists of 81 stalls; these are operated by a mix of food and non-food traders and by service traders such as hairdressers, cafes and a dry cleaner.
- 4.25 The Outdoor Market is open seven days a week and its 104 stalls are permanently covered, so that it can continue to trade even in poor weather. The Outdoor Market runs specialist events, including a table top sale each Sunday, a Cake and Craft market, and a 'Farmers and Producers' market that sells locally-grown, fresh produce.
- 4.26 A report by ROI Team, commissioned by the National Association of British Markets (NABMA) and published in May 2015, demonstrates the significance of the Markets to the local economy and community of Ashton.³¹ The report states that:
- 'From our research in the market, almost half of customers do not visit any other market, demonstrating the importance and popularity of the market for the town. The only serious competitor for Ashton Market identified by customers is the famous Bury Market, also visited by 25% of Ashton customers. More than 60% of market customers plan to shop elsewhere in the town in the same day. And almost half of Ashton Market customers tell us they know somebody whose livelihood depends on the market.'*
- 4.27 The ROI Team report also notes that the market supports approximately 200 full-time jobs and has an aggregate turnover of almost £30m per year, returning a healthy profit

³¹ ROI Team, 'Ashton under Lyne Market - Supporting the Local Economy' (May 2015), <https://www.nabma.com/wp-content/uploads/2015/06/Output-Ashton-Market-completed.pdf>

for the Council. In addition, the Markets play a vital role in providing employment opportunities, apprenticeships/training schemes and supply chain roles to local people. Some traders have engaged with the Ashton community by contributing to local charities or giving free talks and workshops on skills such as cooking.

- 4.28 Ashton Markets are subject to an ongoing £4.5m investment in their refurbishment and redevelopment. The first phase is now more or less complete and includes new stalls and kiosks, the creation of an events area and additional seating areas, public realm improvements and enhanced landscaping. The Phase 1 works have been successful in attracting new quality traders, such as Ashton Flower Lyne. Phase 2 of the Ashton Markets redevelopment is expected to be completed later in 2018. Phase 2 involves the construction of a new Civic Square in front of the Grade II listed Victorian Town Hall and the retained façade of the former Water Board building, together with new paving, street furniture, street lighting and landscaping.
- 4.29 Other recent investment by the Council in Ashton Town Centre is expected to benefit the Markets by increasing the number of people living, working and studying in the area. According to the 2015 NABMA report, only 2 per cent of the Market's customer base comprised students, while retirees made up approximately 76 per cent. Thus, the recent opening of Clarendon Sixth Form College, which is opposite the Markets, is expected to enable the Markets to attract a much-needed younger demographic.

The Proportion of Vacant, Street-Level Property

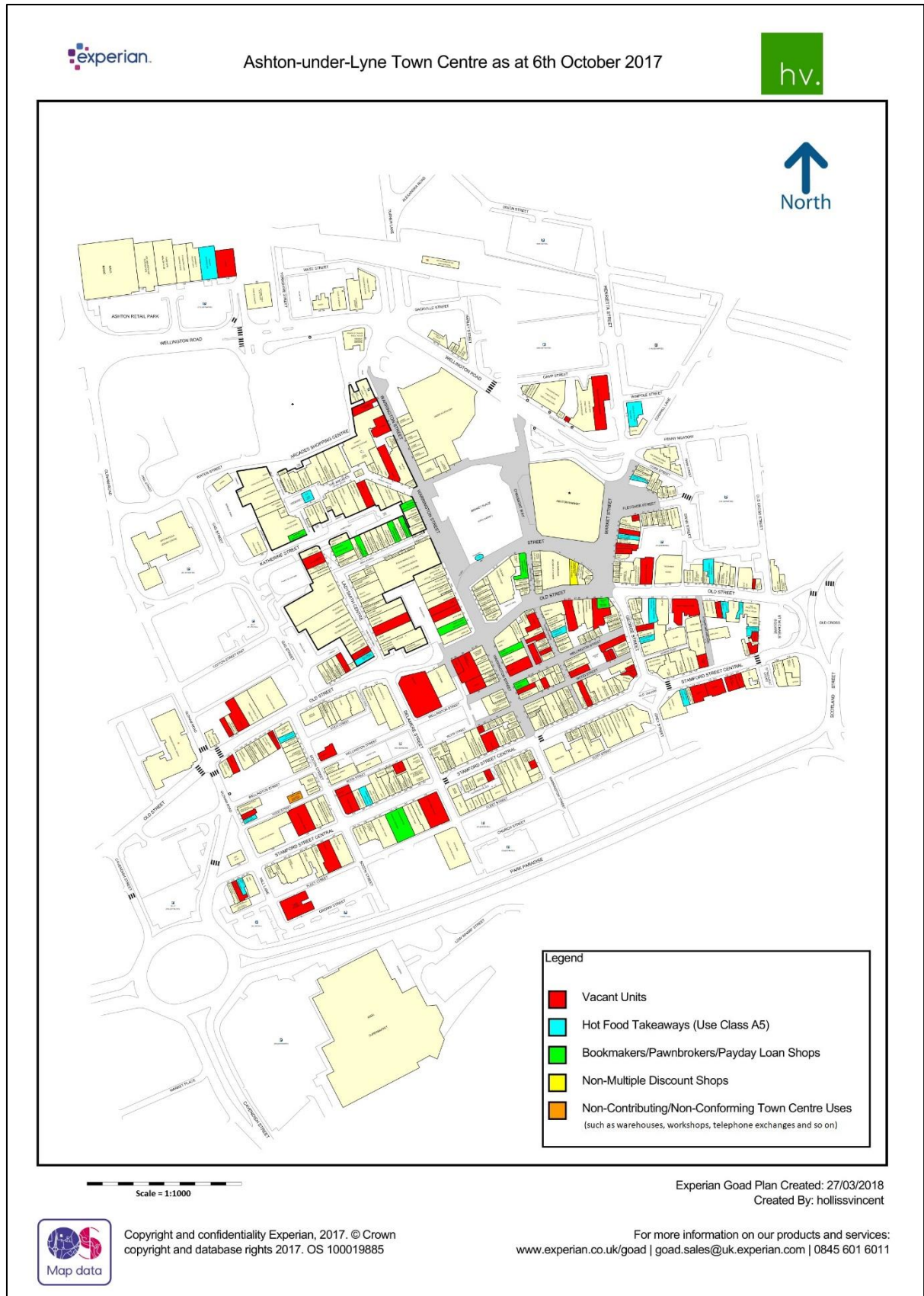
- 4.30 Our survey of August 2017 shows a total of 66 vacant units in Ashton-under-Lyne Town Centre, which represents a unit vacancy rate of 17.3 per cent, compared to a UK average rate in September 2017 of 12.2 per cent. In terms of floorspace, Ashton's vacancy rate is 14.6 per cent, which compares to a UK floorspace vacancy rate of 11.1 per cent. We would emphasise, however, that 55 of the 66 vacant units at August 2017 are less than 280 sq. m gross in size and that only four out of the 66 units are above 400 sq.m gross. Thus, the average size for vacant units in Ashton, at August 2017, is just 163 sq.m gross, which is too small for most modern retailers.

- 4.31 **Figure 4.1** reveals that the Arcades and Ladysmith Shopping Centres have relatively few vacancies, reflecting their popularity as well-managed, busy shopping centres. In the Arcades, it is the upper floor where lettings of vacant units have proved more difficult. There is, however, a cluster of bookmakers in the northern part of the Ladysmith Centre. Thus, Figure 4.1 shows that the most significant concentrations of vacancies and hot food takeaways are away from the shopping centres, in the older shopping streets of Old Street, Wellington Street, Wood Street and Stamford Street Central.
- 4.32 We consider, therefore, that the high number of vacant units in Ashton, as depicted in Figure 4.1, reflects two main factors, which are:
- a) the small size of the majority of vacant units, which, although suitable for independent retailers and new start-up businesses, are too small for many national multiple retailers; and
 - b) the impact of structural changes in retailing, including further polarisation, which has meant that Ashton has faced ever-increasing competition not only from the growth of e-commerce, but also from Manchester City Centre and from other large unit retail and leisure destinations such as Ashton Leisure Park, Snipe Retail Park, and Crown Point Shopping Centre in Denton.

Commercial Yields on Non-Domestic Property

- 4.33 The Valuation Office no longer publishes information on prime shopping yields, so that there is no longer any information on yields that is available on a consistent basis for all centres, thereby diminishing greatly the usefulness of this health check indicator.

Figure 4.1 – Annotated Goad Plan showing Vacancies & Other Uses in Ashton, October 2017



Customers' and Businesses' Views and Behaviour

- 4.34 As part of this study, Tameside Borough Council commissioned surveys of pedestrians in the Town Centres of Ashton-under-Lyne, Denton, Droylsden Hyde and Stalybridge, undertaken by NEMS in July 2017. The survey findings, which are reported in full in **Volume 3**, have enabled us to obtain a better understanding of customers' views of the various centres. We should emphasise, however, that the views of customers are often based on their individual perceptions and not necessarily based on objective reality.
- 4.35 Thus, notwithstanding this caveat, the pedestrian survey sought satisfaction ratings on a scale of 1 (very dissatisfied) to 5 (very satisfied) in relation to various aspects of the retail, leisure and service offer in each of the five centres. For Ashton-under-Lyne, the highest mean score, of 3.80, related to its *'range of financial, legal and personal services'*. Somewhat surprisingly, however, pedestrians gave Ashton the lowest mean ranking score in relation to its *'supermarket offer'* (3.15), compared to the other main centres in Tameside (with Hyde achieving the highest mean score in relation to its supermarket offer, of 4.04). We can only surmise that this finding relates to the fact that the Sainsbury's and M&S stores appear to operate as out-of-centre stores and the fact that the Asda, Lidl and Aldi stores are also outside Ashton's Primary Shopping Area.
- 4.36 The mean satisfaction ratings in relation to Ashton's *'range and quality of shops'*, its *'family entertainment facilities'* and its *'food and drink offer'* were 3.22, 3.30, and 3.65, respectively. Thus, Ashton was ranked fourth of the five main centres in Tameside in terms of the range and quality of its shops, second in terms of its family entertainment facilities and third in respect of its food and drink offer.
- 4.37 So far as environmental and personal safety factors are concerned, Ashton was the top ranking of the five main centres in Tameside in relation to *'shelter from weather'*, but was ranked fourth by customers in terms of *'cleanliness of shopping streets'* and *'personal safety/policing'*. Ashton was the second ranking centre in terms of the *'quality and overall appearance of its buildings and landscaping'* and third in relation to *'pedestrian safety'*.
- 4.38 So far as accessibility factors are concerned, Ashton was the lowest ranking of Tameside's five main centres in terms of *'access for people with mobility/hearing/sight difficulties'*. It

was also perceived to be the worst centre in terms of the amount of car parking. The relatively low mean score for the amount of car parking available in Ashton is slightly surprising, given that the two-storey Ladysmith car park does not appear to be fully utilised. Nevertheless, Ashton was given a high mean score of 4.05 in terms of accessibility by bus, and Ashton is set to benefit from a further boost to its public transport accessibility once the Interchange is developed.

Retailer Representation and Intentions to Change Representation

- 4.39 The Javelin Group's Market Position Classification for Ashton, in its 2011 Venuescore Rankings³², is 'Down', with a Market Position Index score of 76, compared to a UK average of 100. Nevertheless, the same report identifies a higher Fashion Position Index for Ashton of 112, leading to a Fashion Position Classification of 'Fashion Forward'.
- 4.40 In order to identify the types of comparison retailers and service trader that are missing, we have undertaken an analysis of a basket of 100 multiple traders that could be expected to be represented in a Principal Town Centre such as Ashton. Our analysis is presented as **item 9 in Volume 2**. This shows that within the Goad area definition of Ashton-under-Lyne Town Centre (which excludes the Marks & Spencer store at Lord Sheldon Way, Ashton Moss), there is representation from just 42 of the basket of 100 (excluding any concessions). Comparison retailers noticeable by their absence include those identified in **Table 4.4**.

Table 4.4: Notable Comparison Goods National Multiples Missing in Ashton-under-Lyne

Accessorize	Early Learning Centre	Laura Ashley	Primark
Ann Summers	French Connection	Lush	River Island
Apple	Game	Matalan	Sony Centre
Clarks	Gap	Miss Selfridge	Sports Direct
Clas Ohlson	H&M	Monsoon	The Carphone Warehouse
Currys & PC World	Hotel Chocolat	Mothercare	TK Maxx
Debenhams	House of Fraser	Oasis	Warehouse
Dorothy Perkins	Jane Norman	Optical Express	Waterstones
Dunelm	La Senza	Phones 4 U	Zara

32 Sourced from a report by the Javelin Group prepared for AGMA, entitled *Greater Manchester Towns Data Analysis*, September 2012.

- 4.41 We have also undertaken an analysis of Experian's basket of 31 '*major*' national retailers, which it uses to gauge the comprehensiveness of the offer in town centres. **Table 4.5** shows that Ashton contains a total of 15 of the 31; that Denton contains 12 of the 31, but with most of Experian's '*major*' retailers in Denton being located at Crown Point; and that Hyde enjoys representation from only 6 of Experian's '*major*' retailers.

Table 4.5: Representation amongst Experian's 'Major' Comparison Retailers

	Ashton	Denton	Hyde
Argos	Yes	No	Yes
Boots Chemist	Yes	Yes	Yes
Burton	No	No	No
Carphone Warehouse	No	Yes	No
Clarks	No	Yes	No
Clintons	Yes	Yes	No
Debenhams	No	No	No
Dorothy Perkins	No	No	No
EE	Yes	No	Yes
H&M	No	Yes	No
HMV	No	No	No
House of Fraser	No	No	No
John Lewis	No	No	No
M&S	Yes	No	No
Monsoon/Accessorize	No	No	No
New Look	Yes	Yes	No
Next	Yes	No	No
O2	Yes	Yes	Yes
Primark	No	No	No
River Island	No	Yes	No
Sainsbury's	Yes	No	No
Superdrug	Yes	No	Yes
TK Maxx	No	Yes	No
Tesco	No	No	No
Topman	Yes	No	No
Topshop	Yes	Yes	No
Vodafone	Yes	Yes	Yes
Waitrose	No	No	No
Waterstones	No	No	No
WHSmith	Yes	No	No
Wilkinsons	Yes	Yes	No
	15 out of 31	12 out of 31	6 out of 31

Commercial Rents

- 4.42 We have very little information on Zone A rents, but, based on asking rents for the limited number of vacant properties in the Arcades and Ladysmith Shopping Centres, it would seem that the Zone A rents in Ashton are much lower than the pre-recession levels reported by WYG in Appendix 3 of the Tameside Retail Study of May 2010. Indeed, based on the limited transactions being advertised, it would seem that Zone A rents in these prime shopping centres are now below £600 per sq.m.

Pedestrian Flows

- 4.43 Our consultations with the owners of the Ladysmith and Arcades Shopping Centres suggest that footfall levels peaked in 2011, but then fell between 2011 and 2014. Footfall levels are once again reported to be on the upturn, helped in part by the opening of Clarendon Sixth Form College, but consultees felt that they would improve still further once the Tameside Vision Phase 2 works are complete. This is because the construction works are perceived to have had a temporary negative impact on footfall and permeability within the Town Centre generally. It was clear from our fieldwork, however, that footfall levels decline dramatically after 5.30pm, in line with our general finding that the evening economy in Ashton-under-Lyne needs to be improved.

Accessibility

- 4.44 The NEMS survey of pedestrians in Ashton-under-Lyne Town Centre reveals that 25 per cent of trips to the town centre are by public transport, which is marginally lower than the findings for Hyde and Denton, where public transport accounts for 27 per cent of the trips to each of these centres. Indeed, of the five main centres in Tameside, Ashton has the highest percentage of trips by car, at 62.5 per cent, and the lowest proportion of walk-in trips. The high proportion trips to Ashton by car may be a reflection of the northern and southern bypasses and Oldham Road, which make pedestrian movement more challenging.
- 4.45 However, the new Transport Interchange, for which the construction contract is imminent, is expected to be operational by early 2020. This will greatly improve

connectivity between buses, the train station, and the Metrolink stop, and enhance the overall accessibility of Ashton-under-Lyne Town Centre.

Perception of Safety and Occurrence of Crime

- 4.46 NEMS' survey of pedestrians in Ashton-under-Lyne Town Centre produced a mean score, in relation to personal safety and policing, of 3.57, making it the fourth ranked of the five main town centres in Tameside, with Droylsden achieving the highest personal safety/policing score, of 4.00. Our own fieldwork suggests that, during the day, Ashton feels very safe as a centre, but that the low pedestrian footfall in the evening makes the town centre feel less secure.

State of the Town Centre Environmental Quality

- 4.47 The Vision Tameside works are having a noticeable short-term impact on perceptions of environmental quality, because of general construction activity. There is no doubt, however, that the public realm at the northern entrance into the town centre will be greatly improved once the second phase of the Tameside Vision construction contract is completed and once the new Transport Interchange is in place. Indeed, there has already been a considerable improvement to the public realm in Market Place.
- 4.48 Much of the Ashton Town Centre is within two defined conservation areas. The first, and largest, conservation area includes the Indoor and Outdoor Market areas, which have benefitted, and continue to benefit, from substantial investment in their refurbishment. This first conservation area also contains the historic shopping streets, including Old Street, Wellington Street, Wood Street and Stamford Street Central, the southern part of Delamere and the St Petersfield area, which is becoming a focus for new office development.
- 4.49 The second conservation area, to the south-west of the town centre, contains Portland Basin, which has very attractive buildings and open areas and has been described by one of our consultees as one of Greater Manchester's favourite hidden gems. It is unfortunate, therefore, that the Asda store was built right on top of the Canal, and that Portland Basin is separated from the remainder of the town centre by the very busy

A635. Obviously, the Portland Basin area lies in an area that has been dominated by industrial uses, but the environment is beginning to change, with the development of houses, apartments and the Heritage Wharf tourist attraction.

Town Centre Rankings

- 4.50 The Javelin Group's year 2014 rankings of centres in the UK places Ashton-under-Lyne at number 215. This means that Ashton is ranked between Oldham, at number 170, and Rochdale and Altrincham, at numbers 229 and 242, respectively. However, Ashton is significantly lower in the Venuescore rankings than the other four Principal Town Centres in Greater Manchester, with Bury ranked at number 90, Stockport ranked at 94, Bolton ranked at 98 and Wigan ranked at 108. Thus, Ashton ranks sixth amongst the eight Principal Town Centres identified in the emerging Greater Manchester Spatial Framework.

Overall Conclusion in Relation to the Health of Ashton-under-Lyne Centre

- 4.51 Our overall conclusion is that Ashton-under-Lyne is a moderately healthy Town Centre. On the positive side, it is clear that the major investments associated with Vision Tameside, the Markets, and St Petersfield, and in the Portland Basin area are beginning to have a transformational effect, which can be expected to be further improved by the planned investment in the new Transport Interchange.
- 4.52 Indeed, it is clear that many of the aspirations of the 2012 Development Prospectus are well underway, with the Northern Quarter providing for the new administrative centre for Tameside, the Clarendon Sixth Form College, the Advanced Skills Centre and the soon-to-be-delivered Transport Interchange. Similarly, substantial progress has been made as a result of the ongoing refurbishment and public realm improvements to the Indoor and Outdoor Markets and progress is clearly being made in developing the office and business development district in St Petersfield.
- 4.53 Nevertheless, Ashton-under-Lyne Town Centre continues to face competition from the continued growth in e-commerce and the polarisation trend which has favoured the City Centre and some of the larger, Principal Town Centres. Indeed, the 2014 Venuescore

rankings place Ashton as sixth of the eight Principal Town Centres in Greater Manchester, some way behind Bury, Stockport, Bolton and Wigan and with Manchester City Centre (which Javelin ranks second after Glasgow) being at the top of the regional hierarchy. As a consequence, the vacancy rate, both in terms of units and floorspace, remains significantly above the UK average, with substantial concentrations of vacancies and non-retailing activity in the Old Town. It is also clear that there is a need to improve representation amongst some of the more high profile comparison goods retailers.

- 4.54 In our assessment, the most significant weakness of Ashton Town Centre relates to its entirely inadequate night-time economy, which reflects, in large part, the very disappointing food and beverage offer for a Principal Town Centre with a catchment area of the size of Ashton. The poor evening economy means that Ashton Town Centre is very quiet in the evenings and is much less welcoming than in the day time. In part, this is likely to reflect the presence of various chain restaurants at the out-of-centre Ashton Leisure Park; these include Frankie & Benny's, Nandos, Harvester, The Eat Inn, Prezzo, Bella Italia, Five Guys and Chiquito. The presence of such operators at Ashton Leisure Park makes the prospect of attracting them to the Town Centre more challenging.

Hyde Town Centre

- 4.55 At the time of the preparation of the UDP in 2004, Hyde was identified as a Large District Centre that was second only to Ashton in Tameside's overall hierarchy. However, by the time of the Tameside Retail Study in May 2010, WYG were recommending that Hyde and Denton be identified as town centres in the second tier, following the considerable expansion in Denton arising from the Crown Point Shopping Centre. WYG's recommendations subsequently informed the hierarchy of centres set out in the Council's Preferred Options Joint Core Strategy and Development Management DPD consultation document, of January 2013.
- 4.56 Hyde Town Centre is focussed around the main public space of the Market Ground, where an outdoor market is held five times a week. The main shopping area is Clarendon Square Shopping Centre, which was comprehensively refurbished in the mid-1980s and has been subject to further investment, reconfiguration and amalgamation of units by

LaSalle Investment Management, which acquired Clarendon Square in 2012. The Primary Shopping Area is focussed on Clarendon Square and the central and northern parts of Market Street, which also contains the Town Hall and Market Place. The Morrisons and Asda superstores located on the edge of the Primary Shopping Area, help to anchor the town centre and promote pedestrian flows from east to west and vice versa.

- 4.57 However, the overall town centre boundary for Hyde, as defined on the UDP Proposals Map, is very extensive geographically and, in Section 7, we recommend a substantial contraction. In particular, we recommend the exclusion of a large area of land to the west of the railway line, which comprises a mixture of industrial premises, scrapyards, other commercial premises and residential uses; land to the north of the motorway; and the southern end of Market Street, where there are very few retail occupiers.

Diversity of Uses

- 4.58 **Table 4.6** provides an analysis for the Experian/Goad survey area by broad sector, as at the time of our fieldwork in August 2017. It shows that the representation in the convenience and comparison goods sectors in Hyde is very similar to the UK average, but that Hyde has a significantly higher proportion of vacant units (18.4 per cent) than does the UK (12.2 per cent). Conversely, Hyde has a lower proportion of uses in the services sector, compared to the UK average. It is important to note, however, that the Indoor and Outdoor Markets in Hyde have not been included in the analysis set out in Table 4.6.

Table 4.6 – Broad Breakdown of the Number and Proportion Retail and Service Units in the Goad Area of Hyde Town Centre in August 2017

HV Survey of Hyde in August 2017, Compared to UK Average in September 2017			
Broad Sector	Hyde (no. of units)	Hyde (% of units)	UK Average (% of units)
Convenience	29	10.3	9.6
Comparison	115	40.8	38.5
Services	82	29.1	38.5
Vacant	52	18.4	12.2
Miscellaneous	4	1.4	1.2
TOTAL	282	100.0	100.0

Source: HV Survey of August 2017 and Experian data for UK in September 2017

Note: The Market has been removed from this table because it is not possible to provide a breakdown between convenience stalls and comparison stalls

4.59 **Table 4.7** provides a corresponding analysis to Table 4.6, but in terms of floorspace provision. It shows that Hyde has a higher proportion of floorspace which is vacant compared to the UK average (13.8 per cent, compared to 11.1 per cent), and a significantly lower proportion of floorspace accounted for by services (14.6 per cent, compared to 26.0 per cent). However Hyde Town Centre is significantly over-represented in the convenience sector, reflecting the presence of the Morrisons and Asda superstores. Conversely, the amount of comparison sector floorspace in Hyde is much lower than the UK average. These floorspace figures reflect the fact that Hyde is very much geared towards serving the convenience needs of its immediate hinterland, and with a much more limited comparison sector presence than there is in Ashton.

Table 4.7 – Broad Breakdown of the Amount and Proportion Retail and Service Floorspace in the Goad Area of Hyde Town Centre in August 2017

HV Survey of Hyde in August 2017, Compared to UK Average in September 2017			
Broad Sector	Hyde (floorspace in sq.m)	Hyde (% of floorspace)	UK Average (% of floorspace)
Convenience	19,840	35.5	18.4
Comparison	19,510	34.9	43.6
Services	8,175	14.6	26.0
Vacant	7,695	13.8	11.1
Miscellaneous	740	1.3	0.9
TOTAL	55,960	100.0	100.0

Source: HV Survey of August 2017 and Experian data for UK in September 2017

Note: The Market has been removed from this table because it is not possible to provide a breakdown between convenience stalls and comparison stalls

4.60 **Table 4.8** provides a more detailed breakdown of retail and service sector representation in Hyde Town Centre in August 2017. In terms of floorspace, Hyde Town Centre has significant over-representation in grocery and frozen foods, as a result of Morrisons and Asda. There is also a significant degree of over-representation in the 'DIY, hardware and household goods' sub-sector. Conversely, Hyde Town Centre is significantly under-represented in the 'variety/department & catalogue showrooms' and 'mixed and general clothing' sub-sectors.

Table 4.8 – Detailed Breakdown of Retail and Service Uses in Hyde Town Centre in August 2017

Hyde Town Centre Uses Summary							
		Units			Floorspace		
GOAD Code	GOAD Categorisation of Operator	No. of Units	% of Total Units	UK Average %	Amount of Floorspace (sq m)	% of Total Floorspace	UK Average %
	Convenience Goods						
G1A	Bakers	4	1.4%	2.1%	370	0.7%	1.1%
G1B	Butchers	2	0.7%	0.7%	250	0.4%	0.4%
G1C	Greengrocers & fishmongers	0	0.0%	0.6%	0	0.0%	1.3%
G1D	Grocery and frozen foods	10	3.5%	2.9%	18,070	32.3%	12.7%
G1E	Off-licences and home brew	1	0.4%	0.5%	120	0.2%	0.3%
G1F	Confectioners, tobacconists, newsagents	12	4.3%	2.5%	1,030	1.8%	2.6%
	TOTAL	29	10.3%	9.4%	19,840	35.5%	18.3%
	Comparison Goods						
G2A	Footwear & repair	2	0.7%	1.6%	130	0.2%	1.2%
G2B	Men's & boys' wear	0	0.0%	0.9%	0	0.0%	0.8%
G2C	Women's, girls, children's clothing	5	1.8%	2.9%	530	0.9%	2.6%
G2D	Mixed and general clothing	6	2.1%	4.1%	760	1.4%	6.7%
G2E	Furniture, carpets & textiles	15	5.3%	3.3%	1,670	3.0%	3.6%
G2F	Booksellers, arts/crafts, stationers/copy bureaux	6	2.1%	4.1%	700	1.3%	3.0%
G2G	Electrical, home entertainment, telephones and video	19	6.7%	3.5%	2,370	4.2%	2.4%
G2H	DIY, hardware & household goods	16	5.7%	2.3%	7,470	13.3%	4.3%
G2I	Gifts, china, glass and leather goods	1	0.4%	1.7%	30	0.1%	0.9%
G2J	Cars, motorcycles & motor accessories	3	1.1%	1.1%	840	1.5%	1.7%
G2K	Chemists, toiletries & opticians	13	4.6%	3.9%	2,220	4.0%	3.9%
G2L	Variety, department & catalogue showrooms	1	0.4%	0.6%	330	0.6%	6.3%
G2M	Florists and gardens	2	0.7%	0.8%	150	0.3%	0.4%
G2N	Sports, toys, cycles and hobbies	3	1.1%	2.0%	330	0.6%	2.3%
G2O	Jewellers, clocks & repair	5	1.8%	1.9%	320	0.6%	0.9%
G2P	Charity shops, pets and other comparison	18	6.4%	4.4%	1,660	3.0%	3.1%
	TOTAL	115	40.8%	39.0%	19,510	34.9%	44.1%
	Service Uses						
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	28	9.9%	17.5%	3,010	5.4%	13.1%
G3B	Hairdressers, beauty parlours & health centres	31	11.0%	10.7%	2,080	3.7%	5.2%
G3C	Laundries & drycleaners	2	0.7%	0.9%	150	0.3%	0.4%
G3D	Travel agents	4	1.4%	1.0%	305	0.5%	0.6%
G3E	Banks & financial services (incl. accountants)	12	4.3%	3.7%	2,110	3.8%	4.0%
G3F	Building societies	0	0.0%	0.5%	0	0.0%	0.4%
G3G	Estate agents & auctioneers	5	1.8%	4.0%	520	0.9%	2.2%
	TOTAL	82	29.1%	38.3%	8,175	14.6%	25.9%
	Miscellaneous Uses						
G4A	Employment, careers, Post Offices and information	4	1.4%	1.2%	740	1.3%	0.9%
G4B	Vacant units (all categories)	52	18.4%	12.1%	7,695	13.8%	10.8%
	TOTAL	56	19.9%	13.3%	8,435	15.1%	11.7%
	GRAND TOTAL FOR CATEGORISED UNITS	282	100.0%	100.0%	55,960	100.0%	100.0%
(blank)	GOAD Uncategorised Units	66			14,760		
	GRAND TOTAL INCLUDING UNCATEGORISED UNITS	348			70,720		

GOAD uncategorised units include the following: car parks, entrances, offices, schools, religious institutions, etc

Source: HV Survey (August 2017) and Experian National Averages (June 2017)

- 4.61 The sub-sector with the highest degree of under-representation in Hyde, compared to the UK, is 'restaurants, cafes, coffee bars, fast food and takeaways'. However, it is the restaurant, café and coffee bar components that are under-represented, whereas the Town Centre contains at least 16 fast food and hot food takeaway outlets. Moreover,

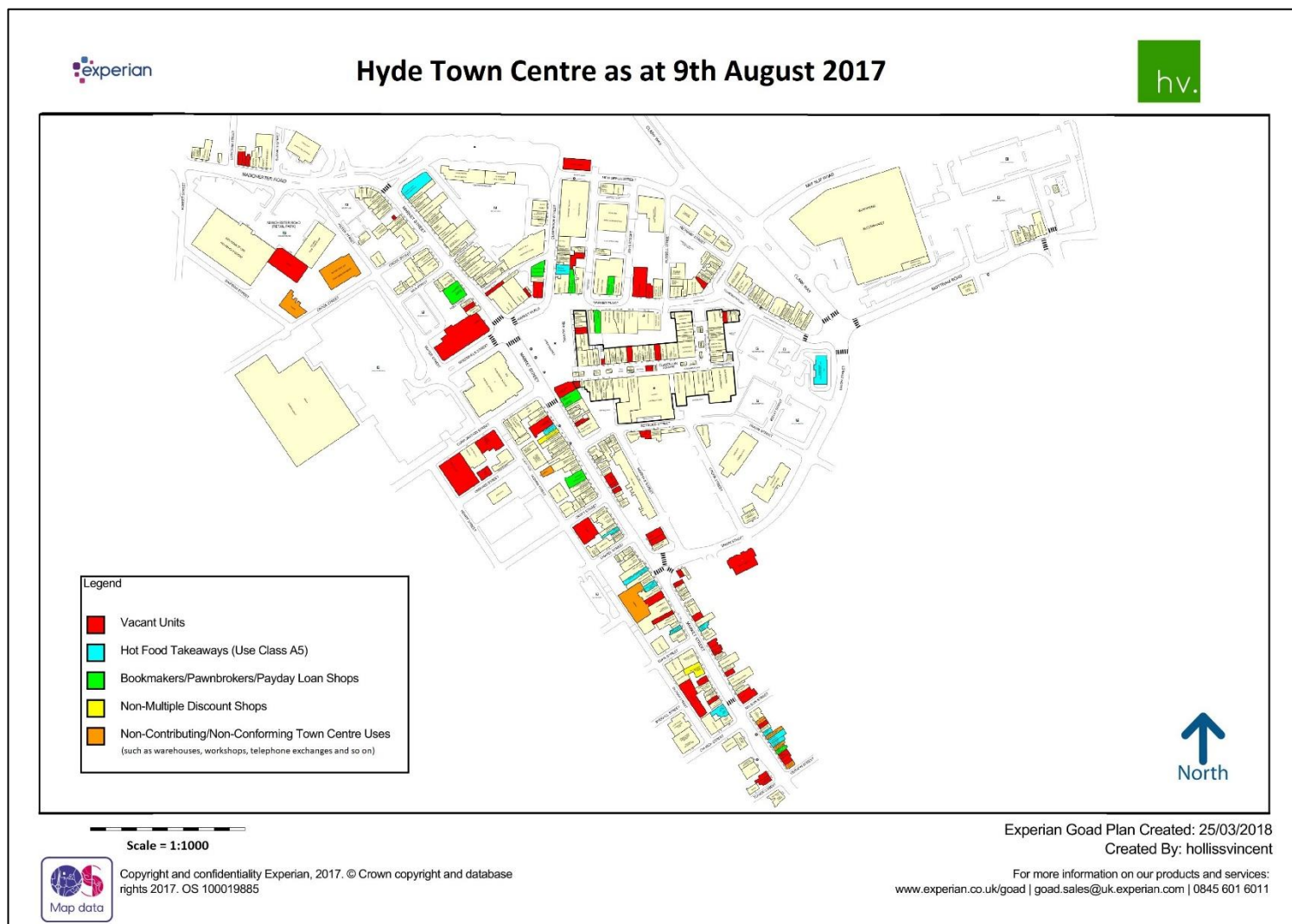
officers in Public Health have emphasised the need for an increase in the presence of restaurants and cafes that provide for a more healthy and sustainable food offer, in order to strengthen the overall vitality and diversity of Hyde's food scene.

- 4.62 It is recognised, however, that independent food businesses may have more flexibility to adapt ingredients, menus and cooking processes than chains and it should be noted that the Indoor and Outdoor Markets in Hyde, which may provide for such independents, have not been included in the analysis set out in Tables 4.6, 4.7 and 4.8. Furthermore, Hyde does contain a number of popular Indian restaurants – Maha, Adnan's and Jaipur – and a quality Italian restaurant called Pagliacci.

Proportion of Vacant, Street-Level Property

- 4.63 Our survey of August 2017 shows a total of 52 vacant units in Hyde Town Centre, which represents a unit vacancy rate of 18.4 per cent, compared to a UK average rate of 12.2 per cent. In terms of floorspace, Hyde's vacancy rate is 13.8 per cent, compared to a UK floorspace vacancy rate of 11.1 per cent. We would emphasise, however, that 44 of the 52 vacant units in Hyde are less than 280 sq.m gross in size and that only 4 out of the 52 units are above 400 sq.m gross. Thus, the average size for vacant units in Hyde, at August 2017, is just 148 sq.m gross, which is too small for most modern retailers.
- 4.64 We note, however, that the configuration of the Indoor Market within Clarendon Square Shopping Centre is not ideal, being on three levels. We consider, therefore, that there may be an opportunity in the future for a redevelopment of the Indoor Market so as to provide for larger retail units, if alternative facilities for the Indoor Market traders can be found elsewhere within the Town Centre. However, any such redevelopment potential of the Indoor Market would clearly require further discussion between the Council and the owners of Clarendon Square.
- 4.65 **Figure 4.2** reveals, however, that the Clarendon Square Shopping Centre had very few vacancies in August 2017, and, indeed, that there was only one large vacant unit within the Primary Shopping Area, that being the unit to the immediate north of the Town Hall.

Figure 4.2: Annotated Goad Plan showing Vacancies & Other Uses in Hyde, August 2017



- 4.66 There is, however, a cluster of vacancies and non-retail uses on Market Street, below its intersection with Chapel Street. Moreover, the closure of the former Cotton Bale public house and adjacent bank would appear to have had a detrimental impact on Market Place. Nevertheless, we would reiterate that the relatively high number of vacant units in Hyde, as depicted in Figure 4.2, reflects the small size of the majority of vacant units, which, although suitable for independent retailers and new start-up businesses, are too small for many national retailers.

Commercial Yields on Non-Domestic Property

- 4.67 The Valuation Office no longer publishes information on prime shopping yields, so that there is no longer any information on yields that is available on a consistent basis for all centres, thereby diminishing greatly the usefulness of this health check indicator.

Customers' and Businesses' Views and Behaviour

- 4.68 The NEMS survey of pedestrians sought satisfaction ratings on a scale of 1 to 5 in relation to various aspects of the retail, leisure and services offer in each of Tameside's five main centres. For Hyde, the highest mean scores related to the '*supermarket offer*' (4.04) and to the '*range of financial, legal and personal services*' (4.04). Indeed, Hyde achieved the highest mean score of the five main centres against these two criteria. The mean satisfaction rating in relation to Hyde's '*food and drink offer*' was also healthy, at 3.67, with Hyde ranking second of the five main centres in relation to this factor. So far as the '*range and quality of shops*' is concerned, Hyde's mean score was 3.23, with Hyde ranked third of the five main centres. Hyde's mean score in relation to '*family entertainment facilities*' was 3.06, with Hyde once again ranking third of the five main centres.
- 4.69 So far as environmental and personal safety factors are concerned, Hyde was the top ranking of the five centres in relation to '*pedestrian safety*', with a mean score of 4.08. Hyde also scored highly in relation to '*personal safety/policing*', with a mean score of 3.86. Indeed, Hyde's lowest mean score (3.16) was in relation to the '*quality and overall appearance of its buildings and landscaping*'.

- 4.70 So far as accessibility factors are concerned, it was clear that there was customer dissatisfaction with the cost of *'car parking'*, with Hyde ranking fifth among the centres with a mean score of 3.30, which compares to a top mean score of 4.13 for Droylsden. Nevertheless, Hyde achieved high mean scores in relation to *'accessibility by bus'* (4.36), *'ease of movement around the centre on foot'* (4.31) and *'access for people with mobility/hearing/sight difficulties'* (4.09).
- 4.71 Thus, it is pleasing to note that Hyde was the top ranking of the five main centres across the sixteen criteria, taken as a whole, with Hyde being the top ranked centre in terms of environmental and personal safety issues, and the second ranked centre in terms of its retail/leisure/service offer and in terms of accessibility.

Retailer Representation and Intentions to Change Representation

- 4.72 Hyde Town Centre achieves representation from only six of Experian's *'major'* comparison retailers, these being Argos, Boots the Chemist, EE, O2, Superdrug and Vodafone (see Table 4.5). However, recently attracted retailers include B&M and an Iceland Food Warehouse at Manchester Road, and Poundworld, Bonmarché and Peacocks in the Clarendon Square Shopping Centre. The new retailers in Clarendon Square were attracted, in each case, following the amalgamation of two units, so as to create units big enough for these retailers.

Commercial Rents

- 4.73 We have no information on Zone A rents in the Clarendon Square Shopping Centre, because this is confidential, and there were too few transactions elsewhere in Hyde to give a reliable guide.

Pedestrian Flows

- 4.74 Footfall within the Primary Shopping Area during our field visit was at a good level between 10am and 3pm, but there was quite a noticeable fall-off in pedestrian flow after 3pm. Moreover, as was the case in Ashton, pedestrian flow in the evening is quiet, reflecting the need for further improvements in Hyde's food and beverage offer. There

are three particular areas where public realm improvements can assist in improving pedestrian flows and permeability, as envisaged in the Hyde Town Centre SPD of April 2011; these being the need for:

- i) improved connectivity and signage between the Hyde Central Rail Station and the core of the Town Centre, with the existing gateway for pedestrians being poor;
- ii) landscaping and quality public realm improvements in the Western Gateway, particularly along Manchester Road, so as to soften the corridor, create a more pedestrian-friendly environment and, ultimately, encourage a more comprehensive redevelopment, so as to facilitate improved linkages with the Primary Shopping Area; and
- iii) enhanced Eastern Gateway linkages, so as to better integrate Morrisons with the Primary Shopping Area, through pedestrian crossings over Clark Way/Fernally Street, and so as to take advantage of the high levels of footfall along Mottram Road and Walker Lane/Ridling Lane generated by Hyde United Football Club and the Hyde Leisure Pool, with many of the visitors to these leisure attractions having to pass through the Eastern Gateway on their way to the bus and rail stations.

Accessibility

- 4.75 Hyde Town Centre is well served by public transport and has a new, modern bus station at Clarendon Street. The Primary Shopping Area (PSA) is also in reasonable proximity to the train station at Hyde Central, although, as stated above, linkages between the train station and the PSA are in need of improvement.

Perceptions of Safety and Occurrence of Crime

- 4.76 NEMS' survey of pedestrians in Hyde Town Centre produced a mean score in relation to 'personal safety/policing' of 3.86, making it the second ranked of the five main town centres in Tameside. Our own fieldwork suggests, as is the case in Ashton, that Hyde feels very safe as a centre during the day, but less secure during the evenings.

State of Town Centre Environmental Quality

- 4.77 The NEMS survey suggests that Hyde ranks third amongst the five main centres in Tameside in terms of: the '*cleanliness of the shopping streets*'; the overall '*quality and appearance of the buildings and landscaping*'; and '*shelter from weather*'. The street furniture is of good quality, with recent investment in the Market Ground making use of high quality natural materials.

Overall Conclusion in Relation to the Health of Hyde Town Centre

- 4.78 Our overall conclusion is that Hyde is a moderately healthy town centre. On the positive side, the Clarendon Square Shopping Centre has benefitted from substantial investment and has relatively few vacancies. Furthermore, the Asda and Morrisons superstores provide solid anchors in the convenience goods sector, although we note that WYG's May 2010 study considered that these two stores are over-dominant, to the detriment of the fortunes of the independent traders.
- 4.79 Hyde is clearly popular with visitors to the centre, who gave it the highest overall mean score in relation to the sixteen criteria explored in the NEMS survey of pedestrians, with Hyde achieving particularly high scores in relation to its supermarket offer, its range of financial, legal and personal services, pedestrian safety, accessibility by bus, ease of movement around the centre on foot and access for people with mobility/hearing/sight difficulties. Thus, Hyde would appear to serve its local catchment area well.

Denton Town Centre

- 4.80 Denton's fortunes as a retail centre have been transformed by the Crown Point Shopping Centre which opened in 2004. Crown Point is located to the north of the motorway, but within the overall boundary of Denton Town Centre shown on the Proposals Map of the UDP. Crown Point is linked to the traditional core of the town centre via a pedestrian bridge over the motorway, although linkages between the two would benefit from better signage/wayfinding.
- 4.81 Crown Point has attracted most of the comparison goods multiple traders that are currently present in Denton and has provided a substantial boost to the town centre's overall retail turnover. Indeed, 12 of the 31 '*major*' retailers identified by Experian are

located at Crown Point. Furthermore, as discussed in Section 5, Denton has a wider pattern of trade draw than does Hyde and a much higher comparison goods turnover (£127m for Denton, versus £39m for Hyde); hence our recommendation, in Section 8, that Denton joins Hyde as a Town Centre at the second level in Tameside's hierarchy.

Diversity of Uses

- 4.82 The diversity of uses in Denton is set to be improved by the development of the Denton Wellness Centre, which will provide a 25 metre, 8 lane main pool, with provision for 150 spectators to facilitate local aquatic competition. The Wellness Centre will also provide for a smaller pool with moveable floor, a ten-lane ten pin bowling centre, a spa (with sauna, steam and treatment facilities), soft play facilities, a community room with crèche, a fitness centre and a community gathering space with café. To the immediate east of the Wellness Centre, a large housing development is proposed, which will provide for approximately 200 dwellings and help to generate expenditure for retail and food/drink purposes during the day and evenings.
- 4.83 **Table 4.9** provides an analysis for the Experian/Goad survey area in Denton, by broad sector, as at the time of our fieldwork in July 2017. It should be noted, at the outset, that the Goad survey area does not include Crown Point. Bearing this in mind, Table 4.9 shows that the traditional town centre in Denton that falls within the Goad survey area has significantly less representation in terms of comparison goods units than the UK average, but a much higher representation than the UK average in respect of the number of service traders. Thus, the service traders are clearly concentrating in the older, traditional centre, and Crown Point is making up for the lack of representation in the comparison goods sector in the older part of the centre. Table 4.9 also shows that the vacancy level in the Goad area, at 6.9 per cent, is significantly below the UK average of 12.2 per cent.

Table 4.9 – Broad Breakdown of the Number and Proportion Retail and Service Units in the Goad Area of Denton Town Centre in July 2017

HV Survey of Denton in July 2017, Compared to UK Average in September 2017			
Broad Sector	Denton (no. of units)	Denton (% of units)	UK Average (% of units)
Convenience	11	7.6	9.6
Comparison	45	31.0	38.5
Services	78	53.8	38.5
Vacant	10	6.9	12.2
Miscellaneous	1	0.7	1.2
TOTAL	145	100.0	100.0

Source: HV Survey of July 2017 and Experian data for UK in September 2017

- 4.84 **Table 4.10** provides a corresponding analysis to Table 4.9, but in terms of floorspace provision. It shows that the traditional centre's under-representation in the comparison sector is even more marked in terms of floorspace, than in terms of the number of units, with only 24.9 per cent of the floorspace in the Goad area being occupied by comparison traders, compared to a UK average of 43.6 per cent. Conversely, in floorspace terms, service sector provision in Denton only marginally exceeds the UK average, whereas in terms of number of units, it greatly exceeds the UK average. In the convenience sector, the historic part of the centre is over-represented in terms of floorspace, compared to the UK average. This reflects the presence within the Goad survey area of Morrisons and Lidl.

Table 4.10 – Broad Breakdown of the Amount and Proportion Retail and Service Floorspace in the Goad Area of Denton Town Centre in July 2017

HV Survey of Denton in July 2017, Compared to UK Average in September 2017			
Broad Sector	Denton (floorspace in sq.m)	Denton (% of floorspace)	UK Average (% of floorspace)
Convenience	9,960	38.2	18.4
Comparison	6,488	24.9	43.6
Services	7,200	27.6	26.0
Vacant	2,370	9.1	11.1
Miscellaneous	60	0.2	0.9
TOTAL	26,078	100.0	100.0

Source: HV Survey of July 2017 and Experian data for UK in September 2017

- 4.85 **Table 4.11** provides a more detailed breakdown of retail and service sector representation in Denton Town Centre in August 2017. In terms of floorspace, the

traditional part of Denton Town Centre, as covered by the Experian/Goad survey, is significantly over-represented in terms of the grocery and frozen foods sub-sector, but significantly under-represented in the '*mixed and general clothing*' and '*variety/department and catalogue showroom*' sub-sectors. In terms of number of units, there is significant over-representation in the '*hairdressers, beauty parlours and health centres*' and some over-representation in the '*restaurant, cafes, coffee bars, fast food and takeaways*' sub-sectors. Indeed, Denton is gaining a reputation as a place to eat, with an impressive range of Spanish, Italian, Thai, Turkish and Indian restaurants.

Proportion of Vacant, Street Level Property

- 4.86 Our survey of July 2017 shows a total of 10 vacant units in Denton Town Centre, which represents a unit vacancy rate of just 6.9 per cent, compared to a UK average rate of 12.2 per cent. In terms of floorspace, Denton's vacancy rate is 9.1 per cent, compared to a UK floorspace vacancy rate of 11.1 per cent. However, the average size of vacant unit in Denton, at 237 sq.m, is higher than in Ashton and Hyde. Indeed, four of the ten vacant units in Denton are 400 sq.m or more in size.
- 4.87 **Figure 4.3** reveals that most of the vacant floorspace in Denton Town Centre is located either side of Stockport Road, and in Market Street, with very little vacancy along Manchester Road. Figure 4.3 also reveals quite a high number of takeaways in Class A5 for a centre the size of Denton. Indeed, it is somewhat disappointing that the cluster of properties right at the heart of the centre, bounded by Victoria Street/Stockport Road/Manchester Road/Market Street contain quite a high proportion of non-A1 uses.

Commercial Yields on Non-Domestic Property

- 4.88 The Valuation Office no longer publishes information on prime shopping yields, so that there is no longer any information on yields that is available on a consistent basis for all centres, thereby diminishing greatly the usefulness of this health check indicator.

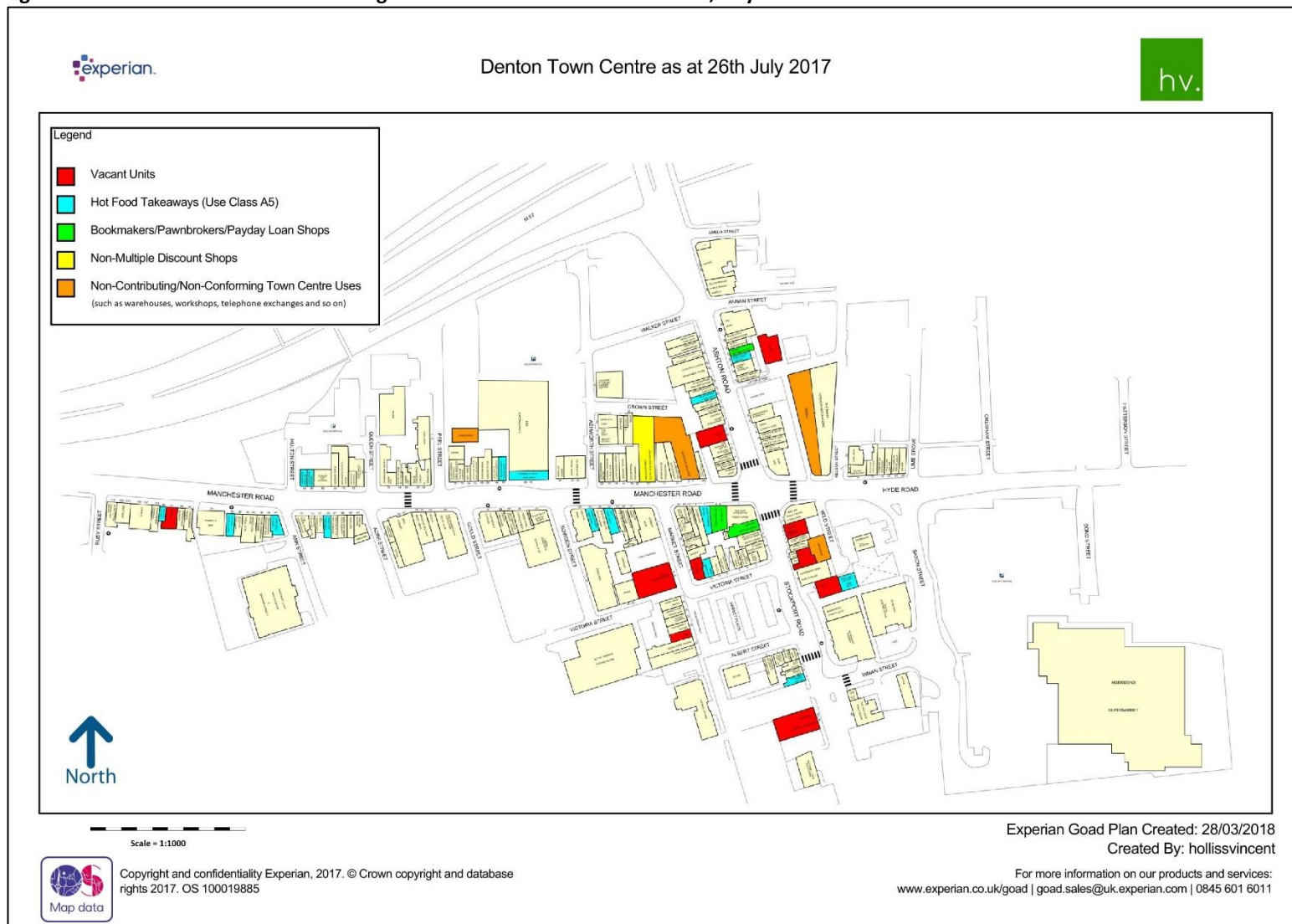
Table 4.11 – Detailed Breakdown of Retail and Service Uses in Denton Town Centre in July 2017

Denton Town Centre Uses Summary							
		Units			Floorspace		
GOAD Code	GOAD Categorisation of Operator	No. of Units	% of Total Units	UK Average %	Amount of Floorspace (sq m)	% of Total Floorspace	UK Average %
	Convenience Goods						
G1A	Bakers	2	1.4%	2.1%	170	0.7%	1.1%
G1B	Butchers	0	0.0%	0.7%	0	0.0%	0.4%
G1C	Greengrocers & fishmongers	0	0.0%	0.6%	0	0.0%	1.3%
G1D	Grocery and frozen foods	3	2.1%	2.9%	9,240	35.4%	12.7%
G1E	Off-licences and home brew	1	0.7%	0.5%	130	0.5%	0.3%
G1F	Confectioners, tobacconists, newsagents	5	3.4%	2.5%	420	1.6%	2.6%
	TOTAL	11	7.6%	9.4%	9,960	38.2%	18.3%
	Comparison Goods						
G2A	Footwear & repair	1	0.7%	1.6%	70	0.3%	1.2%
G2B	Men's & boys' wear	0	0.0%	0.9%	0	0.0%	0.8%
G2C	Women's, girls, children's clothing	1	0.7%	2.9%	100	0.4%	2.6%
G2D	Mixed and general clothing	3	2.1%	4.1%	190	0.7%	6.7%
G2E	Furniture, carpets & textiles	4	2.8%	3.3%	538	2.1%	3.6%
G2F	Booksellers, arts/crafts, stationers/copy bureaux	5	3.4%	4.1%	390	1.5%	3.0%
G2G	Electrical, home entertainment, telephones and video	6	4.1%	3.5%	470	1.8%	2.4%
G2H	DIY, hardware & household goods	2	1.4%	2.3%	1,290	4.9%	4.3%
G2I	Gifts, china, glass and leather goods	1	0.7%	1.7%	70	0.3%	0.9%
G2J	Cars, motorcycles & motor accessories	1	0.7%	1.1%	220	0.8%	1.7%
G2K	Chemists, toiletries & opticians	7	4.8%	3.9%	1,390	5.3%	3.9%
G2L	Variety, department & catalogue showrooms	1	0.7%	0.6%	330	1.3%	6.3%
G2M	Florists and gardens	4	2.8%	0.8%	500	1.9%	0.4%
G2N	Sports, toys, cycles and hobbies	2	1.4%	2.0%	290	1.1%	2.3%
G2O	Jewellers, clocks & repair	1	0.7%	1.9%	50	0.2%	0.9%
G2P	Charity shops, pets and other comparison	6	4.1%	4.4%	590	2.3%	3.1%
	TOTAL	45	31.0%	39.0%	6,488	24.9%	44.1%
	Service Uses						
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	31	21.4%	17.5%	2,840	10.9%	13.1%
G3B	Hairdressers, beauty parlours & health centres	31	21.4%	10.7%	2,140	8.2%	5.2%
G3C	Laundries & drycleaners	1	0.7%	0.9%	90	0.3%	0.4%
G3D	Travel agents	2	1.4%	1.0%	300	1.2%	0.6%
G3E	Banks & financial services (incl. accountants)	6	4.1%	3.7%	1,000	3.8%	4.0%
G3F	Building societies	0	0.0%	0.5%	0	0.0%	0.4%
G3G	Estate agents & auctioneers	7	4.8%	4.0%	830	3.2%	2.2%
	TOTAL	78	53.8%	38.3%	7,200	27.6%	25.9%
	Miscellaneous Uses						
G4A	Employment, careers, Post Offices and information	1	0.7%	1.2%	60	0.2%	0.9%
G4B	Vacant units (all categories)	10	6.9%	12.1%	2,374	9.1%	10.8%
	TOTAL	11	7.6%	13.3%	2,434	9.3%	11.7%
	GRAND TOTAL FOR CATEGORISED UNITS	145	100.0%	100.0%	26,082	100.0%	100.0%
(blank)	GOAD Uncategorised Units	35			10,098		
	GRAND TOTAL INCLUDING UNCATEGORISED UNITS	180			36,180		

GOAD uncategorised units include the following: car parks, entrances, offices, schools, religious institutions, etc

Source: HV Survey (August 2017) and Experian National Averages (June 2017)

Figure 4.3: Annotated Goad Plan showing Vacancies & Other Uses in Denton, July 2017



Customers' and Businesses' Views and Behaviour

- 4.89 The NEMS survey of pedestrians sought satisfaction ratings on a scale of 1 to 5 in relation to various aspects of the retail, leisure and services offer in each of Tameside's five main centres. For Denton, the highest mean scores related to the *'range and quality of shops'*, for which the mean score was 3.82; its *'supermarket offer'*, for which the mean score was 3.71; and its *'food and drink offer'*, for which the mean score was 3.70. Moreover, Denton was the top ranking centre in Tameside in relation to *'range & quality of shops'*, *'family entertainment facilities'* and its *'food & drink offer'*. However, Denton was ranked fourth out of the five centres in terms of its *'range of financial, legal & personal services'*, with a mean score of 3.60.
- 4.90 So far as environmental and personal safety factors are concerned, Denton was the top ranking of the five centres in relation to the *'quality and overall appearance of buildings and landscaping'*, despite achieving a mean score of only 3.38. However, Denton was the lowest ranked centre in terms of *'pedestrian safety'*, with a mean score of 3.77.
- 4.91 So far as accessibility factors are concerned, Denton was the lowest ranking centre in terms of accessibility by bus and cycle, but was the second ranking centre in terms of amount and cost of parking.
- 4.92 Overall, therefore, Denton ranked second out of the five main centres in terms of the mean of means of the sixteen customer satisfaction factors. Denton scored particularly well in relation to its retail and food/drink offer, for which it was the top-ranked centre, but less well in relation to accessibility, for which it was the third ranking centre.

Retailer Representation and Intentions to Change Representation

- 4.93 Table 4.5 has shown that 12 of Experian's 26 *'major'* comparison retailers are located in Denton, all of which are at Crown Point Shopping Centre. However, recent closures at Crown Point include the M&S Outlet unit, BHS, and Tesco Homeplus. The former BHS premises have been sub-divided and are now occupied by Flannels and Sports Direct

Commercial Rents

- 4.94 We have no information on retail rents in Denton, either at Crown Point or in the traditional part of the centre.

Pedestrian Flows

- 4.95 Pedestrian flows are reasonable within the traditional core of Denton Town Centre, but are much higher at Crown Point Shopping Centre, where the awnings provide protection from the rain. Our field observations suggest, however, that there is a degree of pedestrian linkage between Crown Point Retail North and the traditional centre, via the footbridge over the motorway. We also observed pedestrian flows between Morrisons and the Primary Shopping Area, via Jubilee Square, which has high-quality granite paving, and also between Victoria Park, which is within the wider Town Centre Boundary, and the Primary Shopping Area, again via Jubilee Square.

Accessibility

- 4.96 The NEMS survey of pedestrians in Denton Town Centre produced mean scores in relation to accessibility by bus and cycling which were the lowest of any of the five main centres in Tameside. Denton was also ranked fourth of the five centres in terms of '*access for people with mobility/hearing/sight difficulties*'. Nevertheless, Denton achieved high mean scores for the amount and cost of car parking, being the second ranked centre in relation to both these factors.

Perceptions of Safety and Occurrence of Crime

- 4.97 The NEMS survey of pedestrians in Denton produced the lowest mean satisfaction rating of any of the main five centres in terms of '*pedestrian safety*'. However, Denton achieved a higher ranking (third out of five) in terms of '*personal safety/policing*'.

State of Town Centre Environmental Quality

- 4.98 Denton is the highest ranking centre in terms of perceptions of the '*quality and overall appearance of its buildings and landscaping*', with a mean customer satisfaction score of

3.38, whereas Droylsden, which was the worst performing centre in this respect achieved a mean score of just 2.84. In part, the high ratings for the environmental quality in Denton reflects the monies generated via a Section 106 agreement in respect of the Crown Point North Retail Park, which funded, for example, the installation of the dry fountain within the former Market Square.

Overall Conclusion in Relation to the Health of Denton Town Centre

- 4.99 Our overall conclusion is that the Crown Point Shopping Centre has put Denton on the map as a comparison goods destination. It seems clear, however, that there is a need for improved linkages between Crown Point and the traditional part of the town centre to the south of the motorway, possibly via a widened pedestrian footbridge.
- 4.100 Nevertheless, Denton is gaining a good reputation as a place to eat, with strong representation in the restaurant sector, offering a range of cuisines. The Town Centre will further benefit from the introduction of the Wellness Centre and the housing development to the east. Thus, we consider that Denton is a healthy centre, and that this is further demonstrated by the very low vacancy rate, which is below the UK average.

Stalybridge District Centre

- 4.101 Stalybridge is a District Centre located in the eastern part of Tameside. Stalybridge is an important centre for Tameside and has been nominated as the centre for the Greater Manchester Mayor's Town Centre Challenge, which was launched in November 2017, with the objective of unlocking the potential of Greater Manchester's towns by fostering collaboration between industry and public bodies. Indeed, the intention is to transform the nominated centres into world class places to live, shop and do business.
- 4.102 The Mayor's Challenge recognises that local authorities are now becoming increasingly active in property development and the Mayor wants to provide them with a platform to work with landowners, developers and national bodies such as Homes England. Indeed, the Council's Executive Leader has stated that this is a *'golden opportunity to come up with a vision for regeneration that is unique and bespoke to Stalybridge'*, highlighting its

many advantages in terms of its picturesque location, its canal and river frontages, its excellent rail transport links, digital connectivity and mix of development plots.

4.103 The report to the Council's Executive Cabinet, of 7th February 2018, makes it clear that the Town Centre Challenge is to be focussed on non-principal town centres, such as Stalybridge. However, no specific criteria were outlined and it was made clear that it was up to individual local authorities to nominate the centre that was considered to be most suited. Nevertheless, in choosing their town centre, districts were asked to consider five key factors, as follows:

- the potential number of housing units that could be delivered;
- links to existing public transport nodes (and potential rail station devolution);
- evidence of how the proposals coming forward genuinely have, or create, a sustainable housing demand;
- financial viability; and
- deliverability

4.104 Thus, we can understand why Stalybridge was chosen, given the housing developments by Urban Splash at Pattern House and the ongoing developments at Summers Quay and Castle Street. Furthermore, Stalybridge would seem to meet the criteria in relation to public transport nodes, with its excellent rail services east and west, linking to Leeds and Manchester, and the potential attractiveness of Stalybridge as a residential location in the foothills of the Pennines.

4.105 Thus, with this background in mind, we turn to our appraisal of Stalybridge District Centre against the PPG indicators.

Diversity of Uses

4.106 The Primary Shopping Area in Stalybridge is focussed around Melbourne Street, Grosvenor Street and part of Market Street. Stalybridge provides for quite a limited comparison goods function, in line with its district centre status, and with the main convenience representation provided by the Tesco and Aldi supermarkets.

4.107 There are, however, a substantial number of redevelopment opportunities in Stalybridge, for which housing-led development would seem potentially suited. These opportunities include Stalybridge West, and more short-term housing development opportunities relate to some of the under-used car parks in the centre. Recent examples of residential development include:

- the mixed-use development by Urban Splash known as Pattern House, Longlands, which provides for 104 new build and conversion residential units in a one- and two-bed format, together with commercial floorspace of 1,750 sq.m gross, to provide for a range of A1/A2/A3/A4/B1/D1/D2 uses;
- the development, by New Charter Housing Group, at Summers Quay, Armentieres Square, which will provide 67 one and two-bed apartments for private rent; and
- the development by Rowlinson Construction on behalf of Mosscafe Housing Group on Castle Street, which will provide for a three-storey block containing 38 one- and two-bed apartments for affordable rent, and a second parcel for a further 18 affordable residential units.

4.108 So far as the Experian/Goad survey area is concerned, the breakdown of uses in terms of unit numbers at the time of survey in August 2017 is as set out in **Table 4.12**, which shows that representation in Stalybridge in the convenience and comparison retail sectors is similar to the UK average. However, the proportion of services uses, at 29.2 per cent of units, is much lower than the UK average of 38.5 per cent. However, as with Ashton and Hyde, the vacancy rate in Stalybridge is significantly above the UK average, at 20.1 per cent compared to 12.2 per cent.

Table 4.12 – Broad Breakdown of the Number and Proportion Retail and Service Units in the Goad Area of Stalybridge District Centre in August 2017

HV Survey of Stalybridge in August 2017, Compared to UK Average in September 2017			
Broad Sector	Stalybridge (no. of units)	Stalybridge (% of units)	UK Average (% of units)
Convenience	15	10.4	9.6
Comparison	56	38.9	38.5
Services	42	29.2	38.5
Vacant	29	20.1	12.2
Miscellaneous	2	1.4	1.2
TOTAL	144	100.0	100.0

Source: HV Survey of August 2017 and Experian data for UK in September 2017

4.109 **Table 4.13** provides a corresponding analysis to Table 4.12, but in terms of floorspace. It shows that Stalybridge has a much higher proportion of floorspace in the convenience goods sector, at 39.9 per cent, than the UK average of 18.3 per cent, reflecting the representation by Tesco and Aldi. Conversely, Stalybridge is significantly under-represented in terms of comparison and service user floorspace. Interestingly, the vacancy rate in Stalybridge in terms of floorspace is only marginally higher than the UK average, reflecting the small size of vacant units within the Experian/Goad survey area.

Table 4.13 – Broad Breakdown of the Amount and Proportion Retail and Service Floorspace in the Goad Area of Stalybridge District Centre in August 2017

HV Survey of Stalybridge in August 2017, Compared to UK Average in September 2017			
Broad Sector	Stalybridge (floorspace in sq.m)	Stalybridge (% of floorspace)	UK Average (% of floorspace)
Convenience	9,040	39.9	18.4
Comparison	6,020	26.6	43.6
Services	4,095	18.1	26.0
Vacant	2,695	11.9	11.1
Miscellaneous	810	3.6	0.9
TOTAL	22,660	100.0	100.0

Source: HV Survey of August 2017 and Experian data for UK in September 2017

4.110 **Table 4.14** provides a more detailed breakdown of retail and service sector representation in Stalybridge District Centre and confirms the significant over-representation in terms of convenience goods floorspace that has already been mentioned. However, the detailed breakdown reveals that the sub-sectors most under-

represented, compared to the UK, are the 'restaurants, cafes, coffee bars, fast food and takeaways', 'mixed and general clothing' and 'variety/department stores' sub-sectors.

Table 4.14 – Detailed Breakdown of Retail and Service Uses in Stalybridge District Centre in August 2017

Stalybridge District Centre Uses Summary							
		Units			Floorspace		
GOAD Code	GOAD Categorisation of Operator	No. of Units	% of Total Units	UK Average %	Amount of Floorspace (sq m)	% of Total Floorspace	UK Average %
	Convenience Goods						
G1A	Bakers	1	0.7%	2.1%	90	0.4%	1.1%
G1B	Butchers	1	0.7%	0.7%	80	0.4%	0.4%
G1C	Greengrocers & fishmongers	2	1.4%	0.6%	110	0.5%	1.3%
G1D	Grocery and frozen foods	5	3.5%	2.9%	8,220	36.3%	12.7%
G1E	Off-licences and home brew	1	0.7%	0.5%	50	0.2%	0.3%
G1F	Confectioners, tobacconists, newsagents	5	3.5%	2.5%	490	2.2%	2.6%
	TOTAL	15	10.4%	9.4%	9,040	39.9%	18.3%
	Comparison Goods						
G2A	Footwear & repair	1	0.7%	1.6%	60	0.3%	1.2%
G2B	Men's & boys' wear	0	0.0%	0.9%	0	0.0%	0.8%
G2C	Women's, girls, children's clothing	4	2.8%	2.9%	260	1.1%	2.6%
G2D	Mixed and general clothing	4	2.8%	4.1%	250	1.1%	6.7%
G2E	Furniture, carpets & textiles	9	6.3%	3.3%	800	3.5%	3.6%
G2F	Booksellers, arts/crafts, stationers/copy bureaux	7	4.9%	4.1%	950	4.2%	3.0%
G2G	Electrical, home entertainment, telephones and video	6	4.2%	3.5%	380	1.7%	2.4%
G2H	DIY, hardware & household goods	5	3.5%	2.3%	560	2.5%	4.3%
G2I	Gifts, china, glass and leather goods	1	0.7%	1.7%	60	0.3%	0.9%
G2J	Cars, motorcycles & motor accessories	0	0.0%	1.1%	0	0.0%	1.7%
G2K	Chemists, toiletries & opticians	6	4.2%	3.9%	1,200	5.3%	3.9%
G2L	Variety, department & catalogue showrooms	0	0.0%	0.6%	0	0.0%	6.3%
G2M	Florists and gardens	1	0.7%	0.8%	70	0.3%	0.4%
G2N	Sports, toys, cycles and hobbies	3	2.1%	2.0%	230	1.0%	2.3%
G2O	Jewellers, clocks & repair	1	0.7%	1.9%	60	0.3%	0.9%
G2P	Charity shops, pets and other comparison	8	5.6%	4.4%	1,140	5.0%	3.1%
	TOTAL	56	38.9%	39.0%	6,020	26.6%	44.1%
	Service Uses						
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	15	10.4%	17.5%	1,410	6.2%	13.1%
G3B	Hairdressers, beauty parlours & health centres	19	13.2%	10.7%	1,475	6.5%	5.2%
G3C	Laundries & drycleaners	0	0.0%	0.9%	0	0.0%	0.4%
G3D	Travel agents	1	0.7%	1.0%	80	0.4%	0.6%
G3E	Banks & financial services (incl. accountants)	3	2.1%	3.7%	830	3.7%	4.0%
G3F	Building societies	1	0.7%	0.5%	110	0.5%	0.4%
G3G	Estate agents & auctioneers	3	2.1%	4.0%	190	0.8%	2.2%
	TOTAL	42	29.2%	38.3%	4,095	18.1%	25.9%
	Miscellaneous Uses						
G4A	Employment, careers, Post Offices and information	2	1.4%	1.2%	810	3.6%	0.9%
G4B	Vacant units (all categories)	29	20.1%	12.1%	2,695	11.9%	10.8%
	TOTAL	31	21.5%	13.3%	3,505	15.5%	11.7%
	GRAND TOTAL FOR CATEGORISED UNITS	144	100.0%	100.0%	22,660	100.0%	100.0%
(blank)	GOAD Uncategorised Units	43			10,930		
	GRAND TOTAL INCLUDING UNCATEGORISED UNITS	187			33,590		

GOAD uncategorised units include the following: car parks, entrances, offices, schools, religious institutions, etc

Source: HV Survey (August 2017) and Experian National Averages (June 2017)

Proportion of Vacant, Street-Level Property

- 4.111 Our survey of August 2017 shows a total of 29 vacant units in Stalybridge District Centre, which represents a unit vacancy rate of 20.1 per cent, compared to a UK average of 12.2 per cent. However, in terms of floorspace, Stalybridge's vacancy rate is similar to the UK average. This is because 28 of the 29 vacant units are smaller than 280 sq.m, with only 1 of the 29 vacant units above 400 sq.m, so that the average size of vacant unit is 93 sq.m. **Figure 4.4** reveals that most of the vacancies in Stalybridge are concentrated in Market Street, which is also the focus for most of the hot food Class A5 takeaway units. Nevertheless, there is also a scattering of vacancies in the Primary Shopping Area.

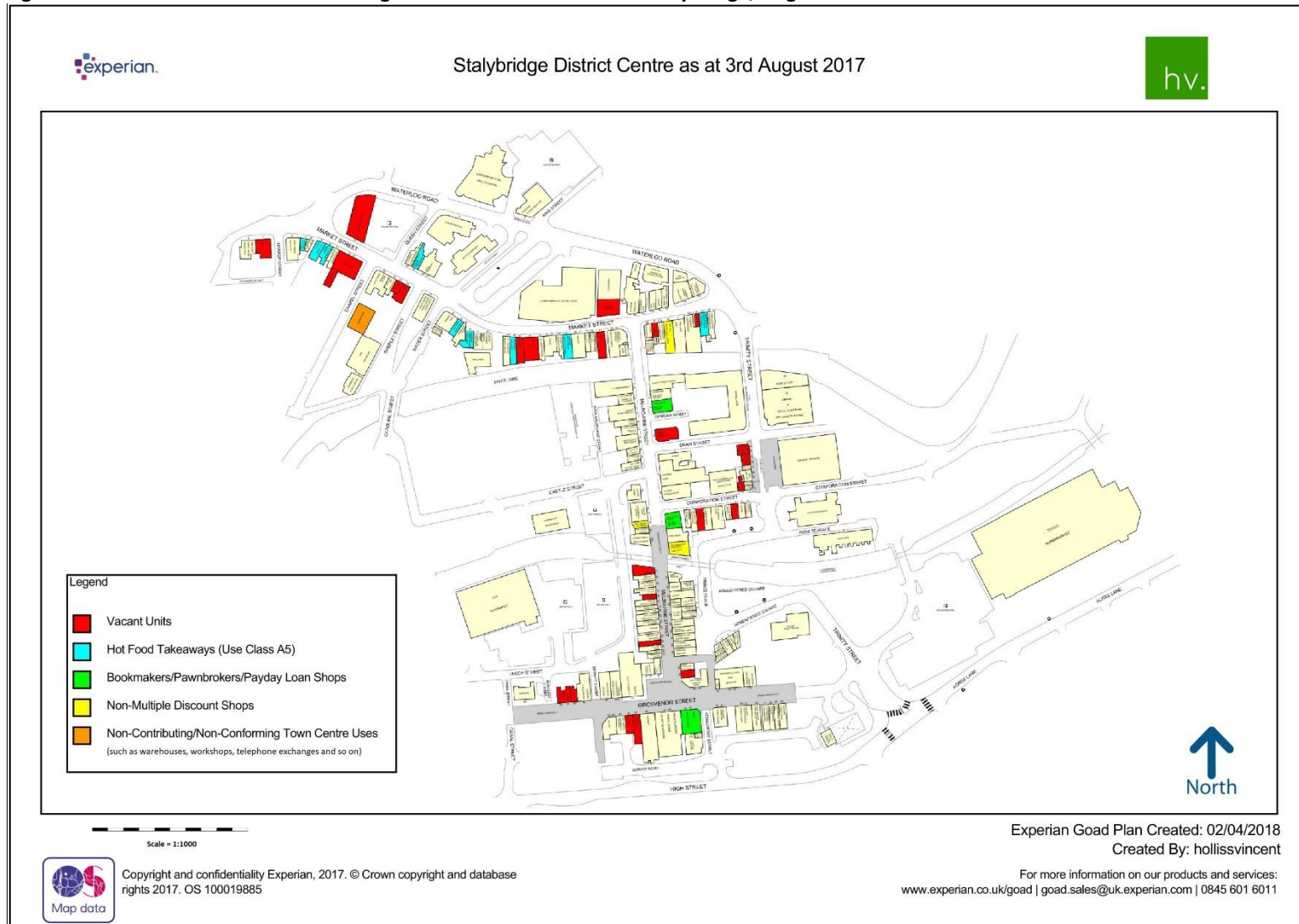
Commercial Yields on Non-Domestic Property

- 4.112 The Valuation Office no longer publishes information on prime shopping yields, so that there is no longer any information on yields that is available on a consistent basis for all centres, thereby diminishing greatly the usefulness of this health check indicator.

Customers' and Businesses' Views and Behaviour

- 4.113 The NEMS survey of pedestrians produces a high mean customer satisfaction rating for the '*supermarket offer*' in Stalybridge, of 3.86, making it the second highest ranking centre in relation to this criterion. However, Stalybridge ranks as the fourth of the five main centres in terms of its '*family entertainment facilities*' and its '*food and drink offer*'. The low mean score for food and drink, of 3.64, is a reflection of the downturn in Stalybridge's evening economy fortunes from the time it was known as '*Staly Vegas*'.
- 4.114 Visitors to Stalybridge also gave low mean scores in relation to most environmental and personal safety factors, with Stalybridge the worst performing centre in terms of the '*cleanliness of its shopping streets*', '*personal safety/policing*' and '*shelter from the weather*', with mean scores for these factors of 2.75, 3.54 and 2.66, respectively.

Figure 4.4: Annotated Goad Plan showing Vacancies & Other Uses in Stalybridge, August 2017



- 4.115 Stalybridge is also the worst ranking centre in terms of '*ease of movement around the centre on foot*' and the fourth ranking centre in terms of '*accessibility by bus*'. As a result, Stalybridge is bottom of the overall mean of means ranking, with an overall mean of means score of 3.47, compared to Hyde as the top ranking centre with a score of 3.71.

Retailer Representation and Intentions to Change Representation

- 4.116 Representation in the comparison goods sector in Stalybridge is particularly weak, with very few national multiples, these being limited to Quality Save, Savers, Wells Pharmacy, Lloyds Pharmacy and national charity shops such as Age UK. As a consequence, it is not surprising that the survey of shopping patterns reported in Section 5 of our report shows that Stalybridge District Centre retains only 11.5 per cent of the comparison goods expenditure of the residents of Zone 4 (its localised zone), with most of this being accounted for by comparison goods spending in the Tesco store.

Commercial Rents

- 4.117 We have no information on retail rents in Stalybridge District Centre.

Pedestrian Flows

- 4.118 Pedestrian flows in Stalybridge are strongest along Market Street and along Melbourne Street. Indeed, the desired pedestrian route from the railway station to the Primary Shopping Area is along Market Street, which also contains the bus station, and then down Melbourne Street until its intersection with Grosvenor Street. We consider that there is potential, however, to create stronger pedestrian loops through and in the vicinity of the Primary Shopping Area and between the Aldi and Tesco supermarket anchors. For example, there would seem to be potential to strengthen the loop from the bottom of Melbourne Street, along Grosvenor Street to the east, and then up Trinity Street, and over the canal to Dean Street, prior to returning the Melbourne Street. There is also a need to develop and improve a pedestrian circuit along Castle Street, over Caroline Street and the Canal, through Stalybridge West, and then back to the railway station.

- 4.119 Our understanding, however, is that evening pedestrian flows are much lower than they were ten years ago, particularly along Market Street, as a result of the previously-mentioned demise of *'Staly Vegas'*.

Accessibility

- 4.120 Stalybridge's key accessibility advantage is its rail station, which is served by three lines: the Huddersfield to Manchester Victoria Line; the TransPennine Express Line from Manchester to Leeds and beyond; and the Stockport to Stalybridge Line. These rail services should be a huge advantage in helping to stimulate demand for housing.

Perceptions of Safety and Occurrence of Crime

- 4.121 NEMS' survey of pedestrians produced a mean score for Stalybridge in relation to *'personal safety/policing'* of 3.54, making it the lowest ranked of the five main town centres in Tameside. Our consultations suggest that Stalybridge used to have a thriving evening economy and at one time became known as Staly Vegas. However, we further understand that a number of issues arose in relation to anti-social behaviour, and that Stalybridge has lost much of its evening custom as a result.

State of Town Centre Environmental Quality

- 4.122 The NEMS pedestrian survey shows quite a low level of satisfaction with Stalybridge in relation to the *'cleanliness of the shopping streets'*, *'the quality and appearance of the buildings and landscaping'*, and the inadequate *'shelter from weather'*. This is unfortunate, given its inherent advantages of being located in the foothills of the Pennines and with the positive environmental assets created by the canal and River Tame, which both run through the heart of the Town Centre.

Overall Conclusion in Relation to the Health of Stalybridge District Centre

- 4.123 We consider that Stalybridge District Centre is a weak and vulnerable District Centre, but that it offers huge potential in terms of the sheer scale of development opportunities

within the district centre, particularly for housing. As a consequence, the opportunity offered by the Mayor's Town Centre challenge would seem to be of crucial importance.

Droylsden District Centre

- 4.124 Droylsden District Centre is located in the western part of Tameside and, crucially, to the west of the M60 orbital motorway. Indeed, one of the consultees considered that Droylsden functions much more as a suburb of Manchester, rather than as a part of Tameside. Furthermore, Droylsden has some unique advantages as a commuter settlement in terms of access to the City Centre via Metrolink and its stock of pleasant and relatively affordable housing, including the nearby Moravian settlement.
- 4.125 Droylsden's advantages are being further enhanced by the recently-completed Guardsman Tony Downes House, which provides office accommodation for the Greater Manchester Pension Fund; by the ongoing residential-led development, known as the Wharf, at Droylsden Marina; and by the proposed investment in the redevelopment of Victoria Mills, to the west of the Town Centre, which will provide for a mixed-use development of over 130 dwellings and new community and commercial space.

Diversity of Uses

- 4.126 Droylsden District Centre is subject to a number of exciting ongoing and committed investments. Of crucial importance is the ongoing housing-led, mixed-use redevelopment of Droylsden Marina, known as the Wharf. The original masterplan comprised a hotel, townhouses, apartments, retail with office space above, a nursery, live/work units and A3 leisure units. However, much of the retail and commercial potential has not come to fruition, so that the Wharf scheme is now overwhelmingly dominated by residential uses.
- 4.127 Another exciting proposal is that being put forward by DeTrafford Estates for the regeneration and redevelopment of Victoria Mill, to the west of the District Centre, which comprises up to 131 units, spread across 14 development blocks. The vision, by architects Ollier Smurthwaite, is to create a new urban village, reminiscent of the character of the nearby Moravian settlement, whilst acknowledging the industrial heritage of the immediate area. The scheme will include apartments, townhouses and mews houses,

with integrated communal facilities throughout, complemented by street frontage commercial space. The scheme is very much targeted at Manchester's commuters, located 4 miles from the City Centre.

- 4.128 **Table 4.15** provides a broad breakdown of the diversity of uses within the area covered by the Experian/Goad plan, based on our survey of July 2017, in terms of units. It shows that Droylsden is under-represented in the convenience and comparison goods sectors, in terms of proportion of units, compared to the UK average, but with a much higher unit vacancy rate, of 18.9 per cent, compared to 12.2 per cent for the UK average. Droylsden is also slightly over-represented in the service sector.

Table 4.15 – Broad Breakdown of the Number and Proportion Retail and Service Units in the Goad Area of Droylsden District Centre in July 2017

HV Survey of Droylsden in July 2017, Compared to UK Average in September 2017			
Broad Sector	Droylsden (no. of units)	Droylsden (% of units)	UK Average (% of units)
Convenience	7	6.3	9.6
Comparison	35	31.5	38.5
Services	47	42.3	38.5
Vacant	21	18.9	12.2
Miscellaneous	1	0.9	1.2
TOTAL	111	100.0	100.0

Source: HV Survey of July 2017 and Experian data for UK in September 2017

- 4.129 **Table 4.16** provides a corresponding analysis to Table 4.15, but in terms of floorspace provision. Table 4.16 shows that Droylsden has a retail and services structure that is very much in line with the national average in terms of floorspace, with convenience and services floorspace very slightly over-represented, and with comparison floorspace very slightly under-represented. It is interesting that in terms of floorspace, the vacancy rate in Droylsden is only marginally above the UK average, whereas it had been significantly above the UK average in terms of units.

Table 4.16 – Broad Breakdown of the Amount and Proportion Retail and Service Floorspace in the Goad Area of Droylsden District Centre in July 2017

HV Survey of Droylsden in July 2017, Compared to UK Average in September 2017			
Broad Sector	Droylsden (floorspace in sq.m)	Droylsden (% of floorspace)	UK Average (% of floorspace)
Convenience	4,190	19.0	18.4
Comparison	9,360	42.5	43.6
Services	5,850	26.6	26.0
Vacant	2,540	11.5	11.1
Miscellaneous	60	0.3	0.9
TOTAL	22,000	100.0	100.0

Source: HV Survey of August 2017 and Experian data for UK in September 2017

4.130 **Table 4.17** provides a more detailed breakdown of the retail and service representation in Droylsden, compared to the UK average. In terms of floorspace, there is significant over-representation in the *‘DIY, hardware and household goods’* sub-sector, whereas there is significant under-representation in terms of *‘variety/department store’* floorspace, which is not unexpected for a district centre. In terms of number of units, Droylsden is slightly over-represented in the *‘hairdressers/beauty parlours’* sub-sector, and in terms of *‘restaurants/coffee bars/fast food/takeaway units’*. Indeed, the latter includes a range of Indian, Spanish and Italian restaurants, seemingly of good quality.

Proportion of Vacant, Street-Level Property

4.131 Our survey of July 2017 shows a total of 21 vacant units in Droylsden District Centre, which represents a vacancy rate of 18.9 per cent, compared to a UK average of 12.2 per cent. However, in terms of floorspace, Droylsden’s vacancy rate of 11.5 per cent is very close to the UK average of 11.1 per cent. Moreover, we would emphasise that 19 of the 21 vacant units in Droylsden are less than 280 sq.m in size, and that only 2 of the 21 units are above 400 sq.m gross. One of the large units, at 97 Market Street, has been vacant for some time, but there is also one vacant unit among the modern units at Greenside Lane. Thus, the average size for vacant units in Droylsden at July 2017 is 121 sq.m gross, which is too small for many modern retailers.

Table 4.17 – Detailed Breakdown of Retail and Service Uses in Droylsden District Centre in July 2017

Droylsden District Centre Uses Summary							
		Units			Floorspace		
GOAD Code	GOAD Categorisation of Operator	No. of Units	% of Total Units	UK Average %	Amount of Floorspace (sq m)	% of Total Floorspace	UK Average %
	Convenience Goods						
G1A	Bakers	2	1.8%	2.1%	170	0.8%	1.1%
G1B	Butchers	1	0.9%	0.7%	70	0.3%	0.4%
G1C	Greengrocers & fishmongers	0	0.0%	0.6%	0	0.0%	1.3%
G1D	Grocery and frozen foods	2	1.8%	2.9%	3,760	17.1%	12.7%
G1E	Off-licences and home brew	1	0.9%	0.5%	30	0.1%	0.3%
G1F	Confectioners, tobacconists, newsagents	1	0.9%	2.5%	160	0.7%	2.6%
	TOTAL	7	6.3%	9.4%	4,190	19.0%	18.3%
	Comparison Goods						
G2A	Footwear & repair	2	1.8%	1.6%	610	2.8%	1.2%
G2B	Men's & boys' wear	1	0.9%	0.9%	100	0.5%	0.8%
G2C	Women's, girls, children's clothing	1	0.9%	2.9%	830	3.8%	2.6%
G2D	Mixed and general clothing	3	2.7%	4.1%	790	3.6%	6.7%
G2E	Furniture, carpets & textiles	4	3.6%	3.3%	500	2.3%	3.6%
G2F	Booksellers, arts/crafts, stationers/copy bureaux	4	3.6%	4.1%	230	1.0%	3.0%
G2G	Electrical, home entertainment, telephones and video	3	2.7%	3.5%	150	0.7%	2.4%
G2H	DIY, hardware & household goods	3	2.7%	2.3%	4,270	19.4%	4.3%
G2I	Gifts, china, glass and leather goods	0	0.0%	1.7%	0	0.0%	0.9%
G2J	Cars, motorcycles & motor accessories	1	0.9%	1.1%	40	0.2%	1.7%
G2K	Chemists, toiletries & opticians	5	4.5%	3.9%	1,300	5.9%	3.9%
G2L	Variety, department & catalogue showrooms	0	0.0%	0.6%	0	0.0%	6.3%
G2M	Florists and gardens	2	1.8%	0.8%	90	0.4%	0.4%
G2N	Sports, toys, cycles and hobbies	1	0.9%	2.0%	70	0.3%	2.3%
G2O	Jewellers, clocks & repair	1	0.9%	1.9%	30	0.1%	0.9%
G2P	Charity shops, pets and other comparison	4	3.6%	4.4%	350	1.6%	3.1%
	TOTAL	35	31.5%	39.0%	9,360	42.5%	44.1%
	Service Uses						
G3A	Restaurants, cafes, coffee bars, fast food & take-aways	21	18.9%	17.5%	3,650	16.6%	13.1%
G3B	Hairdressers, beauty parlours & health centres	15	13.5%	10.7%	950	4.3%	5.2%
G3C	Laundries & drycleaners	1	0.9%	0.9%	80	0.4%	0.4%
G3D	Travel agents	2	1.8%	1.0%	220	1.0%	0.6%
G3E	Banks & financial services (incl. accountants)	4	3.6%	3.7%	530	2.4%	4.0%
G3F	Building societies	0	0.0%	0.5%	0	0.0%	0.4%
G3G	Estate agents & auctioneers	4	3.6%	4.0%	420	1.9%	2.2%
	TOTAL	47	42.3%	38.3%	5,850	26.6%	25.9%
	Miscellaneous Uses						
G4A	Employment, careers, Post Offices and information	1	0.9%	1.2%	60	0.3%	0.9%
G4B	Vacant units (all categories)	21	18.9%	12.1%	2,540	11.5%	10.8%
	TOTAL	22	19.8%	13.3%	2,600	11.8%	11.7%
	GRAND TOTAL FOR CATEGORISED UNITS	111	100.0%	100.0%	22,000	100.0%	100.0%
(blank)	GOAD Uncategorised Units	24			4,470		
	GRAND TOTAL INCLUDING UNCATEGORISED UNITS	135			26,470		

GOAD uncategorised units include the following: car parks, entrances, offices, schools, religious institutions, etc

Source: HV Survey (July 2017) and Experian National Averages (June 2017)

- 4.132 **Figure 4.5** shows a concentration of vacancies in the southern part of Market Street, but also within the Droylsden Shopping Centre, which, we understand, is for sale. Most of the Class A5 hot food takeaway units are located along Market Street, but the maximum cluster of takeaways is two units, so that they are generally quite well interspersed.

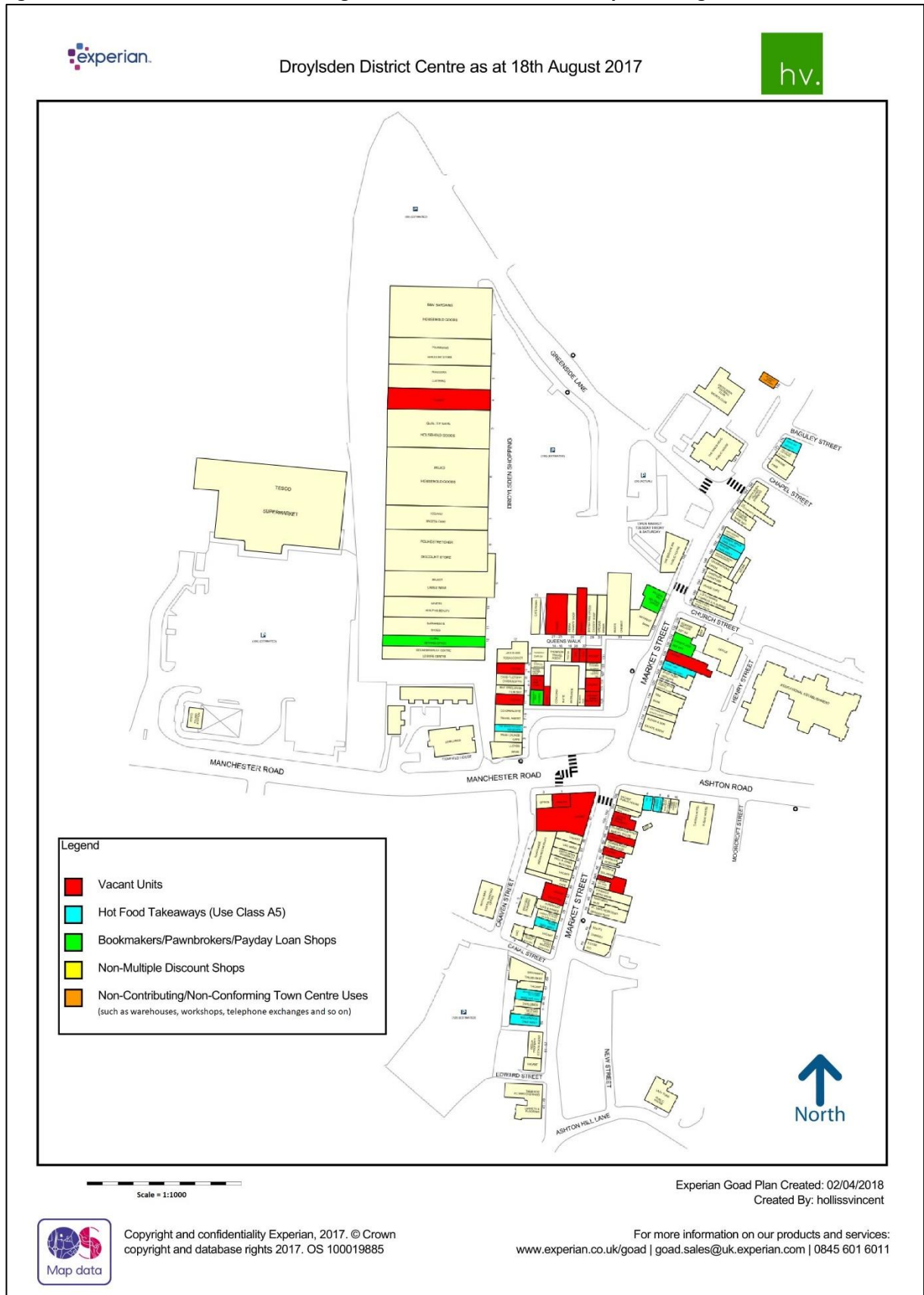
Commercial Yields on Non-Domestic Property

- 4.133 The Valuation Office no longer publishes information on prime shopping yields, so that there is no longer any information on yields that is available on a consistent basis for all centres, thereby diminishing greatly the usefulness of this health check indicator.

Customers' and Businesses' Views and Behaviour

- 4.134 The NEMS survey of pedestrians in Droylsden reveals significant levels of dissatisfaction in relation to the retail, leisure and services offer. Indeed, Droylsden is the lowest ranked of the five major centres in Tameside in relation to *'range and quality of shops'*, *'family entertainment facilities'*, *'the food and drink offer'* and *'the range of financial, legal and personal services'*. Moreover, Droylsden ranks fourth in terms of its *'supermarket offer'*.
- 4.135 However, so far as environmental and personal safety factors are concerned, Droylsden is the top-ranked centre in terms of the perceptions of its visitors in relation to *'cleanliness of shopping streets'* and *'personal safety/policing'*. Unfortunately, however, Droylsden is the lowest ranked centre in terms of the *'overall quality and appearance of the buildings and landscaping'*, and is the fourth ranking centre in terms of *'shelter from the weather'*.
- 4.136 Nevertheless, Droylsden District Centre is the top ranking centre across all six accessibility factors. Thus, it is the top ranked centre in terms of *'amount of car parking'*, *'cost of car parking'*, *'accessibility by bus'*, *'cycle access'*, *'ease of movement around the centre on foot'* and *'access for people with mobility/hearing/sight difficulties'*.

Figure 4.5: Annotated Goad Plan showing Vacancies & Other Uses in Droylsden, August 2017



Retailer Representation and Intentions to Change Representation

- 4.137 We have no evidence of firm intentions for changes in retailer representation. However, a couple of the consultees considered that the Marina development, together with the housing regeneration projects, such as at Victoria Mill, should help to improve the range of retailers, and sustain and enhance the vitality and viability of Droylsden.

Commercial Rents

- 4.138 We have no information on retail rents in Droylsden District Centre.

Pedestrian Flows

- 4.139 There is a very reasonable level of footfall within Droylsden District Centre, especially in the middle of the day. The retail park format units at Greenside Lane have the highest level of footfall and there is an obvious flow of people to and from the retail park and the traditional core. The healthy level of pedestrian flows is clearly related to the excellent accessibility of the centre, with frequent buses and Metrolink running through the centre.

Accessibility

- 4.140 We have already noted that Droylsden District Centre is the top-performing centre on all of the accessibility factors, by public transport, by foot and in terms of the cost and availability of car parking provision.

Perceptions of Safety and Occurrence of Crime

- 4.141 The general busyness of Droylsden is considered to be a factor behind its top ranking in terms of customer perceptions in relation to its personal safety/policing issues. Indeed, our own field visits confirmed that the centre feels safe and had a pleasant character, without any material amount of graffiti.

State of Town Centre Environmental Quality

- 4.142 We have already noted that the NEMS survey confirms Droylsden as the top centre in terms of customer perceptions of the '*cleanliness of its shopping streets*' and in relation

to *'personal safety/policing issues'*. Nevertheless, Droylsden is also perceived to be one of the worst-performing of Tameside's major centres in terms of the *'quality and overall appearance of its buildings and landscaping'*. However, given that the Concord Suite is now understood to be vacant, and given its obvious redevelopment potential in the heart of the Primary Shopping Area, there would seem to be scope for future improvement in the District Centre's overall appearance.

Overall Conclusion in Relation to the Health of Droylsden District Centre

- 4.143 We consider that Droylsden is reasonably healthy and an improving District Centre. It enjoys an excellent accessibility advantage, with Metrolink, frequent buses, and plentiful amounts of car parking. The recently-completed Guardsman Tony Downes House, as the office headquarters for the Greater Manchester Pension Fund; the ongoing Wharf development at the Marina; and proposals for major housing regeneration projects, such as at Victoria Mill, suggest that Droylsden has a bright future, and that it will increasingly attract further commuters who work in Manchester City Centre.

Hattersley District Centre

- 4.144 Hattersley District Centre is an emerging replacement centre that currently comprises just Tesco and the Hub, with the latter providing for a community centre, a library, a youth club, a police post and a café, together with office accommodation for the Peak Valley Housing Association and Tameside Council. Thus, whilst there is a commitment for further development to the south of Ashworth Lane to complete the District Centre, it is not appropriate, at this stage, to seek to apply the PPG health check indicators to the embryonic centre; they simply do not apply to the situation in Hattersley.

Mossley Local Centre

- 4.145 Similarly, it is not appropriate to seek to apply the PPG health check indicators to Mossley Local Centre. Mossley is an attractive settlement that functions very much as a dormitory for people working in Ashton and Manchester City Centre, taking advantage of the rail services that are available. Thus, Mossley Local Centre has a healthy convenience goods

offer to meet the needs of its local residents, anchored by the Co-op store on Arundel Street and a number of quality convenience trader independents located on Stamford Street, which is the primary shopping street.

- 4.146 The Local Centre also contains a healthy range of financial and professional services, a doctor's surgery, post office, and a range of personal services such as hair salons, barber shops and a good range of restaurants and takeaways. In short, Mossley has everything that you would expect of a Local Centre.
- 4.147 Our overall conclusion, therefore, is that Mossley is a very healthy Local Centre that forms an entirely complementary function to the roles performed by Stalybridge District Centre and the Principal Town Centre of Ashton.

Summary Table of Health Checks

- 4.148 **Table 4.18** summarises our assessment of the performance of Tameside's five main Town and District Centres against the key health check indicators in the PPG.

Table 4.18 - Summary of the Performance of Tameside's Town and District Centres against the Key Health Check Indicators in the PPG

	Ashton	Hyde	Denton	Stalybridge	Droylsden
Diversity of uses	Moderately Healthy	Signs of Weakness	Moderately Healthy	Moderately Healthy	Moderately Healthy
Proportion of vacant street level property	Signs of Weakness	Signs of Weakness	Healthy	Moderately Healthy	Moderately Healthy
Customers' views and behaviour	Signs of Weakness	Healthy	Moderately Healthy	Signs of Weakness	Signs of Weakness
Retailer representation and intentions to change representation	Signs of Weakness	Moderately Healthy	Moderately Healthy	Unhealthy	Moderately Healthy
Pedestrian flows	Signs of Weakness	Signs of Weakness	Healthy	Signs of Weakness	Healthy
Accessibility	Moderately Healthy	Moderately Healthy	Signs of Weakness	Healthy	Healthy
Perception of safety and occurrence of crime	Signs of Weakness	Moderately Healthy	Signs of Weakness	Unhealthy	Healthy
State of the town centre environmental quality	Moderately Healthy	Moderately Healthy	Healthy	Signs of Weakness	Moderately Healthy
OVERALL	Moderately Healthy	Moderately Healthy	Healthy	Signs of Weakness	Moderately Healthy

5 PATTERNS OF RETAIL SPENDING AND LEISURE VISITS

Survey Area

- 5.1 Our assessment of current patterns of retail spending and leisure visits is based on the telephone survey of 1,500 households, undertaken by NEMS Market Research in July and August 2017. The survey area comprises fifteen Zones, based on postcode sectors (as shown in **Figure 5.1** and as defined in **Table A** in **Volume 2**). The survey area has an estimated population in 2016 of 427,000 persons. Zones 1 to 9, inclusive, more or less coincide with the administrative area of Tameside, whereas Zones 10 to 15, inclusive, comprise parts of the administrative areas of Manchester City, Oldham, High Peak and Stockport. Our survey area is considerably smaller than that employed by WYG in the Tameside Retail Study of May 2010, in order to better reflect the actual combined catchment area of Tameside's centres. Indeed, the WYG survey found that the Principal Town Centre of Ashton attracted only very small proportions of expenditure from residents of four of its zones, thereby diluting unnecessarily the sampling fraction.
- 5.2 Furthermore, we decided to increase the sample size to 1,500 households (compared to WYG's sample of only 1,000), to further improve statistical reliability and produce a more accurate reflection of patterns of retail spending and leisure visits.

Survey Questionnaire

- 5.3 The survey questionnaire, which is reproduced in **Volume 2** of our report, sought to establish patterns of comparison goods (non-food) spending, based on the last two purchases of seven different categories of comparison goods, as follows:
- a) clothing and footwear (29.1 per cent of all the comparison goods spending of residents of the survey area, according to the Experian base data);
 - b) furniture, carpets and soft furnishings (13.7 per cent of all comparison spending);
 - c) DIY and decorating goods (4.3 per cent of all comparison spending);
 - d) domestic appliances and electrical goods (12.3 per cent of all comparison spending);

- e) health, beauty and chemist items (15.9 per cent of all comparison spending);
- f) recreational goods (14.9 per cent of all comparison spending); and
- g) all other comparison goods, including books, CDs, jewellery, china and glass (9.8 per cent of all comparison spending).

- 5.4 The composite pattern of comparison goods spending, accounting for 100 per cent of such expenditure, is derived from the application of a weight to each of the seven categories of comparison goods spending, which reflects the proportion of total expenditure accounted for by each category (as recorded above, in paragraph 5.2).
- 5.5 Patterns of convenience goods (food and groceries) spending have been based on the last two trips for the three categories of expenditure included in the questionnaire, these being *'main food and groceries'*, *'top up shopping'* and *'spending in small shops'*. The survey questionnaire also sought information on how much money is normally spent on each of these three types of convenience goods purchases. The data gathered enabled NEMS to calculate a mean spend of £70.96 for main food shopping trips; a mean spend of £10.89 for top-up trips; and a mean spend of £4.91 for other convenience spending in small shops. These mean spend results enabled NEMS to provide us with composite patterns of convenience goods spending.

Population and Expenditure

- 5.6 **Spreadsheet Table 1a of Volume 2** sets out the current and projected population for each of the survey Zones. The population projections have been provided by Experian, with the base data derived from its year 2017 database (the latest available). Experian's projections are based on a wide variety of data inputs, including the ONS's 2014-based sub-national population projections for England, released on the 25th May 2016. The unadjusted ONS projection for Tameside Borough suggests a growth in population, from 221,400 in 2015, to 236,500 in 2035. In contrast, Experian's 2017-based projection for Tameside identifies a growth from 225,400 in 2016, to 240,800 in 2036, so that Experian's compound annual growth rate is very marginally higher, at 0.3308 per cent, per annum, compared to the unadjusted ONS 2014-based sub-national projection, of 0.3304 per cent,

per annum. Thus, the absolute difference, over the 20 year forecast period, is just 300 persons, with Experian projecting a growth of 15,400 persons, compared to the unadjusted ONS growth of 15,100 persons.

- 5.7 **Spreadsheet Tables 1b and 1d of Volume 2** set out the current and projected per capita expenditure in the comparison and convenience goods sectors, respectively. These projections are based on the latest forecasts published by Experian in December 2017 (Retail Planner Briefing Note 15). **Spreadsheet Tables 1c and 1e of Volume 2** then set out the total existing and projected expenditure in the comparison goods and convenience goods sectors; these are based on the product of **Spreadsheet Tables 1a and 1b** in the comparison goods sector and on the product of **Spreadsheet Tables 1a and 1d** in the convenience goods sector.

Comparison Goods Spending Patterns

- 5.8 The current pattern of comparison goods spending is set out in **Spreadsheet Table 2 of Volume 2**, in terms of percentage market shares, and in **Spreadsheet Table 3 of Volume 2**, as absolute monetary flows. **Spreadsheet Table 3** reveals that the total comparison goods expenditure of residents of the overall survey area amounts to £1,252.2m in the year 2016, of which £581.6m, or 46.5 per cent, is retained by centres and stores located within the overall survey area. The remaining 53.5 per cent of comparison goods expenditure (£670.5m) is accounted for by locations beyond the overall survey area and by Special Forms of Trading (SFT). We treat the latter as being part of expenditure leakage, although we would acknowledge that an unknown proportion of this SFT expenditure represents 'Click & Collect' spending, with the items picked up from stores located within the survey area.
- 5.9 We consider 46.5 per cent to be a reasonable expenditure retention level, given the competition posed by Manchester City Centre, the Principal Town Centres of Stockport and Oldham, the Trafford Centre and other out of centre locations beyond the overall survey area, and the fact that we have treated SFT (which accounts for £236.7m) as forming part of the overall leakage of £670.5m. SFT therefore accounts for approximately 35 per cent of the leakage.

- 5.10 **Table 5.1**, which is derived from **Spreadsheet Table 3** of **Volume 2**, summarises the primary destinations for comparison goods spending. As expected, the Principal Town Centre of Ashton-under-Lyne is the most important destination for comparison goods spending, with an estimated comparison goods turnover drawn from residents of the overall survey area of £140.6m. This represents 11.2 per cent of the overall comparison goods expenditure of residents of the survey area, and 24.2 per cent of the expenditure retained by retail locations within the survey area (see the Ashton-under-Lyne Principal Town Centre row in the final two columns of **Table 5.1**).
- 5.11 **Figure 5.2** of **Volume 2**, which is derived from **Spreadsheet Table 2** of **Volume 2**, reveals that Ashton-under-Lyne Principal Town Centre has a comparison goods market share of over 30 per cent in only two of the survey Zones (Numbers 1 and 2), and that the Ashton-under-Lyne has a comparison goods market share of less than 5 per cent for residents in Zones 13, 14 and 15, which form the High Peak and Stockport fringes. It is noteworthy and disappointing, however, that the Principal Town Centre of Ashton-under-Lyne has a comparison goods market share of less than 10 per cent in Zones 7 (Hattersley), 8 (Hyde) and 9 (Denton), and less than 20 per cent in Zones 4 (Stalybridge) and 6 (Droylsden). In Zone 3 (Mossley) and Zone 5 (Dukinfield), the Principal Town Centre of Ashton-under-Lyne has a comparison goods market share between 20 and 30 per cent.
- 5.12 The Ikea store in Ashton draws only £14.6m from residents of the survey area, as shown in **Spreadsheet Table 3** of **Volume 2**. We are aware, however, that the Ikea store draws from a much wider catchment area that extends to Blackburn in the North, Holmfirth to the East, Macclesfield to the South and from post codes to the west of the City Centre, up to around Bolton, where the catchment is shared with Ikea's Warrington store. Indeed, our consultation with Ikea has confirmed that the store now attracts 2.3 million visitors a year, and we would estimate an annual comparison goods turnover of around £60m.

Table 5.1 Comparison Goods Expenditure Destinations in 2017 (derived from NEMS Survey of July/August 2017)

ZONE	Destinations	Comparison Goods Turnover £m	Total Market Share %	Share of Retained Expenditure %
	Principal Town Centre in Tameside			
1	Ashton-under-Lyne Principal Town Centre	140.6	11.2	24.2
	Town Centres in Tameside			
8	Hyde Town Centre	39.4	3.1	6.8
9	Denton Town Centre	126.6	10.1	21.8
	Sub-Total for Town Centres in Tameside	166.0	13.3	28.5
	District Centres in Tameside			
4	Stalybridge District Centre	16.7	1.3	2.9
6	Droylsden District Centre	11.4	0.9	2.0
7	Hattersley District Centre	4.4	0.3	0.8
	Sub-Total for District Centres in Tameside	32.5	2.6	5.6
	Local Centres in Tameside			
3	Mossley Local Centre	3.8	0.3	0.6
	Sub-Total for Local Centres in Tameside	3.8	0.3	0.6
	Retail Parks and Freestands Stores/Outlets within Tameside			
1	Ashton Moss	8.8	0.7	1.5
1	Snipe Retail Park	111.0	8.9	19.1
3	Sainsbury's, Oldham Street, Denton	4.9	0.4	0.8
	Sub-Total for Retail Parks/Freestanding Stores within the Survey Area	124.6	10.0	21.4
1 to 9	Other Destinations in Tameside	7.3	0.6	1.3
	Sub-Total Within Tameside	474.8	37.9	81.6
	Town and District Centres elsewhere within the Survey Area			
10	Eastland District Centre	7.8	0.6	1.3
10	Failsworth District Centre	29.2	2.3	5.0
10	Gorton District Centre	5.9	0.5	1.0
13	Glossop Town Centre	32.4	2.6	5.6
15	Houldsworth Square (Reddish) District Centre	4.2	0.3	0.7
	Sub-Total for Town and District Centres elsewhere within the Survey Area	79.4	6.3	13.6
	Retail Parks/Freestands Stores/Outlets elsewhere within the Survey Area			
13	Tesco, Wren Nest Road, Glossop	4.7	0.4	0.8
13	Wren Nest Retail Park	2.5	0.2	0.4
	Sub-Total for Retail Parks/Freestanding Stores/Outlets elsewhere within the	7.2	0.6	1.2
10 to 15	Other Destinations elsewhere within the Survey Area	20.3	1.6	3.5
	Sub-Total Outside of Tameside but within Survey Area	106.9	8.5	18.4
	OVERALL TOTAL WITHIN SURVEY AREA	581.6	46.5	100.0
	Town and District Centres outside of the Survey Area			
X	Bury Town Centre	2.7	0.2	
X	Manchester City Centre	120.5	9.6	
X	Oldham Town Centre	49.2	3.9	
X	Stockport Town Centre	125.0	10.0	
	Sub-Total for Town and District Centres outside the Survey Area	297.4	23.8	
	Retail Parks/Freestands Stores/Outlets outside the Survey Area			
X	Elk Mill Retail Park, Bury	20.9	1.7	
X	John Lewis, Wilmslow Road, Cheadle	8.2	0.7	
X	Manchester Road Retail Park	4.2	0.3	
X	The Trafford Centre, Manchester	27.3	2.2	
X	Other Retail Parks/Free Standing Stores Outside Survey Area	8.2	0.7	
	Sub-Total for Retail Parks, Freestanding Stores/Outlets	68.7	5.5	
X	All Other Destinations Outside Survey Area	67.8	5.4	
X	Special Forms of Trading	236.7	18.9	
	Sub-Total for Other Destinations outside Survey Area & SFT	304.4	24.3	
	OVERALL TOTAL FOR ALL DESTINATIONS OUTSIDE SURVEY AREA	670.5	53.5	
	TOTAL COMPARISON GOODS EXPENDITURE	1252.2	100.00	

- 5.13 The second most important comparison goods spending destination within the survey area is Denton Town Centre (including Crown Point Retail Park), which has an estimated comparison goods turnover drawn from residents of the survey area of £126.6m (**Table 5.1**). However, of this total turnover of £126.6m, some £89.4m (71 per cent) is derived from the Crown Point Shopping Park. Thus, Denton Town Centre, including Crown Point Retail Park, has a comparison goods market share of approximately 36 per cent of the expenditure of residents in Zone 9 (Denton), and comparison goods market shares of approximately 21 per cent of the residents of Zone 7 (Hattersley), reflecting the easy road communications between Hattersley and Denton, via the M67 (**Figure 5.3** in **Volume 2**).
- 5.14 Moreover, Denton Town Centre has a comparison goods market share of between 10 and 20 per cent in Zones 2 (North Ashton), 5 (Dukinfield), 6 (Droylsden) and 8 (Hyde). It is interesting, also, that Denton has a comparison goods market share of between 5 and 10 per cent amongst the residents of Zone 4 (Stalybridge), for whom Ashton Town Centre represents an intervening opportunity, and in Zone 15 (Reddish, Stockport), which is outside the administrative area of Tameside. It seems clear, therefore, that the Crown Point Shopping Park exerts quite a wide geographical influence.
- 5.15 The third most important destination for comparison goods spending within the survey area is the out-of-centre Snipe Retail Park, which we estimate achieves a comparison goods turnover of £111m. Indeed, **Spreadsheet Table 2** of **Volume 2** reveals that Snipe Retail Park achieves a comparison goods market share of between 10 and 20 per cent across a large part of Tameside, with market shares in Zone 3 (Mossley, at 12%), in Zone 9 (Denton, at 12.3%), in Zone 2 (North Ashton, at 14.4%), in Zone 5 (Dukinfield, at 15.7%), in Zone 1 (Ashton, at 16.4%) and in Zone 6 (Denton, at 17.6%).
- 5.16 **Table 5.1** shows that Hyde Town Centre is estimated to achieve a comparison goods turnover from residents of the survey area of £39.4m. **Figure 5.4** in **Volume 2** shows, however, that Hyde Town Centre achieves comparison goods market shares of between 10 and 20 per cent only for the residents of Zone 8 (Hyde) and Zone 7 (Hattersley). In all other Zones within the survey area, Hyde Town Centre achieves a comparison goods market share of less than 5 per cent. Thus, Hyde Town Centre's comparison goods

function is highly localised and may contract further, when the emerging district centre in Hattersley matures, over time.

- 5.17 **Table 5.1** shows that the district centres of Stalybridge and Droylsden achieve comparison goods turnovers of approximately £16.7m and £11.4m, respectively. **Spreadsheet Tables 2 and 3** of **Volume 2** reveal, however, that Stalybridge achieves almost all of its comparison goods turnover from residents of Stalybridge (Zone 4) and Dukinfield (Zone 5). Likewise, **Spreadsheet Tables 2 and 3** of **Volume 2** reveal that Droylsden achieves almost all of its comparison goods turnover from its localised Zone 6.
- 5.18 Hattersley District Centre is unique, in that its retail offer, currently, is confined to the Tesco superstore, which is reflected in our survey-derived estimate for comparison goods turnover, shown in **Table 5.1**, of £4.4m. This is similar to the £3.8m comparison goods turnover estimated to be achieved by Mossley Local Centre (also shown in **Table 5.1**). However, our subsequent recommendations, with respect to the appropriate hierarchy of centres in Tameside, suggest that Hattersley should be a District Centre to reflect:
- a) the extant consent (ref: 18/00015/REM) for the creation of southern part of the District Centre, through provision of 11 units, totalling around 5,700 sq.m, anchored by a foodstore, targeted at Lidl, and ten further units of a variety of sizes for a mix of A1, A3 and A5 uses; and
 - b) the emerging proposals in the Draft Greater Manchester Spatial Framework for major housing development at Godley Green and at Mottram.
- 5.19 As an aside, **Table 5.1** shows that all stores and centres within the administrative area of Tameside (Zones 1 to 9) retain £474.8m of the comparison goods expenditure of residents throughout the survey area, a market share of 37.9 per cent. The findings shown in Table 23 of Appendix 5 of WYG's Tameside Retail Study, of May 2010, are not directly comparable, because the WYG study had a much wider survey area geographically. With this caveat in mind, we note that Zones 7 to 10 of the WYG study – which approximates to the administrative area of Tameside, excluding Mossley and Droylsden – retained 31.1 per cent of the aggregate expenditure of residents of WYG's wider survey area.

5.20 Thus, going back to our **Table 5.1**, we note that other centres, outside the administrative area of Tameside, but within the survey area, include:

- **Glossop Town Centre** (with an estimated comparison goods turnover of £32.4m);
- **Failsworth District Centre** (with an estimated comparison goods turnover of £29.2m);
- **Eastlands District Centre** (with an estimated comparison goods turnover of £7.8m);
- **Gorton District Centre** (with an estimated comparison goods turnover of £5.9m); and
- **Houldsworth Square (Reddish) District Centre** (with an estimated comparison goods turnover of £4.2m).

5.21 These five centres, collectively, account for 13.6 per cent of the retained expenditure, with an aggregate comparison turnover of £79.4m (**Table 5.1**).

5.22 The principal destinations for the comparison goods expenditure which 'leaks' to locations beyond the survey area are set out at the bottom of **Spreadsheet Table 3** of **Volume 2**. The most important source of 'leakage' is Special Forms of Trading (SFT). Indeed, SFT spending by residents of the survey area amounts to £236.7m, or 18.9 per cent of the total comparison goods expenditure pot, which is very similar to Experian Retail Planner Briefing Note 15's UK average of 18.0 per cent. However, it is fair to anticipate that a proportion of this expenditure represents 'Click & Collect' spending, with the items picked up in stores located within the survey area.

5.23 **Spreadsheet Table 3** of **Volume 2** shows that the other main leakage destinations are: Stockport Town Centre (including the Peel Centre), which attracts £125.0m of the comparison goods expenditure of residents of the survey area; Manchester City Centre (which attracts £120.5m); Oldham Town Centre (which attracts £49.2m); the Trafford Centre (£27.3m); and Elk Mill Retail Park, Oldham (£20.9m).

Convenience Goods Spending Patterns

5.24 The current pattern of convenience goods spending is set out in **Spreadsheet Table 6** of **Volume 2**, as percentage market shares and in **Spreadsheet Table 7** of **Volume 2**, as absolute monetary flows. **Spreadsheet Table 7** of **Volume 2** reveals an aggregate

retention rate for convenience goods spending of 81.9 per cent. The main destinations for convenience goods spending are set out in **Table 5.2** of this main report.

- 5.25 **Spreadsheet Table 7 of Volume 2 and Table 5.2** reveal that stores within Ashton Town Centre, as defined on the Proposals Map of the UDP, have a combined, estimated convenience goods turnover of £122.2m, which is 17.3 per cent of the retained convenience goods expenditure. However, if our subsequent recommendations in relation to the overall boundary of Ashton Town Centre and its Primary Shopping Area are accepted, the Sainsbury's, M&S and ASDA stores would fall into the '*out-of-centre*' category, for the purposes of the definitions given in the Annex 2 Glossary of the NPPF, and the Aldi at Wellington Road and the Lidl store at Cavendish Street would fall into the '*edge-of-centre*' category; these five stores account for £104.5m of the £122.2m retained by stores located within the UDP's definition of Ashton Town Centre.
- 5.26 **Spreadsheet Table 7 of Volume 2 and Table 5.2** show that stores in Hyde Town Centre, as defined on the Proposals Map of the UDP, have a combined estimated convenience goods turnover of £90.7m. The ASDA store at Greenfield Street has the highest convenience turnover, at £36.5m, with the Morrisons store having an estimated convenience turnover of £23.7m. The survey suggests that the Aldi store at Great Norbury Street is very popular and substantially overtrading. Nevertheless, we regard the Aldi store at Great Norbury Street to be in an '*out-of-centre*' location for the purposes of the definitions given in the Annex 2 Glossary of the NPPF, given our subsequent recommendation in relation to the definition of the Primary Shopping Centre in Hyde.
- 5.27 **Spreadsheet Table 7 of Volume 2 and Table 5.2** show that Denton Town Centre, as defined on the UDP Proposals Map, has a total convenience goods turnover of approximately £54.5m, with the Morrisons store itself, which we regard to be '*edge-of-centre*', having a convenience goods turnover of approximately £42.1m.

Table 5.2 Convenience Goods Expenditure Destinations in 2017 (derived from NEMS Survey of July/August 2017)

ZONE	Destinations	Convenience Goods Turnover £m	Total Market Share %	Share of Retained Expenditure %
	Principal Town Centre in Tameside			
1	Ashton-under-Lyne Principal Town Centre	122.2	14.2	17.3
	Town Centres in Tameside			
8	Hyde Town Centre	90.7	10.5	12.9
9	Denton Town Centre	54.5	6.3	7.7
	Sub-Total for Town Centres in Tameside	145.2	16.9	20.6
	District Centres in Tameside			
4	Stalybridge District Centre	63.0	7.3	8.9
6	Droylsden District Centre	27.3	3.2	3.9
7	Hattersley District Centre	15.3	1.8	2.2
	Sub-Total for District Centres in Tameside	105.6	12.3	15.0
	Local Centre in Tameside			
3	Mossley Local Centre	5.0	0.6	0.7
	Sub-Total for Local Centres in Tameside	5.0	0.6	0.7
	Retail Parks/Freestanding Stores/Outlets within Tameside			
2	Asda, Queens Road, Hurst	9.8	1.1	1.4
3	Sainsbury's, Oldham Street, Denton	17.9	2.1	2.5
5	Morrisons, Foundry Street, Dukinfield	26.4	3.1	3.7
	Sub-Total for Retail Parks/Freestanding Stores/Outlets in Tameside	54.1	6.3	7.7
1 to 9	Other Destinations in Tameside	14.2	1.6	2.0
	Overall Total for Destinations in Tameside	446.3	51.9	63.3
	Town and District Centres elsewhere within Survey Area			
10	Failsworth District Centre	39.5	4.6	5.6
10	Gorton District Centre	14.5	1.7	2.1
13	Glossop Town Centre	33.7	3.9	4.8
15	Houldsworth Square (Reddish) District Centre	25.6	3.0	3.6
	Sub-Total for Town and District Centres elsewhere within Survey Area	113.3	13.2	16.1
	Retail Parks/Freestanding Stores/Outlets elsewhere within Survey Area			
10	Aldi, Ashton New Road, Clayton	16.5	1.9	2.3
10	Asda, Ashton New Road, Eastlands	12.9	1.5	1.8
10	Morrisons, Ashton Old Road, Openshaw	9.8	1.1	1.4
10	Morrisons, Poplar Street, Failsworth	20.3	2.4	2.9
12	Tesco, Chew Valley Road, Greenfield	12.2	1.4	1.7
13	Tesco, Wren Nest Road, Glossop	25.2	2.9	3.6
14	Morrisons, Stockport Road West, Bredbury	25.1	2.9	3.6
	Sub-Total for Retail Parks/Freestanding Stores/Outlets within Zones 10 to 15	122.1	14.2	17.3
10 to 15	Other Destinations elsewhere within Survey Area	23.3	2.7	3.3
	Sub-Total for Destinations Outside Tameside but Inside Survey Area	258.7	30.1	36.7
	OVERALL TOTAL WITHIN SURVEY AREA	705.0	81.9	100.00
	Town and District Centres Outside Survey Area			
X	Harpurhey District Centre	5.6	0.6	
X	Manchester City Centre	4.3	0.5	
X	Oldham Town Centre	11.4	1.3	
X	Stockport Town Centre	15.4	1.8	
X	Other Centres Outside of Survey Area	8.5	1.0	
	Sub-Total for Town and District Centres outside Survey Area	45.2	5.3	
	Retail Parks/Freestanding Stores/Outlets outside Survey Area			
X	Aldi, Green Lane, Romiley	9.7	1.1	
X	Aldi, Newbridge Lane, Stockport,	6.3	0.7	
X	Morrisons, Hollinwood Avenue, Oldham	13.3	1.5	
X	Tesco, Featherstall Road, Oldham	7.4	0.9	
X	Tesco, Huddersfield Road, Oldham	8.7	1.0	
X	Tesco, Tiviot Way, Stockport	9.6	1.1	
X	Other Retail Parks/Free Standing Stores Outside Survey Area	8.6	1.0	
	Sub-Total for Retail Parks/Freestanding Stores/Outlets outside Survey Area	63.7	7.4	
X	All Other Destinations Outside Survey Area	30.3	3.5	
X	Special Forms of Trading	16.2	1.9	
	Sub-Total for Other Destinations outside Survey Area & SFT	46.5	5.4	
	OVERALL TOTAL FOR ALL DESTINATIONS OUTSIDE SURVEY AREA	155.3	18.1	
	TOTAL CONVENIENCE GOODS EXPENDITURE	860.3	100.00	

- 5.28 The three district centres of Stalybridge, Droylsden and Hattersley are estimated to have a combined convenience goods turnover of £105.6m (**Table 5.2**). Stalybridge has the highest convenience turnover of £63.0m, of which £59.9m is accounted for by the Tesco and Aldi stores, combined; these two stores, which we regard to be in ‘*edge-of-centre*’ locations, have a similar turnover of around £30m each, suggesting that Aldi is substantially overtrading.
- 5.29 **Table 5.2** suggests that Droylsden has an estimated convenience goods turnover of £27.3m, with **Spreadsheet Table 7 of Volume 2** revealing that the ‘*edge-of-centre*’ Tesco store accounts for £19.7m of this total. **Spreadsheet Table 7 of Volume 2** also reveals that there is quite a high leakage of convenience goods expenditure from residents of the Droylsden area (Zone 6), to stores in Manchester (Zone 10), particularly to the Aldi store at Clayton and the ASDA store at Eastlands.
- 5.30 In Hattersley, the Tesco store has an estimated convenience turnover of just £15.3m, which confirms that the store is substantially under-trading, as it reportedly has done since its opening. Indeed, we understand that the upper level car parking is now used by the police and the local authority, and that the upper level has always been severely underutilised. In hindsight, it would seem that the Tesco store is far too large and not in keeping with the socio-economic profile of the residents of the Hattersley catchment area. Indeed, **Spreadsheet Tables 6 and 7 of Volume 2** show that residents of Zone 7 spend a much higher proportion of their convenience goods expenditure in stores in Hyde Town Centre than they do in Hattersley, with the Aldi and Morrisons stores in Hyde being particularly popular with the residents of Zone 7.
- 5.31 **Spreadsheet Table 7 of Volume 2** and **Table 5.2** show that Mossley Local Centre has an estimated convenience goods turnover of £5.0m, almost all of which is drawn from the residents of Zone 3, but with a small amount drawn from the residents of Zone 4 (presumably from the northern part, in the vicinity of Carbrook).
- 5.32 There are three further individual stores within the administrative area of Tameside which have fairly significant convenience turnovers, but which are not in centres defined in the hierarchy set out in Policy S1 of the UDP. The first of these is the Morrisons store at

Foundry Street, Dukinfield, which has a convenience goods turnover of £26.4m (**Spreadsheet Table 7 of Volume 2**). This Morrisons store draws £14.9m of this turnover from residents of Zone 5, but it also pulls in some smaller, but not insignificant, amounts of trade from the residents of Zones 1 to 4.

- 5.33 The second store that is not within or near to any of the defined centres is the Sainsbury's store at Oldham Street, Denton, which is a freestanding store with an estimated convenience goods turnover of £17.9m. The Sainsbury's store at Denton draws most of its turnover from residents of Zone 9 (Denton), Zone 15 (Reddish, Stockport) and Zone 8 (Hyde). We consider, however, that this Sainsbury's store is likely to have only a very weak relationship, if any, with Denton Town Centre.
- 5.34 The third store that is not within, or on the edge of, a defined centre is the ASDA store at Hurst, which **Spreadsheet Table 7 of Volume 2** suggests has a convenience turnover of £9.8m. Most of this turnover is drawn from the residents of North Ashton (Zone 2), Stalybridge (Zone 4) and Mossley (Zone 3).
- 5.35 It is noteworthy that the 20 medium and large-sized supermarkets within the survey area that are individually identified in **Spreadsheet Table 7 in Volume 2** have a combined convenience turnover of £512.4m, which equates to 73 per cent of the overall level of retained convenience goods expenditure of £705.0m. This finding reflects the continuing, albeit slightly shrinking, high market share of the major superstore operators, combined with the spectacular growth in market share of Aldi and Lidl.
- 5.36 So far as leakage of convenience goods expenditure is concerned, the bottom part of **Spreadsheet Table 7 in Volume 2** and the bottom part of **Table 5.2** reveal that £155.3m, or 18.1 per cent, of the aggregate pot of convenience expenditure of the residents of the survey area flows to stores located beyond the survey area. The principal destinations for this leakage of convenience goods expenditure are to stores within and on the edge of Oldham and Stockport Town Centres, and to the Morrisons store at Hollinwood Avenue, Oldham. We have also included SFT as part of the leakage and this amounts to £16.2m, or 1.2 per cent of the convenience goods expenditure of residents of the survey area.

5.37 **Figure 5.5** in **Volume 2**, and **Table 5.3** of this Main Report, which are derived from **Spreadsheet Table 6** of **Volume 2**, set out the localised convenience goods retention levels for each Zone, at the time of the NEMS survey in July/August 2017. **Figure 5.5** of **Volume 2** and **Table 5.3** show that the highest localised convenience goods retention rates are in Zone 13 (Glossop), Zone 1 (Central Ashton), Zone 8 (Hyde), Zone 9 (Denton) and Zone 4 (Stalybridge). Localised convenience goods retention levels are also above 50 per cent in East Manchester.

Table 5.3 – Localised Convenience Goods Retention Levels by Zone (from July/August 2017 survey)

Zones	Name of Zone	Localised Retention Level in 2017 (%)
1	Central Ashton	79.1
2	North Ashton	8.5
3	Mossley	18.0
4	Stalybridge	65.4
5	Dukinfield	42.4
6	Droylsden	31.4
7	Hattersley	23.9
8	Hyde	72.6
9	Denton	70.5
10	East Manchester	62.4
11	Oldham Fringe	0.1
12	Rural Oldham	29.9
13	Glossop	79.7
14	Stockport Fringe	43.2
15	Reddish, Stockport	40.9

5.38 Conversely, the lowest localised convenience goods retention levels are in Zone 11 (Oldham Fringe) and Zone 2 (North Ashton). Localised convenience goods retention levels are also low in Zone 3 (Mossley) and Zone 7 (Hattersley). There would also seem to be a need to improve the localised convenience goods retention level in Droylsden. However, the most urgent need for an improved retention of localised convenience goods spending is in Hattersley, where the current retention level is just 23.9 per cent. Nevertheless, the commitment to complete the remainder of the new District Centre at Hattersley will provide for a discount foodstore to be operated by Lidl, which will substantially improve the localised retention level.

- 5.39 Localised convenience goods retention levels are obviously important to the social inclusion agenda. It is important to note, therefore, that mapping of the Index of Multiple Deprivation in **Figure 5.6** of **Volume 2** shows that the main concentrations of severe deprivation in Tameside (amongst the 3 per cent most deprived LSOAs in England) are in Hattersley and in Central Ashton. These areas are associated with low car ownership rates, so that access to convenience shopping is of critical importance. It is pleasing, therefore, that the localised retention level in Central Ashton is already very high, and that the localised retention level in Hattersley is set to improve, as noted above.

Pattern of Leisure Visits

Spending on Leisure Services

- 5.40 The Retail Expenditure Guide prepared by Pitney Bowes for 2014/15 provides information on per capita expenditure levels in the UK, across a number of leisure services. This information is summarised in **Table 5.4**.

Table 5.4 - Spending on Leisure Services in the UK in 2014, in 2014 Prices

Type of Leisure Services	Per Capita Expenditure in 2014 (£)	Percentage of Spending on Leisure Services in 2014 (%)
Recreation and Cultural Services , which include: spending at sports stadia, racecourses, golf courses, bowling alleys, skating rinks and so on; spending on cinemas, theatres, concerts and TV/satellite subscriptions; and various forms of gaming, including lotteries and scratch cards	585	28.1
Restaurants, Cafes and Bars , which includes: meals, alcohol, snacks and catering services in school canteens	1,265	60.7
Accommodation Services , which includes: spending in hotels, B&Bs, youth hostels and so on	139	6.7
Hair and Personal Grooming , which includes: spending in salons, beauty shops, saunas, solariums, massages and so on	94	4.5
TOTAL	2,083	100.0

Source: Pitney Bowes Retail Expenditure Guide 2014/15

- 5.41 Thus, according to Pitney Bowes, spending on leisure services in the UK in 2014 averaged £2,083 per capita. By comparison, the Pitney Bowes figure for comparison goods in the same year was £3,403 per capita, and the spending on convenience goods was £2,074 per capita. Thus, on average, UK residents spend roughly the same amount on leisure services as they do on convenience goods shopping.

- 5.42 By far the most important leisure services sector is spending in restaurants, cafes and bars, which accounts for 61 per cent of total spending on leisure services. The second most important sector is entitled '*Recreation and Cultural Services*', but this Pitney Bowes category contains a very wide variety of different types of spending, for which there is no more detailed breakdown available.

Findings of the NEMS Telephone Survey

- 5.43 The questionnaire for the NEMS telephone survey, which is reproduced in **Volume 2** of our report, had a filter question (number 25) which asked: '*Do you or members of your household undertake any of the following activities?*'
- *A visit to the cinema*
 - *A visit to an indoor entertainment centre (e.g. bowling, skating rink, adventure play centre)*
 - *A visit to an outdoor leisure facility, such as a cycle park, a country park, or a "Go Ape" type facility*
 - *A visit to the gym / health club / sport facility*
 - *A visit to a museum / gallery or other place of historical / cultural interest*
 - *A visit to the theatre/ a concert hall / live music venue*
 - *A visit to a pub / bar / nightclub*
 - *A visit to a restaurant / café'*
- 5.44 The number and proportion of affirmative responses from residents throughout the survey area are set out in Table 5.5, which shows that the highest propensities for undertaking leisure pursuits relate to: '*a visit to a restaurant/café*' (65.3%), '*a visit to a pub or night club*' (47.6%), '*a visit to the cinema*' (47.2%) and '*a visit to a theatre/concert hall/live music venue*' (34.7%).

Table 5.5 - Number and Proportion of Telephone Survey Respondents Responding in the Affirmative to Various Leisure Activities

Leisure Activity	Number of Affirmative Responses	Percentage of Affirmative Responses
A visit to the cinema	711	47.2%
A visit to an indoor entertainment centre (e.g. bowling, skating rink, adventure play centre)	293	19.4%
A visit to an outdoor leisure facility, such as a cycle park, a country park, or a Go Ape" type facility"	212	14.1%
A visit to the gym / health club / sport facility	370	24.6%
A visit to a museum / gallery or other place of historical / cultural interest	400	26.5%
A visit to the theatre/ a concert hall / live music venue	522	34.7%
A visit to a pub / bar / nightclub	717	47.6%
A visit to a restaurant / café	983	65.3%
(None of these)	218	14.5%

Cinema Visits

- 5.45 By far the most important cinema destination, accounting for 70.4 per cent of those who visit cinemas, is the Cineworld at Ashton Leisure Park. Indeed, Ashton Leisure Park attracts at least 75 per cent of the cinema visitors in all nine of the zones within Tameside Borough. Other cinema destinations accounting for 3 or 4 per cent of cinema visitors include the Showcase Cinema at Bellvue, the Odeon Cinema at Oldham, Cineworld at Stockport, Cineworld at Parrs Wood, the Odeon at the Trafford Centre and the Vue Cinema at the Printworks in Manchester.

Visits to Indoor Entertainment Centres

- 5.46 The Hollywood Bowl at Ashton Leisure Park represents by far the most frequently visited indoor entertainment facility, accounting for 68.1 per cent of those who visit such facilities. The only other indoor entertainment centre which attracts more than 5 per cent of visitors to such centres is the Bizzy Bouncers indoor play area at Ashton.

Visits to Outdoor Leisure Facilities

- 5.47 The only outdoor facilities that attract 3 per cent or more of those visiting such facilities are Etherow Country Park in Romiley; Hyde Park in Hyde; Go Ape in Rivington, Horwich; and Werneth Low Country Park.

Visits to a Gym/Health Club/Sports Facility

- 5.48 The most frequently cited destinations for visits to a gym/health club/sports facility are Pure Gym at Oldham Street, Denton; The Gym at Lime Square in Manchester; Active Ashton at Water Street, Ashton; and the Oldham Community Leisure Centre in Failsworth.

Visits to Museums, Galleries, and Other Places of Historic/Cultural Interest

- 5.49 By far the most important museum destination is the Museum of Science and Industry in Manchester City Centre. However, other museums and galleries that are cited by the more than 4 per cent of survey respondents are the Manchester Art Gallery in Moseley Street and the Portland Basin Museum at Portland Place in Ashton-under-Lyne.

Visits to Theatres, Concert Halls and Live Music Venues

- 5.50 By far the most important destinations for visits to a theatre/concert hall/live music venue are the Palace Theatre at Oxford Street, Manchester; the Manchester Opera House at Quay Street, Manchester; the Lowry at Salford Quays; the Manchester Arena at Victoria, Manchester; and the Apollo Theatre at Stockport Road, Manchester.

Visits to Pubs, Bars and Night Clubs

- 5.51 The most frequently cited destinations for visits to pubs, bars and nightclubs are Manchester City Centre (23 per cent), Glossop Town Centre (10 per cent), Ashton-under-Lyne Town Centre (7 per cent), Stockport Town Centre (6 per cent) and Denton Town Centre (6 per cent). Manchester City Centre is particularly attractive for visits to pubs, bars and night clubs on the part of residents in Zone 5 (Dukinfield), Zone 7 (Hattersley), Zone 10 (East Manchester) and Zone 14 (Romiley/Bredbury).

Visits to Restaurants and Cafes

- 5.52 The most frequently cited destinations for visits to restaurants and cafes were Manchester City Centre (26.4 per cent); Ashton-under-Lyne, including the Town Centre, Snipe Retail Park and Ashton Moss Leisure Park (14.7 per cent); Glossop Town Centre (7.5 per cent); Stockport Town Centre (5.2 per cent) and Denton Town Centre (4.8 per cent).

Conclusions in Relation to Retail and Leisure Spending Patterns

Comparison Goods Spending Patterns

- 5.53 Ashton-under-Lyne Town Centre is the most important destination for comparison goods spending, with an estimated comparison goods turnover drawn from residents of the overall survey area of £140.6m. This represents 11.2 per cent of the overall comparison

goods expenditure of residents of the survey area, and 24.2 per cent of the retained expenditure. However, somewhat disappointingly, Ashton-under-Lyne, as the Principal Town Centre, has a comparison goods market share of over 30 per cent only in Zones 1 and 2 (Ashton and North Ashton), although the Town Centre does achieve a comparison goods market share of between 20 and 30 per cent amongst residents of Zone 5 (Dukinfield) and Zone 3 (Mossley).

- 5.54 The second most important destination for comparison goods spending within the survey area is Denton Town Centre, which has an estimated comparison goods turnover drawn from residents of the survey area of £126.6m. However, of this total, some £89.4m (71 per cent) is derived from the Crown Point Shopping Park. Denton achieves a comparison goods market share of 36 per cent amongst residents of Zone 9 (Denton) and 21 per cent amongst residents of Zone 7 (Hattersley), reflecting the easy road communications between Hattersley and Denton, via the M67.
- 5.55 The third most important destination for comparison goods spending is the out-of-centre Snipe Retail Park, which we estimate achieves a comparison goods turnover of £111m. Indeed, Snipe Retail Park achieves a comparison goods market share of between 10 and 20 per cent across a large part of Tameside.
- 5.56 Hyde Town Centre is estimated to have a comparison goods turnover of £39.4m. However, Hyde Town Centre's comparison goods function would appear to be quite localised, and it achieves comparison goods market shares of between 10 and 20 per cent only in Zone 8 (Hyde) and in Zone 7 (Hattersley). However, Hyde's trade draw from the residents of Hattersley is likely to diminish, over time, when the new District Centre at Hattersley becomes firmly established.
- 5.57 The district centres of Stalybridge and Droylsden achieve comparison goods turnovers of £16.7m and £11.4m, respectively, with Droylsden deriving most of its comparison goods turnover from its local Zone 6, and with Stalybridge deriving most of its comparison goods turnover from its local Zone 4 and from Zone 5 (Dukinfield).
- 5.58 The retail offer in the emerging district centre at Hattersley is currently confined to the Tesco superstore, for which our survey-derived estimate for comparison goods turnover

is £4.4m. This is similar to the comparison goods turnover of Mossley Local Centre, of £3.8m. Nevertheless, our subsequent recommendations with respect to the appropriate hierarchy of centres suggest that Hattersley should be a district centre, to reflect the extant consent for the development of the southern part of the centre (ref: 18/00015/REM) and the large housing allocations proposed in the draft of the Greater Manchester Spatial Framework at Godley Green and Mottram.

- 5.59 The overall comparison goods market share for all centres and freestanding stores within the administrative area of Tameside (Zones 1 to 9) is 37.9 per cent, or £474.8m. It is important to recognise, however, that the main source of leakage is Special Forms of Trading, which accounts for £236.7m, or 18.9% of the total comparison goods expenditure pot, which is very similar to the national average. The other principal leakage destinations are: Stockport Town Centre (£125.0m), Manchester City Centre (£120.5m), Oldham Town Centre (£49.2m), the Trafford Centre (£27.3m) and Elk Mill Retail Park (£20.9m). It would seem, therefore, that the influence of the Trafford Centre is less than might have been anticipated.

Convenience Goods Spending Patterns

- 5.60 The overall retention rate for convenience goods spending is a healthy 89.1 per cent. Stores within Ashton-under-Lyne Town Centre, as defined on the UDP's Proposals Map, have an aggregate convenience goods turnover of £122.2m, of which £104.5m is accounted for by Sainsbury's, M&S, Aldi, Lidl and ASDA.
- 5.61 Hyde Town Centre, as defined on the UDP Proposals Map, has an estimated convenience goods turnover of £90.7m, of which £83.4m is accounted for by the ASDA, Morrisons and Aldi stores, with the latter seemingly over-trading to a substantial degree.
- 5.62 Denton Town Centre has an estimated convenience goods turnover of £54.5m, of which the Morrisons store alone accounts for £42.1m.
- 5.63 The three district centres of Stalybridge, Droylsden and Hattersley have an estimated combined convenience goods turnover of £105.6m, with Stalybridge accounting for £63.0m of this total. However, the Tesco store in Hattersley has an estimated

convenience turnover of just £15.3m, which would seem to confirm that this store is substantially under-trading. Indeed, the survey suggests that residents of Zone 7 (Hattersley) spend a higher proportion of their convenience goods expenditure in Hyde Town Centre than they do in Hattersley.

- 5.64 Mossley Local Centre has an estimated convenience goods turnover of £5m, almost all of which is drawn from the residents of Zone 3, but with some derived from the residents of the Carbrook area of Zone 4.
- 5.65 It is noteworthy that the 20 medium and large-sized supermarkets located within the survey area have a combined convenience goods turnover of £512.4m, which equates to 73 per cent of the overall level of retained expenditure of £705.0m. This finding reflects the continuing, albeit slightly shrinking, high market share of the major superstore operators, combined with the spectacular growth in market share of Aldi and Lidl.
- 5.66 Leakage of expenditure in the convenience goods sector accounts for 18.1 per cent of the expenditure of the residents of the overall survey area, with most of the leakage accounted for by stores within and on the edge of Stockport and Oldham Town Centres, and at the Morrisons store at Hollinwood Avenue, Oldham. Special Forms of Trading accounts for only 1.9 per cent of convenience goods spending.

Spending on Leisure Services

- 5.67 Data from the Pitney Bowes Retail Expenditure Guide suggest that UK residents spend roughly the same amount on leisure services (£2,083 per capita in 2014) as they do on convenience goods shopping (£2,074 per capita in 2014). Spending in restaurants, cafes and bars accounts for 61 per cent of overall expenditure on leisure services.

Propensity for Undertaking Various Forms of Leisure Pursuit

- 5.68 The NEMS survey for this study suggests that the highest propensities for undertaking leisure pursuits relate to: 'a visit to a restaurant/café' (65.3%), 'a visit to a pub or night club' (47.6%), 'a visit to the cinema' (47.2%) and 'a visit to a theatre/concert hall/live music venue' (34.7%).

Leisure Destinations

5.69 The NEMS survey shows that:

- the Cineworld at Ashton Leisure Park is by far the most important cinema destination, accounting for 70.4 per cent of those respondents who visit cinemas;
- the Hollywood Bowl at Ashton Leisure Park is by far the most frequently visited indoor entertainment facility, accounting for 68.1 per cent of those who visit such facilities;
- the most frequently identified locations for outdoor leisure facilities are the Etherow Country Park in Romiley, Hyde Park in Hyde, Werneth Low Country Park and the Go Ape facilities at Rivington and Buxton;
- the most frequently visited gyms/health clubs are the Pure Gym in Denton, The Gym at Lime Square, Active Ashton at Water Street (Ashton), and the Oldham Community Leisure Centre in Failsworth;
- the most frequently visited places museums/galleries are the Museum of Science and Industry in Manchester City Centre, the Manchester Art Gallery and the Portland Basin Museum in Ashton;
- the most frequently cited destinations for pubs/bars/night clubs are Manchester City Centre, Glossop Town Centre, Ashton-under-Lyne Town Centre, Stockport Town Centre and Denton Town Centre; and that
- the most frequently cited destinations for visits to restaurants are Manchester City Centre, Ashton-under-Lyne Town Centre, Glossop Town Centre, Stockport Town Centre and Denton Town Centre.

6 QUANTITATIVE AND QUALITATIVE RETAIL & LEISURE NEEDS

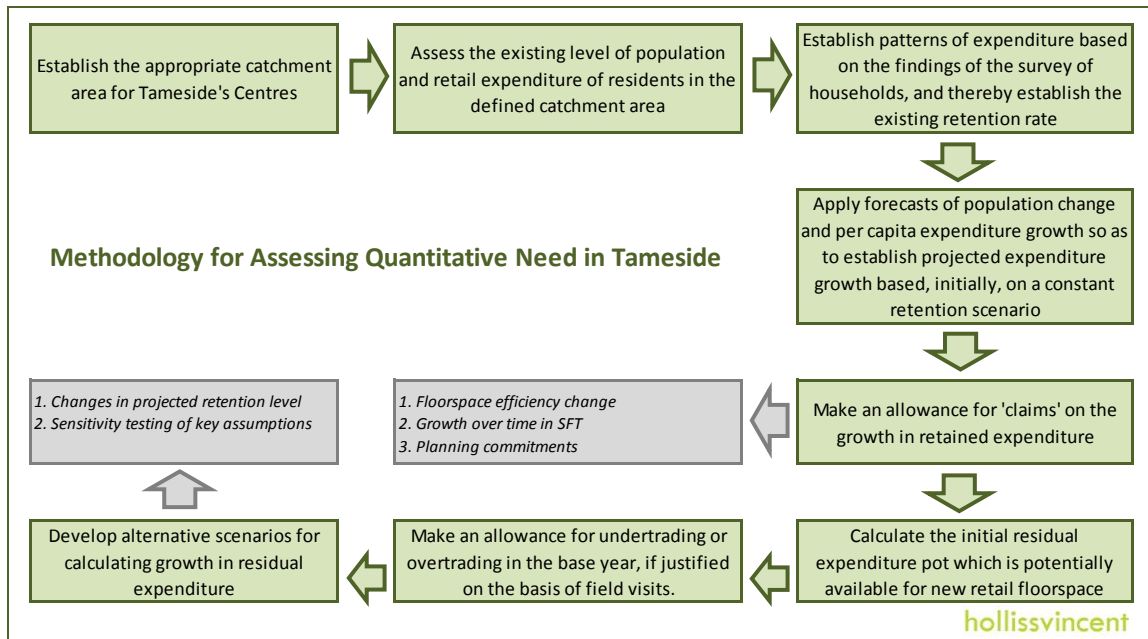
Introduction

- 6.1 In Paragraphs 2.6 to 2.12 of our report, we set out the requirements for plan-making in the new NPPF. We noted the provisions of Paragraph 31 of the NPPF, which requires that the preparation and review of all policies ‘*...should be underpinned by relevant and up-to-date evidence*’, which is to be ‘*...adequate and proportionate*’. We further emphasised the requirements of Paragraph 85 of the NPPF, which urges that planning policies and decisions ‘*...should support the role that town centres play at the heart of local communities, by taking a positive approach to their growth, management and adaptation*’. Thus, we noted, in particular, the requirement for planning policies to:
- allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead, with a stipulation that ‘*...meeting anticipated needs for retail, leisure, office and other main town centre uses over this period [ten years] should not be compromised by limited site availability, so [that] town centre boundaries should be kept under review...*’; and
 - allocate appropriate edge of centre sites, if suitable and viable town centre sites are not available and, if such edge of centre sites can’t be identified, policies should explain how identified needs can be met in other accessible locations that are well-connected to the town centre.
- 6.2 We have therefore undertaken an up-to-date assessment of the quantitative retail need that is likely to arise in the comparison and convenience goods retail sectors in the period up to 2026 and, more tentatively, up to 2036. The findings of this assessment will form part of the evidence base for the emerging local plan in Tameside and will assist the Council in identifying the scale of retail development that should be planned for in the different types of centre in its overall network and hierarchy of centres.
- 6.3 The quantitative work has also been taken into account in our subsequent recommendations in Section 7, with respect to the definition of Primary Shopping Areas

and overall town centre boundaries. We note, however, that neither the NPPF, nor the PPG, specifically refer to the need to consider whether there is a requirement for enlargement or contraction of Primary Shopping Areas. This is obviously a critical issue in applying the sequential test to proposals for retail development, for which the definition of '*edge of centre*' relates to locations up to 300m from the Primary Shopping Area, whereas for the other main town centre uses the definition of '*edge of centre*' is through reference to locations within 300m of the overall town centre boundary, or, in the case of office uses, to a 500m distance from a public transport interchange.

Methodology for Assessing Quantitative Need in the Retail Sector

- 6.4 With this policy background in mind, we turn first to a description of the methodology we have employed in assessing quantitative need in both the comparison and convenience goods sectors in the period up to 2036. It is important to recognise, however, that the effects of expenditure growth over time become exponential. Thus, in looking to the period beyond 2026, the Council should adopt a plan, monitor and manage approach, so as to ensure that the forecast floorspace requirements are kept in line with changes in expenditure and changing methods of retailing.
- 6.5 There is no detailed guidance as to how to assess the quantitative need for retail development in the NPPF, or in the PPG. As a consequence, we have applied an eight step approach, which represents a refinement of the methodology advocated in Appendix B of the now-superseded Planning for Town Centres Practice Guidance of December 2009. These eight steps are shown, diagrammatically, in **Figure 6.1**.

Figure 6.1: Methodology for Assessing Quantitative Need in the Retail Sector

6.6 Thus, the eight steps are as follows:

- i) The first step is to establish the appropriate overall retail catchment area for the hierarchy of centres in Tameside, which is shown in **Figure 5.1** of **Volume 2**. This catchment area covers the whole of the administrative area of Tameside, together with parts of the administrative areas of Oldham, High Peak, Stockport and Manchester. Thus, the overall catchment comprises 15 zones, defined on the basis of clusters of postcode sectors, with Zones 1 to 9 collectively equating, approximately, to the administrative area of Tameside.
- ii) The second step is to assess the existing level of population and the existing volume of retail expenditure of those who reside within the overall catchment area.
- iii) The third step is to establish where the retail expenditure of residents of the overall catchment area is currently spent, through the use of an empirical telephone survey of households and thereby establish the proportion of the retail expenditure of catchment area residents which is currently retained by town centres, retail parks and freestanding stores located within the overall catchment area – that is the aggregate retention rate.

- iv) The fourth step is to apply forecasts of population change and per capita expenditure change, so as to establish the overall level of projected growth in expenditure for residents of the overall catchment area, and an assessment of growth in retained expenditure, based, initially, on a constant retention scenario.
- v) The fifth step is to make an allowance for growth in inflows of expenditure into the catchment area from those who reside outside in the catchment area.
- vi) The sixth step is to make an allowance for under-trading, or over-trading in the base year, but only if this is justified on the basis of the clear empirical evidence.³³
- vii) The growth in retained expenditure (step iv), is added to the growth in inflows (step v), and an allowance for under / over-trading (step vi), so as to derive an initial expenditure surplus. Thus, the seventh step is to make allowance for 'claims' on the initial expenditure surplus, as a result of:
 - **Floorspace Efficiency Change for Existing Retailers** (growth over time in turnover per sq. m sales area). We have assumed that the efficiency gains in the comparison sector account for 37.9 per cent of the forecast expenditure change rate in each year, and that efficiency gains in the convenience goods sector account for 46.2 per cent of the forecast expenditure change in each year – these proportions are based on past national trends in the relationship between expenditure growth and floorspace efficiency.
 - **Growth Over Time in Special Forms Of Trading (SFT)**, which we derive from the final two columns of Figure 5 of Experian's Retail Planner Briefing Note 15 of December 2017.
 - **Planning Commitments, as at December 2017**, for which information has been provide by Tameside Council and neighbouring authorities.

33 Evidence of over-trading might include, for example, low stocked shelves, stocking during opening hours, full car parks, queues at tills and survey evidence of customer dissatisfaction with store/centre congestion. Evidence of under-trading might include underutilisation of car parks, low levels of pedestrian footfall, high levels of vacancy, low survey derived turnovers, and so on. The important point, however, is that such evidence would need to apply to a large part of the overall survey area in order to justify any allowance. If such evidence does not exist, the starting position is assumed to be one of equilibrium.

viii) The culmination of steps i) to vii) is the calculation of the residual expenditure pot which is potentially available for new retail floorspace, under a constant retention assumption. Thus, the final step, where appropriate, is to develop alternative scenarios for calculating growth in residual expenditure, based on:

- increases or decreases in the projected retention level; and
- sensitivity testing of key assumptions, such as projected population change.

6.7 The methodology we have employed in assessing quantitative retail need is essentially the same in both the comparison and convenience sectors. However, there is no established methodology for assessing quantitative need in the commercial leisure sector, where development opportunities are entirely operator-driven.

6.8 Nevertheless, it will be recalled that we set out an analysis of growth in household spending on various leisure services since 1997, in Section 3 and in item 10 of Volume 2. This found that the highest rate of growth in consumer spending has been on '*cultural services*' (which include cinemas, theatres and concerts) and on '*accommodation*' (which includes hotels, B&Bs and youth hostels). However, by far the most important category of spending on leisure services is the '*restaurants, cafes etc.*' sector (which includes pubs), and which has consistently accounted for 53 to 56 per cent of total spend on leisure services over the past 20 years, although there was a sharp drop in spending in the '*restaurants, cafes etc.*' sector during the recession and its immediate aftermath.

6.9 Thus, in the leisure sector, we focus more on an assessment of qualitative need, taking into account the evidence sources cited later in Paragraph 6.37. In the next part of this section, therefore, we present the findings in relation to quantitative need in the comparison and convenience goods retail sectors.

Quantitative Need in the Comparison Goods Sector

6.10 In the comparison goods sector, we have adopted three assumptions in relation to the expenditure retention level, as follows:

- a static retention, at 46.5 per cent throughout the forecast period (on the basis that SFT is treated as being part of the expenditure leakage);

- a gradual reduction in the retention level, from 46.5 per cent in 2016 to 44.5 per cent by 2036 (i.e. a loss of two percentage points over the forecast period), to reflect the potential for further polarisation and loss of market share in Tameside, as a result of further competition with the City Centre, or from other Principal Town Centres, such as Stockport and Oldham; and
- a gradual increase in the retention level, from 46.5 per cent in 2016, to 48.5 per cent by 2036 (i.e. a gain of two percentage points over the forecast period), to reflect the potential for enhancement of the retail offer within Tameside's overall catchment area, vis-à-vis competing locations beyond.

- 6.11 Our findings in relation to quantitative need in the comparison retail sector are set out for two ten-yearly intervals, from 2016 to 2026, and then from 2026 to 2036.
- 6.12 The first step is to identify the residual expenditure that is potentially available to support new development/reconfiguration/refurbishment. Then we translate the residual expenditure available into a range of floorspace needs at the various retention levels.
- 6.13 It is important, therefore, for the Council to understand what we mean by the '*quantitative need*' floorspace figures, which are all expressed in terms of sq.m gross. For example, in the comparison goods sector, under the static retention scenario, we identify a need, up to 2026, for approximately 14,400 sq.m gross. This figure should be interpreted as the net gain in occupied retail stock, and this net gain may be achieved in a number of ways. For example, the net gain of 14,400 sq.m gross may comprise the demolition of 10,000 sq.m gross of existing retail stock and the provision of 24,400 sq.m gross of new/refurbished/reconfigured accommodation, and/or a reduction in the quantum of vacant floorspace. Alternatively, the net gain of 14,400 sq.m gross may involve demolition of just 5,000 sq.m gross and the provision of 19,400 sq.m gross of new/refurbished/reconfigured accommodation, and/or a reduction in vacancies.
- 6.14 The findings of our assessment of residual expenditure capacity, or quantitative need, in the comparison goods sector are set out in **Volume 2 Spreadsheet Tables 5a (static), 5b (decrease in retention) and 5c (increase in retention)**. These Spreadsheet Tables show a residual comparison goods expenditure capacity in the twenty-year period up to 2036

which is in the range £129.3m (**Table 5b**) to £231.9m (**Table 5c**). It is important to stress, however, that much of the residual expenditure capacity arises in the period after 2026, because of the exponential nature of expenditure growth. Thus, the comparison goods expenditure residual over the next ten years, up to 2026, is much lower and is in the range £41.6m (**Table 5b**) to £77.7m (**Table 5c**). In part, this reflects the assumption that the commitments that existed at the end of 2017, as set out in **Table 4** of **Volume 2**, are all implemented and operational by the year 2026.

- 6.15 The potential gross floorspace requirements associated with these residual expenditure capacity estimates, for each of the three retention scenarios, are set out in **Table 6.1**, which derives from **Spreadsheet Tables 5a, 5b and 5c** of **Volume 2**. Under each retention scenario, the exponential nature of expenditure growth is confirmed by the fact that almost two thirds of the quantitative need arises in the second half of the forecasting period, from 2026 to 2036.

Table 6.1: Summary of Quantitative Need in the Comparison Goods Sector for the Tameside Survey Area as a Whole (sq.m gross)

	Decline in Retention	Static Retention	Uplift in Retention
	Sq.m gross	Sq.m gross	Sq.m gross
2016-2026	10,200	14,400	19,100
2026-2036	19,200	26,300	33,600
2016-2036	29,400	40,800	52,800

NB: Figures are rounded to the nearest 100 sq.m gross

- 6.16 The detailed spreadsheet tables in Volume 2 reveal that the gross floorspace requirements set out in Table 6.1 have been calculated in two steps, as follows:
- First, we apply a comparison goods sales density (in row 'm' of Tables 5a, 5b and 5c) – of £5,000 per sq.m (in 2016), rising to £6,273 per sq.m (in 2036) – to the residual expenditure shown in row 'i' of Tables 5a, 5b and 5c. This sales density estimate assumes that much of the new/reconfigured/refurbished floorspace would be in the form of development within and on the edge of town centres, but it also reflects an assumption that there will be some further development in retail parks, which may be in out-of-centre locations. In the previous study, undertaken by WYG, the comparison

goods sales density was assumed to be £4,500 per sq.m in the year 2010. Thus the outcome of this first step are the '*net sales area floorspace requirements*' set out row 'n' of Spreadsheet Tables 5a, 5b and 5c.

- Second, we convert the net sales areas in row 'n' of Spreadsheet Tables 5a, 5b and 5c to the gross floorspace requirements set out in row 'o' of Spreadsheet Tables 5a, 5b and 5c, through the application of a net sales area to gross ratio of 75 per cent.

- 6.17 It is important to acknowledge that these gross floorspace requirements relate to the whole of the survey area, including locations in survey Zones 10 to 15, which are outside of the administrative area of Tameside, such as Eastlands District Centre, Failsworth District Centre, Gorton District Centre, Glossop Town Centre and so on. It is appropriate, therefore, that some of the residual expenditure identified is channelled towards these centres. The requirements for Tameside are set out later, in **Table 6.6** of this report.
- 6.18 Thus, Table 6.1 shows that our estimated comparison goods floorspace requirement, for the survey area as a whole, over the next ten years up to 2026, is in the range 10,200 sq.m gross to 19,100 sq.m gross. Over the longer period up to 2036, the potential capacity in the comparison goods sector increases substantially to a range from 29,400 sq.m gross to 52,800 sq.m gross. We would reiterate, however, that the capacity identified in the period after 2026 should be treated as indicative, and with a reasonable degree of caution, and that the Council should be undertaking regular reviews, adopting the principles associated with plan, monitor and manage.

Quantitative Need in the Convenience Goods Sector

- 6.19 In the convenience goods sector, we have only two retention scenarios – a static retention rate at 81.9 per cent, and an increase from 81.9 per cent in 2016, to 84.0 per cent by 2036 (i.e. a gain of just over two percentage points). There is no justification to plan for a fall in the aggregate retention level in the convenience sector, given that convenience shopping should be undertaken on as localised a basis as possible.
- 6.20 The findings of our assessment of residual expenditure capacity, or quantitative need, in the convenience goods sector are set out in **Spreadsheet Tables 9a (static) and 9b**

(increase in retention) of Volume 2. Spreadsheet Table 9a, under the static retention scenario, shows a small negative residual convenience goods expenditure capacity, across the survey area as a whole, in the twenty-year period up to 2036, of minus £0.2m. However, under the increase in retention scenario, there is a positive convenience goods expenditure residual up to 2036, of £19.6m (Table 9b).

6.21 The negative residual in the convenience goods expenditure, under the **static retention scenario**, arises, quite simply, because the initial surplus derived from growth in retained expenditure and expenditure inflows, which amounts to £60.1m in the period up to 2036 (final column of row 'f' of Spreadsheet Table 9a), is more than outweighed by the claims on that expenditure. These claims are:

- the increase in turnover of existing retailers, of £2.0m, through floorspace efficiency change (row 'g' of Spreadsheet Table 9a);
- the three convenience commitments at: Wood Mill (Glossop), Ashworth Lane/Chain Bar Lane (Hattersley) and at Vision Tameside (in Ashton), with a projected aggregate convenience turnover in the year 2036 of £25.1m (row 'h' of Spreadsheet Table 9a); and
- the expected growth in Special Forms of Trading, which is expected to amount to £33.2m in the period up to 2036 (row 'i' of Spreadsheet Table 9a).

6.22 Under the **increase in expenditure retention scenario** (Spreadsheet Table 9b), there is a positive residual convenience goods expenditure by 2036 of £19.6m. Nevertheless, even under the increase in retention scenario, the positive residual does not arise until after 2026, so that in the short term there is a negative convenience goods expenditure residual. Notwithstanding this caveat, we have translated the positive convenience goods expenditure residual that occurs after 2026 into a gross floorspace requirement that has been calculated in two steps (as was the case in the comparison goods sector), which are as follows:

- First, we apply a convenience goods sales density (in row 'n' of Spreadsheet Tables 9a and 9b in Volume 2) – of £8,000 per sq.m (in 2016), rising to £8,022 per sq.m in 2036

– to the residual expenditure shown in row ‘m’ of Spreadsheet Tables 9a and 9b. This convenience goods sales density estimate is close to the mid-point of that used by WYG in its May 2010 study.

- Second, we convert the net sales areas, in row ‘o’ of Spreadsheet Tables 9a and 9b, into a gross floorspace requirement, set out in row ‘p’ of Spreadsheet Tables 9a and 9b, through the application of a net sales area to gross ratio of 65 per cent.

6.23 Thus, under the increase in expenditure retention scenario, there would be sufficient residual convenience goods expenditure to support a net gain in the occupied stock of convenience floorspace of 3,700 sq.m gross by 2036 (row ‘p’ of Spreadsheet Table 9b), as summarised in **Table 6.2**. Nevertheless, across the Survey Area as a whole, there would seem to be an excess supply of convenience goods floorspace, up to 2026, even if we assume an increase in the aggregate convenience goods retention rate.

Table 6.2 Summary of Quantitative Need in the Convenience Goods Sector for the Tameside Survey Area as a Whole (sq.m gross)

	Static Retention	Uplift in Retention
	Sq.m gross	Sq.m gross
2016-2026	-3,900	-2,000
2026-2036	+3,800	+5,800
2016-2036	0	+3,700

NB: Figures are rounded to the nearest 100 sq.m gross

- 6.24 However, this finding does not mean that there should be no foodstore development over the next 10 years. This is because there will still be localised gaps in convenience goods provision and some convenience stores will need to be replaced or refurbished. For example, there would appear to be a generalised gap in the convenience sector provision within the Mossley, Hattersley and Droylsden Zones, where the convenience retention rates are considered to be disappointingly low. We accept, however, that the localised convenience goods retention rate in Hattersley will improve once the replacement District Centre is completed, the second phase of which will include a new store for Lidl.
- 6.25 There is also likely to be a need for further localised convenience goods provision associated with two of the strategic sites identified in the consultation draft edition of the

Greater Manchester Spatial Framework of October 2016, these being Godley Green, which is expected to provide for 2,350 new homes, and Littlemoss/Ashton Moss, which is expected to provide for 1,980 new homes. It can be anticipated, therefore, that once these strategic locations become substantially developed, there will be scope for provision of small supermarkets of 500 sq.m gross or less to meet the day-to-day convenience needs of the new population.

- 6.26 Thus, having identified some of the locations where there is likely to be some degree of localised deficiency in convenience goods provision, and taking account of the overall surplus of convenience goods floorspace across the survey area as a whole, we turn to our analysis of the potential geographical distribution of the quantitative floorspace need that does arise in the comparison goods sector.

Distribution of Quantitative Need in the Comparison Goods Sector

- 6.27 We have taken a strategic approach in identifying the overall level of net gain to the occupied comparison goods retail stock that is required across the whole of the Survey Area, in the period up to 2036, including in centres such as Eastlands District Centre, Failsworth District Centre, Gorton District Centre, Glossop Town Centre, Romiley District Centre and Houldsworth Square (Reddish) District Centre, which are within the NEMS survey area, but outside the administrative area of Tameside. The next step is to provide some advice on the potential distribution of the net gain in the occupied comparison goods retail stock across Tameside Borough.
- 6.28 We anticipate that the emerging Local Plan may refer to the evaluation of a number of options for distributing the quantitative need that we have identified. Our starting point is to consider the current proportions of comparison goods expenditure retained by stores located within the zones that most closely correspond to the seven town, district and local centres that are the subject of this study. The Principal Town Centre of Ashton-under-Lyne is allocated Zones 1, 2 and 5, whereas the other centres are associated with individual zones. We have also assessed the current proportion of expenditure retained by the centres and stores located in Zones 10 to 15, combined, which are within the survey area, but outside the administrative area of Tameside. This analysis is derived from

Spreadsheet Table 3 of **Volume 2**, as annotated in **Spreadsheet Table 10** of **Volume 2**, and is summarised in **Table 6.3** below.

Table 6.3: Current Shares of Retained Comparison Goods Expenditure

Zones	Sub-Area	Retained Comparison Goods Expenditure £m	Percentage Share (%)
1, 2 and 5	Ashton-under-Lyne	265.8	45.7
3	Mossley	3.8	0.6
4	Stalybridge	16.8	2.9
6	Droylsden	11.8	2.0
7	Hattersley	5.2	0.9
8	Hyde	39.7	6.8
9	Denton	131.8	22.7
Sub-Total for Tameside Metropolitan Borough Council		474.8	81.6
Sub-Total for Area Outside Administrative Area of TMBC		106.9	18.4
Overall Total for the TRLS 2017 Survey Area		581.6	100.0

- 6.29 Table 6.3 confirms that stores and centres within the Ashton-under-Lyne sub-area (i.e. Zones 1, 2 and 5) currently enjoy 45.7 per cent of the aggregate comparison goods expenditure retained by stores and centres within the overall survey area, i.e. £265.8m of the £581.6m retained. Likewise, stores and centres located within the Hyde sub-area (i.e. within Zone 8) currently enjoy a 6.8 per cent share of the aggregate amount of retained expenditure across the survey area as a whole. The same principle applies to the other sub-areas that correlate with each of the centres in Tameside, and Table 6.3 also provides for the combined area covered by Zones 10 to 15, which are within the overall survey area but outside Tameside Borough.
- 6.30 Thus, the initial distribution of the comparison floorspace need in **Table 6.4** is quite simply on the basis of current shares of retained expenditure. This initial distribution in Table 6.4, is in respect of the aggregate comparison goods need of 40,800 sq.m gross generated by the static retention scenario in Spreadsheet Table 5a in Volume 2. Indeed, the final percentage figures in the final column of Table 6.3 are quite simply transported into the penultimate column of Table 6.4. Thus, on this initial basis, the Ashton-under-Lyne sub-area, which currently enjoys 45.7 per cent of the retained expenditure, is given a 45.7 per cent share of the comparison retail need 'cake', so that the Ashton sub-area is

allocated 18,600 sq.m gross (or 45.7 per cent) of the aggregate comparison goods need, under the static retention scenario, of 40,800 sq.m.

Table 6.4: Distribution of the Net Gain in Occupied Comparison Floorspace by Sub-Area, up to 2036, under the Static Retention Scenario, based on Constant Market Shares for Each Sub-Area

Zones	Sub-Area	Current Percentage Share of Retained Expenditure (%)	Net Gain in Occupied Comparison Floorspace Stock (sq.m gross)
1, 2 and 5	Ashton-under-Lyne	45.7	18,600
3	Mossley	0.6	300
4	Stalybridge	2.9	1,200
6	Droylsden	2.0	800
7	Hattersley	0.9	400
8	Hyde	6.8	2,800
9	Denton	22.7	9,200
Sub-Total for Tameside Metropolitan Borough Council		81.6	33,300
Sub-Total for Area Outside Administrative Area of TMBC		18.4	7,500
Overall Total for the TRLS 2017 Survey Area		100.0	40,800

NB: Floorspace figures are rounded to the nearest 100 sq.m gross

- 6.31 However, the current pattern of shares in retained expenditure is unlikely to be fully reflective of the physical potential and qualitative need for comparison goods development in the various sub-areas. For example, Denton's current share of retained expenditure, of 22.7 per cent, is a reflection of the role of the Crown Point Shopping Centre, which is already more or less fully developed, with limited potential for future expansion. Conversely, our analysis of Zonal comparison goods market shares for Ashton, as shown in Figure 5.2 of Volume 2, reveals that it has a comparison goods market share of less than 10 per cent in Zones 7 (Hattersley), 8 (Hyde) and 9 (Denton), and less than 20 per cent in Zones 4 (Stalybridge) and 6 (Droylsden).
- 6.32 It seems clear, therefore, that there is room for improvement in Ashton's performance, as the Principal Town Centre, and that there is merit in planning to increase its share of retained comparison goods expenditure. Likewise, the Zonal market share analysis for Hyde, shown in Figure 5.4 in Volume 2 and our analysis of development opportunity areas

in Figure 7.3, suggests scope to increase Hyde's localised retention of comparison goods expenditure from the residents of Zone 8.

- 6.33 There is also scope to increase the shares of retained comparison goods expenditure by the three District Centres in Stalybridge, Droylsden and Hattersley, all of which have development opportunity areas identified in Section 7 of our report. Finally, there is merit in seeking to plan for a very small increase in Mossley Local Centre's market share.
- 6.34 Thus, a reasonable alternative distribution, which would increase the market shares for Ashton and Hyde Town Centres; the three District Centres in Stalybridge, Droylsden and Hattersley; and Mossley Local Centre, is set out in **Table 6.5**. However, this alternative scenario sees a reduction in the share allocated to Denton Town Centre, given that its existing market share is very much influenced by Crown Point Shopping Centre, which is almost fully developed. This alternative distribution also sees some clawback/attraction of trade from residents in Zones 10 to 15, which lie outside the administrative area of Tameside Council, albeit at the expense of some of the centres located in Zones 10 to 15.

Table 6.5: Reasonable Alternative Distribution of the Net Gain in Occupied Comparison Floorspace by Sub-Area, up to 2036, under the Static Retention Scenario, but based on Planned Variations to Market Shares

Zones	Sub-Area	Reasonable Alternative Planned Percentage Share of Retained Expenditure (%)	Net Gain in Occupied Comparison Floorspace Stock (sq.m gross)
1, 2 and 5	Ashton-under-Lyne	50.0	20,400
3	Mossley	1.0	400
4	Stalybridge	4.0	1,600
6	Droylsden	4.0	1,600
7	Hattersley	4.0	1,600
8	Hyde	12.0	4,900
9	Denton	10.0	4,100
Sub-Total for Tameside Metropolitan Borough Council		85.0	34,600
Sub-Total for Area Outside Administrative Area of TMBC		15.0	6,100
Overall Total for the TRLS 2017 Survey Area		100.0	40,800

NB: Floorspace figures are rounded to the nearest 100 sq.m gross

6.35 **Table 6.6** sets out a comparison of the distribution of the comparison goods floorspace need, under current and reasonable alternative planned shares of retained of expenditure, and under the static retention scenario.

Table 6.6: Comparison of Distribution of Comparison Goods Floorspace Need up to 2036 Under Current and Reasonable Alternative Planned Scenarios

Zones	Sub-Area	Current Percentage Share of Retained Expenditure (%)	Net Gain in Occupied Comparison Floorspace Stock (sq.m gross)	Reasonable Alternative Planned Percentage Share of Retained Expenditure (%)	Net Gain in Occupied Comparison Floorspace Stock (sq.m gross)
1, 2 and 5	Ashton-under-Lyne	45.7	18,600	50.0	20,400
3	Mossley	0.6	300	1.0	400
4	Stalybridge	2.9	1,200	4.0	1,600
6	Droylsden	2.0	800	4.0	1,600
7	Hattersley	0.9	400	4.0	1,600
8	Hyde	6.8	2,800	12.0	4,900
9	Denton	22.7	9,200	10.0	4,100
1 to 9	Sub-Total for Tameside Metropolitan Borough Council	81.6	33,300	85.0	34,600
10 to 15	Sub-Total for Area Outside Administrative Area of TMBC	18.4	7,500	15.0	6,100
1 to 15	Overall Total for the TRLS 2017 Survey Area	100.0	40,800	100.0	40,800

NB: Floorspace figures are rounded to the nearest 100 sq.m gross

6.36 The choice of distribution strategy for retail development in the comparison goods sector that is most appropriate in Tameside will depend on a range of factors, including:

- an examination of the physical and environmental potential of the existing town, district and local centres to provide for appropriate retail, or retail-led mixed use development;
- the potential for the development industry to progress viable retail redevelopment in locations which meets the requirements of the sequential approach;
- the strength of existing and latent demand from the retail industry to occupy premises in each of the Sub-Areas; and
- the distribution of population growth associated with the potential strategic allocations being put forward in the October 2016 Draft for Consultation edition of

the GMSF, which include Godley Green, near Hyde and Hattersley (Zones 8 and 7), and Littlemoss/Ashton Moss, near Droylsden and Ashton (Zones 6 and 2).

Qualitative Need in the Retail and Leisure Sectors

6.37 Our assessment of qualitative needs in the retail and leisure sectors in Tameside derives from a number of streams of work, as follows:

- our consultations with key stakeholders;
- the survey of pedestrians in Ashton-under-Lyne, Denton, Droylsden, Hyde and Stalybridge, as reported in **Volume 3** of our report;
- our assessment of recent changes in the retail and leisure industries, as set out in Section 3 of our report;
- our assessment of the vitality and viability of the various centres, as set out in Section 4 of our report;
- the analysis of shopping and leisure patterns, set out in Section 5; and
- our own fieldwork.

Ashton-under-Lyne Principal Town Centre

6.38 For Ashton-under-Lyne, as the Principal Town Centre, we have grouped our assessment of qualitative needs under seven headings, as follows:

- i) the food and drink offer and the evening economy;
- ii) commercial leisure;
- iii) comparison sector retailer representation in the middle and upper-middle sectors;
- iv) modern convenience stores;
- v) office employment opportunities;
- vi) residential accommodation; and
- vii) education.

The Food and Drink Offer and the Evening Economy

- 6.39 Our consultations with key stakeholders, the survey of pedestrians undertaken by NEMS, and our analysis of shopping and leisure patterns suggest that that evening economy in Ashton-under-Lyne Town Centre is weak. Indeed, the latest Experian/Goad survey identifies very few restaurants of quality, with the most notable exceptions being the Italian restaurants Puccini and Pinocchio, Lilly's Patisserie and Bistro, Rezaurante Ghassemis, the Jade Garden Chinese restaurant and the Indian Ocean restaurant.
- 6.40 It is hardly surprising, therefore, that the NEMS telephone survey identifies just 15 per cent of the respondents as citing Ashton-under-Lyne (including the Town Centre, Snipe Retail Park and Ashton Moss Leisure Park) as their most frequently visited location for dining out at a restaurant or café. Indeed, Ashton-under-Lyne achieves restaurant market shares of over 45 per cent only amongst residents of Zones 1 and 2. Outside of this immediate catchment area, Ashton-under-Lyne's restaurant market share reaches 30 per cent in Zones 3 (Mossley) and 5 (Dukinfield), but falls to below 25 per cent for residents of Zone 6 (Droylsden) and to less than 20 per cent for residents of Zone 4 (Stalybridge).
- 6.41 By far the most important destination for visits to restaurants, as might be expected, is Manchester City Centre, which is cited by 26 per cent of the NEMS telephone survey respondents. Glossop Town Centre also attracts a significant proportion of the restaurant visits by residents of Zones 13 (High Peak) and 7 (Hattersley). Likewise, Upper Mill is an important restaurant destination for the residents of Zone 12 (Rural Oldham); Stockport is an important restaurant destination for the residents of Zones 14 (Romiley/Bredbury) and 15 (Reddish); and Oldham Town Centre is an important restaurant destination for the residents of Zone 12 (Rural Oldham).
- 6.42 Ashton-under-Lyne Town Centre's role as a destination for visits to pubs and bars is very much confined to residents of its immediate catchment area, with pubs and bars having market shares of just over 50 per cent for residents of Zones 1 and 2, but less than 10 per cent in all other zones. Thus, the most important destinations for pubs and bars are Manchester City Centre (23 per cent), Glossop Town Centre (10 per cent), Stockport Town Centre (6 per cent) and Denton Town Centre (6 per cent).

Commercial Leisure

- 6.43 Ashton-under-Lyne Town Centre is distinctly lacking in commercial leisure facilities, and this is clearly a reflection of the popularity of Cineworld at Ashton Leisure Park, which is cited as the most frequent cinema destination by over three quarters of the residents in all of the nine NEMS survey zones within the administrative area of Tameside. Likewise, the Hollywood Bowl at the Ashton Leisure Park is by far the most important destination for indoor entertainment, being cited by over two thirds of the NEMS survey respondents. Thus, the only commercial leisure facilities within, or close to, Ashton Town Centre are Gala Bingo on Wellington Road, Bizzy Bouncers at Turner Street and the Skate Station on Boodle Street. Indeed, the Town Centre contains a vacant single-screen cinema and a vacant theatre, the Grade II listed Tameside Hippodrome, both of which have been vacant for some time.

Comparison Sector Retailer Representation in the Middle and Upper-Middle Sectors

- 6.44 Ashton-under-Lyne Principal Town Centre's retail offer continues to be dominated by the mid to lower end sectors of the market, and the NEMS telephone survey identifies substantial leakage of comparison goods expenditure to Manchester City Centre and Stockport Town Centre. Thus, in order to identify the types of store that are missing, we have undertaken an analysis of a basket of 100 multiple and service traders that could expect to be represented in a Principal Town Centre such as Ashton-under-Lyne (**item 9 of Volume 2**) and found representation from just 42 of these 100 traders. Retailers which do not have a standalone shop in Ashton Town Centre, and are notable by their absence, include those identified earlier in our report, in Table 4.4.
- 6.45 However, many of these missing retailers will typically have a floorspace requirement in the range 465 sq.m to 930 sq.m gross. In contrast, our analysis of vacancies in Ashton-under-Lyne has revealed that the average size of the 65 vacant units is just 163 sq.m gross, and that there are only three vacant units between 500 sq.m and 1,000 sq.m. There is, therefore, a qualitative need to provide for some modern retail accommodation, so as to help in attracting some of these missing retailers, with the most obvious short-

term opportunity being the development site located between the new Interchange and the Prince of Orange Public House, as shown later in Figure 7.1 in Section 7.

Modern Convenience Stores

- 6.46 Ashton is well provided for in terms of medium and large-sized food supermarkets, including Sainsbury's, ASDA, M&S, Aldi and Lidl. However, none of these food operators are within the Primary Shopping Area, and there are no modern convenience stores within, or on the edge of, Ashton's Primary Shopping Area that fall under the 'Tesco Express' and 'Sainsbury's Local' fascia.

Office Employment Opportunities

- 6.47 There is a clear economic and qualitative need for further office development opportunities in Ashton-under-Lyne Town Centre, with offices being one of the 'main town centre uses' in the definition provided in Annex 2 of the NPPF. Thus, we would emphasise the importance of developments such as 1 Henry Square, which is the first of a series of high quality office buildings to be completed in the new digital media quarter in St Petersfield, with this development envisaged to comprise over 37,000 sq.m of offices, shops, restaurants and apartments. The Henry Square development has also provided for a new Enterprise Centre for Tameside College.

Residential Accommodation

- 6.48 The influential reports discussed in Section 3 have highlighted the need for further diversification of uses within town centres, and the need to increase the population within and adjacent to such centres, so as to promote sustainability and improve customer bases. In Ashton, there is a qualitative need to promote further housing development, although there is a need to balance this with commercial ambitions and care should be taken, for example, not to dilute the office quarter being brought forward at St Petersfield.

Education

- 6.49 Finally, we would like to highlight the huge importance to the future vitality and viability of Ashton-under-Lyne Town Centre of the ongoing Vision Tameside initiatives. Phase 1

has already seen the delivery of the Advanced Learning Centre known as Clarendon Sixth Form College, which provides for 600 students and opened its doors in October 2015. Our consultations suggest that the opening of the College has already provided a boost for lunchtime spending in the Town Centre, even if this is only for students to have a coffee.

- 6.50 Furthermore, the passage of a further 12 months saw the opening, in October 2016, of the Advanced Engineering and Technology Centre at the Beaufort Road campus of Tameside College, providing for approximately 960 students, half of which fall into the “mature” category, with many attending evening classes. Moreover, the final component of the Vision Tameside initiative is already under construction at Market Square, where the Advanced Skills Centre is currently being constructed as part of Phase 2, which will also provide for new accommodation for Tameside Council.

Hyde Town Centre

- 6.51 Hyde Town Centre serves quite a localised function, focussing very much on the requirements of the residents of the urban area of Hyde, whilst also drawing in trade from residents of the Hattersley area, pending the development of a new district centre in Hattersley. The Primary Shopping Area in Hyde is focused very much around Clarendon Square, the Market, Market Place and Market Street. However, the Experian/Goad database reveals that many of the retail units in Hyde are small, with the average size of a unit being 198 sq.m. Of particular significance is the limited size of the comparison offer, particularly in the fashion sector.
- 6.52 Indeed, Hyde Town Centre functions very much as a centre for convenience shopping – anchored by the Asda and Morrisons stores, which are supported by a very busy Aldi – and as a service centre for the immediate hinterland. Our consultations suggest, however, that the higher income residents within the Hyde catchment (who tend to live in Gee Cross, Woodley, Werneth Low and Godley) tend to shop further afield for comparison shopping in locations such as Glossop Town Centre and the out-of-centre retail parks at Cheadle Royal and Handforth Dean.

- 6.53 Perhaps the greatest qualitative need in Hyde is to improve the evening economy. Our consultations suggest that the town centre lacks vibrancy in the evenings, with one consultee going as far as to say that ‘...*everything shuts at 5.30pm.*’ Nevertheless, Hyde Town Centre contains a number of popular Indian restaurants – Maha, Adnan’s and Jaipur – and a quality Italian restaurant called Pagliacci. As a consequence, the NEMS survey found that 19 per cent of the residents of Zone 8 chose Hyde Town Centre as their most frequently visited location for a restaurant, with Hyde Town Centre also attracting an 11 per cent share of the restaurant spend of the residents of Zone 7 (Hattersley). However, there is a considerable leakage of restaurant expenditure from the residents of Zone 8 (Hyde) to Manchester City Centre, which has a 32 per cent market share, and with Glossop Town Centre achieving the highest restaurant market share from the residents of Zone 7 (Hattersley).
- 6.54 Similarly, there is a significant leakage of expenditure in pubs and bars to locations in Manchester City Centre, which is the most frequent destination for 36 per cent of the residents of Zone 8.
- 6.55 So far as commercial leisure is concerned, residents of the Hyde area are heavily dependent on the Cineworld at Ashton Leisure Park, in terms of cinema visits, and the Hollywood Bowl facility, which is also at the Ashton Leisure Park. However, whilst Hyde Town Centre would benefit if it could attract a new leisure operator, commercial realities suggest that the chance of success in attracting such an operator is limited.
- 6.56 The other main qualitative gap in Hyde Town Centre relates to the existing stock of office accommodation, much of which dates from the 1960s, 70s and 80s. Thus, we note the potential of the Eastern and Western Gateway sites identified in 2011 in the Draft Hyde Town Centre Supplementary Planning Document.

Denton Town Centre

- 6.57 The retail function of Denton Town Centre has been transformed by the Crown Point Retail Park, so that Denton Town Centre has a comparison goods market share in excess of 10 per cent in six of the nine zones located within the administrative area of Tameside.

However, the traditional core of Denton is under-represented in the comparison goods sector and did not contain any of the top 20 retailers identified by Focus at the time of the WYG Tameside Retail Study of May 2010. In contrast, current representation at Crown Point includes Boots, Clarks, Game, H&M, Holland & Barrett, JD Sports, Mothercare, New Look, River Island, Sports Direct, The Works, TK Maxx and Topshop.

- 6.58 As a consequence, a large proportion of the units within the traditional part of the town centre are in non-A1 uses and the traditional part of the town centre has developed a strong restaurant offer, including a number of Italian, Turkish, Indian, Thai and Spanish restaurants, so that the evening economy is much stronger than in Hyde. It is not surprising, therefore, that Denton Town Centre is the most popular destination for visits to restaurants amongst residents of Zone 9 of the NEMS survey, for which the restaurant market share is 34 per cent, with leakage to Manchester City Centre being limited to 12 per cent. Likewise, the NEMS survey confirms that Denton Town Centre is by far the most frequently visited location for visits to pubs and bars for residents of Zone 9, with facilities in Denton having a 39 per cent market share and with leakage to Manchester City limited to 19 per cent.
- 6.59 There is no qualitative gap in convenience goods provision, with the Morrisons and Lidl stores both appearing to be popular and trading well.

Stalybridge District Centre

- 6.60 Stalybridge provides for limited comparison goods function, in line with its status as a district centre. We would observe, however, that the vacant units in Stalybridge, though plentiful, have an average size of just 93 sq.m, which is far too small for the requirements of most modern comparison goods retailers. Nevertheless, there is no obvious qualitative gap in the convenience offer, with Stalybridge well served by Tesco and Aldi.
- 6.61 The overwhelming qualitative gap/opportunity in Stalybridge relates to the scope for significant levels of residential development, recent examples of which include:
- the mixed-use development by Urban Splash known as Pattern House, Longlands, which provides for 104 new build and conversion residential units in a one- and two-

bed format, together with commercial floorspace of 1,750 sq.m gross to provide for a range of A1/A2/A3/A4/B1/D1/D2 uses;

- the development, by New Charter Housing Group, at Summers Quay, Armentieres Square, which will provide 67 one and two-bed luxury apartments for private rent; and
- the development by Rowlinson Construction on behalf of Mosscares Housing Group, on Castle Street, which will provide for a three-storey block containing 38 one- and two-bed apartments for affordable rent, and a second parcel for a further 18 affordable residential units.

6.62 Stalybridge has a significant advantage as a residential location, in that it is served by train services both to Leeds and to Manchester, so that it is likely to be a popular location for commuters.

6.63 Stalybridge used to have a thriving evening economy, to such an extent that it was given the nickname “Staly Vegas.” However, our consultations suggest that the district centre has lost much of its popularity as a food and drink destination, partly because of disturbances and neighbour nuisance issues. Nevertheless, the NEMS survey confirms that Stalybridge is the most frequently visited location for pubs and bars on the part of 28 per cent of the residents of Zone 4 and that Stalybridge also attracts residents from Zone 2 (Ashton North, 13 per cent), Zone 7 (Hattersley, 11 per cent) and Zone 5 (Dukinfield, 10 per cent).

Droylsden District Centre

6.64 In Droylsden, the urgent qualitative need is to secure redevelopment, reconfiguration and refurbishment of the old part of the shopping centre, which we understand is available for acquisition. However, there is also a qualitative need to provide more choice in the convenience goods sector, with Droylsden overly dominated by Tesco, which is not satisfactorily integrated with the remainder of the district centre. Indeed, the only solution would seem to be to punch an access through the Greenside Lane retail units, by taking out one of the units.

- 6.65 Droylsden has many opportunities for increasing its residential base, with major ongoing residential-led mixed-use development around the marina, and with planning permission having been granted to DeTrafford Estates for the Victoria Mills redevelopment, which will provide for 131 new dwellings, together with commercial, retail and community space in 14 development blocks. Metrolink means that Droylsden has the opportunity to become an increasingly popular residential location for students, young professionals and families, and the increase in population should help to sustain the future vitality and viability of the district centre, which currently suffers from a high level of vacant units.
- 6.66 There are a range of Indian, Italian and Spanish restaurants in Droylsden, but the NEMS survey suggests that the district centre suffers from its easy proximity to Manchester, with 46 per cent citing Manchester City Centre as the most frequent destination for visits to restaurants, whereas the district centre itself has a restaurant market share of just 8 per cent amongst the residents of Zone 6. Likewise, Manchester City Centre is the most frequently cited destination for pubs and bars of 46 per cent of the residents of Zone 6. Indeed, in many ways, Droylsden is closely related with East Manchester.

Hattersley District Centre

- 6.67 The qualitative need in Hattersley focuses, quite simply, on the task of creating a new district centre. At present, the emerging centre comprises the seemingly under-performing Tesco food superstore, together with The Hub, which includes a community centre, a library, a youth club, a police post and a café, together with office accommodation for the Peak Valley Housing Association and Tameside Council. As consequence, The Hub has helped to create a hive of community activity.
- 6.68 The southern part of the emerging district centre is the subject of a reserved matters permission for a scheme by Maple Grove Developments (ref: 18/00015/REM), which comprises a foodstore of 1,794 sq.m gross (understood to be targeted at Lidl); nine further units intended for occupiers in Classes A1 to A5, totalling 3,716 sq.m gross; and a Class A3/A5 drive-through restaurant unit of 167 sq.m gross. This planning permission does provide for some small units towards the northern part of the site, but the urgent

need is for the two halves of the district centre to be integrated, so that they become mutually reinforcing. This is best achieved by improving the public realm, improved linkages between the northern and southern parts of the District Centre, and through enhancement of the commercial frontages.

Mossley Local Centre

- 6.69 Mossley is a popular residential settlement that has the benefit of rail services to Manchester Piccadilly. Mossley Local Centre is the most frequently cited location for visits to pubs and bars on the part of the residents of Zone 3, with a market share for these residents of 49 per cent. However, Mossley performs less strongly in relation to visits to restaurants, with Ashton-under-Lyne Town Centre proving to be a significant competitor.
- 6.70 Overall, we can find no obvious qualitative needs in Mossley and it would seem to be a self-sustaining local centre. We note, however, that the rail station and post office are located away from the Local Centre, in what is known locally as 'Bottom Mossley'. Nevertheless, the latter has no status and we consider that it remains appropriate that the Local Centre be defined on the basis of 'Top Mossley'.

Overall Conclusions in Relation to Retail and Leisure Needs

Convenience Goods Sector

- 6.71 In the convenience goods sector, our findings suggest that there will be a surplus in the overall stock of floorspace, at least until up to 2026. Indeed, even in the period up to 2036, and under the uplift in retention scenario, the quantitative need across the survey area as whole is just 3,700 sq.m gross.
- 6.72 This finding does not mean that there should be no foodstore development over the next ten years, because there are localised gaps in convenience goods provision. For example, there are low localised retention levels in the Mossley, Droylsden and Hattersley Zones, albeit that the localised retention level in Hattersley will improve once the emerging District Centre is completed and established.

- 6.73 There is also likely to be some qualitative need in the convenience sector arising from the strategic allocations being mooted in the draft GMSF, at Godley Green and at Littlemoss/Ashton Moss.

Commercial Leisure Sector

- 6.74 So far as the commercial leisure sector is concerned, there is no established methodology for assessing quantitative need, and the leisure operators themselves will determine whether any viable opportunities exist. In Tameside, however, it is clear that Ashton Moss is the overwhelmingly dominant commercial leisure location, providing for the Cineworld multiplex, which attracts 70 per cent of cinema visits amongst residents of the survey area, and Hollywood Bowl, which accounts for 68 per cent of the respondents who visit indoor entertainment facilities.
- 6.75 The most important destination for spending on leisure services, however, is the food and beverage sub-sector, which consistently accounts for between 53 per cent and 56 per cent of such expenditure. It is important to emphasise, therefore, that there is a serious qualitative deficiency in Ashton Town Centre, where the quality of the food and beverage offer is very weak.

Comparison Goods Sector

- 6.76 In the comparison goods retail sector, we have identified a requirement for a significant net gain in the occupied stock of floorspace in the period up to 2036. It is important to emphasise, however, that the exponential nature of comparison goods expenditure growth means that almost two thirds of the quantitative need that we have identified in the twenty year period, from 2016 to 2036, occurs in the second half of the forecasting period, from 2026 to 2036. This is made clear in the summary of quantitative need provided in Table 6.1 for the survey area as a whole, which goes beyond Tameside.
- 6.77 With this exponential point in mind, we have identified a quantitative need, up to 2036, under the static retention scenario, for a net gain in the occupied stock of comparison goods floorspace, within Tameside Borough, that is in the range 33,300 sq.m to 34,600

sq.m, as set out in Tables 6.4, 6.5 and 6.6. However, as explained in Paragraph 6.13, the gains in the occupied stock can arise from a combination of new developments, refurbishments, reconfigurations and reductions in vacant floorspace, but having allowed, also, for demolitions and newly vacant properties, in order to arrive at the net gain floorspace figures cited in Tables 6.1, 6.4, 6.5 and 6.6.

- 6.78 Thus, in order to set the Borough-wide comparison floorspace need range, of 33,300 sq.m to 34,600 sq.m, in its proper context, we set out, in **Table 6.7**, a summary of the vacant floorspace stock that existed in 2017, as provided by Experian/Goad. For the five centres covered by the Goad surveys, the vacant stock amounted to 25,960 sq.m, so that it is clear that a reduction in vacancies can make some contribution to the comparison sector needs that we have identified.

Table 6.7: Vacant Floorspace Stock in Tameside's Town and District Centres in 2017

Centre	Vacant floorspace in 2017 (sq.m)
Ashton	10,660
Hyde	7,695
Denton	2,370
Stalybridge	2,695
Droylsden	2,540
TOTAL	25,960

Source: Experian/Goad surveys

- 6.79 The distribution of the quantitative need we have identified in the comparison sector will reflect the factors identified in Paragraph 6.36 above. Nevertheless, having taking account of the exponential nature of the expenditure growth and the distribution of the stock of vacant premises, we have concluded that it would be reasonable for the emerging Local Plan to seek to provide for the following net gains in the occupied stock of comparison goods floorspace the final column of Table 6.6 and repeated below:
- 20,400 sq.m gross within, and on the edge of, Ashton Principal Town Centre;
 - 4,900 sq.m gross within, and on the edge of, Hyde Town Centre;
 - 4,100 sq.m gross within, and on the edge of, Denton Town Centre;

- 1,600 sq.m gross within, and on the edge of, each of the three District Centres of Stalybridge, Droylsden and Hattersley; and
- 400 sq.m gross within, and on the edge of, Mossley Local Centre.

6.80 Thus, bearing these quantitative and qualitative needs and floorspace requirements in mind, particularly in the comparison goods sector, we now turn to our recommendations with respect to the definition of the Primary Shopping Areas in each of the main centres and their overall Town Centre Boundaries. These boundary definition plans additionally indicate potential development opportunity areas that reflect our fieldwork and our consultations with key consultees and officers of the Council.

7 RECOMMENDATIONS FOR OVERALL TOWN CENTRE BOUNDARIES AND PRIMARY SHOPPING AREAS

Introduction

- 7.1 In this Section, we put forward our recommendations with respect to the definition of the overall ‘*extent of the town centres*’ and their ‘*primary shopping areas*’, as required by Paragraph 85 b) of the new National Planning Policy Framework (the NPPF). These recommendations have been informed by: the definitions set out in the Annex 2 Glossary of the new NPPF; our own fieldwork; consultations with key stakeholders; Experian’s Goad mapping and retail store/service user listings; and discussion with officers of the Council. We have taken into account, also, the existing definitions for Town Centre Boundaries set out on the Proposals Map of the Tameside Unitary Development Plan (the UDP), adopted in November 2004, and the Primary Shopping Areas (PSAs) shown on the Proposals Map for Ashton-under-Lyne and Hyde Town Centres.
- 7.2 In Section 6, we set out the further requirements of Paragraph 85 of the NPPF, insofar as they relate to the allocation of sites in development plans and the need to keep town centre boundaries under review. As a consequence, our boundary definition plans also indicate potential development opportunity areas which are in need of diversification and improvement, based on our fieldwork and close liaison with officers of the Council.
- 7.3 We note, however, that neither the NPPF, nor the Planning Practice Guidance (the PPG), specifically refer to the need to consider whether there is a requirement for enlargement or contraction of the PSAs, although, by necessity, this is a critical consideration in seeking to plan for retail needs.
- 7.4 Furthermore, the definition of PSAs also has important ramifications for the application of the sequential test. For retail development proposals, the definition of ‘*edge of centre*’ relates to ‘*a location that is well-connected to, and up to 300m from, the primary shopping area*’. In contrast, for all other main town centre uses, except offices, the definition of ‘*edge of centre*’ is ‘*...a location within 300m of a town centre boundary*’. For

offices, the definition of ‘*edge of centre*’ is ‘...*locations outside the town centre but within 500m of a public transport interchange*’.

- 7.5 This Section of our report also provides a set of plans that indicate our recommendations with respect to primary and secondary frontages. Although Paragraph 85 of the new NPPF does not require the separate identification of primary and secondary frontages, we nevertheless include them in our recommendations, because they may be of assistance to the Council in interpreting development management policies in relation to proposals for hot food takeaways (Class A5) and other non-A1 uses within the town centres.
- 7.6 Thus, with these national policy requirements in mind, we turn next to the NPPF definitions, prior to setting out our recommendations with respect to each of the seven main centres in Tameside.

NPPF Definitions

- 7.7 The Annex 2 Glossary of the NPPF states that the ‘**town centre**’ will be an:
- ‘Area defined on the local authority’s policies map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres, but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in the development plan, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.’*
- 7.8 The Annex 2 Glossary of the NPPF defines the term ‘**primary shopping area**’ simply as a:
- ‘Defined area where retail development is concentrated’.*

Ashton-under-Lyne Town Centre

Overall Town Centre Boundary

- 7.9 We recommend a substantial shrinkage in the geographical area covered by the overall boundary for Ashton Town Centre, compared to the boundary shown on the Proposals

Map of the adopted UDP. Thus, we consider that the Sainsbury's and M&S stores at Ashton Moss, together with their car parks and associated road infrastructure, do not form part of the town centre. Similarly, we consider that the substantial area of land between Park Parade and the River Tame, to the south, and the area covered by the Memorial Gardens and the Albion United Reformed Church, to the east, do not form part of the town centre. Thus, our overall recommended boundary for Ashton-under-Lyne Town Centre is shown edged in red in **Figure 7.1**.

Primary Shopping Area (PSA)

7.10 In Ashton-under-Lyne, we recommend a number of minor additions to the Primary Shopping Area (PSA) identified on the Proposals Map of the UDP, so as to include:

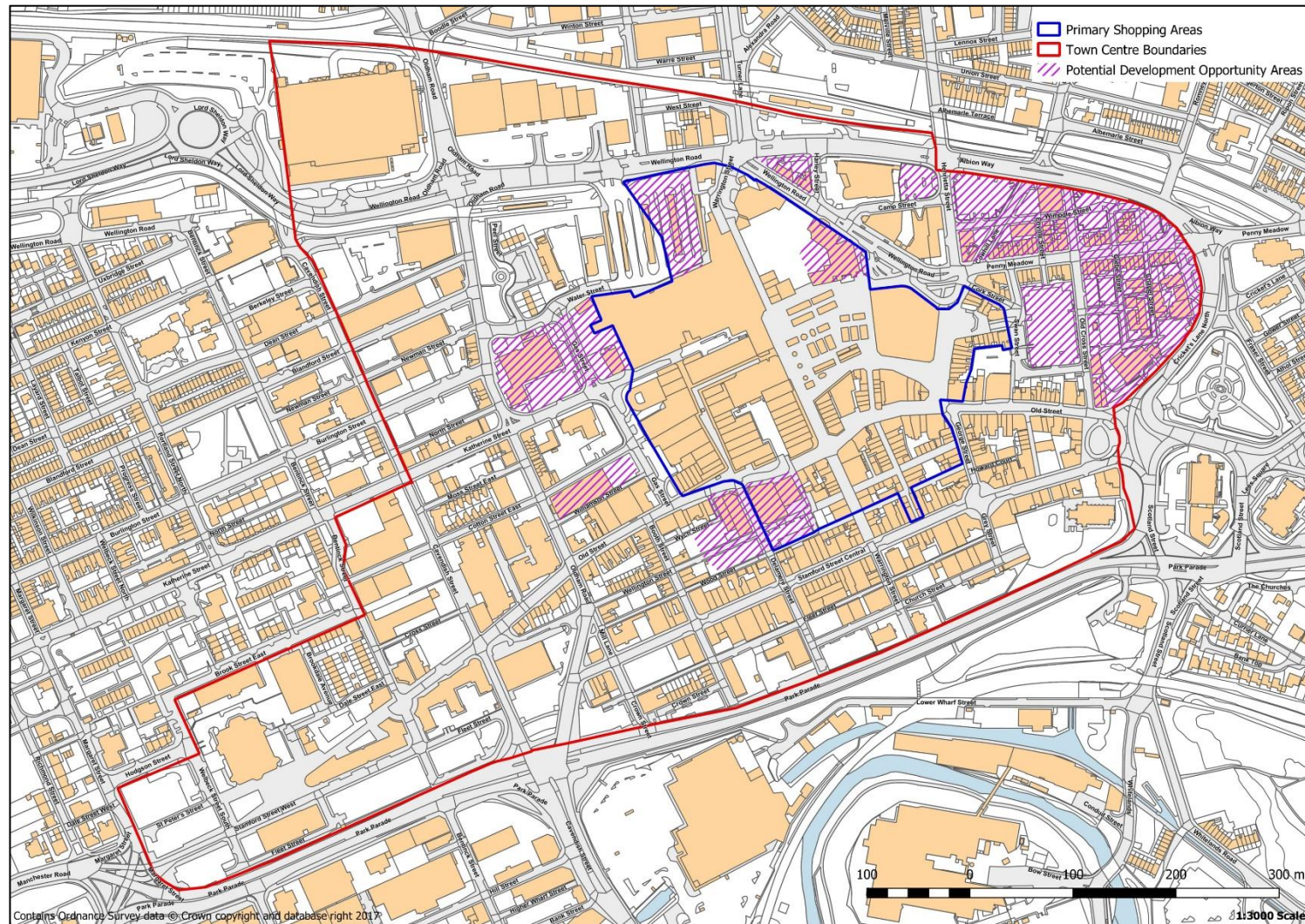
- i) the development opportunity site to the east of the new transport interchange;
- ii) an area off Wellington Road that will help to link Clarendon Sixth Form College with the Markets; and
- iii) an area to the east of Ashton Market which links to Swan Street.

7.11 We have also identified an area to the south of Old Street, to the east of Delamere Street and to the north of Wood Street that we consider should be included within the PSA. Thus, our recommended PSA is shown edged in blue in Figure 7.1; it contains the whole of the PSA identified in the UDP, together with the minor additions referred to above.

Potential Development Opportunity Areas

7.12 Based on our fieldwork, and through close liaison with the Council's officers, we have identified a number of potential development opportunity areas within Ashton's town centre boundary which are in need of diversification and improvement, some of which are within the Primary Shopping Area (PSA). These are shown as the hashed areas in Figure 7.1; they are in addition to the Development Opportunity Areas previously identified under Policy E2 of the adopted UDP, with significant progress having been made, in particular, in relation to the Development Opportunity Areas at St Petersfield, E2 (1), and at Portland Basin, E2 (2).

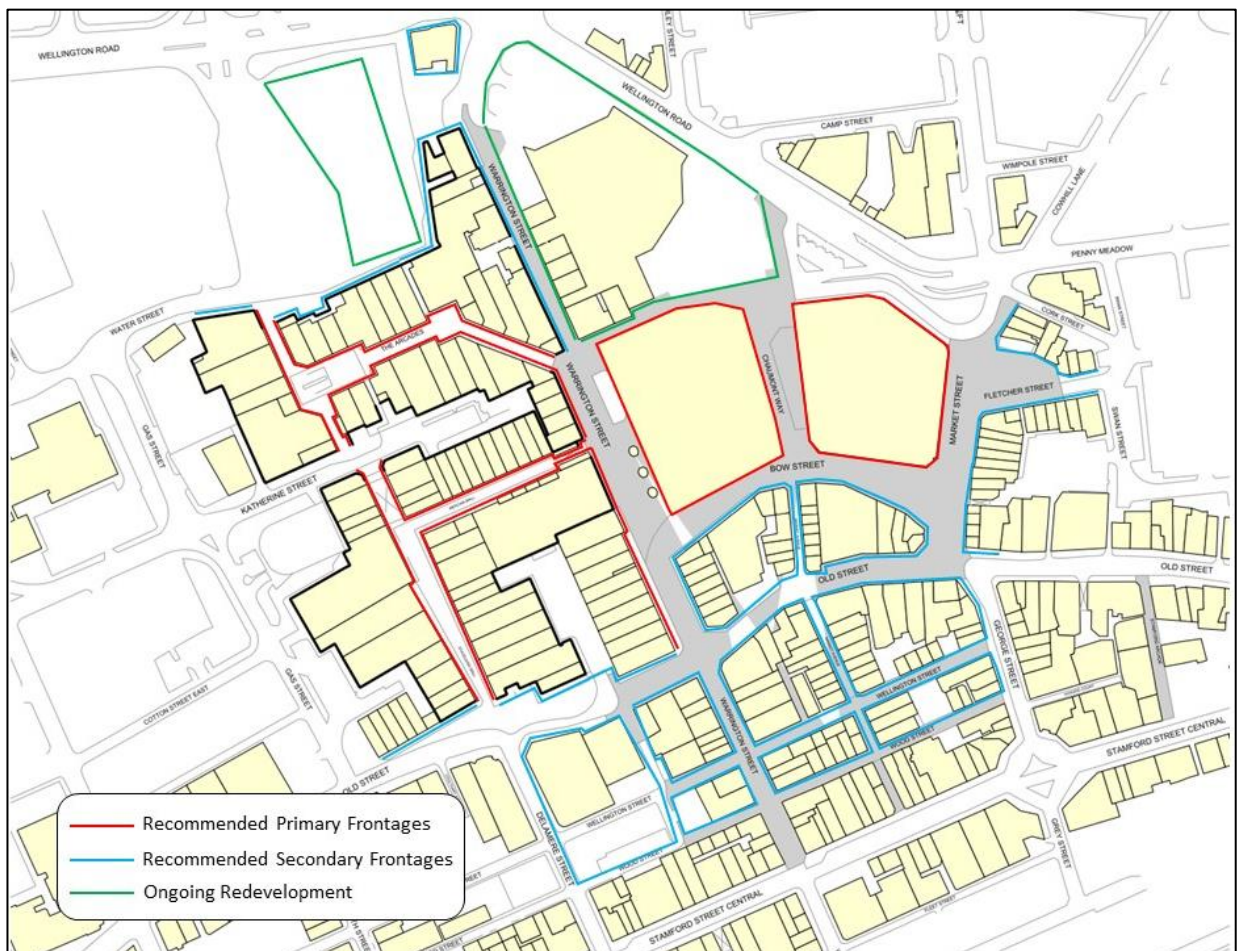
Figure 7.1: Recommended Town Centre Boundary and Primary Shopping Area for Ashton, and Potential Development Opportunity Areas



Primary and Secondary Frontages in Ashton-under-Lyne

- 7.13 Unlike its predecessor, the new NPPF does not require identification of primary and secondary frontages, but we had already undertaken the necessary research work before the new NPPF was published. Thus, given that the identification of primary and secondary frontages may assist the Council in interpreting development management policies in relation to proposals for hot food takeaways (Class A5) and other non-A1 uses, we set out our recommendations with respect to the definition of the primary and secondary shopping frontages within the Primary Shopping Area in **Figure 7.2**.

Figure 7.2: Recommended Primary and Secondary Frontages within Ashton's Primary Shopping Area



Hyde Town Centre

Overall Town Centre Boundary

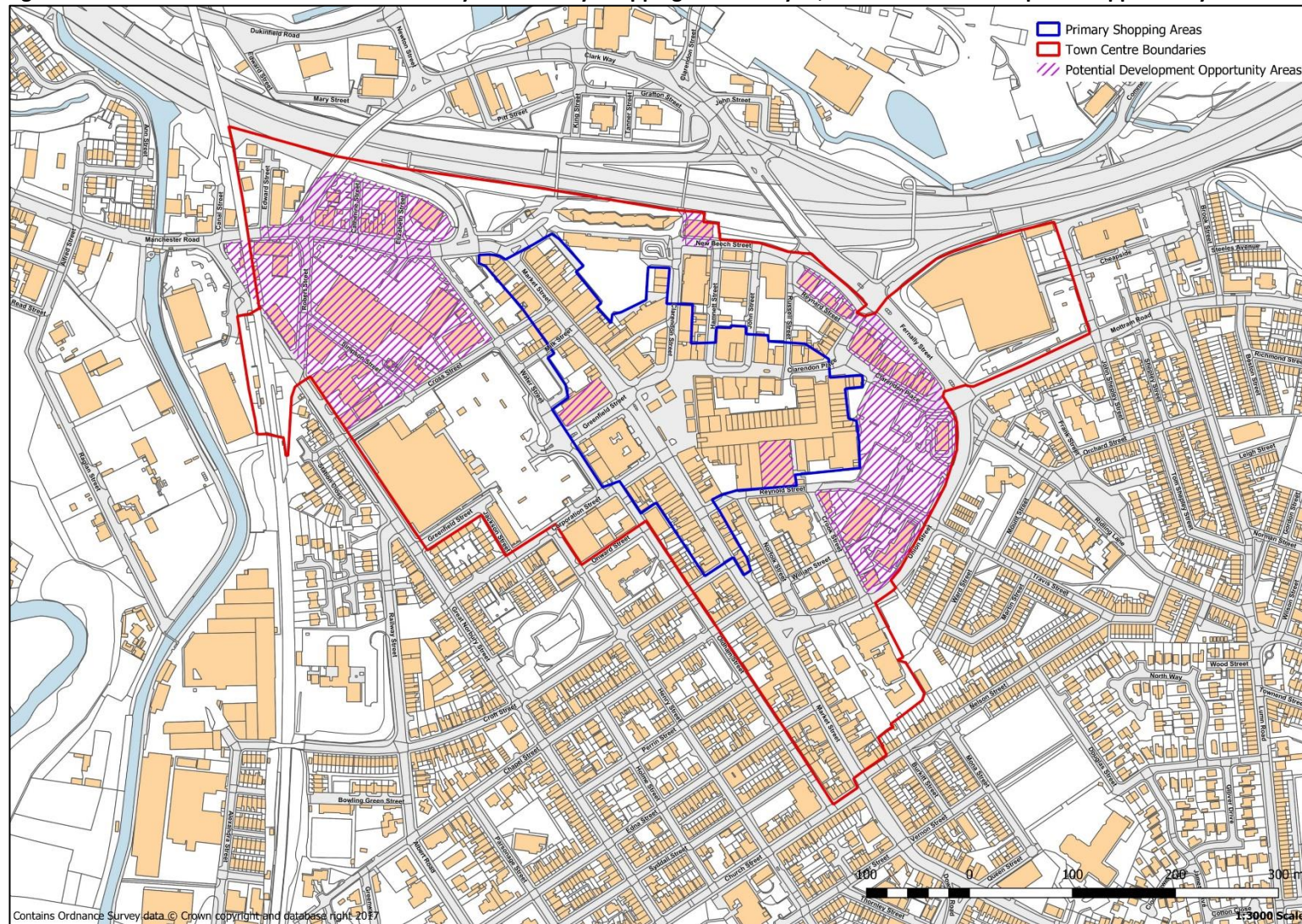
7.14 As is the case in Ashton, we recommend a substantial contraction in the geographical extent of Hyde Town Centre compared to that shown on the UDP Proposals Map. The areas recommended for exclusion include:

- i) a large area of land to the south of the motorway, to the west of the railway line and to the west of Alexandra Street;
- ii) the area of land between Clark Way and the bus station;
- iii) the Morrisons Car Park and petrol station;
- iv) the southern end of Market Street below its intersection with Church Street;
- v) the Anchor-Hatton Grange Care Home; and
- vi) the residential development between Corporation Street and Greenfield Street.

Primary Shopping Area

7.15 Despite our recommended contraction of the overall town centre boundary for Hyde, we recommend a significant extension to its Primary Shopping Area (PSA), compared to that shown on the Proposals Map of the Tameside UDP, as shown edged in blue in **Figure 7.3**. The UDP's PSA focusses, almost exclusively, on the Clarendon Square Shopping Centre, whereas we consider that the frontages to Market Street, between the bus station and Croft Street, should form part of the PSA, as should the properties facing Clarendon Street and Market Place. We agree that the frontages to Market Street, Clarendon Street and north side of Market Place are secondary, but we consider that they should be in the PSA because they are closely related to the Market and Clarendon Square.

Figure 7.3: Recommended Town Centre Boundary and Primary Shopping Area for Hyde, and Potential Development Opportunity Areas

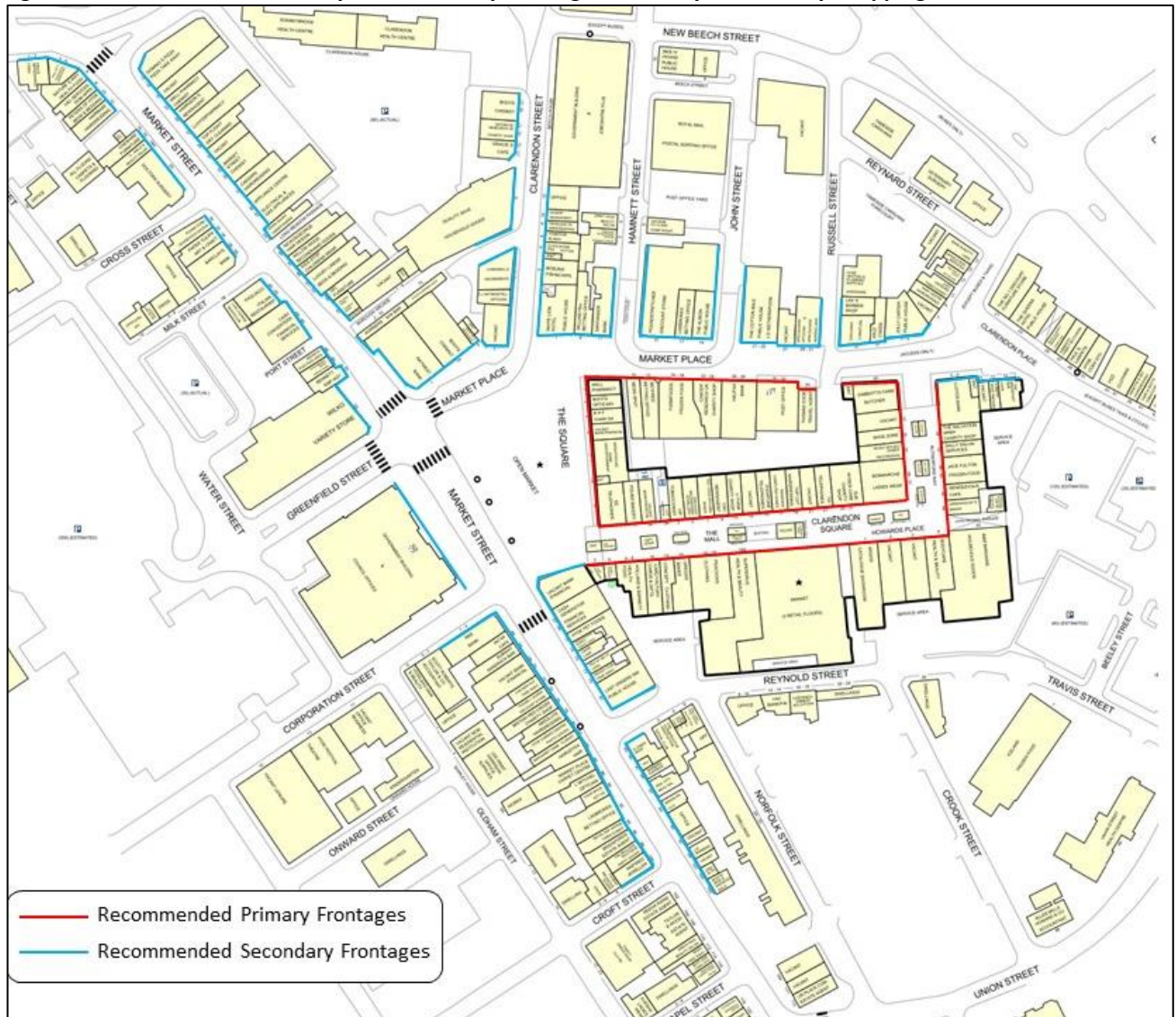


Potential Development Opportunity Areas

- 7.16 Based on our fieldwork, and through close liaison with the Council's officers, we have identified a number of potential development opportunity areas within the overall town centre boundary which are in need of diversification and improvement, but with only two small opportunities within the PSA. These are shown as the hashed areas in Figure 7.3; they are in addition to the development opportunity area previously identified under Policy E2 (6) of the adopted UDP and we have recommended that the town centre boundary be contracted so as to exclude the overwhelming part of the Policy E2 (6) area.

Primary and Secondary Frontages in Hyde

- 7.17 Our recommendations with respect to the definition of the primary and secondary shopping frontages within the PSA in Hyde are set out in **Figure 7.4**. The primary frontages comprise those within the Clarendon Square Shopping Centre, the even-numbered units fronting Market Place, and the units facing The Square. The secondary frontages run along both sides of Market Street, between the bus station and the intersection of Market Street with Croft Street, and also include the odd-numbered properties facing Market Place and some of the properties on Clarendon Street, Hamnett Street, John Street and Russell Street.

Figure 7.4: Recommended Primary and Secondary Frontages within Hyde's Primary Shopping Area

Denton District Centre

Overall Town Centre Boundary

- 7.18 We recommend some reduction to the overall town centre boundary in Denton, compared to that shown on the UDP Proposals Map, although the reduction is much less than in Ashton and Hyde. Indeed, the recommended boundary shown edged red in **Figure 7.5** involves only one major exclusion, which is the majority of the former Oldham Batteries site which was included within Policy E2 (11) of the UDP. The area proposed to be excluded includes land which is the subject of extant consents for approximately 200 dwellings, together with the existing residential properties and Methodist church to the

east of Gresham Street and to the north of Hyde Road. A small part at the extreme western end of the Batteries site is proposed to be retained within the Town Centre boundary, this being the site of the Denton Wellness Centre.

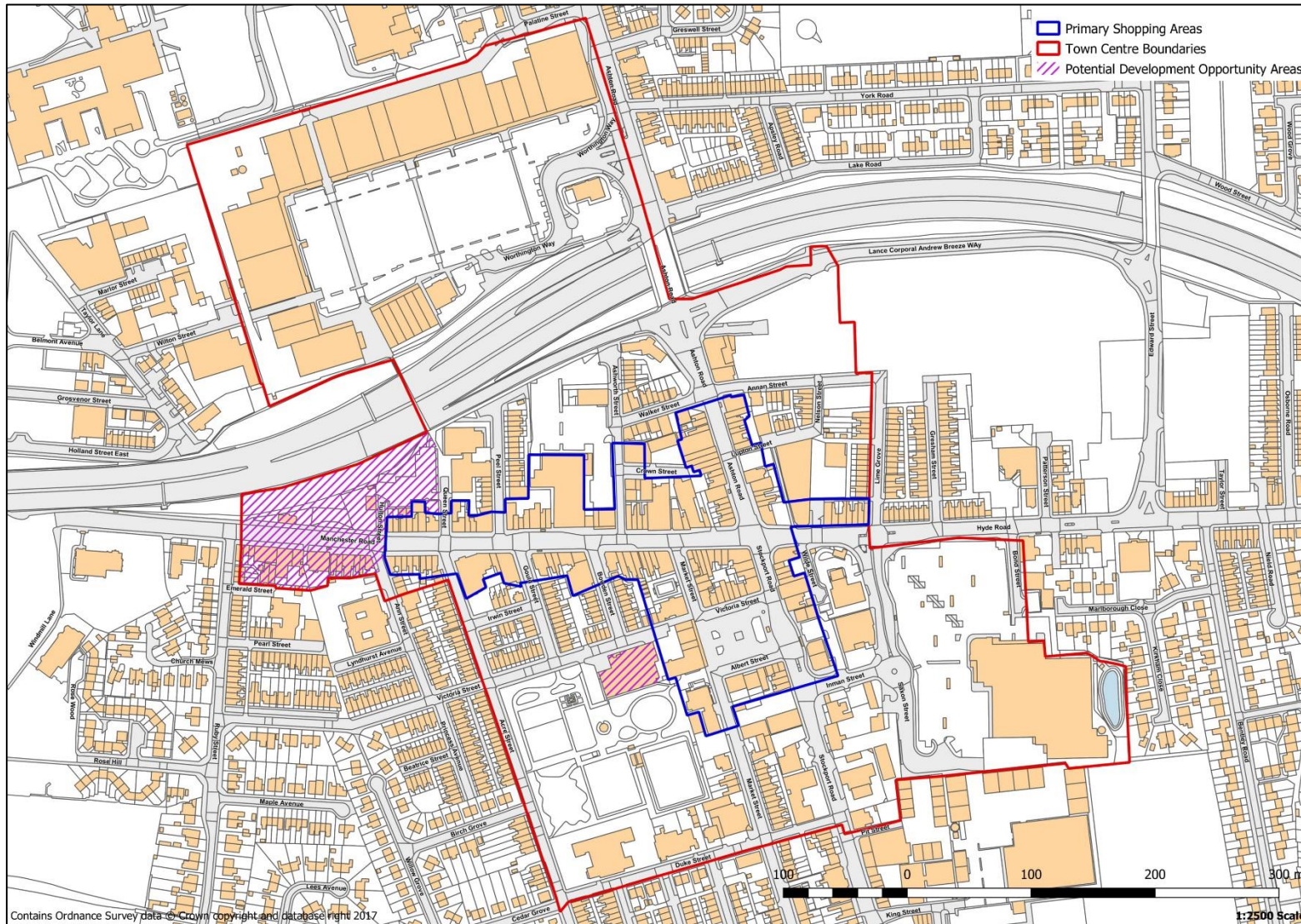
Primary Shopping Area

- 7.19 There is no primary shopping area for Denton defined on the Proposals Map of the UDP. Our recommended PSA is edged in blue in Figure 7.5; it represents a slightly amended version to that put forward by WYG in the Tameside Retail Study of May 2010. It is perhaps worth recording, however, that one of the points made during our consultations was that Crown Point Retail Park is the busiest part of the District Centre, and that perhaps this might warrant its inclusion as part of the PSA.

Potential Development Opportunity Areas

- 7.20 Based on our fieldwork, and through close liaison with the Council's officers, we have identified a number of potential development opportunity areas within the overall town centre boundary in Denton that are in need of diversification and improvement. These are shown as the hashed areas in Figure 7.5; they are in addition to the Development Opportunity Area previously identified under Policy E2 (11) of the adopted UDP and we have recommended that the town centre boundary be contracted so as to exclude the overwhelming part of the Policy E2 (11) area. However, we have not been able to identify any development opportunities within the PSA.

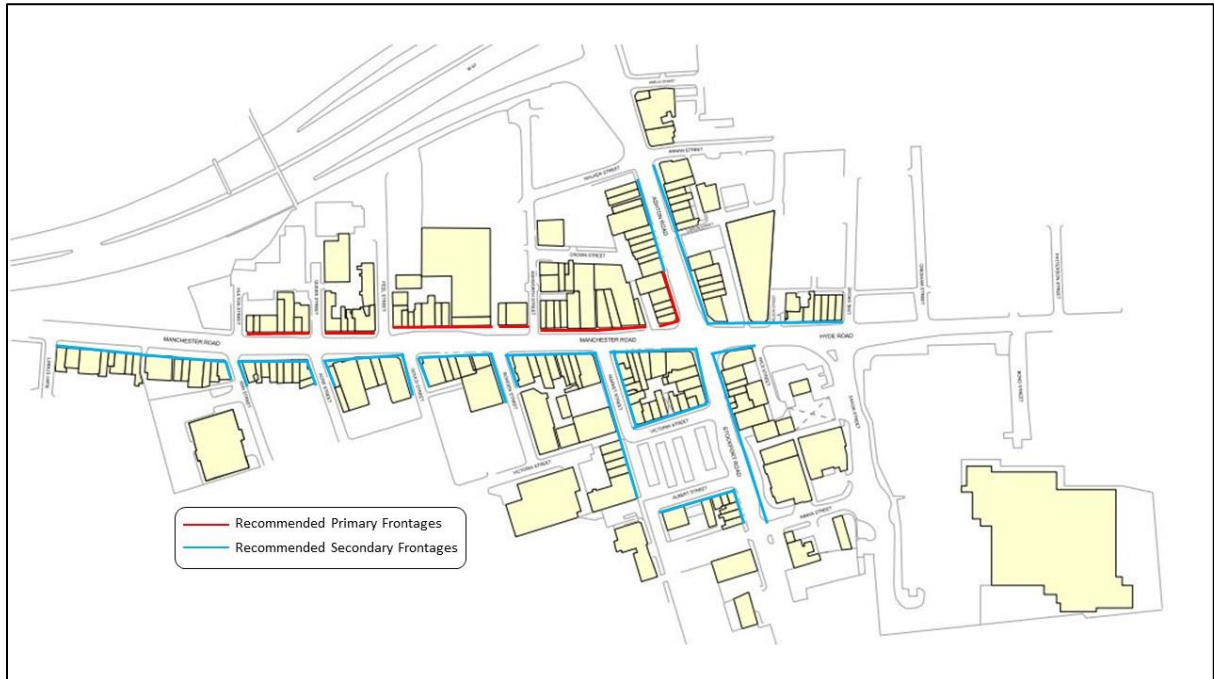
Figure 7.5: Recommended Town Centre Boundary and Primary Shopping Area for Denton, and Potential Development Opportunity Areas



Primary and Secondary Frontages in Denton

- 7.21 The parts of Denton which have the lowest concentrations of non-A1 uses are on the northern side of Manchester Road and around the corner into Ashton Road. Thus, our recommendations for primary and secondary frontages are as shown in **Figure 7.6**.

Figure 7.6: Recommended Primary and Secondary Frontages within Denton's Primary Shopping Area

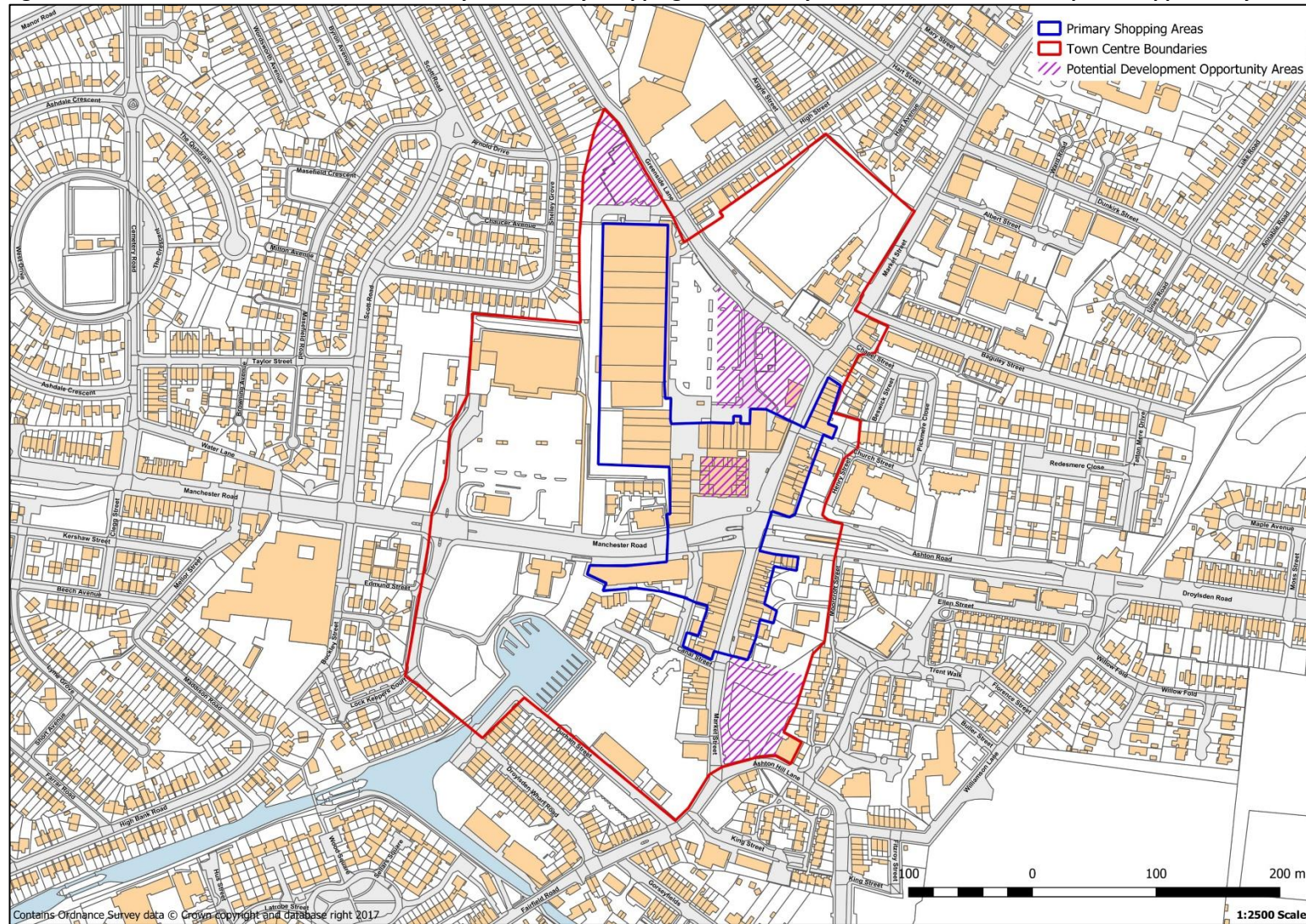


Droylsden District Centre

Overall Town Centre Boundary

- 7.22 In Droylsden, we recommend a number of deletions from the area covered by the town centre boundary shown on the Proposals Map of the UDP. The largest of the recommended deletions are the existing residential areas, to the south and west, and areas of warehousing and industrial plant on the western side of the town centre. We also recommend some deletions relating to residential and warehousing uses to the north-west of the football club site and some of the residential, nursery and warehousing uses to the south-east of the football club site. Our recommended changes will provide for a more compact town centre that allows for linkages with the mixed-use and residential developments around Droylsden Marina, as shown in **Figure 7.7**.

Figure 7.7: Recommended Town Centre Boundary and Primary Shopping Area for Droylsden, and Potential Development Opportunity Areas



Primary Shopping Area

- 7.23 As is the case in Denton, there is no primary shopping area for Droylsden shown on the Proposals Map of the UDP. We have had regard to the recommendations by WYG in its Tameside Retail Study of May 2010, but we consider that the PSA should be amended, compared to WYG's recommendations, so as to include the larger units in the Droylsden Shopping Centre, which is one of the busiest parts of the District Centre and contains the highest concentration of retail use. Our recommended PSA is shown in Figure 7.7.

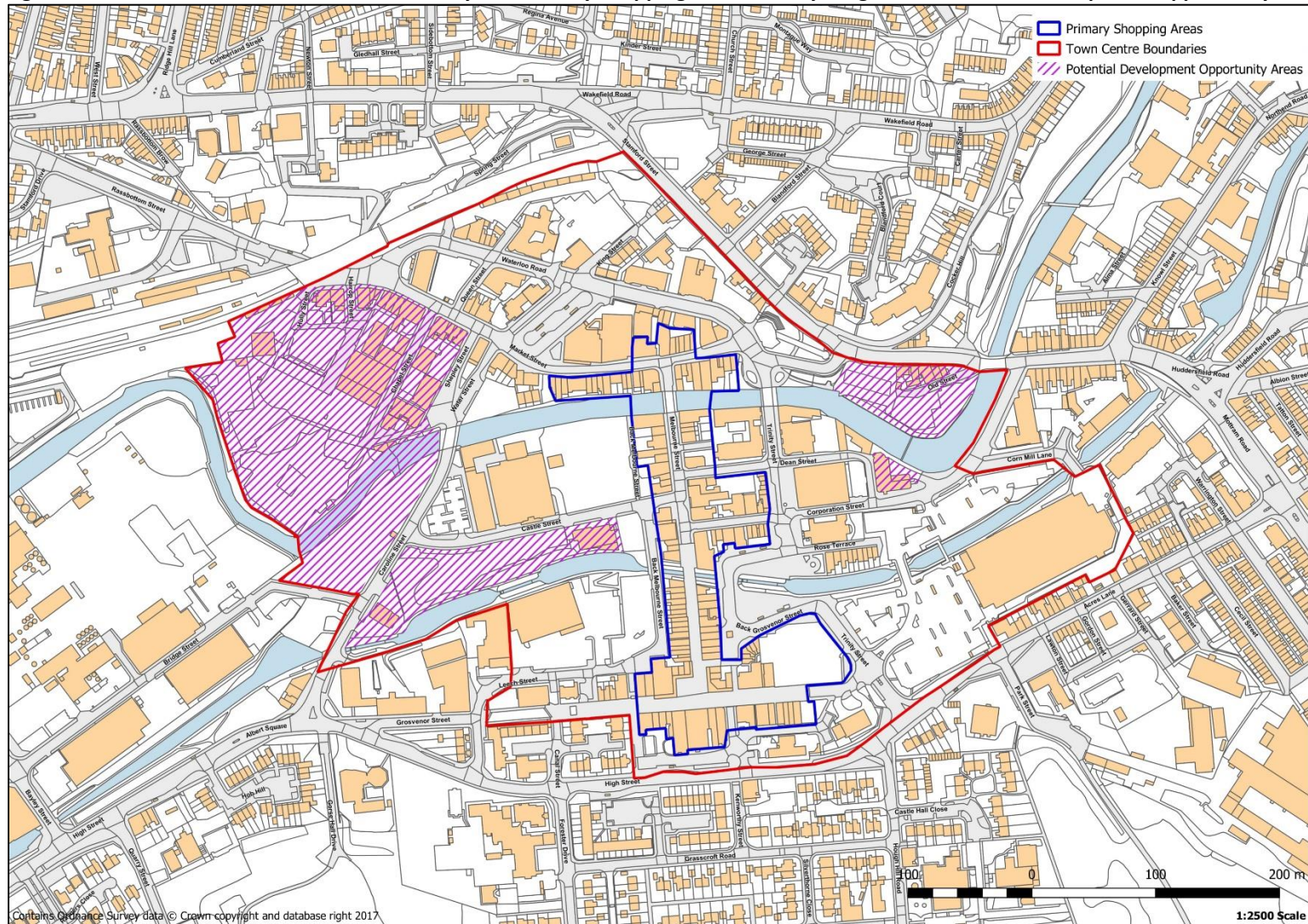
Potential Development Opportunity Areas

- 7.24 Based on our fieldwork, and through close liaison with the Council's officers, we have identified a number of potential development opportunity areas within the overall town centre boundary in Droylsden that are in need of diversification and improvement. These are shown as the hashed areas in Figure 7.7; they are in addition to the Development Opportunity Area previously identified under Policy E2 (4) of the adopted UDP, which has now been largely developed as a result of the Wharf development. However, we have only been able to identify one development opportunity within the PSA, which is the now-vacant Concord Suite.

Primary and Secondary Frontages in Droylsden

- 7.25 Unfortunately, there are large concentrations of non-A1 property on both sides of Market Street, and these are recommended to have a secondary frontage designation, as shown in **Figure 7.8**. Indeed, we consider that the primary frontages are confined to the larger retail units in the Droylsden Shopping Centre and to the frontages in the older part of the Droylsden Centre, albeit that the latter suffer from a high level of vacancy.

Figure 7.9: Recommended Town Centre Boundary and Primary Shopping Area for Stalybridge, and Potential Development Opportunity Areas



Primary Shopping Area

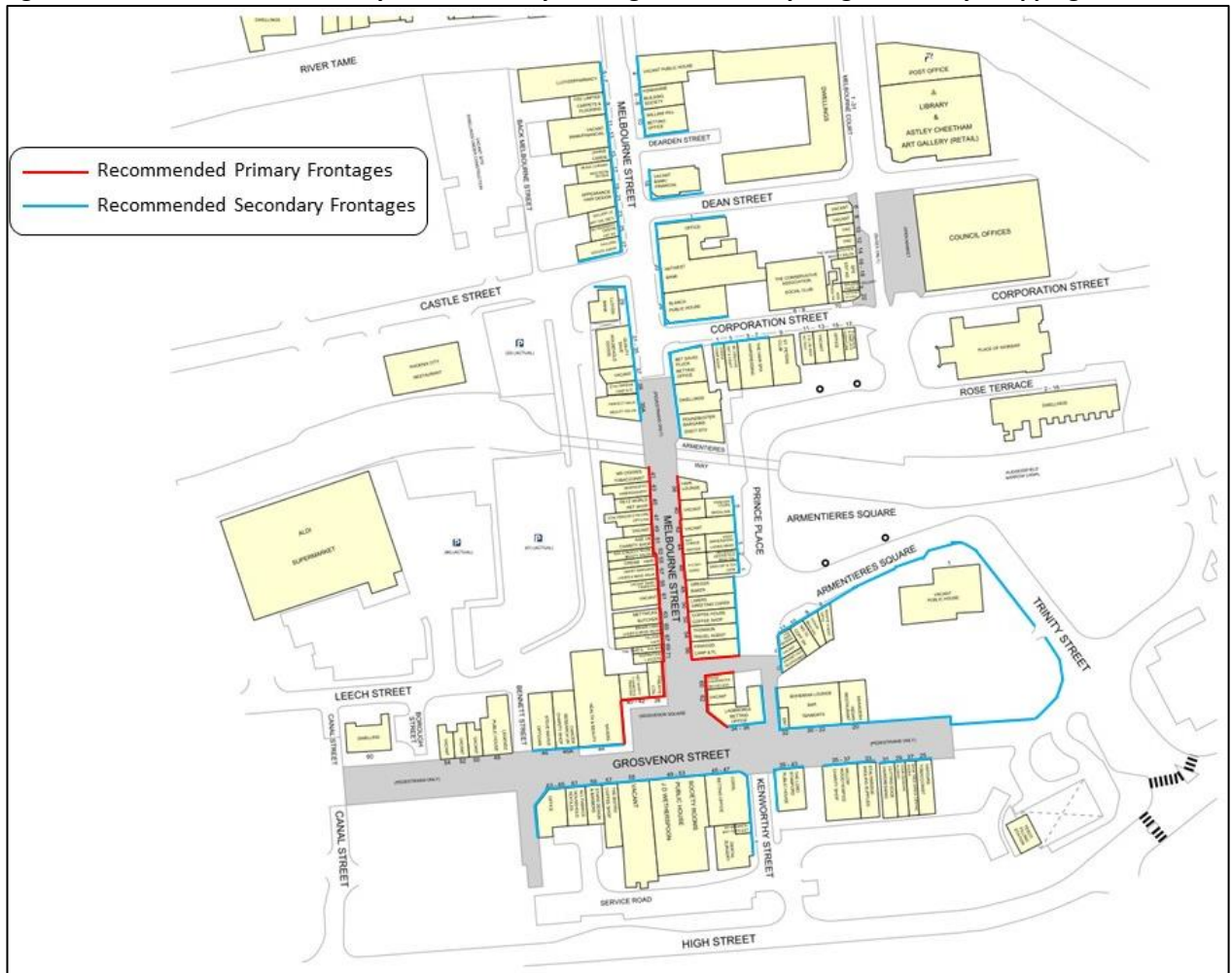
- 7.27 There is no primary shopping area for Stalybridge defined on the Proposals Map of the UDP. Our recommended PSA is shown edged in blue in Figure 7.9, with the focus very much on Melbourne Street and Grosvenor Street. However, we have also recommended the inclusions of Summers Quay within the PSA, because we understand that this area will have ground floor commercial uses.

Potential Development Opportunity Areas

- 7.28 Figure 7.9 shows substantial development opportunity areas within the western part of Stalybridge Town Centre, with these opportunities including large parts of the areas previously covered by UDP Policies E2 (8) and E2 (9). We have also identified a further potential development opportunity on the eastern edge of the town centre. All of these development opportunity areas are in need of diversification and improvement. However, the constrained nature of the PSA has meant that we have not been able to identify any development opportunities within it.

Primary and Secondary Frontages in Stalybridge

- 7.29 So far as prime frontages are concerned, we consider that these are very much focussed on the southern end of both sides of Melbourne Street. Whilst there is potential for Grosvenor Street to provide for primary frontages in the future, it suffers at present from a high concentration of non-A1 uses.

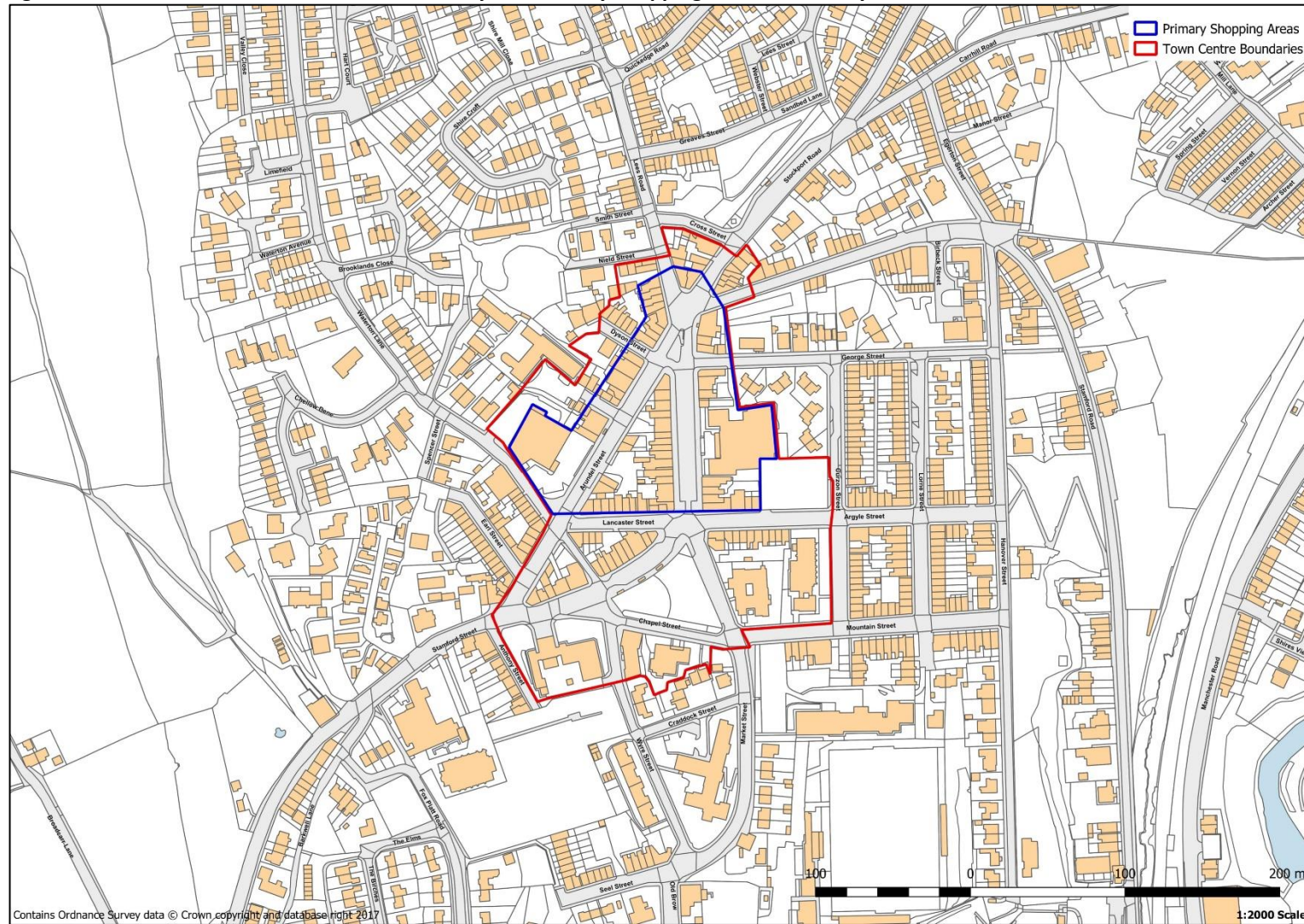
Figure 7.10: Recommended Primary and Secondary Frontages within Stalybridge's Primary Shopping Area

Mossley Local Centre

Overall Town Centre Boundary

- 7.30 We have recommended only limited changes to the overall boundary of Mossley Local Centre, compared to that shown on the UDP Proposals Map. The main changes are the exclusion of an area to the north-west of the Local Centre, in the vicinity of Smith Street/Nield Street, and some 'tidying up' of the southern and south-western boundaries, so as to exclude Craddock Street and Curzon Street. Thus, our recommended overall centre boundary is shown edged in red in **Figure 7.11**.

Figure 7.11: Recommended Town Centre Boundary and Primary Shopping Area for Mossley Local Centre



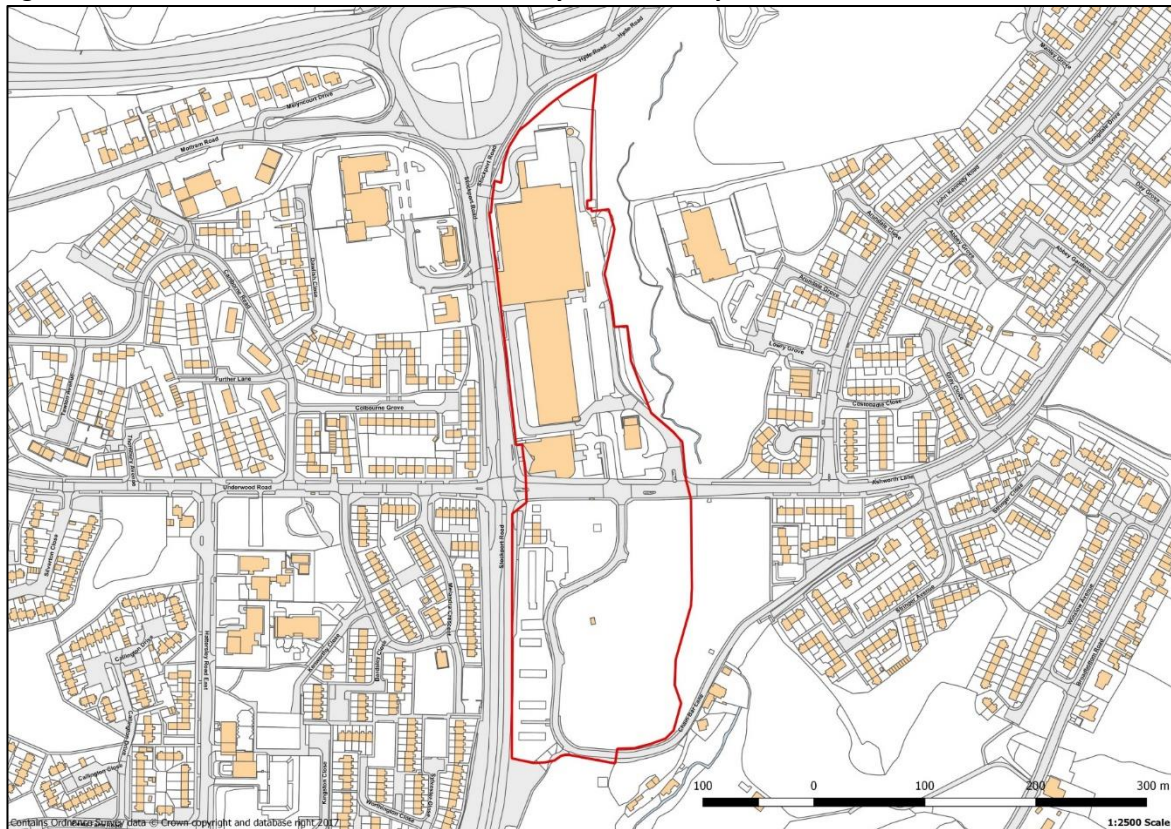
Primary Shopping Area

- 7.31 Our recommended PSA for Mossley is shown edged in blue in Figure 7.11 and focuses very much on that part of the Local Centre to the north of Lancaster Street, along Arundel Street (which includes the Co-op) and Market Street.

Hattersley District Centre

- 7.32 The situation in Hattersley is different than in the other centres, in that the former district centre, to the east of Hattersley Road East, between Beaufort Road and Underwood Road, has been demolished. Nevertheless, as envisaged in the Hattersley and Mottram Supplementary Planning Guidance, of April 2004, a new district centre is being created to the east of Stockport Road, between Chain Bar Lane, to the South, and the M67/Hyde Road roundabout, to the north.
- 7.33 The emerging district centre lies to the north and south of Ashworth Lane. Most of the northern part comprises a Tesco Extra food superstore (opened in 2012), with adjacent parking at ground floor and first floor levels, and a mezzanine within the store. However, the northern part of the emerging centre also provides for The Hub, which provides for a community centre, a library, a youth club, a police post and a café, together with office accommodation for the Peak Valley Housing Association and Tameside Council. As consequence, The Hub has helped to create a hive of community activity.
- 7.34 The southern part of the emerging district centre is the subject of a reserved matters permission for a scheme by Maple Grove Developments (ref: 18/00015/REM), which comprises a foodstore of 1,794 sq.m gross (understood to be targeted at Lidl); nine further units intended for occupiers in Classes A1 to A5, totalling 3,716 sq.m gross; and a Class A3/A5 drive-through restaurant unit of 167 sq.m gross.
- 7.35 As a consequence, in putting forward our recommendation for the geographical extent of the new district centre, we have utilised the red line boundaries associated with the applications for Tesco, The Hub and the Maple Grove scheme, as shown in **Figure 7.12**.

Figure 7.12: Recommended Town Centre Boundary for Hattersley District Centre



8 OTHER RECOMMENDATIONS

Introduction

8.1 In this final section of our report, we outline our other recommendations, which relate to:

- the network, hierarchy and role of the centres included in Policy S1 of the Tameside Unitary Development Plan (the UDP), adopted in November 2004;
- local impact assessment thresholds; and
- appropriate policy mechanisms for non-retail uses, particularly hot food takeaways.

Network, Hierarchy and Role of Centres

8.2 An important requirement of Paragraph 85 of the new National Planning Policy Framework (the NPPF) for planning policies to *'...define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters'*.

8.3 This requirement is reflected in the Council's Brief for our study, the key aspects of which are summarised in paragraph 1.2 of our report. In responding to this aspect of the Brief, we have referred to the new survey evidence set out in paragraph 1.3 of our report. On the basis of this evidence, we have concluded that the network of centres in Policy S1 of the UDP is appropriate, but that there needs to be amendments to the hierarchy of centres within the network.

8.4 Thus, in **Table 8.1**, we set out a comparison of the hierarchy as set out in the adopted UDP, the hierarchy recommended by WYG in the Tameside Retail Study of May 2010 and our own recommendation, informed by the present Study. It is clear that Ashton-under-Lyne is the Principal Town Centre in Tameside, but we do not consider that it functions as a Sub-Regional Centre, because of the limitations on its geographical sphere of influence. Nevertheless, evidence to support the conclusion that Ashton-under-Lyne is clearly at the top of the hierarchy includes the fact that its combined comparison and retail turnover

drawn from residents of the survey area amounts to £263m, prior to making allowance for inflow of expenditure to the Ikea store that derives from beyond the survey area.

Ashton Town Centre therefore performs a similar role in the Greater Manchester hierarchy as the Principal Town Centres of Oldham, Rochdale and Altrincham.

Table 8.1: Network and Hierarchy of Tameside's Main Centres

Centre	UDP 2004 Hierarchy	WYG Retail Study 2010 Hierarchy	HV TRLS 2018 Hierarchy
Ashton-under-Lyne	Sub Regional Centre	Sub Regional Centre	Principal Town Centre
Hyde	Large District Centre	Town Centre	Town Centre
Denton	District Centre	Town Centre	Town Centre
Stalybridge	District Centre	District Centre	District Centre
Droylsden	District Centre	District Centre	District Centre
Hattersley	Small District Centre	District Centre	District Centre
Mossley	Small District Centre	Local Centre	Local Centre

- 8.5 At the second level in the hierarchy are the Town Centres of Hyde and Denton, which have a very different history over the past ten to fifteen years. Thus, at the time of the UDP adoption, Hyde was identified as a '*Large District Centre*', ahead of Denton, which was merely a '*District Centre*'. However, since 2004, the Crown Point Shopping Centre has been developed within the boundary of the town centre, as set out in the UDP Proposals Map, which clearly anticipated its arrival. Indeed, as a result of Crown Point, the comparison goods turnover in Denton, of £127m, dwarfs that achieved in Hyde, which amounts to just £39m. Nevertheless, Hyde Town Centre's convenience goods function is more dominant than Denton's and the evidence suggests that Hyde Town Centre's convenience goods turnover is around £91m, compared to just £55m for Denton.
- 8.6 There is, however, a clear difference in the roles performed by these two Town Centres. Hyde's role is very much focussed on serving the needs of the Hyde Urban Area, whilst drawing in some trade from Hattersley, pending the full development of Hattersley District Centre. Denton, in contrast, has a much greater sphere of influence that reflects the comparison offer available at Crown Point.
- 8.7 The third tier in Tameside's hierarchy comprises the District Centres of Stalybridge and Droylsden and the emerging District Centre at Hattersley. Nevertheless, as is the case at the second level, there are some differences in the characteristics of Stalybridge and Droylsden. Both centres have limited comparison goods offers and similar comparison

goods turnovers, although Stalybridge achieves a significantly higher level of retention of convenience goods expenditure. Furthermore, Stalybridge is set to benefit from being nominated under the Mayor's Greater Manchester Town Centre Challenge initiative, and from continued residential growth, both in the core of the centre and on its edge.

- 8.8 In contrast, Droylsden's unique advantage lies in its close proximity to Manchester and it enjoys excellent accessibility by Metrolink and high-frequency bus routes. Droylsden is also beginning to benefit from the recent office developments, principally Guardsman Tony Downes House, which provides the office headquarters for the Greater Manchester Pension Fund and the ongoing residential-led mixed-use development at the Marina, known as the Wharf. As a consequence, Droylsden is already a moderately healthy centre and, like Stalybridge, faces a bright future.
- 8.9 The emerging District Centre in Hattersley is very much at an embryonic stage and is currently dominated by Tesco and the Hub. Thus, the new District Centre will become more functional when the extant consent to the south of Ashworth Lane becomes operational. Furthermore, the replacement District Centre in Hattersley is set to benefit from further residential development by Barratts and, potentially, from the strategic allocation proposed for further housing growth at Godley Green in the consultation draft of the GMSF.
- 8.10 Mossley is a very healthy dormitory settlement that benefits from rail access to Ashton and Manchester City Centre. Moreover, the defined Local Centre at Top Mossley appears to be a vital and viable centre and is clearly an important Local Centre. There is a cluster of further retail and services uses close to the rail station in Bottom Mossley, but there is insufficient critical mass for Bottom Mossley to be defined as a separate Local Centre.

Local Impact Thresholds for Retail and Leisure Assessments

- 8.11 Paragraph 89 of the new NPPF offers the opportunity for local planning authorities to introduce a '*proportionate, locally set floorspace threshold*' for retail and leisure impact assessments in their Local Plans. This locally-set threshold may be lower than the 2,500 sq.m default threshold incorporated in Paragraph 89 of the NPPF for triggering a

requirement for applicants to undertake impact assessments in relation to the two tests it sets out.

8.12 Paragraph ID2b-016 of the PPG sets out the considerations that should be taken into account in setting locally appropriate thresholds, these being:

- i) scale of proposals relative to town centres;
- ii) the existing viability and vitality of town centres;
- iii) cumulative effects of recent developments;
- iv) whether local town centres are vulnerable;
- v) likely effects of development on any town centre strategy; and
- vi) impact on any other planned investment.

8.13 The PPG does not provide any further clarification as to how these factors should be taken into account in setting thresholds, but it does seem clear that the impact thresholds should vary for different levels in the hierarchy. Thus, taking all of the findings of the study into account, and on balance, we recommend the locally set thresholds shown in **Table 8.2**.

Table 8.2: Floorspace Thresholds for Retail and Leisure Impact Assessments - Sq.m Gross External Area (GEA)

Centre	Local Retail/Leisure Impact Thresholds
Ashton-under-Lyne Principal Town Centre	1,750 sq.m GEA
Denton Town Centre	1,250 sq.m GEA
Hyde Town Centre	1,250 sq.m GEA
Droylsden District Centre	750 sq.m GEA
Stalybridge District Centre	750 sq.m GEA
Hattersley District Centre	750 sq.m GEA
Mossley Local Centre	500 sq.m GEA

8.14 The relevant threshold to apply to each retail/leisure proposal should be identified by the Local Planning Authority, as the sole arbiter, and will be determined by two factors, as follows:

- i) the location of the application proposal and the identification of the nearest Centre(s) by road or by foot (rather than as the crow flies); and
- ii) the identification of the Centre(s) for which the application proposal poses most risk in relation to impact on investment and impact on vitality and viability, i.e. in relation to the two tests set out in Paragraph 89 of the new NPPF.

8.15 For example, Ashton Town Centre would be the nearest centre in respect of any retail/leisure development proposal at Snipe Retail Park. However, if the Local Planning Authority was to consider that the main impacts of this particular application proposal are likely to be experienced more by Denton District Centre, it should insist on the application of the lower floorspace threshold, for District Centres, rather than the threshold for the Principal Town Centre of Ashton, i.e. 1,250 sq.m GEA, rather than 1,750 sq.m GEA. If the Local Planning Authority is in doubt as to which centre is likely to be most affected, and the centres are at different levels in the hierarchy, the principle must be to apply the lower threshold.

Policy Mechanisms for A5 and Other Non-A1 Uses in Town Centres

- 8.16 Item h) of the Council's Brief, as set out in **Volume 2** of our report, requires an assessment as to whether there are any parts of identified centres where the concentration of non-retail uses is adversely affecting the vitality and viability of the centres and to suggest draft policy mechanisms for remedying this. The detailed mapping of concentrations of non-retail uses is contained in the Figures incorporated in Section 4 of our report.
- 8.17 The existing policy for non-retail uses set out in the adopted UDP that remains of most relevance is Policy S4, which states that:

'In the primary shopping areas of the town centres as shown on the proposals map, the Council will not permit the change of use of retail premises to non-retail uses where this would create an imbalance or dominant grouping of non-retail uses in any particular area. A continuity of shop fronts will be required within the primary shopping areas.'

‘Outside the primary shopping areas, the Council will permit a diversity of uses which contribute to the overall appeal of the town centre, help to minimise the extent of empty properties, and improve the appearance of the centre.

‘Consideration will be given to diversifying the leisure business in Ashton town centre and avoiding the night time economy creating street frontages which have no attraction to visitors during the remainder of the day.’

- 8.18 The explanatory wording to Policy S4, which is based on the thrice-superseded PPG6, suggests that the retail uses in the cores of Ashton and Hyde Town Centres should be protected, but that diversification through alternative uses should be encouraged in Denton, Droylsden and Stalybridge. Thus, in the Primary Shopping Areas in Ashton and Hyde, the explanatory wording states that *‘...as a guide the Council would normally wish to avoid more than two separately occupied non Class A1 units being situated adjacent to each other, and an overall proportion of such units exceeding one third within the defined areas’*. It seems clear, however, that these aspects of Policy S4 require to be revisited in light of changing national policy guidance and changing trends since 2004.
- 8.19 Indeed, our review of local authority policies elsewhere in the North, North-West, West Midlands and Greater London suggests that the most effective approaches to non-retail uses in town centres have involved two types of policy. The first type of policy, which usually applies only to City, Town and large District Centres (particularly in London), seeks to control the proportion and clustering of all non-A1 uses, sometimes with separate thresholds for Primary and Secondary Frontages. The second type of policy specifically targets Class A5 uses, and usually applies to all centres in the hierarchy.

Our Recommended Policy Mechanism for Controlling **Non-A1** Development (Except A5 Uses) in the **Primary Shopping Areas** of Ashton, Denton and Hyde Town Centres

8.20 Examples of the **first type of policy**, relating to all non-A1 uses³⁴ that a) tend to have been accepted by Inspectors in recent Examinations, and that b) we consider to be appropriate for premises at the ground floor within the Primary Shopping Areas (the PSAs)³⁵ of Ashton, Hyde and Denton Town Centres (but not to the District and Local Centres) have been constructed along the following lines:

*Unless it can be demonstrated that the ground floor of the premises proposed for non-A1 use within the Primary Frontage have been vacant for more than, say, **12 to 24** months, and that the premises have been genuinely marketed for Class A1 uses, but without success, throughout the period of the vacancy, any proposal for a non-A1 use will be refused if it results in more than:*

- **15 per cent of the total length of the ground floor in any one length of a frontage within the PSA of the Principal Town Centre of Ashton being in non-A1 uses; or**
- **25 per cent of the total length of the ground floor in any one length of a frontage within the PSAs of Denton and Hyde Town Centres being in non-A1 uses**

OR, if it results in:

- **a cluster of more than 2 adjoining units in non-A1 uses at the ground floor of any one length of a frontage within the PSAs of Ashton, Denton or Hyde Town Centres.**

8.21 Thus, unless the proposal for a non-A1 use on the ground floor of a frontage **within the PSA** passes the vacancy/marketing **exception test**, we recommend that any such proposal would need to pass each of the elements of the above double limbed policy test, subject, of course, to other material considerations.

³⁴ Except A5 uses, which are usually subject to a separate policy.

³⁵ The emphasis is on ground floor frontages because these have most impact on perceptions of vitality and viability amongst visitors.

Our Recommended Policy Mechanism for Controlling **Hot-Food Takeaways in Use Class A5** within the Primary Shopping Areas of All Centres

- 8.22 The **second type of policy**, which focuses on A5 uses, tends to be tailored to suit centres at different levels in the hierarchy, so that there are separate thresholds, or parameters, for the Town, District and Local Centres.
- 8.23 In Tameside, Public Health officers are very concerned about the high density of Hot Food Takeaways (HFTs), with the Borough having the second highest density of HFTs per 100,000 population in Greater Manchester, after Bury. Moreover, some of the wards in Tameside with the highest number of HFTs are close to, or incorporate, part of the Town/District Centres of Ashton, Denton and Droylsden, these being St Peters (65 HFTs), Denton North East (29 HFTs) and Droylsden East (26 HFTs). Thus, in Tameside, Public Health officers are keen to see a reduction in ward level HFT densities to the lowest denominator (which is Droylsden West). Officers recognise the absence of licensing controls for HFTs, but have raised the issue, in consultation with the Planning Officers, as to whether planning policy can assist in reducing the number of HFTs.
- 8.24 Thus, with this background in mind, our research has shown that the type of policies for Class A5 takeaway uses that: a) tend to have been accepted by Inspectors in recent Examinations, and that b) we consider would be appropriate for the **Primary Shopping Areas** of Tameside's Town, District and Local Centres, have been constructed along the lines set out below:

*'Unless it can be demonstrated that the premises proposed for A5 use have been vacant for more than, say, **12 to 24** months and that the premises have been genuinely marketed for other main town centre uses (particularly those in Use Classes A1, A2 and A3), but without success, throughout the period of the vacancy, any proposal for a Class A5 use at the ground floor level in any premises within the **Primary Shopping Areas** of Tameside's Town, District and Local Centres, will be refused, if it results in any of the following:*

- i) the proportion of units within the Primary Shopping Area (PSA), or the proportion of the length of any one frontage within the PSA, accounted for by A5 uses exceeds **5** per cent in Ashton, or **10** per cent in the Town Centres of Denton and Hyde, or **15** per cent in Droylsden, Stalybridge, Hattersley and Mossley; or*
- ii) more than **2** consecutive Class A5 units in any one length of frontage in the PSA'.*

8.25 Thus, unless the proposal for an A5 use passes the vacancy/marketing **exception test**, set out at the beginning of the policy, we recommend that any such proposal would need to pass each of the two limbs of the policy test, subject, of course, to other material considerations.

Policy Mechanisms for A5 Uses Outside Town Centres

8.26 The emerging Local Plan is also likely to have a separate policy for proposals for A5 uses which come forward in locations outside the defined Town, District and Local Centres. Such a policy may outline the following considerations, to be taken into account, on a case by case basis:

- the vitality and viability of the centre;
- the existing level of A5 provision in the vicinity of the new A5 proposal;
- design quality;
- the character of the surrounding area;
- the impact on the amenity of nearby residents and businesses (from traffic, noise, vibrations, litter, fumes, odour, lighting, activity levels and hours of operation);
- parking and highway safety;
- accessibility for all groups;
- community safety, anti-social behaviour, disorder and crime; and the
- provision for on-site waste storage and for the disposal of litter and waste materials.

8.27 In addition, some authorities have successfully imposed restrictions on out-of-centre Class A5 uses which are within a certain radii (usually 400m) of facilities such as primary and secondary schools, sixth form colleges, parks, playgrounds, youth centres, leisure centres, and other sensitive community facilities. Furthermore, in Gateshead's

Supplementary Planning Guidance on hot food takeaways, it is stated that planning permission will not be granted for A5 use in wards where more than ten per cent of year 6 pupils are classified as obese. This is because many authorities are increasingly concerned about the relationship between the potential health impacts of hot food takeaways, and the possibility that such A5 uses encourage obesity, particularly amongst vulnerable groups such as children and young adults.



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