

# Ashfield District

## Retail and Leisure Study

on behalf of Ashfield District Council

August 2016



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## 1.0 Introduction

### Instruction

- 1.1 Nexus Planning (Nexus) was commissioned by the Ashfield District Council ('the Council') in December 2015 to undertake a Retail and Leisure Study for the District of Ashfield.
- 1.2 This 2016 Retail and Leisure Study acts as an update to the two previous Ashfield Retail Studies completed in 2006 and 2011. This Retail and Leisure Study (or Study) will form the evidence base upon which the emerging Ashfield Local Plan (up to 2032) will be established.
- 1.3 A fundamental objective of this Study is to deliver an appraisal of the retail / leisure needs and capacity in the period to 2032, and to review the current performance of Sutton, Kirkby and Hucknall town centres, as well as the local shopping centres across the District. The comprehensive appraisal of these elements is of particular importance given recent instabilities in the UK economy. The economic recession which spanned the period 2008-2013 (approximately) had a significant impact on many town centres and the retail and leisure sectors as a whole.
- 1.4 The approach adopted by Nexus has been refined to reflect the latest Government guidance provided in the National Planning Policy Framework (NPPF) (March 2012) and National Planning Practice Guidance (NPPG) (2014).
- 1.5 The aims and objectives for this Study therefore include the following:
  - i. Review the national planning policy position and an appraisal of economic and retail and leisure trends in shopping patterns at a national and regional level;
  - ii. Comprehensive assess the existing vitality and viability of each of Ashfield's retail centres (specifically, Sutton in Ashfield Sub Regional Centre, Hucknall Major District Centre and Kirkby-in-Ashfield District Centre);
  - iii. Audit and analyse Local Shopping Centres and Shopping Parades across the District to examine the potential for increased capacity in retail convenience and comparison floorspace and identify any deficiencies of provision;
  - iv. Comment on any retail and leisure deficiencies of provision identified within the District;
  - v. Develop a flexible model of the retail expenditure and floorspace projections across the Study Area that will allow for a number of different possible housing and jobs growth

- scenarios to be run in accordance with the emerging Ashfield Local Plan and surrounding Local Authorities' housing targets;
- vi. Assess the future demand for retail floorspace across the District over the plan period;
  - vii. Project quantitative leisure expenditure and floorspace for the plan period, in addition to qualitatively assess the leisure facility offer within the District;
  - viii. Analyse committed pipeline retail and leisure developments across Ashfield's neighbouring authorities and competing centres; and
  - ix. Recommend future policy strategies for the most appropriate mix of town centre uses, the potential of the District's centres to meet the identified needs, assess appropriateness town centre boundaries, potential development opportunities for allocation, in addition to a review of existing local threshold for considering impact of out-of-centre retail planning applications on existing centres.
- 1.6 Nexus have engaged NEMS Market Research Limited (NEMS) to undertake surveys of 1,000 households within a defined Study Area in January 2016. The Study Area for the household survey encompasses ten zones, which are based on postcode sectors grouped to reflect areas that are expected to exhibit similar patterns of shopping behaviour.
- 1.7 To complete this Study, Nexus has drawn on a wide-ranging examination of existing operators within the District and examined the existing published data sources, such as Experian GOAD, and Venuescore. Nexus has also referred to the latest Experian population and expenditure data (published by Experian in 2015) in order to establish the up-to-date position with regard to both convenience and comparison goods capacity.

### Structure of Report

- 1.8 We have structured our report as follows:
- **Section 2** summarises key current and future retail and leisure trends, therefore, providing the context for this Retail and Leisure Study;
  - **Section 3** provides an abridged explanation relevant national, regional and local planning policy as it relates to retail and leisure;
  - **Section 4** comprises a synopsis of the vitality and viability of Ashfield District's town centres, and is supplemented by a brief audit of local shopping centres at **Appendix D**;

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- **Section 5** details our assessments of the current and future population and expenditure levels within the Study Area;
  - **Section 6** comprises a review of the survey research and considers the key findings with regard to shopping trip patterns throughout the Study Area;
  - **Section 7** provides our analysis in respect to the quantitative and qualitative need for further convenience and comparison goods retail floorspace over the assessment period (to 2032);
  - **Section 8** details the existing leisure provision in Ashfield and considers future leisure capacity over the plan period; and
  - **In Section 9** we identify our recommendations in respect of the Council's future strategy for retail, town centre and leisure development.

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## 2.0 Current and Emerging Retail Trends

- 2.1 Nexus has reviewed recent research completed by a number of retail research providers, including but not limited to; Office for National Statistics (ONS), Colliers International, Experian, and Verdict. Through the analysis of this research we can ascertain information on recent trends and future forecasts for the UK retail market.
- 2.2 Since the 1950's, the UK retail market has, in general, experienced expansive growth. The rate of which the growth is occurring has increased in speed in recent years. The level of growth is resultant of several influencing factors. These factors are summarised in brief below:
- a. Improving standards of living;
  - b. A population with higher disposable incomes;
  - c. The popularity of obtaining fiscal credit;
  - d. Changes in modes of transport; and
  - e. New (digital) technologies, including online retailing.
- 2.3 The key identified trends are summarised in brief below, and expanded within the subsequent sections:
- i. An economic climate that prevailed during the recent recession (circa 2008 to 2013) had substantial impacts on the retail market; by restricting resident incomes and reducing standards of living. In consequence, the level of spending retracted. Since 2013 (recognised as being the end of the recession in the UK) the economy has been slowly regaining momentum and economic reports released in early 2016 indicate a return to pre-recession levels. The most recent release from the ONS on Retail Sales (published in March 2016)<sup>1</sup> identified that March 2016 represented the 28<sup>th</sup> consecutive month of growth for retail sales UK wide.
  - ii. As with the retail market, the retail property landscape in the UK has dramatically developed over the last 50 years. The post-war years saw a significant redevelopment effort focused on town centres. However, in more recent times, and most notably during the 1990s', the retail landscape changed following the introduction of expansive out-of-town regional shopping malls as well as retail parks. But as will be explained later in in this section, new retail development is once again becoming more focused on town centre locations.

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<sup>1</sup> 'Statistical bulletin: Retail Sales' ONS, March 2016

- iii. The physical location of where consumers are spending has also undergone a significant shift over the past 15 years. Recent findings of Verdict Retail demonstrate this shift. Verdict's 2013 research identified that spending within town centres as a proportion of overall spending declined from 50.7% in 2003 to 45.0% at 2013. In contrast, spending in out-of-centre locations increased over the same period (2003 to 2013) by 4.7%; rising from 31.5% in 2003 to 36.2% in 2013<sup>2</sup>. The movement towards out-of-centre locations has directed recent Governments to endorse their commitment to UK town centres through the nationwide promotion of the 'town centre first' policy approach. The 'town centre first' approach is outlined at Paragraph 23 of the National Planning Policy Framework (NPPF) (March 2012). Further Government support for directing new retail development towards town centres is set out in the March 2014 publication of the Ensuring the Vitality of Town Centres National Planning Practice Guidance.
- iv. Another factor that has led to notable changes in the retail market is the rise in "E-tailing" (or "E-commerce"). The popularity and increased availability of the internet, as well as the growing confidence of consumers in making purchases online, has led to a distinctive change in the way in which goods and services are purchased. Reports on "E-tailing" suggest it currently accounts for somewhere between one in every five to ten pounds that are spent in the UK<sup>3</sup> (taking account of monthly fluctuations). One report released in March 2016 stated that 20% of retail sales in the UK were completed online<sup>4</sup>.
- v. Consumer expectations are also continually evolving, producing a dynamic and unstable retail market. Retail providers are required to evolve as a result of numerous dynamic factors, including – the characteristics of the UK population, consumer demands, popularity in private car ownership, planning policy and digital advances. The diverse nature of the factors which form consumer expectations is forcing retailers to pursue new innovative development proposals. Consumers are seeking more out of their shopping experience and wanting it now.

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<sup>2</sup> 'British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence', Economic and Social Research Council and the University of Southampton, March 2015

<sup>3</sup> 'UK online retail sales to reach £62.7bn in 2020', Verdict Retail, 17 September 2015

<sup>4</sup> 'More than 20% of UK retail sales took place online in February, as consumers moved more spending to the internet', Chole Rigby, Internet Retailing Online, 6 March 2016

## Current Retail Picture

### Household Spending and Labour Trends

- 2.4 In their August 2015 Retail Report, Colliers International documented that since Quarter 1 2011 household spending has steadily increased each year<sup>5</sup>. Following 2.3% year-on-year growth in Quarter 1 2015, growth in household spending has reached the pre-recession levels of 2006 and 2007. Notably, trends in real wages have been supporting the increase in spending. Real wages reached a 4.5% year-on-year growth rate in March 2015. This is the highest level since March 2007<sup>6</sup>. The Centre for Retail Research published their Retail Forecast for 2016-2017 in January 2016 which support Colliers findings. In this forecast they confirm (as suggested by the figures above) the UK retail sector has enjoyed uninterrupted growth since 2013<sup>7</sup>.
- 2.5 Domestic economic drivers of UK retail performance are linked to two key factors:
- i. Low inflation – drives growth in real wages, strengthens household confidence and disposable income.
  - ii. Low interest rates – lead to low mortgage rates, which in turn results in more money in the pockets of borrowers.
- 2.6 Both of the factors set out above have a significant impact on the public's general confidence, and in turn their tendency to spend their earnings on retail goods. Most notably, reports on consumer confidence indicate that it is currently the strongest it has been for over a decade<sup>8</sup>. Total recorded spending for Quarter 4 2015 was £279.1 billion<sup>9</sup> according to the ONS. This is indicative of considerable increases in spending when considering the low level of spending which occurred in 2009. Notably, in Quarter 2 2009 spending hit a low of £250.8 billion<sup>10</sup>, as reported by the ONS.
- 2.7 Also of note are current trends in the labour market. This information is sourced from the ONS. The median gross earning for full-time employees in the UK has increased and as at April 2016 sat at £528 per week, an increase of 1.8% from £518 per week a year earlier (April 2015)<sup>11</sup>. Figure 2.1 illustrates how earnings have increased since 1997, and further exemplifies the deceleration in year-on-year growth that has occurred since the start of the recession in 2008.

<sup>5</sup> 'Midsummer Retail Report', Colliers, August 2015

<sup>6</sup> 'Midsummer Retail Report', Colliers, August 2015

<sup>7</sup> 'The Retail Forecast for 2016-2017', Centre for Retail Research, 5 January 2016

<sup>8</sup> 'UK Economic Outlook', PwC, March 2016

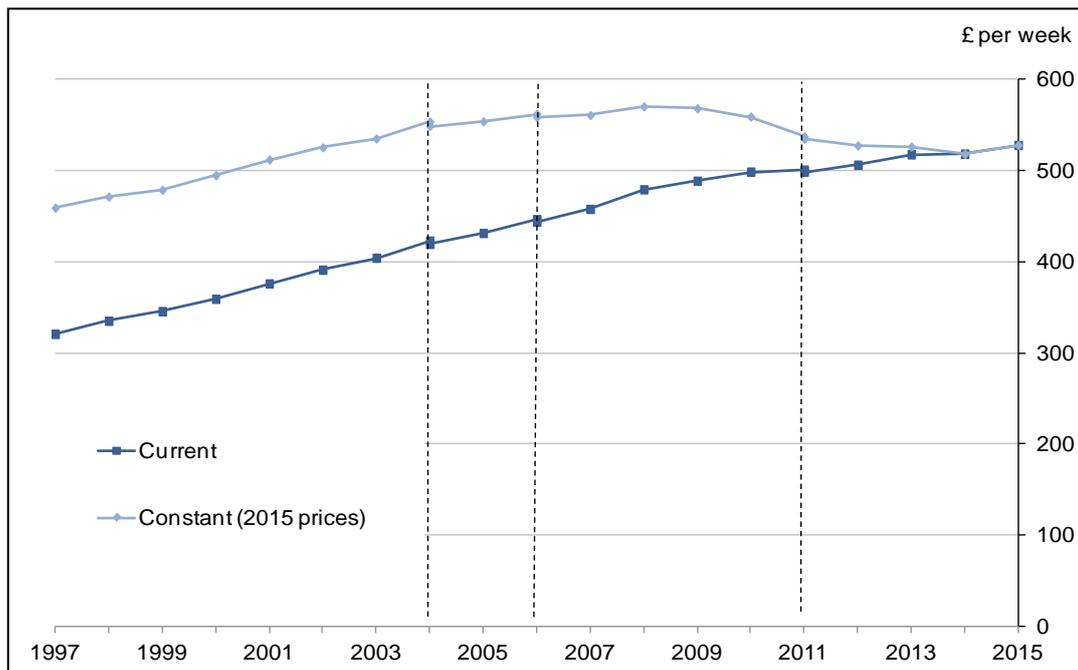
<sup>9</sup> 'Statistical bulletin: Retail Sales' ONS, March 2016

<sup>10</sup> 'Midsummer Retail Report', Colliers, August 2015 and 'Statistical bulletin: Retail Sales' ONS, March 2016

<sup>11</sup> 'Statistical bulletin: Annual Survey of Hours and Earnings: 2015 Provisional Results', ONS, 18 November 2015

2.8 Since the year 2010 taxation rates and levels have increased (including VAT, national insurance contributions, and capital gains tax). As a direct result of these increases consumers' spending power is reduced, impacting upon households' spending. Therefore, the gross increase of pay in consumers' pockets cannot be used as a direct comparison.

**Figure 2.1 | Median full-time gross weekly earnings in current and constant (2015) prices, UK, April 1997 to 2015**



Source:

'Statistical bulletin: Annual Survey of Hours and Earnings: 2015 Provisional Results', ONS, 18 November 2015

2.9 What is more, the employment rate (the proportion of people aged 16 to 64 who were in work) was 74.1% in March 2016. This is the highest score since records began in 1971. The unemployment rate was recorded as being 5.1% at March 2016<sup>12</sup>. When considering this figure against the 2014-2015 rates it indicates a decreasing trend. The UK unemployment rate was recorded as being 5.7% between October and December 2014<sup>13</sup>.

### UK Retail Property Market

2.10 In 2011 (the year in which the previous Retail Study was undertaken by WYG), Colliers CRE reported on major changes in UK high streets, with many retailers putting a concerted effort into purchasing sites in city centres and major regional shopping centres, vacating weaker towns and

<sup>12</sup> 'Labour Market Statistics' ONS, 16 March 2016

<sup>13</sup> 'Labour Market Statistics' ONS, 16 March 2016

displaying signs of caution by reducing the size of their property portfolios<sup>14</sup>. At this time comparison goods retailers were finding it increasingly difficult to justify being represented in every town in the UK. However, over the five years to 2016, the circumstances inflicted upon UK town centres have changed dramatically. More recent reports, including those published by Colliers, Verdict, PwC, provide a more positive picture for high street retail. Most notably, Colliers declare that high streets are 'no longer dead or dying'. Representative of this is the fact that in 2014 investment into high street assets jumped by circa 30% to £2.39 billion<sup>15</sup>. There have been fewer retailer failures on the high street and its retailers' requirements continue to increase, report Colliers<sup>16</sup>.

- 2.11 In 2014, Colliers acknowledged that recent improvements to the economic outlook were beginning to show positive results for town centres<sup>17</sup>. For example, increased consumer confidence and retailer expansion was resulting in a reduction in vacant retail space. However, Colliers remained cautious at this time (2014), and in their report explained that even though the speed at which a significant amount of vacant space was being taken off the market and the positivity of the current economic indicators suggested a return to normalcy, online retailing flourished during the recession and high street stores struggled. They warned retailers to continue with caution when deciding to building existing store networks<sup>18</sup>.
- 2.12 In terms of current vacancy rates, the UK average rate of retail shopping pitches as at March 2016 was identified by Experian as 11.3%<sup>19</sup>. The rate of vacancies is described by Colliers as being 'stubbornly high' as it is not typical or reflective of the total economic or retail climate. Colliers explains that in light of recent advances in the performance of the UK economy it should have improved a lot more against its 2012 peak of 16.3%. Perhaps we should expect the vacancy rate to drop to a figure that is more akin to pre-recession time – for example in 2006 the vacancy rate dropped to 7.3%<sup>20</sup>. In terms of actual quantities, reports suggest some 46,000 UK shops lie unoccupied, and around a third of those have been empty for more than three years<sup>21</sup>.
- 2.13 It is vital to distinguish that this high level of vacancies is driven mainly by non-prime units. Colliers identify that the prime unit vacancy rate sits around 7.5% while non-prime is as high as 17%<sup>22</sup>. As a consequence of the recent economic difficulty that troubled the early 2000s and subsequent lack of investment into retail property, we have seen demand drop considerably for 'poorer quality stock'.

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<sup>14</sup> 'Great Britain Retail: Autumn 2011', Colliers CRE, 2011

<sup>15</sup> 'Midsummer Retail Report: 2015', Colliers, August 2015

<sup>16</sup> 'Midsummer Retail Report: 2015', Colliers, August 2015

<sup>17</sup> 'National Retail Barometer: Summer 2014', Colliers, September 2014

<sup>18</sup> 'National Retail Barometer: Winter 2013', Colliers, 2013

<sup>19</sup> 'Experian Sutton-in-Ashfield GOAD Category Report', Experian March 2016

<sup>20</sup> 'Midsummer Retail Report: 2015', Colliers, August 2015

<sup>21</sup> 'Where have all Britain's shoppers gone?', The Guardian, 26 April 2016

<sup>22</sup> 'Midsummer Retail Report: 2015', Colliers, August 2015

Such stock is often found in secondary shopping frontages within smaller towns. As a result this poorer quality stock suffers from a proportionate reduction in value (and often rent)<sup>23</sup>.

- 2.14 The significantly high number of voids during the recession, the lack of investment in premises, including upkeep, led to a harmful impact on the overall attractiveness of town centres. As set out within the recommendations of Mary Portas's December 2011 Review into the future of UK high streets – there is a recognised necessity to encourage the redevelopment of high street retail space. To do this Portas explained it will be important to empower local authorities to address negligent landlords, especially those of long-term vacant units<sup>24</sup>.
- 2.15 In short, the incessantly high average vacancy rate, despite improving economic conditions, is representative of a discernible divergence between in-demand high quality units and diminishing demand for secondary premises in smaller locations.

#### **Other Factors Influencing the Improving Town Centre Environment**

- 2.16 It is important to recognise that the improving high street environment is not solely driven by 'pure' retail offerings. The food and beverage sector is a significant contributing factor to the recent success and growth of UK high streets. Colliers explains the desire of UK shoppers to 'graze' while they shop has seen a significant boost in the quantity of coffee shops, restaurants, bars and grab-and-go convenience food outlets on UK high streets<sup>25</sup>. In addition to this, the popularity of going out to eat also brings more visitors to the town centre<sup>26</sup>.
- 2.17 Further to this, as digital technologies continue to advance the importance of understanding and operating within the digital world of retail shopping is becoming just as essential as trading in the traditional physical shopping world. The challenges set by online retailing are irrefutable. However, large cities, towns, or shopping centres, which offer an 'experience' and choice for customers with high volume trading potential for the retailers, continue to be attractive. Growing investments in physical retail development is indicative of the desire of shoppers to have a physical retail experience and not just make all of their retail purchases online.
- 2.18 To conclude, UK town centres and high streets provide highly visible and empirical evidence of the scale of the economic downturn (2008 to 2013). Recent improvements in the economy (as evident when reviewing household spending and average earnings statistics) have seen increased investment into town centre retail stores and a drop in prime unit vacancy rates.

<sup>23</sup> 'National Retail Barometer Autumn 2015', Colliers, Autumn 2015

<sup>24</sup> 'Portas Review – An independent review into the future of our high streets', Mary Portas, 2012

<sup>25</sup> 'Midsummer Retail Report: 2015', Colliers, August 2015

<sup>26</sup> 'The Deloitte Consumer Review – Role of the High Street', Deloitte, 2013

## Trends in Comparison Goods Retailing

- 2.19 Available research suggests that comparison retail sector saw the biggest drop in trade during the 2008 – 2013 economic recession. The Economic and Social Research Council, in their March 2015 report attribute the drop in sales to two corresponding factors – (1) consumers' general reluctance to spend on comparison 'big-ticket' items, and (2) the fact comparison retailers are often more susceptible to online price comparison<sup>27</sup>. In recent years, consumers are growing more confident in making online purchases of comparison goods they continue to suffer in consequence. The strong performance of comparison online retailing is supported by reports showing high levels of year-on-year growth in the sector.
- 2.20 There are two types of comparison goods retailers that are identified as suffering the most - those whose trade has been fundamentally changed by competition from online providers (e.g. music and video retailers, book shops – which consumers happily use in a virtual form) and second, those whose products are bulky and space-consuming, meaning high operational costs for high street stores has left them uncompetitive in contrast to out-of-centre and online retailers with much lower tenancy costs<sup>28</sup>. That said certain types of comparison-goods retailers have increased their share of town centre trade. For example, Verdict data indicated that clothing and footwear retailers increased their share from 20.5% to 25.4% from 2007 to 2013, and department stores saw their market share increase from 7.4% to 9.5%<sup>29</sup>.
- 2.21 Against this background, Colliers predicts that comparison retailers are searching for high quality retail units with high floor plates where they can provide a wider range of items<sup>30</sup>. This is driven by the need to provide consumers with a high-quality shopping environment, coupled with their expectations for a wide selection of goods being available in store. Retailers must meet these demands in order to compete with the rise of E-tailing for comparison goods.
- 2.22 The recent liquidation of British Home Stores (BHS) in April 2016, further illustrates the struggles facing comparison retailers. Reports on the reasons for the failure of BHS identify the following issues facing the company – (1) the internet, (2) international competition, (3) the on-going impacts of the recession and (4) their failure to keep up with the demands of consumers for innovation in retailing<sup>31</sup>.

<sup>27</sup> 'British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence', Economic and Social Research Council and the University of Southampton, March 2015

<sup>28</sup> 'British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence', Economic and Social Research Council and the University of Southampton, March 2015

<sup>29</sup> 'British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence', Economic and Social Research Council and the University of Southampton, March 2015

<sup>30</sup> 'Colliers Midsummer Retail Report', Colliers, August 2015

<sup>31</sup> 'Mary Portas: how I would have saved BHS', Mary Portas, The Guardian Online, 25 April 2016

- 2.23 In summary, comparison retailing is fuelled by fierce competition, in particular that made possible by the internet. Companies operating in the comparison market need to fight for their sales through adapting to the new and modern desires and needs of the consumer, and most importantly acknowledge the fact they are likely to compare prices over the internet. How to combine a physical and online store is essential to success, as will be established later on under the sub-title “E-Tailing”. The option of ‘click and collect’ is one such combination being introduced in response to growing popularity<sup>32</sup>. In order to attract customers into a physical store it is vital that it is both (1) physically and aesthetically pleasing and exciting, making for an enjoyable experience for the shopper, as well as (2) providing for a wide array of different products that they can see and touch.

### **Trends in Food and Grocery Retailing**

- 2.24 A 2015 study by Retail Economics reported that spending on food accounted for approximately 40% of all retail spend nationwide<sup>33</sup>. As a consequence, trends in food retailing have a significant influence on retail trends in general.
- 2.25 Instability currently prevails in the food retailing market and supermarkets are most affected. Numerous supermarket chains are currently in the process of consolidating their assets; selling stores, pulling construction programmes, and letting go of sites already with planning permission. But as explained below, instability and structural change in food and grocery retailing has been occurring for a number of years, and predates the recent challenges presented by the recession (2008 to 2013).

### **Food Retailing Back in the Heart of Town Centres**

- 2.26 The structure of food and grocery retailing has changed significantly since the departure from large format out-of-centre foodstores. It was during the 1990’s that a significant number of out-of-centre foodstores with large floor plates were developed and provided cheap rent when compared to town centre locations<sup>34</sup>. The success of these developments was dependent on the dominant transport culture, which at that time was much more tolerant of the reliance on the car and people were generally happy to travel greater distances to shop.
- 2.27 As out-of-centre foodstores thrived, town centres suffered. However, following recognition of these detrimental impacts, central Government enforced stricter local planning rules which make these types of development harder to gain planning permission for. Foremost was the ‘town centre first’

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<sup>32</sup> ‘The Deloitte Consumer Review – Digital Predictions 2015’, Deloitte, 2015

<sup>33</sup> ‘UK Retail Sales’, Retail Economics, March 2016

<sup>34</sup> BIS Research Paper No.188 – ‘Policy Implications of Recent Trends in the High-Street/Retail Sector’, Department for Innovations and Skills, December 2014

- approach prescribed by the NPPF in 2012 and NPPG in 2014. Application of this policy considerably reduced the number of new out of town foodstores obtaining planning permission.
- 2.28 Food and grocery retailers have had to return to town centres and adopt alternative methods of retailing. The most common approach taken is to offer lower cost product ranges. Following that, we also see retailers offering much more flexible models, including protracted opening hours (sometimes staying open 24 hours), opportunity to shop online, home delivery, as well as click and collect. Some retailers have also diversified into non-food items including fuel. Also in a bid to keep and win new customers many retailers have opted to put a concerted effort into branding, marketing, including presence on social media. Tapping in to the modern consumers desire to purchase food on the go several food retailers now have a presence in dense town centre locations where their stores are accommodated over much smaller floor plates (Sainsbury's Local, Tesco Express, Morrisons M Local Stores now My Local).
- 2.29 Growth figures in sales in the food and grocery within UK town centres are evidence that food and grocery stores are reasserting their presence within the town centre. Verdict Research identified that sales made in UK town centres on the food and groceries has developed from 16.9% in 2007 to 24.2% in 2013<sup>35</sup>.

### **The Rise of the Food Discounter**

- 2.30 In 2013, Mintel reported that the recession, along with a period of high inflation, impacted on consumer behaviours and the wider dynamics of grocery retailing. Consumers who have less disposable income are likely to seek out food and grocery items that are offered at the lowest price, or more importantly, food and groceries which represent the best value for money<sup>36</sup>. Therefore, in order to attract shoppers, food retailers have to compete not just on price points but by also offering the best in high quality good value products. The complex nature of consumer demands results in a dynamic market that is often difficult to negotiate. The rise of online food retailing adds yet another dimension to this market. Reports by Retail Economics suggest that while the general retail food market suffered, the number of online food purchases rose by 10.3% year-on-year in January 2016<sup>37</sup>.
- 2.31 The scene set above indicates the food sector is facing a number of unique structural challenges, which is causing issues for food operations and subsequently restricting growth in this sector. One of the overriding challenges comes from the intense price competition created by the key food

<sup>35</sup> Verdict research as reported in 'British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence', Economic and Social Research Council and the University of Southampton, March 2015

<sup>36</sup> 'Food & Drink Retailing', Mintel, March 2013

<sup>37</sup> 'UK Food and Grocery', Retail Economics January 2016

- discounters (Aldi and Lidl), which are taking market share away from the big four grocers (Tesco, Sainsbury's, Morrisons, Asda)<sup>38</sup>.
- 2.32 Illustrating the dynamic nature of the struggling food and grocery environment at present is the number of recent sales of a significant number of food and grocery outlets by major food retailers. For example Morrisons let go of 140 of Morrisons M Local Stores nationwide in late 2015. A decision forced upon Morrisons due to struggling profit ration even though convenience stores are the fastest-growing format in the UK<sup>39</sup>. Making the sale of the Morrisons M Local Stores even more surprising are the 2013 reports from providers such as Mintel who suggested there has been a massive shift away from superstores to more convenient shopping<sup>40</sup>. The first Morrisons M Local Store was only opened in 2011 but after reporting an annual operating loss of £36m on the stores; contributing to the company's total annual loss of £792m, the decision to sell was made<sup>41</sup>. Some of the stores have since been rebranded in a bid to compete with other centrally located top-up convenience stores meeting the demand driven by consumer's increasingly 'hectic' lifestyles. More recently, in early 2016 Sainsbury announced they would be closing down all 16 of its Netto discount grocery stores nationwide<sup>42</sup>. The majority of the stores are located in the north of England and their closure illustrates that this time of uncertainty still prevails.
- 2.33 While the food retail market is still generally described as struggling, up-to-date March 2016 research produced by Retail Economics showed that grocery sales are continuing with their recent run of better performance with sales up 1.5%, year-on-year, the strongest since February 2014. March 2016 sales represent the third consecutive month of growth<sup>43</sup>.
- 2.34 Notwithstanding this, the food and grocery market is predicted to remain fiercely competitive, meaning retailers will be forced to keep their sales margins as compressed as possible.
- 2.35 As recent as September 2015, Retail Economics reported that the UK's largest retailer, Tesco, and their struggles over the past few years are predicted to endure. Retail Economics predicts that it will be competition from the discounters Aldi and Lidl, in particular that will continue to diminish Tesco's market share. While broader market trends, such as consumers' desire to eat-out and purchase only 'grab and go' food at their convenience, will stifle growth across Tesco's core large format superstores – reducing as much as 50% of sales<sup>44</sup>. In April 2016 the Tesco Chief Executive hailed the supermarkets £162 million statutory pre-tax profit for the 2015 / 2016 as "significant progress" when compared to the retailers reported £6.2 billion loss of the 2014 / 2015. However,

<sup>38</sup> 'UK Retail Sales', Retail Economics, March 2016

<sup>39</sup> 'Morrisons sells its chain of convenience stores', BBC Online, 9 September 2015

<sup>40</sup> 'Food UK', Mintel, April 2016

<sup>41</sup> 'Morrisons sells its chain of convenience stores', BBC Online, 9 September 2015

<sup>42</sup> 'Sainsbury's to close Netto stores', BBC Online, 4 July 2016

<sup>43</sup> 'UK Retail Sales', Retail Economics, March 2016

<sup>44</sup> 'UK Food and Grocery', Retail Economics, September 2015

the Chief Executive stressed that recovery would not be a straight process as the food retailing market remained “challenging, deflationary and uncertain”<sup>45</sup>. In order to be successful in the market retailers are forced to cut prices. This means discount food retailers remain the fastest growing supermarkets in UK town centres<sup>46</sup>.

- 2.36 When analysing the performance of Aldi, who are considered a food and grocery discounter, Retail Economics describes that they have “attacked the heartland of UK grocery” by undercutting the ‘big four’ with highly competitive prices and investing in more high quality premium produce. This approach has broadened Aldi’s appeal to more affluent customers. In the same way, Lidl has adopted an aggressive growth programme including ambitious store expansion. To date, the strategy has achieved what it has intended by growing Lidl’s market share. The widening of product ranges will help broaden market appeal while a focus on more alcohol will help support sales<sup>47</sup>.
- 2.37 In late 2015, reports on Lidl and Aldi’s success suggested their joint share of the groceries market doubled to 10% in just three years<sup>48</sup>. Even so, Tesco remains the UK’s largest supermarket with a 27.9% market share, while Sainsbury’s has 16.6%, with Asda on 16.4%. Followed by – Morrisons 10.8%, The Co-operative 6.3%, Aldi 5.6%, Waitrose 5.2%, and Lidl 4.4%<sup>49</sup>.

### **Consumer Behaviours When Making Food and Grocery Purchases**

- 2.38 The UK food market has been shaped in recent years by the broad change in shopping habits with many customers opting to complete smaller but more frequent grocery shops. Fewer households now complete the traditional once-a-week “big shop”. In their March 2015 report, the University of Southampton (published as part of an Economic and Social Research Council study) predicts that forecasts for 2019 will see the convenience store grocery sector account for almost a quarter (24.1%) of total UK grocery sales up from 21.4% in 2014<sup>50</sup>.
- 2.39 An additional demand-driven factor shaping the UK food retail market relates to consumers’ desire to purchase locally sourced food. A 2013 Ethical Consumers Market report provides<sup>51</sup> evidence to suggest that the number of shoppers specifically looking to buy local produce increased from 15% in 2005 to 42% in 2012. Of particular note, the survey found more than 40% of local shoppers said they were prepared to pay a premium for locally produced foods. Tesco benefited from this trend through the promotion of a ‘Love British Food’ promotion which in 2011/2012 saw Tesco sales of

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<sup>45</sup> ‘Tesco shares hit by warning profit growth to slow’, BBC Business Online, 13 April 2016

<sup>46</sup> ‘Tesco shares hit by warning profit growth to slow’, BBC Business Online, 13 April 2016

<sup>47</sup> ‘UK Food and Grocery’, Retail Economics, September 2015

<sup>48</sup> ‘Aldi and Lidl double market share in three years’, BBC Online, 17 November 2015

<sup>49</sup> ‘Aldi and Lidl double market share in three years’, BBC Online, 17 November 2015

<sup>50</sup> ‘British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence’, Economic and Social Research Council and the University of Southampton, March 2015

<sup>51</sup> ‘Ethical Consumer Market Report’, Ethical Consumer Research Association, 2013

local produce reach of £1 billion and over 50% of Tesco customers purchasing more locally sourced food than they were five years ago<sup>52</sup>. Other larger chain supermarkets have recognised the desire of shoppers to buy locally. Sainsbury released a British classic range of ready meals, while Morrisons promoted a range called the Best of British.

- 2.40 To summarise, the competitive nature and price driven market for food and grocery retailing continues to force supermarkets to adapt and seek out how they can do things differently in order to attract consumers.

### **Trends in Leisure**

- 2.41 Leisure is often considered a discretionary activity, and as such consumer spending on leisure is greatly influenced by the economic climate and in particular average levels of disposable incomes. However, when assessing the average spend of UK households on leisure activities it becomes clear that even in light of an economic downturn consumers in the UK have shown a growing desire to engage in leisure activities.
- 2.42 Figure 2.2 illustrates changes in UK average weekly household spending on leisure before the recession (2006), during the recession (2011) and after the recession (2014). ONS have adjusted all the figures to strip out the effects of inflation, so that true like-for-like comparisons can be made.

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<sup>52</sup> 'Love British Food', <http://www.lovebritishfood.co.uk/taking-part/retailers>, 2012

Figure 2.2 | ONS Weekly Household Spending Data on Leisure Items

Leisure Item / Activity	2006	2011	2014
<b>Sports admissions, subscriptions, leisure class fees and equipment hire</b>	£5.80	£6.70	£6.90
<b>Cinema, theatre and museums etc.</b>	£2.00	£2.40	£2.80
<b>Admissions to clubs, dances, discos, bingo</b>	£0.60	£0.60	£0.50
<b>Gambling payments</b>	£3.60	£2.70	£2.90
<b>Restaurants and café meals</b>	£12.80	£14.70	£16.60
<b>Take away meals/food and other snack food</b>	£8.10	£8.40	£8.80
<b>Total</b>	<b>£32.90</b>	<b>£35.50</b>	<b>£38.50</b>

**Sources:**

'Family Spending, 2015 Edition', ONS, released on 8 December 2015

'Family Spending, 2012 Edition', ONS, released on 4 December 2012

'Family Spending, 2006 Edition', ONS, released on 28 January 2008

- 2.43 The most recent ONS data (for the 2014 year) identified that an average household would spend £38.50 on leisure activities, including; £6.90 on 'sports admissions, subscriptions, leisure class fees and equipment hire' and £2.80 on going to 'cinemas, theatres and museums'<sup>53</sup>. This is out a total of £531.30 spent on average per week by UK households. It is interesting to assess the data on average household spending from the ONS for years both preceding (2006) and during the recession (2011). The ONS average household spending figures for 2011 identify that out of the average weekly spend of £483.60, households spent - £6.70 on 'sports admissions, subscriptions, leisure class fees and equipment hire', £2.40 on going to 'cinemas, theatres and museums'. What is more, ONS data from 2006 confirms that on average households spent £455.90 per week, and of that £5.80 was spent on 'sports admissions, subscriptions, leisure class fees and equipment hire' and £2.00 on the 'cinema, theatre and museums' etc. The significant increases in spending from 2006 to 2014 illustrate the popularity of spending on leisure activities.

<sup>53</sup> 'Consumers spending more on cars and leisure, says ONS', Brian Milligan, BBC Business News Online, 8 December 2015

- 2.44 Research completed by the Economic and Social Research Council assessing the diversity of uses within 1,100 centres and high streets during 2000 to 2006 (the years preceding the recession) provides a clear indication that during this time, when the economy was strong the leisure service industry was thriving. They found that the total number of leisure service units within UK town centres increased by 23% between 2000 and 2006<sup>54</sup>.
- 2.45 The UK leisure industry suffered a period of decline during the years 2008 to 2013 in consequence to a difficult trading environment. During these years' income levels of consumers dropped impacting their ability to spend on discretionary activities and other leisure items - consumers cut back hardest on leisure spending.
- 2.46 It was not until the end of 2014 that the industry began to grow again. Mintel calculated that this industry was estimated as worth £80 billion in 2015, approximately 15% higher than the 2010 total expected worth<sup>55</sup>.
- 2.47 A significant challenge that may soon face the industry is anticipated to occur in response to the introduction of the National Living Wage. From 1 April 2016, the UK government introduced a new mandatory National Minimum Wage (NMW) for workers aged 25 and above, initially set at £7.20 - a rise of 50p relative to the previous National Minimum Wage rate. That represents a £910 per annum increase in earnings for a full-time worker on the current National Minimum Wage. A National Minimum Wage rate of £6.70 continues to apply for those aged 21 to 24.
- 2.48 So, while the increased base level wage will improve living standards for low-paid workers but in the process seems certain to push up leisure operators' wage costs, since they largely rely on unskilled workers.

### **Out-of-Centre**

- 2.49 Firstly, it is interesting to acknowledge that at the time the 2006 Retail Study was published out-of-town retailing was recognised as the 'engine of retail growth' from 1996 to 2006. The following figures quite clearly illustrate this – between 1996 and 2006 retail sales as a whole increased by 62.1%, and sales of out-of-town stores grew nearly twice as fast, at 118%<sup>56</sup>. Further to this, the Portas Review, among other reports, highlighted that in the last decade (2001 to 2011) the amount of out-of-town retail floorspace has risen by 30% whilst that in-town has fallen by 14%<sup>57</sup>.

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<sup>54</sup> 'British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence', Economic and Social Research Council and the University of Southampton, March 2015

<sup>55</sup> 'Leisure Review', Mintel, October 2015

<sup>56</sup> 'Ashfield Retail Study', GVA Grimley, March 2006

<sup>57</sup> 'Portas Review – An independent review into the future of our high streets', Mary Portas, 2012

- 2.50 However, growth of out-of-centre retailing has been constrained by the ‘town centre first’ policy regime enforced through the NPPF since its publication in March 2012. As a consequence of the prevailing policy regime, traditionally out-of-centre retailers (for example supermarkets) are being re-focussed back into the centre of UK towns. Most notable, are the number of larger food retailers who now occupy units within the high streets and local centres of the UK<sup>58</sup>, for example Sainsbury’s Local, Tesco Extra, and Little Waitrose.
- 2.51 In 2013, Deloitte highlighted that there is a limit to how much an out-of-centre shopping centre can fully meet the daily needs of consumers<sup>59</sup>. Deloitte reported the drive of consumers to out-of-centre locations is primarily motivated by their desire to seek out lower prices, convenience and the wide range of goods available at out-of-centre locations by virtue of their larger store formats<sup>60</sup>. However, changes in consumer habits has driven a return to smaller format shops in more centrally located and accessible locations. As consumer habits become more aligned, the draw of out-of-centre shopping venues is weakened.
- 2.52 One obvious result of new consumer behaviours has led to larger retailers opting to provide ‘click and collect’ services within their smaller retail units. This service enables consumers to have a much wider variety of goods available to them, but for collection to take place in an easily accessible and convenient location suitable for their busy lifestyles – likely to be a town centre location. Similarly, the Economic and Social Research Council reported that rising numbers of consumers are less convinced by the costs versus benefits balance of the out-of-centre superstore/retail park proposition and have sought convenience at the ‘local’ level and in the ‘community’<sup>61</sup>.

### **Shopping Centre Development and Investment**

- 2.53 Since the 2011 WYG Retail Study was completed, the level of shopping centre development in the UK has seen some progression, following a number of years of very minimal development. In 2011, Colliers reported that shopping centre development was at a standstill and little activity was anticipated over the next four years to 2015<sup>62</sup>.
- 2.54 More recent reports suggest that we should not expect an inundation of new shopping centres to open in the UK (i.e. we will not seek the peak levels reached during the 1980’s to 1990’s). More recent Colliers research (released in August 2015) reported that the shopping centre market has

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<sup>58</sup> ‘British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence’, Economic and Social Research Council and the University of Southampton, March 2015

<sup>59</sup> ‘The Deloitte Consumer Review – Role of the High Street’, Deloitte, 2013

<sup>60</sup> ‘The Deloitte Consumer Review – Role of the High Street’, Deloitte, 2013

<sup>61</sup> ‘British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence’, Economic and Social Research Council and the University of Southampton, March 2015

<sup>62</sup> ‘Midsummer Retail Report’, Colliers CRE, 2011

assumed a dramatic shift, changing from an investment no one was interested in procuring to a “must-have” for investors within a very short time period<sup>63</sup>.

- 2.55 However, some caution is still advised as demand and investment in shopping centre units is focused on prime and regionally dominant assets. In this current climate, it is only those high quality tenants that can support the much desired high-quality shopping experience<sup>64</sup>.
- 2.56 In contrast, shopping centres considered to be in the secondary market (i.e. not ‘A’ Grade or prime shopping centre) should be addressed with a lot more caution. Tenants are seeking shorter lease terms and secondary shopping centres have been described as being in structural decline<sup>65</sup>.
- 2.57 As eluded to above in paragraph 2.17, the draw of shopping centres includes the experience, and not the retail offer alone. Consumers’ willingness to travel to larger out of town shopping centres for their overall experience and to use the leisure facilities appears to be increasing. In response to this, the split between retail and leisure units present within UK shopping centres is shifting; with more experiential offers in the form of leisure services. In 2012, the Portas Review recognised this shift highlighting that:

*“...Epic and immersive experiences offered by today’s new breed of shopping mall. Modern shopping centres; for example Westfields, bring together cinema premieres, worldclass restaurants, bowling alleys, art galleries and luxury brands – replacing the lightless, soulless experiences of the past”<sup>66</sup>.*

- 2.58 When comparing the operation of shopping centres in comparison to high streets, it is useful to reference the submission of the British Property Federation on the Portas Review, in which the Federation stated:

*“Shopping centres and other out-of-town formats often have the advantage of single ownership. The landlord is able to create an identity for the centre, choose the retail mix, manage the centre so that it reinforces the brand, co-ordinate marketing and refresh the centre through regular reinvestment. Single ownership is rare on our high streets, but that shouldn’t stop some of these elements being replicated. Our high streets need to plan their identity and shape their retail offer accordingly. They need leadership, business plans and day-to-day delivery.”*

- 2.59 It is this *managed* experience delivered by a shopping centre that continues to prove attractive to customers. Therefore, as consumers continue to seek out high quality shopping experiences the growth and success of prime shopping centres is set to continue. In consequence town centre

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<sup>63</sup> ‘Colliers Midsummer Retail Report’, Colliers, August 2015

<sup>64</sup> ‘Colliers Midsummer Retail Report’, Colliers, August 2015

<sup>65</sup> ‘Colliers Midsummer Retail Report’, Colliers, August 2015

<sup>66</sup> ‘Portas Review – An independent review into the future of our high streets’, Mary Portas, 2012

managers and local authorities will need to continue to monitor the impact the draw of such centres, whether within their District or within adjoining authorities, may have on the health of their own town centres.

- 2.60 However, as clarified in Experian's October 2015 Retailer Planner Briefing Note, as people work longer hours the idea of completing a weekly shop at an out-of-centre superstore had become less attractive<sup>67</sup>. As we have addressed earlier in this section, the rise of smaller and more regular shopping trips has risen in recent years,

### Neighbourhood Shopping

- 2.61 Limited retail research is available on current trends and forecasts addressing the performance of "neighbourhood parades", as defined by the Department for Communities and Local Government<sup>68</sup> (DCLG).
- 2.62 The very term for neighbourhood shopping areas often varies making it difficult to track and predict trends. Illustrating this point is the fact that what research is available makes reference to a myriad of terms; '*neighbourhood retailing*', '*parades of shops*', '*local shopping centres*', '*local shops*', '*convenience retailing*', and '*secondary retailing*'. Nexus consider the best place to start is the report produced by DCLG entitled 'Parades of Shops - Towards an understanding of performance and prospects', in which they explain that for the purposes of consistency they adopt the terminology of 'neighbourhood parade'<sup>69</sup>. The justification being based on the predominance of a locally focused role. In addition to the fact that, in many cases, the original core functions for 'shopping' has become differentiated.
- 2.63 The DCLG explain most neighbourhood parades offer a diverse and complementary occupier mix, providing essential goods and services which are, in most cases, highly valued by the resident community they serve. Neighbourhood parades tend to be dominated by convenience stores. 2012 research by Verdict suggested that almost 55.0% of retail expenditure undertaken at a neighbourhood level is in convenience stores, with an estimated 70.0% taking account of other food-based outlets<sup>70</sup>. In these locations, convenience retail stores are typically found alongside local service outlets including pubs, takeaways, personal services (Nail and Hair Salons) and niche operators.

<sup>67</sup> 'Retail Planner Briefing Note 13' Experian, October 2015

<sup>68</sup> 'Parades of shops - Towards an understanding of performance & prospects', Department for Communities and Local Government, 2012

<sup>69</sup> 'Parades of shops - Towards an understanding of performance & prospects', Department for Communities and Local Government, 2012

<sup>70</sup> Research by Verdict on Neighbourhood Retail Markets as detailed in 'Parades of shops - Towards an understanding of performance & prospects', Department for Communities and Local Government, 2012

- 2.64 The same 2012 research by Verdict suggests the market share held by neighbourhood parades has been remained relatively stable over the past ten years and this is generally reliant on the fact that they serve a very vital role in the provision of local needs to a local catchment<sup>71</sup>. Verdict released data in 2013 confirming that in 2003 17.9% of all UK retail sales took place at the neighbourhood level, and in 2013 this is relatively the same at 18.8%<sup>72</sup>. Accordingly, very little physical change has occurred on these types of parades.
- 2.65 In terms of the type of uses typically found in neighbourhood centres, in consequence to the average needs/desires of a shopper coming to such a centre, convenience remains the dominant retail type. Illustrating this point is the fact 70% of expenditure in neighbourhood centres is taken by food based retailers, including convenience stores<sup>73</sup>. Neighbourhood retailing as a whole is predicted to grow but it is expected that there will remain considerable pressure on independent shops. Supporting the success of neighbourhood shops is the desire of consumers to do a lot less shopping in terms of volume but on a much higher frequency. In particular it is those neighbourhood parades that are close to transport hubs and links that are benefiting the most, as workers often shop close to home and on their way back from work<sup>74</sup>.
- 2.66 The DCLG, in 2012, reported that even though some parades remain specifically focused shopping locations, a number of other parades have advanced and now comprise new local services, including health, education, leisure and other community facilities. The plethora and diversity of uses expanding their role as 'community hubs'. This has had the effect of extending their role and increasing their value in local place-shaping<sup>75</sup>. Leisure uses are particularly beneficial for positively contributing to the vitality and vibrancy of a neighbourhood centre during the evening as many operate after retail outlets shut their doors for the day. These add to the draw and diversity of neighbourhood parades, extending their role as a focus for residential communities.
- 2.67 In summary, the essential role and function of neighbourhood parades has endured over recent years. This is particularly interesting given structural shifts and drastic changes in consumer trends impacting on a number of retail sectors. Essentially, neighbourhood parades continue to operate not only as a shopping destination but as a 'hub' which people come to for non-retail services as well providing public space in which social exchanges and events occur<sup>76</sup>.

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<sup>71</sup> BIS Research Paper No.188 – 'Policy Implications of Recent Trends in the High-Street/Retail Sector', Department for Innovations and Skills, December 2014

<sup>72</sup> 'British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence', Economic and Social Research Council and the University of Southampton, March 2015

<sup>73</sup> 'Parades of shops - Towards an understanding of performance & prospects', Department for Communities and Local Government, 2012

<sup>74</sup> 'British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence', Economic and Social Research Council and the University of Southampton, March 2015

<sup>75</sup> 'Parades of shops,' Department for Communities and Local Government, 2012

<sup>76</sup> 'British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence', Economic and Social Research Council and the University of Southampton, March 2015

- 2.68 The size of these centres has remained stable, suggesting that overall, they have undergone little or modest physical change in response to broader trends, such as the recession<sup>77</sup>.

### **Growth in E-Tailing (or 'E-Commerce')**

- 2.69 As has already been established in the preceding sections, the rise of "E-tailing" has significantly altered the way in which the average consumer makes purchases across multiple sectors. Between 2008 and 2014, online sales as a proportion of total retail spend (excluding fuel) rose by more than 2.5 times – from under 4.7% in June 2008 to 11.7% in mid-2015 (as reported by the ONS<sup>78</sup>). The most recent data from the ONS on Retail Sales (published in March 2016)<sup>79</sup> identified that the amount spent online accounted for 13.2% of all retail spending (excluding fuel), a further increase from the previous year.
- 2.70 In the current retail environment, reports on "E-tailing" suggest it accounts for one in every five to ten pounds that are spent in the UK<sup>80</sup>. To keep up with the spending patterns of the typical consumer, almost all retailers now have an online presence. Over time online shops are becoming more and more advanced and easy to use. This supports the growing attraction for consumers to make their purchases online.
- 2.71 It is important to acknowledge that there is a substantial variation between the kinds of purchases that are most likely to be made online. The ONS report that 4.4% of all 'food' purchases were made online in March 2016, whereas 11.5% of all 'textile, clothing, and footwear' purchases and 8.8% of 'household good purchases' were made online<sup>81</sup>. Figure 2.3 illustrates the penetration of online sales by sector based on 2013 data. Most notable is the large proportion of music and video, books and electrics that are purchased online.

<sup>77</sup> BIS Research Paper No.188 – 'Policy Implications of Recent Trends in the High-Street/Retail Sector', Department for Innovations and Skills, December 2014

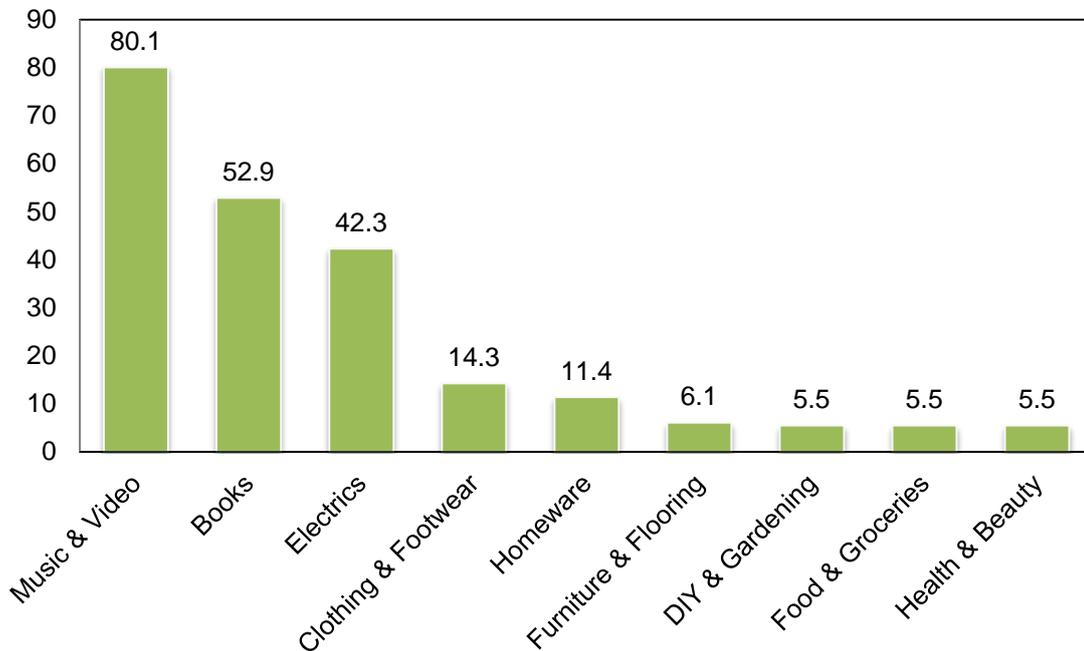
<sup>78</sup> 'Retail Planner Briefing Note 13' Experian, October 2015

<sup>79</sup> 'Statistical bulletin: Retail Sales' ONS, March 2016

<sup>80</sup> 'UK online retail sales to reach £62.7bn in 2020', Verdict Retail, 17 September 2015

<sup>81</sup> 'Statistical bulletin: Retail Sales' ONS, March 2016

**Figure 2.3 | Online Sales Penetration by Sector % (2013 data)**



**Source:** Verdict and SAS – How the UK will shop: 2013

2.72 The popularity of making online purchases is predicted to not only continue but to grow. Experian predict that by 2020 online (non-store) purchases will account for 17.8% of total retail expenditure, rising to 19.9% in 2035<sup>82</sup>. This is a significant increase in contrast to the March 2016 ONS figure of 13.2%. However, it is important to recognise that the increasing internet user base which drove the significant leaps in online sales observed each year from the mid-2000s will no longer be the key contributing factor as 88.5% of the UK population are now internet users (or 57.3 million people)<sup>83</sup>. Nevertheless, growth is expected to be maintained, although through new technology such as mobile phones and tablets.

2.73 In addition, a more co-ordinated approach to retail offers is expected with the online and physical world working together – an approach which is coined “omni-channel”. Indicative of the relationship between an online retail presences producing in-store purchasing is research produced by Deloitte in 2015, which estimated that digital technology influenced 33% of in-store retail sales in the UK in

<sup>82</sup> ‘Experian Retail Planner Briefing Note 13’, Experian, October 2015

<sup>83</sup> ‘Experian Retail Planner Briefing Note 13’, Experian, October 2015

2014, equivalent to £100 billion<sup>84</sup>. In future, Deloitte predict this will continue to grow with 50% of all in-store purchases being influenced digitally at the end of 2015<sup>85</sup>.

- 2.74 The rise in popularity in 'click and collect' is another example of online influenced sales resulting in visits to a physical store. Deloitte estimate that approximately one third of all online shoppers make 'click and collect' services<sup>86</sup>. A variety of retail research providers suggest that the popularity in 'click in collect' is set to grow exponentially in next few years. Interestingly, the ONS highlight that 'click and collect' as a complimentary service to the success of the UK high street<sup>87</sup>.
- 2.75 In summary, the rise of the online retail world is unquestionable. As the influence of "E-Commerce" continues to accelerate, we can expect retailers to react and start prioritising how they will make sure the relationship between real world retail stores and their online presence become more integrated.

## Conclusion

- 2.76 In summary, the retail market has experienced significant changes in recent years. The prevailing retail environment continues to be volatile and unstable. In response to the unpredictability those operating in the market are forced to adapt quickly or otherwise face failing profits and potential collapse altogether.
- 2.77 Poor economic conditions facing the UK (i.e. the economic downturn over the period 2008 to 2013) led to a marked deterioration in established town centres as well as other retail formats, of note shopping centres. The overarching cause of decline resulted from restrictions in available expenditure due to suppressed disposable incomes.
- 2.78 However, 2016 has to date brought a return to economic conditions more akin to pre-recession times (pre 2008). In consequence, consumers are recovering their confidence. The main drivers are considered to be (1) the improved economic outlook (as a result of decreasing unemployment) and (2) the availability of credit, which has seen expenditure growth rates rising. So, whilst forecasts are still below pre-recession levels, they are significantly higher than those recorded over the last three to four years.
- 2.79 The evolution into "E-tailing" has reduced the recognised need for new tangible floorspace in recent years. However, with the retail industry embracing innovative omni-channelling strategies, that are not restricted but supported by online-influenced sales, this provides an opportunity for town centres to regain some of the custom they have lost. To make sure the growing spend actually

<sup>84</sup> 'The Deloitte Consumer Review – Digital Predictions 2015' Deloitte, 2015

<sup>85</sup> 'The Deloitte Consumer Review – Digital Predictions 2015' Deloitte, 2015

<sup>86</sup> 'The Deloitte Consumer Review – Digital Predictions 2015', Deloitte, 2015

<sup>87</sup> 'ONS Statistical Bulletin (2014) Internet Access – Households and Individuals', ONS, 2014

takes place within UK town centres, it is critical that town centres embrace digital solutions whilst also providing suitable and well-maintained retail floorspace that provides for a high quality shopping experience.

- 2.80 It is well recognised that town centres must be open to a holistic retail strategy if they are to secure future vitality and viability.

## 3.0 Planning Policy and Regeneration Context

### Introduction

- 3.1 This Nexus Retail and Leisure Study provides evidence that will support and inform the production of the Ashfield Local Plan. As such it is important to analyse and understand how the adopted and emerging national planning documentation may impact the context of Local Plan policy, in particular those policies that relate to retail.
- 3.2 The following section of the Retail and Leisure Study report establishes the planning policy and regeneration context for the Study Area (refer to Figure 5.2 in Section 5 which illustrates the boundary of the identified Study Area, also included in a larger format at **Appendix A**). Relevant documents from the Ashfield District Council Development Framework, in addition to associated supporting documents, studies, and consultation documentation have been reviewed and a summary is provided below.

### National Planning Policy Framework

- 3.3 The National Planning Policy Framework (NPPF) was published on 27<sup>th</sup> March 2012, coming into force with immediate effect for plan-making and development management decisions. Subsequent to this, the National Planning Policy Guidance (NPPG) was produced and published on 6 March 2014 as an online tool to support the implementation of the NPPF.
- 3.4 The NPPF is unashamedly pro-growth with a “presumption in favour of sustainable development”. It effectively instructs decision makers to make positive decisions and support development unless there are clear adverse environmental, social and/or economic impacts. It is the NPPF that provides the national guidance against which all planning applications should be considered.
- 3.5 The NPPF directly addresses economic development and acknowledges how planning can proactively drive and support economic development and in turn deliver homes, business, industrial units, infrastructure and thriving local places that England needs. Further, the NPPF emphasises that every effort should be made to objectively identify and then meet business development needs.
- 3.6 The NPPF stresses the Government’s commitment to securing economic growth in order to create jobs and prosperity. Paragraph 17 asserts the planning system should do everything it can to support sustainable economic growth. Additionally, Paragraph 19 explains significant weight should be placed on the need to support economic growth through the planning system and that planning should operate to encourage development and not act as an impediment to sustainable growth.

- Paragraph 20 details that local planning authorities should plan proactively to meet the development needs of business and support a “21<sup>st</sup> century economy”. Further to this, Paragraph 21 explains that investment in business should not be over-burdened by the requirements of planning policy.
- 3.7 To ensure the continued vitality of town centres, Paragraphs 23 to 27 of the NPPF promote and support new development and investment within the settlement boundaries of town centres, recognising that town centres are the heart of communities. Where town centres are in decline, the NPPF directs local planning authorities to plan positively for their future to encourage economic activity.
- 3.8 The NPPF recognises the need for local authorities to promote the vitality and viability of their towns and cities through the promotion of competition and growth management. Specifically, Paragraph 23 of the NPPF provides guidance for local planning authorities in drawing up Local Plans, it indicates that they should:
- a. Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
  - b. Define a network and hierarchy of centres that is resilient to anticipated future economic changes;
  - c. Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
  - d. Promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
  - e. Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
  - f. Allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;

- g. Allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
  - h. Set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
  - i. Recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
  - j. Where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.
- 3.9 Furthermore, Paragraph 24 requires local planning authorities to enforce a sequential approach when assessing planning applications for main town centre uses that are not in an existing centre or in accordance with an up to date Local Plan. To do this local authorities should require applications for main town centre uses to be located in town centres, then in edge of centre locations and only if suitable sites are not available should out-of-centre sites be considered. When reviewing edge of centre and out-of-centre proposals, they should give preference to accessible locations well connected to the town centre.
- 3.10 Paragraph 26 specifies that local planning authorities should require an impact assessment for retail, leisure and office development outside of town centres which are not in accordance with an up to date Local Plan and if the development is over a proportionate, locally set threshold for retail, leisure and office uses. Where there is no locally defined threshold, the default threshold will be 2,500 sq m. The impact assessment should assess – (1) the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal, and (2) the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made.
- 3.11 In summary, the NPPF endorses a ‘town centre first’ approach to all retail activity (including leisure). It stipulates that where retail and leisure proposals cannot be accommodated within, or, adjacent to the town centre applicants have to demonstrate through the application of dual impact test and the sequential test that the development will not impact negatively upon the vitality and viability of town centres.

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## Ensuring the Vitality of Town Centres Planning Practice Guidance

- 3.12 National Planning Practice Guidance (referred to as the NPPG) entitled 'Ensuring the Vitality of Town Centres' was published in March 2014 and replaced the previous Planning for Town Centres Practice Guidance. The online tool provides a succinct synopsis of how retail and main town centre planning policy should be applied in practice.
- 3.13 In short, the specific objectives of the NPPG remain similar to those of its predecessor. For example, it directs local planning authorities to plan positively and support town centres. In addition to setting out objectives that aim to generate local employment, promote competition within and between town centres, and create attractive and diverse places for users.
- 3.14 In addition to the enforcement of a 'town centre first' approach in order to meet local needs, the NPPG sanctions this should be delivered through a positive vision or strategy which is communicated through the development plan. In summary, local authorities should use development plan documents, policies and supporting guidance documents to address the following matters:
- a. The appropriate and realistic role, function and hierarchy of town centres in the area for the duration of the plan period. This should involve an audit of the vitality and viability of existing town centres and their ability to accommodate new development;
  - b. Encapsulate a clear vision for the future of each town centre and the most appropriate mix of uses;
  - c. Ability for the town centre to accommodate the scale of assessed need through new development;
  - d. Timeframe for the delivery of new retail floorspace;
  - e. Any other complementary approaches which are necessary or appropriate to enhance the town centre to deliver the vision for its future; and
  - f. How the car parking provision can be enhanced in order to encourage town centre vitality.
- 3.15 Of specific relevance to this Retail and Leisure Study, Paragraph 005 categorises a series of key indicators to be used when assessing the health of a centre over time. It is these indicators that we have based our health checks of the vitality and viability of Ashfield centres on, as set out in detail in Section 5 of this Report.

- 3.16 Paragraph 005 also explains that it is often the case that successful town centre regeneration initiatives involve a range of improvements such as renewed public realm, parking, and accessibility and other partnership mechanisms, rather than being purely led by retail schemes or focused on substantial new development.

### **The Portas Review - An Independent Review into the Future of Our High Streets**

- 3.17 Mary Portas' completed and independent assessment, on behalf of central Government, taking a critical look at the state and predicted future of Britain's high streets and town centres. She set out her findings in a report entitled 'The Portas Review - An Independent Review into the Future of Our High Streets', which was published in December 2011.
- 3.18 Since its publication the report has been referenced as a key guiding document for town centre planning policy and regeneration efforts.
- 3.19 The review provided a critical assessment of the factors contributing to a third of high streets degenerating or failing. In addition, to analysing the reasons why over the previous decade out-of-town retail floorspace had increased by 30% while in town floorspace had actually shrunk by 14%. As part of the Review Portas made 28 recommendations, including actions that Government, businesses and other organisations should take in order to bring back life into their high streets and town centres. Portas put out a challenge to re-imagine them as social hubs, not only just for shopping but also for learning, socialising and fun.
- 3.20 Four months after the publication of the report (March 2012) the Government published a formal response. Principally, the response acknowledged that in retort to the challenges being faced by the UK high street the high street must provide something new and different for its visitors. Most notably, the challenges referenced were those being brought about by out-of-centre retail development and online retailing.
- 3.21 The Government set out an action plan with a set of key recommendations, including the following which are considered to be some of the most pertinent:
- i. Introduction of Town Teams (defined by Portas to be visionary, strategic and strong operational management teams for high streets) – Town Teams should not restrict their imagination;
  - ii. Funding for pilot areas (known as Portas Pilots) which are judged to have the best concepts town centres and high streets improvements;

- iii. A £10 million High Street Innovation fund allocated to councils in areas blighted by empty voids;
  - iv. Support for a new National Market Day to be held on 23 June; and
  - v. £500,000 investment into the development of new Business Improvement Districts.
- 3.22 It is interesting to look back on this response now, given a number of these recognised initiatives are no longer being actively pursued by the Government.
- 3.23 In summary, the Government's response sought to encourage local planning authorities to adopt inspirational thinking in order to ascertain concepts for town centre enhancement and improvement. The overriding goal local authorities were tasked with is to induce their residents back into the town centre, in both the daytime and night-time hours. However, given on-going challenges and competing priorities for both the Government and local authorities a number of the schemes are not currently considered feasible.

### **Relaxation of Permitted Development Rights**

- 3.24 Over the past few years the Government has supported the nation's town centres by adopting flexible policies that allow the diversification of town centre units.
- 3.25 In May 2013 changes were made to the Town and Country Planning (General Permitted Development) Order 1995 in response to the Portas Review's (see above) recommendation to make it easier to convert surplus space in order to provide for the effective re-use of town centre units. The May 2013 amendments provided for a period of three years during which the change of use of B1 offices to C3 residential uses could take place without the need for formal planning permission. Under this order, applicants are simply required to apply for a prior approval notice from the relevant local planning authority.
- 3.26 The 2013 Order also provides for the temporary change of use (for up to two years) of uses falling within Use Classes A1, A2, A3, A4, A5, B1, D1 and D2 to uses falling within Classes A1, A2, A3 and B1. Prior approval for this type of use would be given when it relates to no more than 150 sq m of floorspace and the temporary provision has not formerly been relied upon.
- 3.27 In April 2014, permitted development rights were further extended to provide for certain additional changes of use without the need for formal planning permission. The changes introduced two new classifications of permitted development for commercial premises, as follows:

- a) The first provides for the change of use of premises and land from Use Class A1 to use as a 'deposit taker' (effectively comprising banks, building societies, credit unions and friendly societies).
  - b) The second provides for the change of use from Use Classes A1 and A2 to C3 residential.
- 3.28 Again there are certain restrictions as to where and when the rights can be exercised. Most notably, the change of use must relate to no more than 150 sq m of floorspace.
- 3.29 Further extensions to the permitted development rights came into force two years later on 4 April 2016. The key changes introduced by this 2016 Order include:
- a) Removal of the 31 May 2016 deadline altogether (being the end of the previously identified three year period), thereby making the permitted rights **permanent**; and
  - b) Allowing laundrettes to change to residential uses.
- 3.30 The intended consequence of such measures is to secure the redevelopment and reuse of premises and diminish long-term vacancies. To this end, the rights are expected to support town centres to be comprised of well-utilised units

### Ashfield Local Plan

- 3.31 The Ashfield Local Plan covers the whole of the District of Ashfield and was formally adopted on 22 November 2002. Following the enactment of the Planning and Compulsory Purchase Act 2004, a number of the 2002 Local Plan policies were saved by the Secretary of State's Direction of September 2007 and continue to apply to the consideration of planning applications within the District.
- 3.32 Paragraph 215 of the NPPF explains that due weight can be given to relevant policies in the Local Plan 2002, according to their degree of consistency with the NPPF. The closer the policies in the Local Plan are to the policies in this national Framework, the greater the weight that may be given.
- 3.33 In 2014 an emerging Local Plan was formally withdrawn following a review and subsequent recommendation from an independent Inspector. The Inspector recognised that a considerable amount of work had been put into preparing the emerging Local Plan. However, he raised two principle concerns relating to the sustainability evidence for (1) the Site Development Options and (2) in relation to the Green Belt. A resolution to withdraw the Local Plan Publication was made on 24 July 2014 by a decision of Ashfield's Full Council.

### Emerging Local Plan – The Preferred Approach

- 3.34 Against this background the Council is currently taking the preliminary steps necessary to prepare a new Local Plan in line with the requirements of the NPPF. Housing growth, the local economy and the health of town centres, including the three main town centres, are amongst the issues to be addressed through the new Local Plan.
- 3.35 The Preferred Approach Local Plan recognises that the District is changing and growing, with approximately 10,000 new jobs forecasted by 2032. The District's population is projected to increase by around 13,000 (or approximately 10%). On average 480 new homes a year will be required during the course of the plan period in order to meet the housing needs of the District's communities.
- 3.36 The Council's most progressed version of the emerging Local Plan is the Preferred Approach Local Plan (dated January 2016). Public consultation on the Preferred Approach Local Plan ran from 2 February 2016 to 20 March 2016. The timetable for the preparation of the new Local Plan anticipates formal adoption in early 2017.
- 3.37 Of relevance to this Retail and Leisure Study are the Council's aims and ambitions for the future prosperity of Ashfield's town centres. The Preferred Approach acknowledges this as critical to the success of the Council's emerging spatial strategy. One of the key issues set out in the Preferred Approach Local Plan is the need for continued support and investment to help sustain all the District's town centres into the future. In recognition of the three higher order town centres in Ashfield the Preferred Approach Local Plan includes three town centre specific policies, as follows:
- i. **Policy SO3 'Sutton-in-Ashfield Town Centre'** – To promote and develop Sutton-in-Ashfield town centre as a vibrant and successful Sub Regional Centre with a high quality mix of retail, culture, housing, employment and leisure, which has the ability to compete with neighbouring Sub Regional Centres.
  - ii. **Policy SO4 'Hucknall Town Centre'** – To regenerate Hucknall town centre to provide a lively and prosperous Major District Centre and a traditional retail offer to local residential and visitors exploring Hucknall's rich heritage.
  - iii. **Policy SO5 'Kirkby-in-Ashfield Town Centre'** – To enable Kirkby-in-Ashfield's role as a District Centre to be attractive and function successfully with a good range of everyday services and shopping requirements.
- 3.38 In support of these objectives the Preferred Approach Local Plan contains specific policies that set out how new development should support and strengthen the role of the District's centres and

should be focused on those centres higher up the settlement hierarchy. The proposed hierarchy is as follows:

**Figure 3.1 | Proposed Settlement Hierarchy**

Hierarchy	Towns/settlements
<b>Sub Regional Centre</b>	Sutton-in-Ashfield
<b>Major District Centre</b>	Hucknall
<b>District Centre</b>	Kirkby-in-Ashfield
<b>Local Shopping Centres</b>	Outram Street; Stanton Hill; Annesley Road; Watnall Road; Huthwaite; Jacksdale
<b>Shopping Parades</b>	Annesley Woodhouse; Selston; Skegby; Underwood

**Source:** Ashfield Local Plan – Preferred Approach, January 2016

3.39 Given the preliminary stage of the emerging Local Plan, this assessment of policy context has focused on the policies of the adopted Local Plan 2002 relevant to this Retail and Leisure Study.

### The Adopted Ashfield Local Plan (2002)

3.40 The Local Plan identifies a series of overarching strategic objectives which encapsulate the Council's vision for the District over the plan period to 2011. These objectives are summarised below:

- a. *To protect and enhance the environment.*
- b. *Meet the employment needs to 2011 of those who depend on the District for jobs.*
- c. *Meet the overall housing needs to 2011 of the District in appropriate locations.*
- d. *Balance the need for development with the need to maintain the quality of the environment.*
- e. *Make optimum use of the scarce resources of land, finance and labour.*
- f. *To enhance town centres.*

3.41 In respect to the role and function of the District's centres, the Local Plan explains there is a clear settlement hierarchy in the District:

**Top tier:** The top tier comprises the three Main Urban Areas where housing, jobs and services are concentrated. These are – Sutton-in-Ashfield, Hucknall and Kirkby-in-Ashfield.

**Second tier:** The second comprises the villages of Jacksdale, Selston, Underwood and New Annesley and the part of the larger settlements of Bestwood and Brinsley that lie within the Ashfield jurisdiction boundary.

**Third tier:** The third consists of other smaller settlements within the District's countryside.

3.42 Moreover, **Policy ST2 'Main Urban Areas'** states that development will be concentrated within the Main Urban Areas, where services are concentrated and access to facilities is best. This policy is in accordance with the District's spatial strategy for growth, which specifies that these centres are to remain the main employment, housing and service centres in the District. Notably, Policy ST2 does not distinguish between the three towns in terms of the overall strategic attitude to development, but looks to concentrate new development in each of them during the plan period.

3.43 The sections below address topic specific policies that are pertinent to the vitality, viability and continued success of the District's centres.

### Shopping

3.44 Of particular relevance, **Chapter 7 'Shopping'** of the Local Plan considers the role of the District's town centres. Chapter 7 begins with an explanation of how the role of the town centre is changing from the traditional. Factors attributed to the changes include:

- a. *Tendency towards larger foodstores providing for one-stop shopping trips on a reduced frequency;*
- b. *The development of retail warehouses (either individually or in parks) accommodating DIY goods, electrical appliances, carpets, furniture and other non-food goods; and*
- c. *The development of large regional shopping centres providing a full range of shopping and leisure facilities.*

3.45 Reflective of the ambitions set out in national planning policy of that time – notably the Government's PPG6 'Town Centres and Retail Developments', the local level policies seek to maintain and enhance the role of existing town centres and local shopping provision.

3.46 Policy guidance on the type of development sought after within the District town centres; Sutton-in-Ashfield, Hucknall and Kirkby, is set out in **Policy SH1 'District Shopping Centres'**. Policy SH1 sets out a list of developments that will be permitted within these centres, as follows:

- a. *Development / redevelopment for shopping purposes;*
- b. *Commercial developments appropriate to a town centre;*
- c. *Residential and employment development;*
- d. *Traffic management/servicing schemes;*
- e. *Environmental improvement schemes;*
- f. *Parking facilities provided in accordance with the Council's standards;*
- g. *Measures to improve accessibility by public transport; and*
- h. *Improvement of facilities for cyclists, pedestrians and the disabled.*

3.47 The supporting text for Policy SH1 provides background detail with regards to the aims and ambitions sought through application of this policy. Policy SH1 specifies appropriate main town centres uses that will contribute to the diversity of use and promote vitality and viability. Beyond retail uses, office, leisure and residential are considered positive contributing uses. The re-use of vacant space above shops is heralded as positively influencing the overall vitality of a centre, in particular residential uses. Activities which generate night time activity are also important to ensure the vitality and viability of centres is maintained, while also providing for an evening economy.

#### **The Need for New Retail Development**

3.48 In addition to identifying the type of main town centre uses desirable in the District's town centres, the Local Plan also recognises the quantum of new retail development required. To do this, the Council have developed and applied a potential retail floorspace model to produce a set of base floorspace guidelines. This model is based on the assumption that the shopping behaviour, at that time - 2002, continues in future.

3.49 The Council's quantitative assessment of retail need during the plan period identifies a total of 2,950 sq m (net) of convenience goods floorspace and 15,570 sq m (net) of durable goods (which includes both comparison durable and bulky durable needs) as the potential requirement over the period 1997 to 2011.

#### **Focusing New Retail Development in Town Centres**

3.50 Aligned with current national policy, the Local Plan promotes a 'town centre first' approach for all new retail development (although notably this plan predates the NPPF). The approach adopted by the Council requires planning applicants for retail proposals outside of the District Shopping

Centres to demonstrate suitable alternative sites do not exist within these centres. Where such sites are not available, and there is a recognised need for additional floorspace, retailing provision outside of District Centres should be sited where it is accessible by a choice of means of transport.

### **Local and Minor Shopping Centres and Single Shops**

- 3.51 The function and importance of smaller shopping centres and single shops is acknowledged in the Local Plan. **Policies SH4 'Local Shopping Centres' and SH5 'Minor Shopping Centres and Single Shops'** set the criteria of retail development considered appropriate for these locations by placing restrictions on their scale and only permitting those which fit with the character of the area. The function of local shopping areas, either within smaller settlements or at the edge of existing District Centres, is essential in meeting the needs of local communities and in particular the needs of those residents who are less mobile.
- 3.52 Policy SH4 addresses even smaller scale shopping provisions – which are typically in the form of shopping parades, small groups of shops or individual shops. This scale of provision is considered to account for about 17% of the shops in the District, almost 40% of which are food outlets. Like local shopping centres they provide for the day-to-day needs of communities and particularly the less mobile.
- 3.53 Given the localised role of these lower tier centres 'other uses', such as local community facilities and small scale office uses, are considered acceptable by the Council.

### **Evidence Base**

- 3.54 The Council's evidence base (used to inform the preparation of emerging local plan policies) includes a range of studies and supplementary documents. The studies and supplementary documents cover a range of topics including the economy, employment, housing, and the physical/built environment.
- 3.55 As already referenced above, this Retail and Leisure Study is an update on the 2011 Retail Study completed by WYG, which forms part of the existing evidence base. The 2011 Retail Study built upon the 2006 Retail Study produced by GVA Grimley. Completing a study in 2011 was considered to be of importance given the downturn in the UK economy since the reporting of the previous Grimley GVA 2006 Retail Study, and the notable impact on the retail sector.
- 3.56 The 2011 Retail Study contained a review of the local policy framework, an analysis of household telephone surveys, qualitative health checks, economic capacity forecasts, and set out scope for new retail development in the District. For the purposes of providing an indication of the District's

retail performance in 2011, as well as the forecasted retail growth at that time, key findings from the 2011 Retail Study are set out below.

### Market Share

- 3.57 When considering the spread of market share for spending on comparison and convenience goods among the District's three higher-tier town centres, the 2011 WYG Study identified the following conclusions:
- i. As predicted Sutton accounts for the largest Market Share for the Study Area. In terms of convenience shopping, existing facilities at Sutton attract around 13.8% of expenditure generated within the Study Area. The overall comparison goods market share for Sutton is 12.7% of the Study Area;
  - ii. Kirkby's effect on retail provision is very limited within the Study Area where it performs a relatively modest role in Zone 2, its immediate catchment. Facilities in Kirkby retain 2.0% of the comparison goods expenditure available across the whole Study Area; this is compared to 3.2% for convenience goods expenditure; and
  - iii. Hucknall has a more localised role than the other two district centres, with its influence being mainly limited to Zone 3 (it fails to attract more than 5% of the market share of convenience goods expenditure from any other zone). Similarly, the market share claimed by Hucknall for expenditure on comparison goods is again localised – Hucknall claims nearly a third of the comparison goods expenditure generated in Zone 3, and beyond Zone 3 there is a very limited draw.

### Forecasted Retail Capacity

- 3.58 In terms of identified convenience retail capacity in Ashfield, WYG concluded that based on current shopping patterns and the strong performance of existing facilities; there was a demonstrable need for further retail floorspace within Ashfield. At the time the 2011 Retail Study was published, Ashfield was subject to significant committed convenience goods floorspace in the form of the Morrisons foodstore development in Kirkby. WYG conclude that after taking into account the Morrisons development and when applying the average sales densities of the leading five main food operators (Asda, Tesco, Morrisons, Sainsbury's and Waitrose) to the capacity figures, there was an identified need to accommodate 2,200 sq m (net) of convenience goods floorspace increasing to 4,300 sq m (net) by 2032. However, the exact amount is dependent upon the end operator and type of development.

- 3.59 When assessing comparison retail, the model developed as part of this Study estimated that there will be a capacity of approximately £4.4m by 2016 that could be spent in new facilities. This will increase further to £22.3m by 2021, increasing to £45.1m by 2026 and increasing to £81.0m by 2030. WYG estimated that after taking account of the new comparison floorspace in the Morrisons at Kirkby there would be no need for new comparison floorspace in the period to 2016, but estimated that between 11,000 sq m (net) and 18,500 sq m (net) could be supported by 2030.

#### Impact Thresholds

- 3.60 WYG also provided guidance on impact thresholds (for retail and leisure) for each of the town centres. Their recommendations are set out below:
- a. For Sutton WYG recommended that development proposals providing greater than 500 sq m gross floorspace of town centre uses in an edge or out-of-centre location should be the subject of an impact assessment.
  - b. With regards Hucknall and Kirkby they considered it to be appropriate to reduce the threshold for these district centres to 300 sq m gross and for local centres to 200 sq m gross.

### **Conclusion**

- 3.61 The NPPF recognises and stresses the importance of promoting the vitality and viability of town centres through a 'town centre first' approach to development and a defined retail hierarchy. Town centres play an essential contributing role in the nation's economy as well as acting as the heart of local communities – where both social and commercial exchanges take place.
- 3.62 As a direct result of the NPPF coming into force, all planning applications for main town centre uses must provide a full assessment of the impact of the proposal on the vitality and viability of protected centres (for applications greater than 2,500 sq m, or a locally set threshold). It is on the basis of this impact assessment that local planning authorities consider the overall impact of the planned development on their existing retail provision as well as pipeline retail developments.
- 3.63 The Council's current Local Plan was adopted over thirteen years ago, and nine years before the enactment of the NPPF. Even so, it still comprises a number of planning policies that by and large comply with the guidance set out for local planning authorities by the NPPF as they relate to the promotion of town centres. Notably, the adopted Local Plan identifies and sets out a hierarchy of the District's centres, identifies the boundaries of primary shopping areas, and also includes policies that seek to promote its town centres competitive performance.

- 3.64 At present an emerging Local Plan is under preparation. Public consultation on the Preferred Approach recently finished in March 2016 and the Council's Policy Team are currently reviewing all of the representations received. The emerging Local Plan will help guide sustainable development across the District for the next 15 years up to 2032. One of the key issues set out in the Preferred Approach Local Plan is the need for continued support and investment to help sustain all the District's town centres into the future. Visions for each of the higher order town centres, as well as the smaller local centres, are currently proposed in the Preferred Approach Local Plan.

## 4.0 Assessment of Key Retail Centres

- 4.1 This section of the Retail and Leisure Study details our assessment of the vitality and viability of the Ashfield District's centres.
- 4.2 The analysis focuses on the three district centres of Sutton-in-Ashfield Sub Regional Centre, Hucknall Major District Centre and Kirkby-in-Ashfield District Centre, and addresses them in order of size in the subsequent sections. These three town centres perform an important role in Ashfield by serving the needs of the local community. Further, these centres also function as focal points of activity, by virtue of their range of services that are accessible to the population, comprising; retail, employment, leisure and education facilities.
- 4.3 In addition to these more in-depth evaluations, at **Appendix D**, we set out our assessment of the local shopping centres in the District. These centres include:
- Outram Street Local Shopping Centre on the outskirts of Sutton;
  - Annesley Road Local Shopping Centre in close proximity to Hucknall;
  - Watnall Road Local Shopping Centre, which adjoins the High Street of Hucknall; and
  - The villages of Stanton Hill Local Shopping Centre, Huthwaite Local Shopping Centre and Jacksdale Local Shopping Centre.
- 4.4 The extent of each of the larger town centres assessed has been determined by the Experian GOAD Plans. Whereas the boundaries of the smaller local shopping centres and shopping parades have been taken from the adopted Local Plan<sup>88</sup>.
- 4.5 Section 4 concludes with an appraisal of future capacity and pipeline schemes within competing centres. The quantum of future capacity and pipeline schemes will consolidate the retail offer of the competing centres and enhance their retail offer, augmenting their market share. To do this, Nexus worked in collaboration with the Ashfield Council to contact neighbouring authorities in order to identify notable pipeline schemes within competing centres.

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<sup>88</sup> Due to the size of these centres there are no Experian GOAD Plans available.

## Methodology

4.6 The National Planning Policy Framework (NPPF) of March 2012 states that local planning authorities should:

- Set out policies for the management and growth of town centres over the plan period;
- Recognise town centres as the heart of their communities; and
- Pursue policies to support their viability and vitality.

4.7 It is recognised (at Paragraph 23 of the NPPF) that town centres are the heart of communities and local planning authorities should pursue policies to support their viability and vitality, in addition to promoting competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres.

4.8 We look to the Government's 'Ensuring the Vitality of Town Centres' National Planning Practice Guidance (NPPG) of March 2014 which provides a helpful set of indicators against which the health of town centres can be assessed. Further, the NPPG explains these indicators should be monitored on a consistent basis to allow the performance of the centre to be accurately tracked.

4.9 Below is a list, and accompanying brief descriptions, of the indicators that have been used by Nexus to complete their assessment of the health of the Ashfield centres:

- **Diversity of Uses** - Figures on the diversity of uses in each of the district and local shopping centres was collated during the Retail Surveys completed by Nexus in January 2016. The collected data includes the number, type and quantum of floorspace provided in these locations.
- **Proportion of Vacant Street Level Property** - Nexus also identified vacant units during the January 2016 Retail Surveys.

The volume of vacant floorspace within a town centre can provide an indication of how a town centre is performing. However, it is important to acknowledge that a degree of vacancy is inevitable and indeed desirable. Some 'churn' is expected in the market as units alter and change, as new businesses come in, and others leave. In this context, vacant units can be found in even the strongest of town centres.

Equally, a low vacancy rate does not necessarily mean a town centre is performing well; as the quality and performance of the occupied units may be relatively poor.

- **Customers' Views and Behaviour** - Inferences on customers' views have been taken from the results of the comprehensive NEMS household telephone survey (completed in January 2016). These results provide an indication of how a centre is both used and viewed by local residents.
  - **Retailer Representation** - Javelin Venuescore UK Shopping Venue Rankings, Experian GOAD Category Reports and other published sources have been relied on to derive information on the current strength of centres, retailer representation and retailer requirements.
  - **Pedestrian Flows** - During their site visits to the Ashfield centres in early 2016 Nexus took note of pedestrian flows in various parts of each centre. The centres were visited on different days of the week and at different times of the day. Therefore, Nexus was able to obtain a comprehensive understanding of pedestrian flows through observation at these varying times.
  - **Accessibility** - The accessibility of a centre is determined by the ease and convenience of access by a variety of transport means; including that which is provided to pedestrians, cyclists and disabled people – and the ease of access from the main arrival points to the principal attractions in the centre. In order to ascertain the level of accessibility to each centre Nexus completed a desktop review of data detailing access to public transport and parking facilities, and supplemented this review with observations made during the Nexus site visits, as well as stakeholder engagement.
  - **State of Town Centre Environmental Quality** - Consideration of the quality of the buildings and public realm in each of the centres was informed by Nexus's site visits to each of the centres and the NEMS household telephone survey.
  - **Commercial Rents** - Zone A rental data can provide information on historic trends, however, data on commercial rent is not available publically at this time.
  - **Commercial Yields on Non-Domestic Property** - Whilst this can be an indicator of town centre performance over time, data on commercial yields for the Ashfield area is not available publically at this time.
- 4.10 As part of this study Nexus visited each defined district and local shopping centres and shopping parades in Ashfield with a view to assessing the vitality and viability of each centre. It is important to acknowledge that not all of the above indicators are applicable to smaller centres. The health of these smaller centres was assessed only by the relevant measures. Our appraisal of each smaller centres role in and function can be found in **Appendix D**.

- 4.11 Additionally, a 'health check' summary of the three district centres is included in **Appendix B**, and plans illustrating the location and use of each unit in these centres (as defined by Experian GOAD) is provided at **Appendix C**.
- 4.12 The following sections of the report provide details of the Nexus assessment of the health of Ashfield centres in respect to the above indicators derived from the NPPG.

### **Stakeholder Engagement**

- 4.13 Nexus undertook stakeholder engagement with local business representatives to understand the local context. This included a meeting with the Ashfield District Council Town Centres and Markets Manager, and the Chair of 'We Heart Hucknall' Town Team. The following topics were covered during these meetings; the vitality and viability of the town centre, vacancies, mix of retail, parking, street environment, crime and security and the emergence of Town Centre events.
- 4.14 The assessment begins with an analysis of the role of Ashfield's centres in the sub-regional shopping hierarchy.

### **Sub-Regional Hierarchy**

- 4.15 The plan included as Figure 5.2 in Section 5 (and in a larger format at **Appendix A**) illustrates the location of the Study Area relative to the main settlements in the sub-region.
- 4.16 Figure 4.1 shows Javelin Venuescore UK Shopping Venue Rankings 2014/15 for the sub-region's main settlements. Details from the two previous years' indices are also displayed. The index details from 2010/11 were selected as they represent the time during which the previous 2011 WYG Retail Study was completed. The previous year's scores from 2013/14 were also selected as they provide a clear indication of how any recent improvements tied with the improving UK economy may have affected the centres rankings.
- 4.17 Javelin Venuescore's index ranks 2,711 retail venues within the UK (including town centres, stand-alone malls, retail warehouse parks and factory outlet centres) based on the strength of their current retail provision. To produce the index Javelin uses a scoring system based upon the number of multiple retailers present at each locality (anchor stores, fashion operators and non-fashion multiples). It is important to acknowledge that the Venuescores index does not include an assessment of other town centre health indicators, identified in the NPPG i.e. these factors do not affect the score.

**Figure 4.1 / Comparison of Venuescores for Ashfield Town Centres and Competing Centres**

Centre	Classification	2014-2015 Score	2014-2015 Rank	2013-2014 Rank	2011-2012 Rank	Market Position Classification	Market Position Index (Average 100)
<b>Nottingham</b>	Major City	506	7	7	7	Upper Middle	112
<b>Sheffield</b>	Major City	350	22	25	35	Middle	96
<b>Derby</b>	Major Regional	322	27	27	21	Middle	100
<b>Mansfield</b>	Regional	173	121	134	187	Lower Middle	90
<b>Chesterfield</b>	Regional	148	160	154	112	Middle	92
<b>Newark Centre</b>	Regional	143	170	182	177	Middle	96
<b>Worksop</b>	Sub-Regional	108	235	246	248	Lower Middle	89
<b>Beeston</b>	Major District	72	394	441	365	Lower Middle	87
<b>Sutton-in-Ashfield</b>	<b>Major District</b>	<b>62</b>	<b>468</b>	<b>495</b>	<b>475</b>	<b>Lower Middle</b>	<b>85</b>
<b>East Midlands Designer Fashion Outlet</b>	Major District	62	468	433	527	Upper Middle	123
<b>Alfreton</b>	Major District	49	616	573	615	Lower Middle	81
<b>Arnold</b>	Major District	56	526	532	414	Lower Middle	85
<b>Bulwell</b>	District	39	768	930	592	Lower	71
<b>Kirkby</b>	<b>Minor District</b>	<b>26</b>	<b>1167</b>	<b>1061</b>	<b>1436</b>	<b>Lower Middle</b>	<b>85</b>
<b>Hucknall</b>	<b>Minor District</b>	<b>20</b>	<b>1468</b>	<b>1383</b>	<b>1637</b>	<b>Lower</b>	<b>72</b>
<b>Bingham</b>	Local	14	2010	2061	2061	Middle	98

**Source:** Venue Score, 2011/12, 2013/14, and 2014/15 (Centres in Ashfield shown in **bold**)

- 4.18 As illustrated in Figure 4.1, Sutton is the highest ranked centre in Ashfield. It is classed as a 'Major District' centre by Venuescore and is ranked 468th of all the centres surveyed, gaining 27 places since 2013/14.
- 4.19 Both Kirkby and Hucknall have changed rankings since 2013/14. Kirkby's rank has dropped by 106 places; from 1,061st in 2013/14 to 1,167th. Hucknall has moved down 85 places from 1,383rd in 2013/14 to 1,468th in 2014/15.

- 4.20 The three centres in Ashfield remain relatively low in the rankings compared to traditionally competing regional and sub-regional centres. Notably, Nottingham (ranked seventh) is located approximately six miles from the Ashfield District boundary by road.
- 4.21 Whilst the centres in Ashfield occupy a higher position than Bingham, an identified Local Centre in Nottingham, they are ranked below the larger centres of Nottingham City Centre, Sheffield, Derby, Mansfield, Chesterfield, Newark, Worksop and Beeston. It is also worth noting that the East Midlands Designer Fashion Outlet at Alfreton, Bolsover, is placed relatively highly by Venuescores within the UK shopping. In 2014/15 it was ranked 468<sup>th</sup>. Accordingly, it is categorised as a Major Regional Centre.
- 4.22 The Study Area and the shopping patterns occurring within it are therefore influenced by these higher-order centres by virtue of their attractiveness to shoppers and visitors. Most notably, the transport connections (by road and train) available between the Study Area and Nottingham City Centre mean that this highly-ranked Major City centre draws a substantial amount of trade from Ashfield's centres.

## Sutton-in-Ashfield (or Sutton)

### Introduction

- 4.23 Sutton-in-Ashfield (or Sutton) is the largest settlement in Ashfield District and performs an important role as a retail and service destination for the local area, as well as the nearby smaller centres. According to the 2011 Census, Sutton has a population of circa 46,000 people, and is the location of a significant amount of the District's employment.
- 4.24 Sutton was identified as a 'centre of sub-regional importance' by the Ashfield Retail Study 2011. It is defined as a District Centre in the 2002 Adopted Local Plan and a Sub-Regional Centre in the Preferred Approach Local Plan, which takes account of the WYG recommendations in their 2011 Retail Study.
- 4.25 It is located in the northern portion of the defined Study Area, and is approximately 5 km to the west of Mansfield, 12 km to the north west of Hucknall and 26 km to the north west of Nottingham. The town centre is situated within Zones 1 and 6 of the Study Area.
- 4.26 The core town centre of Sutton consists of three adjoining streets (Low Street, Forest Street, and Outram Street), which all run into the pedestrianised Portland Square. The foremost tourist attraction in Sutton – the largest sundial in Europe – is found in the centre of Portland Square.
- 4.27 The prime retail pitch is situated in and around the pedestrianised area of Low Street. It is in this area that the majority of the retail and service units are located – including The Idlewells Shopping Centre. There are additional retail outlets also located on Outram Street, Portland Square, Market Place and Market Street, Brook Street and Forest Street. The large Indoor Market can be found on Market Street, not far from the pedestrianised Low Street. In April 2016 local authority's Cabinet endorsed a recommendation to refurbish the Indoor Market, identifying it as a key asset for the town, instead of the option to relocate to an alternative site on Fox Street.
- 4.28 The majority of retail units are located towards the pedestrianised part of Low Street, The Idlewells Shopping Centre and the southern end of Outram Street.

### Diversity of Uses

- 4.29 The Nexus Retail Survey completed in January 2016 identified a total of 203 units in the town centre, comprising a total gross floorspace of 43,320 sq m. The Retail Survey also reviewed the diversity of units in the Outram Street Local Shopping Centre. A summary of the lower-tier shopping locations can be found in **Appendix D**.

- 4.30 The defined Sutton District Shopping Centre from the adopted Local Plan (2002) includes the Broad Centre Retail Park on Station Road. This Retail Park is not included within the Experian GOAD Plan for the centre, which has guided how we have defined the town centre for the purposes of this Survey.
- 4.31 We have reviewed the diversity of retail and leisure uses accommodated in Sutton Town Centre (by number, type and quantum of floorspace provided) and provide our findings in Figure 4.2. A plan illustrating the location and use of each unit in the town centre (as defined by Experian GOAD) is provided at **Appendix C**.

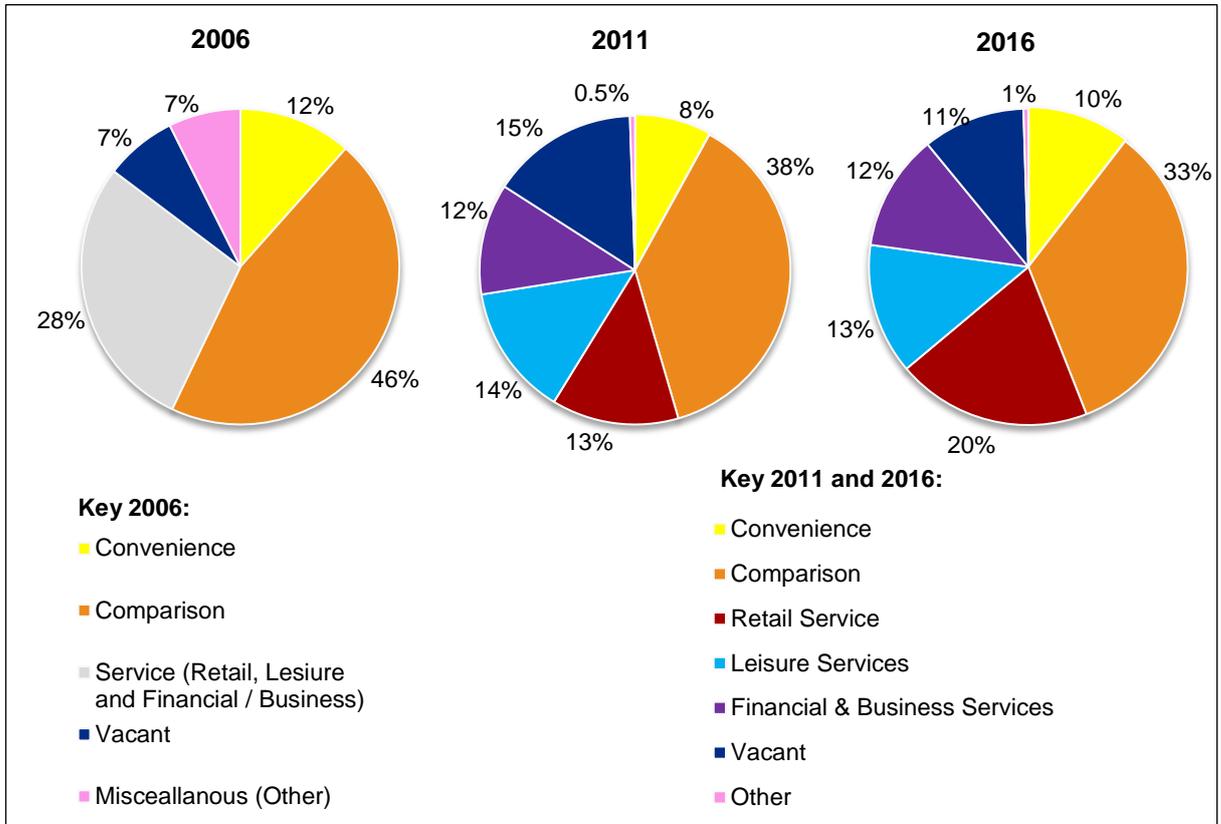
**Figure 4.2 | Sutton Town Centre Composition (Jan 2016)**

	Units (no.)	Units (%)	Units U.K Avg. (%)	Floorspace (sq m)	Floorspace (%)	Floorspace U.K Avg. (%)
<b>Convenience</b>	21	10.3%	8.6%	10,430	24.1%	15.2%
<b>Comparison</b>	68	33.3%	32.1%	13,940	32.2%	35.9%
<b>Retail Service</b>	40	19.6%	14.3%	4,730	10.9%	7.5%
<b>Leisure Services</b>	27	13.2%	22.7%	6,098	14.1%	23.5%
<b>Financial and Business Services</b>	24	11.8%	10.7%	4,130	9.5%	8.1%
<b>Vacant</b>	22	10.8%	11.3%	3,952	9.1%	9.2%
<b>Other</b>	1	1.0%	0.1%	40	0.1%	0.1%
<b>TOTAL</b>	<b>203</b>			<b>43,320</b>		

**Source:** Nexus Retail Survey January 2016

- 4.32 Figure 4.3 shows the change in Sutton’s composition before the recession in 2006, immediately following the recession in 2011, and the most recent survey undertaken in January 2016. The historical data has been sourced from the previous 2011 Retail Study by WYG; who utilised figures from the 2011 Retail Floorspace Survey completed by the Council, and the 2006 Retail Study by GVA Grimley who relied on Experian GOAD (dated October 2015).
- 4.33 It is important to acknowledge that the 2006 data sourced from the GVA Grimley Study adopted the Experian GOAD boundary plan, whereas, data from the 2011 Study adopted the Local Plan town centre designation boundary. We note the 2011 Study identified a total of 189 units – this is 14 units less than those included within the boundary of the GOAD Plan. Additionally, the 2006 GVA Grimley Study does not breakdown service retail units by type – leisure, retail service, or financial / business service. Nonetheless, the comparison of these dataset allows for us to identify trends in the health of the centre.

**Figure 4.3 | Sutton Town Centre Composition in 2006, 2011 and 2016**



**Sources:** GVA Grimley 2006 Ashfield Retail Study, WYG 2011 Ashfield Retail Study and Nexus Retail Survey January 2016

### Convenience Goods Units

- 4.34 Sutton Town Centre is well provided in terms of the quantity and range of convenience goods floorspace. Units retailing convenience goods represent 10.3% of the total town centre units. The convenience units are accommodated over 10,430 sq m of floorspace, making up 24.1% of total town centre floorspace.
- 4.35 A significant number of large format national retailers have convenience outlets in the town centre, including Asda, Jack Fultons, and Iceland. These uses are generally situated in the northern portion of the town centre, close to the large Asda. The Asda extends to approximately 7,590 sq m of floorspace. As such it makes a substantial contribution to the overall provision of convenience floorspace in the town. The town is also provided with a significant supply of much smaller convenience units, such as the 100 sq m Greggs unit situated within The Idlewells Shopping Centre.

- 4.36 The most common convenience units are Confectionery, Tobacco and News (five) and Bakers and Confectioners (four) outlets. There are also three Butchers and three Frozen Food outlets in Sutton Town Centre.
- 4.37 When assessing the convenience provision against UK averages, Sutton has a higher percentage of units at 10.3%; as the national average is 8.6%. Sutton's convenience floorspace percentage is also much higher than the national average – 24.1% in Sutton against the UK average of 15.2%. A significant contributor to this high percentage of convenience floorspace is the large format Asda (7,590 sq m).
- 4.38 The percentage of convenience stores in Sutton has increased since the 2011 Retail Study, growing from 8.9% to 10.3% of the total town centre retail units. Contributing to this increase are two new convenience units occupied by cake stores – The Sweet Explosion and Cake Fusion.

### Comparison Goods Units

- 4.39 Comparison retail stores occupy the most units (68) in the town centre, accounting for 33.3% of all units. This percentage is comparable to the national average figure of 32.1%.
- 4.40 The quantum of comparison floorspace accounts for 32.2% of total floorspace in Sutton. This percentage figure is only marginally higher than the percentage of convenience floorspace (24.1%), when considering the fact it is accommodated over a much lower number of units (21 instead of 68). However, as previously noted, the high level of convenience floorspace is attributable to the large format Asda.
- 4.41 The floorspace percentage in Sutton dedicated to comparison goods is slightly lower than UK average of 35.9%.
- 4.42 Several major comparison retailers are located in the town centre; including Argos, Boots, Dorothy Perkins, New Look, Superdrug and Phones 4 U. This is significantly higher when considered against the limited representation of major comparison retailers in both Hucknall and Kirkby. In addition, a significant proportion of large format comparison retail units are located here, including B&M Bargains and Wilkinsons.
- 4.43 Since the 2011 Retail Study the percentage of comparison units has decreased – from 37.4% to 33.3%. This is illustrative of a structural shift within the comparison market of Sutton. During the Nexus site visits we observed that some of the comparison units within The Idlewells Shopping Centre had recently closed down, but given the popularity of this centre these are anticipated to attract new retail opportunities in the not too distant future.

- 4.44 The closure of comparison retail units is a common occurrence in town centres throughout the UK.
- 4.45 The overall level of comparison representation, including multiple comparison outlets, is aligned with Sutton's function and role as the District's main retail destination for comparison goods.

### Retail Services

- 4.46 There are a total of 40 retail service units located in the town centre accommodated over 4,730 sq m of floorspace. The proportion of retail service units in Sutton has increased from 2011 when they represented 14.7% of total units, to 19.6% now. However, a degree of this increase could be attributable to the fact the these retailers are located outside of the Local Plan town centre boundary on which the 2011 Retail Study was based.
- 4.47 When comparing this level of provision against national averages, Sutton has an above average number of retail services units making up 19.6% compared to the lower UK town centre average of 14.3%.
- 4.48 The most common retail services offered in the town centre are Hairdressers / Barbers and Beauty Salons. There are thirteen Hairdressers and/or Barbers in the town centre and eight Beauty Salons. Additionally, four Opticians are situated within the town centre, two of which are located in The Idlewells Shopping Centre.
- 4.49 Retail service floorspace accounts for 10.9% of total town centre floorspace. This figure is well above the national average of only 7.5%. The large Halfords outlet (760 sq m) and Specsavers (450 sq m) situated within The Idlewells Shopping Centre, contribute to Sutton's high percentage of overall retail service floorspace.
- 4.50 At this point it is useful to point out that 12.7% of respondents to the NEMS Household Survey identified that the choice of services (Hairdressers, Banks etc.) was the main attractor for them to visit Sutton.

### Leisure Services

- 4.51 The percentage of leisure services units in Sutton is below the national average of 22.7%, with only 13.2% of units in the town centre being occupied by leisure service providers.
- 4.52 The predominant leisure services in Sutton are Cafes and Coffee Shops, occupying a total of eight outlets. Additionally, there are four Public Houses and three Betting Shops. The number of Betting Shops is reflective of the size of the centre, and comparable to the two in Kirkby and one in Hucknall.

- 4.53 There are a considerably small number of bars and restaurants to contribute to an evening economy within Sutton Town Centre – two Indian restaurants and four Public Houses. Of note, the Market Tavern Public House on Market Place recently closed. The remaining Public Houses are spread out around the town centre, meaning there is not one particular area of the town attracting that kind of night-time activity.
- 4.54 It is also worth noting that the results of the NEMS Household Survey indicate that just 2.8% of respondents identified that the choice of leisure facilities (Restaurants, Pubs etc.) as the main reason they would visit Sutton.

### Financial and Business Services

- 4.55 The proportion of outlets occupied by financial and business services, 11.8% (24 units), is just above the national average figure of 10.7%.
- 4.56 The proportion of floorspace is slightly higher than the national average; 9.5% in Sutton compared to the national average of only 8.1%. The Ashfield Homes Estate Agent (610 sq m) and JobCentre Plus (520 sq m), which are both accommodated over relatively expansive floor plates, account for a significant proportion of this floorspace. The percentage of financial and business service floorspace has significantly increased since 2011 when it accounted for only 8.2%. The opening of the large JobCentre Plus is one of the reasons for this increase.
- 4.57 Banks and Estate Agents make up over half of these units in the town centre. There are a total of seven Banks and six Estate Agents in Sutton. Additionally, there are two Solicitors and two Building Societies.
- 4.58 As mentioned above, the results of the NEMS Household Survey suggest that for 12.7% of residents the choice of services; including Banks, was a significant draw for the centre.

### Other Units

- 4.59 There is only one retail unit within the town centre identified as 'other'. The Whites Coaches on Outram Street, which was not in operation at the time the 2011 Study was completed. In addition, there is also the Royal Mail Sorting Office, Langton Road, at the edge of the town centre<sup>89</sup>.
- 4.60 Only one retail unit classified as 'other' was identified as part of the 2011 Study; AAA Taxis on King Street, which has subsequently closed down and this unit remains vacant.

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<sup>89</sup> Given its location the sqm floorspace and unit has not been included.

## Summary

- 4.61 Sutton's provision of comparison retail providers is aligned with national averages – 33.3% of units in Sutton compared to 32.1% nationwide. Of note, the leisure service sector is generally underrepresented in the town; occupying only 13.2% of units when the national average is 22.7%.
- 4.62 The large format Asda contributes to the high floorspace percentage dedicated to convenience – 24.1% of Sutton's floorspace whereas the national average is 15.2%.

## **Vacancies**

- 4.63 The Retail Survey completed by Nexus in January 2016 identified approximately 3,952 sq m of vacant floorspace across 22 units in Sutton Town Centre.
- 4.64 In terms of vacancy rates, Sutton is performing moderately well, with the number of vacant units being slightly below the UK average figure – 10.8% compared to 11.3%. The amount of vacant floorspace is directly aligned to the national average – 9.1% compared to 9.2%.
- 4.65 The current vacant units are spread throughout the town centre. However, it is interesting to note that a significant proportion of King Street is vacant, as three of the total of eight units on this small road is vacant. At the time the 2011 Study was completed, all of these units were occupied.

## **Customers' Views and Behaviour**

- 4.66 As explained earlier in this section, we have looked at the findings of NEMS Household Survey with the aim of forming an understanding of how local people perceive Sutton. To do this we have paid particular regard to those questions of relevance to the health and retail operation of Sutton. We summarise below the principal findings of our focused review.

**Figure 4.4 | NEMS Household Response Summary for Sutton**

Question	Total Percentage Response		Respondents from Zone 1 (Location of Sutton)		Respondents from Zone 6 (Location of Sutton)	
<b>Visits Sutton Most Often</b>	50.6%		90.6%		89.8%	
<b>Frequency of Visits to Sutton *</b>	Daily	5.0%	Daily	6.8%	Daily	11.0%
	Two times a week	17.5%	Two times a week	37.3%	Two times a week	27.5%
	Once a week	26.6%	Once a week	34.2%	Once a week	27.5%
	Once a fortnight	10.4%	Once a fortnight	6.1%	Once a fortnight	9.0%
<b>Typical Mode of Transport to Sutton *</b>	Car	79.8%	Car	67.2%	Car	80.9%
	Bus	9.6%	Bus	7.0%	Bus	2.5%
	Walk	7.7%	Walk	23.0%	Walk	12.6%
<b>Main Reason for Visiting Sutton *</b>	Choice and range of shops	42.7%	Choice and range of shops	45.7%	Choice and range of shops	28.3%
	Strength of supermarket	4.6%	Strength of supermarket	2.1%	Strength of supermarket	7.9%
	Choice of leisure services	2.8%	Choice of leisure services	2.2%	Choice of leisure services	2.2%
	Choice of services	12.7%	Choice of services	4.4%	Choice of services	17.0%
	Close to home	14.4%	Close to home	20.3%	Close to home	27.0%
	Close to work	3.5%	Close to work	1.9%	Close to work	8.5%

**Source:** NEMS Household Survey, January 2016

\* These percentages are taken from those respondents who identified that they visit Sutton the most often.

- 4.67 **Appendix A** contains a Study Area plan which shows the boundaries of each of the zones.
- 4.68 The results of the NEMS Survey, not surprisingly, identified that Sutton is the most commonly visited centre in Ashfield, with 50.6% of respondents stating that this was the centre they visited the most.
- 4.69 Furthermore, of respondents who reside in Zone 1 and Zone 6 (being the Zones in which Sutton is located) 90.6% and 89.8%, respectively, said that Sutton was the centre they visit the most often. When asked how often they visit, over 60% of both the Zone 1 and Zone 6 respondents said they visited more than once a week.
- 4.70 The overriding reason for visiting Sutton was found to be the choice and range of shops – the number one reason given by 42.7% of all respondents who said they visited the centre the most often. The second most common reason given was the closeness to home (14.4%), followed by the choice of services (12.7%).
- 4.71 A comparatively small number of respondents visit Sutton daily. This result is illustrative of its role as a retail destination, attracting visitors who are seeking a retail experience and not merely just visiting to satisfy their daily needs.

## Stakeholder Engagement

- 4.72 During engagement with stakeholders some of the key topics discussed in respect to Sutton related to the recent successes of the new market location at Portland Square. The success of the

new location has been assisted by the recent public realm improvements completed by the Council. Further, it is the range of items and amount of footfall attracted to the market stalls that were identified as the key success factors. The effort and support put into the markets by the Council was emphasised.

- 4.73 The support for the Indoor Market also became very clear. When Nexus visited the Indoor Market what they observed confirmed stakeholder comments with regards to the popularity and important local function of the market. The level of community support is evident in the recent decision by the Cabinet to retain the Indoor Market in its current location (refer paragraph 4.27).
- 4.74 Further to this, during engagement it became clear that there is a distinct lack of quality clothing and shoe shops in the town centre. People wishing to purchase clothes or shoes are required to travel out of the District where the variety and breadth of shops is much wider.
- 4.75 Recent closures of some key leisure facilities, most notably the Market Tavern was identified, and the desire for additional eat-in Restaurants noted.

### **Retailer Representation**

- 4.76 As suggested in the NPPG an assessment of retailers represented within a town centre can provide a valuable signal of the vitality and viability of a centre, as it suggests how attractive the town is for existing and potential retail operators.
- 4.77 We have already assessed the Venuescore UK Shopping Venue Rankings to determine the retail hierarchy ranking of Sutton. Notably the rankings are influenced by the presence of multiple retailers. Sutton is identified as 'Major District' centre and given a 'lower-middle' market position. A 'lower-middle' position can suggest that Sutton is comprised of a slightly more discount retail offering that is at the lower end of the market.
- 4.78 Sutton benefits from seven retail units of the top 31 Experian GOAD defined major retailers (Argos, Boots, two Wilkinsons, Dorothy Perkins, Superdrug, and Phone 4 U). It is important to recognise that multiple retailers often take on the role of an anchor tenant – attracting significant footfall. Below we explain our observations in respect of footfall around the centre.

### **Pedestrian Flows**

- 4.79 Nexus completed visits to Sutton in early 2016 during which they observed pedestrian activity and considered the levels of footfall across different parts of the centre. It was evident that Portland Square and the pedestrianised section of Low Street; including its junction with the southern section of Outram Street, attracted the highest number of pedestrians when assessed against

other parts of Sutton Town Centre. Further to this, the newly regenerated and redesigned civic square appeared to attract a significant amount of pedestrians and shoppers to the area. At the time the January 2016 site visit was completed, the market stalls were erected and operational in the new civic square (Portland Square). The market stalls had a significant number of visitors at the time. Of note, people were seen spending significant amounts of time in Portland Square, instead of merely 'passing through'.

- 4.80 Within The Idlewells Shopping Centre Nexus observed significant foot traffic. Additionally, the Indoor Market appeared very active; in particular the cafes were seen to be full of patrons.
- 4.81 The large area dedicated to surface car parking at the Asda site produces an un-welcoming pedestrian environment. The consequences of this were noted by Nexus during their site visits, as the amount of pedestrian activity in this part of the town centre was comparatively low.

### **Accessibility**

- 4.82 Sutton benefits from good access to opportunities for public transport, providing transport both around the centre itself and to nearby centres across the region.
- 4.83 Sutton Parkway Railway Station is located approximately two miles from the centre of the town. East Midlands Trains serve the Sutton Parkway Railway Station and provide half-hourly connections to both Nottingham and Mansfield, in addition to services connecting the District with central London.
- 4.84 A bus terminus is located in the town centre; opposite The Idlewells Shopping Centre. The bus terminus was improved as part of a scheme completed in mid-2009. Bus services leaving this terminus provide connections in and around the town centre and to nearby out-of-centre locations and shopping parades, including the Outram Street Local Shopping Centre.
- 4.85 Sutton offers a wide variety of off-street car parking spaces available at a number of locations throughout the town centre.
- 4.86 A scheme offering free one-hour parking at all Council operated pay and display car parks was enacted on 16<sup>th</sup> November 2015 and is to be retained for the indefinite future.
- 4.87 The main town centre car parks include (ordered from highest provision to lowest):
- Market Street Multi Storey Car Park – 580 short stay car parking spaces
  - Asda Car Park – providing 460 car parking spaces for customers only
  - Forest Retail Park – 60 medium stay car spaces

- Stoney Street – 36 long stay car spaces
- New Street – 46 medium stay car parking spaces
- New Cross Street – 56 free car parking spaces
- Market Place North and South – 48 and 46 medium stay car parking spaces
- Lammas Leisure Centre – 177 car parking spaces for Leisure Centre users

4.88 A limited provision of on-street parking is also available within the town centre. Small amounts can be found on Outram Street, Brook Street and Langton Street.

4.89 The NEMS Household Survey identified that 79.8% of respondents across the Study Area travel to Sutton Town Centre by private car (as driver or passenger), 9.6% by bus, minibus or coach and a further 7.7% walk. Interestingly, 67.2% of respondents who reside in Zone 1 and 80.9% of respondents in Zone 6 (being the two zones Sutton is located within) stated they travel by private car (as driver or passenger). This suggests that even when people live nearby it is still the norm to travel by private car when visiting the town centre.

4.90 Reflective of resident's tendency to drive into the town centre by car is the fact the third most commonly requested improvement to Sutton (after improvements to shopping quality and choice) was more parking.

### **Perception of Safety**

4.91 By virtue of the high volume of pedestrian activity along Low Street and within Portland Square these areas are provided with high level of surveillance.

4.92 With regards to safety during the evening hours, in consequence to the mix of community facilities, including the four Public Houses and 16 Restaurants / Take Aways, Sutton Town Centre manages to maintain a degree of activity during evening hours. Police patrols in this area during the evening also help to reduce the amount of anti-social behaviour taking place.

4.93 In addition, CCTV cameras are located on Low Street, Outram Street, Forest Street, and Market Street. The surveillance provided by the CCTV cameras, indicated by street signage, help to create an impression of a safe place.

4.94 We have reviewed data kept by the Nottinghamshire Police<sup>90</sup> on the total number of offences relating to anti-social behaviour. Notably, the rates show a decreasing trend over recent years. This may suggest that the overall feeling of safety in the town centre is improving. The improvements

<sup>90</sup> UK Crime Statistics, available at <http://www.ukcrimestats.com>

could be attributed to the recent civic square improvements, which enhance the level of openness in this central point of the town, and the introduction of night-time patrols by police teams.

- 4.95 The results of the NEMS Household Survey provide further data with regards to how safe Ashfield resident's feel in Sutton. Of note, when asked if there are any measures which would encourage survey respondents to visit Sutton more often, only 0.7% identified 'better security' as a reason.

### **Environmental Quality**

- 4.96 The townscape of Sutton is considered to be mixed in quality. The late 19<sup>th</sup> and early 20<sup>th</sup> century architecture makes positive contributions to its historic and distinct character. Of note are the Old Police Station, Old Post Station, Public Hall and the Old Town Hall, which form an attractive and harmonious grouping on Brook Street.
- 4.97 The civic square (Portland Square) provides a good quality town centre environment that is well-utilised. As already discussed, recent investment has been directed to Market Place, and resulted in improvements to this area. The improvements have enhanced the overall feel of the central area. The quality of this environment has been recognised by the Council who have recently established a Conservation Area designation around this area.
- 4.98 In 2014, an overarching Regeneration Strategy for Sutton Town Centre was commenced by the Council. The key projects include:
- Short stay car park on the existing Market Place and improved public realm;
  - A Conservation Area around the existing outdoor market place (as above); and
  - Commercial development and improved accessibility and movement for the area around Fox Street.
- 4.99 It was as a result of this Regeneration Strategy that the outdoor market was moved to Portland Square.
- 4.100 Predating the Regeneration Strategy is the 2007 Masterplan which was completed for both Kirkby and Sutton. This vision for this Masterplan was underpinned by a broad set of principles was to deliver quality architecture and design. This Masterplan set out the objective to complete environmental improvements at Portland Square. The need to link the Masterplan projects with wider regeneration initiatives is recognised within the Masterplan document.

- 4.101 The Council have ambitions for further public realm improvements throughout the town centre. The public realm improvements are envisioned to improve overall connectivity and activity through the entire town centre.
- 4.102 The results of the NEMS Household Survey provide an indication of how residents view the environmental quality of Sutton. One of the questions asked respondents to identify measures that would encourage them to visit Sutton more often with improved environment being one of the measures. A very limited number of respondents, 0.6%, identified that improvements to the environment of Sutton would encourage them to visit more.

### **Summary**

- 4.103 In terms of the diversity of retail uses accommodated within Sutton, the town centre is well provided for in terms of convenience goods. Several national retailers are present, including Asda, Greggs, Iceland and Jack Fulton. Similarly, Sutton Town Centre also has a reasonable number of comparison units; including seven of the top 31 Experian GOAD defined major retailers (Argos, Boots, two Wilkinsons, Dorothy Perkins, Superdrug, and Phone 4 U).
- 4.104 The retail service and financial and business service sectors are also provided in excess of the UK average statistics for town centres.
- 4.105 However, there is an identified shortfall in leisure services, both in the number of operators and the quantum of floorspace dedicated to this sector when compared to the national average. Cafes and Coffee Shops make up a significant proportion of the leisure service offer. There are no hotels, cinemas, bars and nightclubs within Sutton, and a limited number of eat-in Restaurants.
- 4.106 When assessing vacancy rates, Sutton is performing relatively well, with a vacancy rate of 10.8%, which is just below the national average across all UK centres of 11.3%. Additionally, in terms of vacant floorspace, Sutton has a quantum of 9.1% (3,952 sq m) which is only 0.1% lower than the national average.

## Hucknall

### Introduction

- 4.107 Hucknall Town Centre is located in the southern portion of the Study Area, and lies within Zone 3. It is approximately 12 km to the south-east of Sutton, and 8 km to the south-east of Kirkby. Additionally, it is approximately 11 km north-west of the Nottingham City Centre; the foremost retail centre in the sub-region.
- 4.108 The primary focus of the Hucknall Town Centre is along the length of the heavily trafficked High Street from Station Road to the Market Place. At the northern end of Station Road, approximately 200 metres to the east is the large Tesco Extra (on Ashgate Road). The Market Place is a popular public space at which the weekly Outdoor Market takes place. In the southern corner of the Market Place is the Library, which is currently undergoing redevelopment and is due to re-open in the second half of-2016. Further redevelopment is currently taking place at the junction of Baker Street with Annesley Road, including a site which has been cleared and appears to have been purchase by a developer.
- 4.109 Additionally, the County Council's plans to fully pedestrianise the High Street (between Baker Street and Watnall Road) are currently underway, having commenced in January 2016 and are expected to be completed in April / May 2017.
- 4.110 Therefore, in addition to the Library redevelopment and Baker Street site the town centre is likely to change quite substantially.
- 4.111 The town centre boundary also incorporates a number of adjoining roads; such as Watnall Road, Vine Terrace, Albert Street, Baker Street, Annesley Road and South Street. However, the density and quality of the shops declines on the connecting roads.
- 4.112 Two significant foodstores are located just outside of the town centre boundary; Aldi and Iceland. The proximate location of these foodstores has a significant effect on the town centre and its function as a local centre. Both Aldi and Iceland provide for the basic convenience needs of local residents.

### Diversity of Uses

- 4.113 The Nexus Survey (completed in January 2016) identified a total of 153 units located in the town centre, making up a total gross floorspace of 32,550 sq m.

- 4.114 The Retail Survey also covered the two defined Local Shopping Centres (Annesley Road and Watnall Road/Derbyshire Lane) which are close to Hucknall. A survey of these Local Shopping Centres is considered in further detail in **Appendix D** of this report.
- 4.115 The results of the Retail Survey enable the diversity of retail and leisure located within the town centre (by number, type, quantum of floorspace) to be assessed. The findings are set out in Figure 4.5.

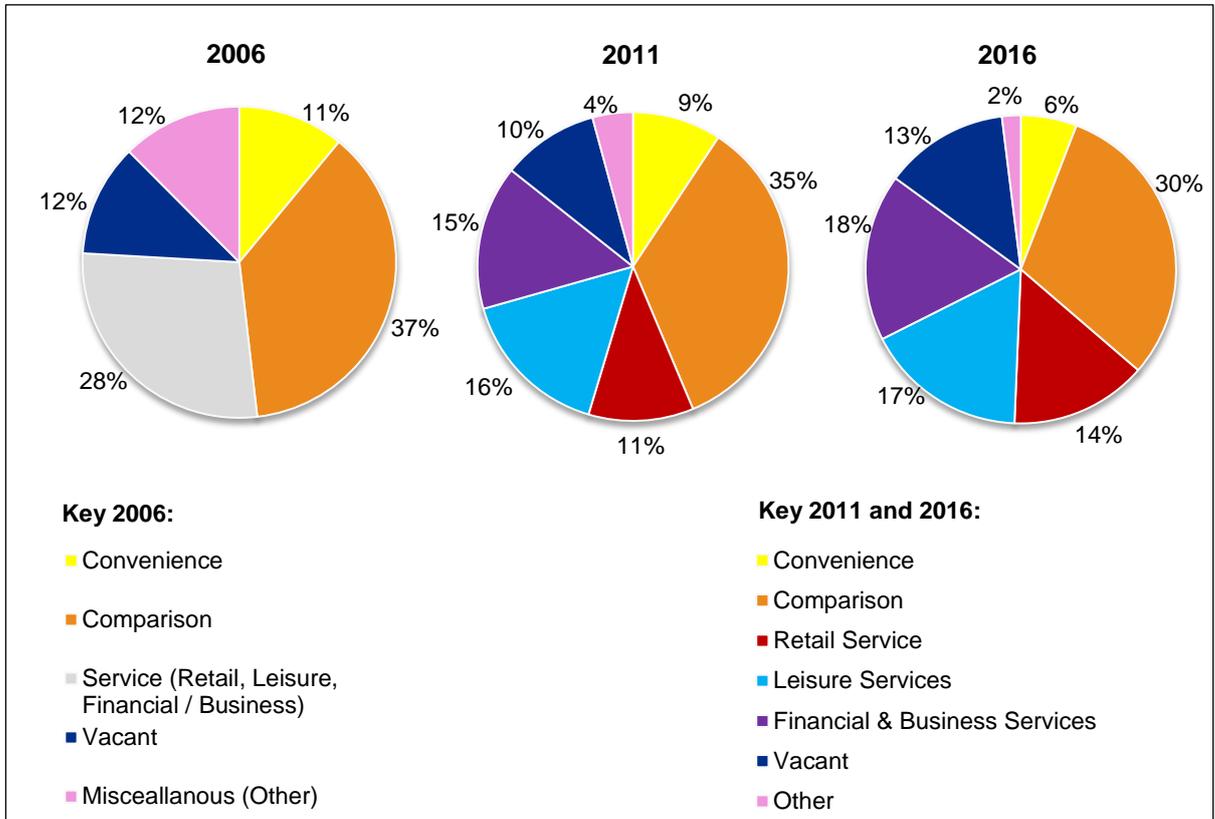
**Figure 4.5 | Hucknall Town Centre Composition (Jan 2016)**

	Units (no.)	Units (%)	Units U.K Avg. (%)	Floorspace (sq. m)	Floorspace (%)	Floorspace U.K Avg. (%)
<b>Convenience</b>	9	5.9%	8.6%	5,940	18.2%	15.2%
<b>Comparison</b>	46	30.1%	32.1%	11,630	35.7%	35.9%
<b>Retail Service</b>	22	14.4%	14.3%	2,440	7.5%	7.5%
<b>Leisure Services</b>	26	17.0%	22.7%	4,680	14.4%	23.5%
<b>Financial &amp; Business Services</b>	27	17.6%	10.7%	3,380	10.4%	8.1%
<b>Vacant</b>	20	13.1%	11.3%	3,820	11.7%	9.2%
<b>Other</b>	3	2.0%	0.1%	660	2.1%	0.1%
<b>TOTAL</b>	<b>153</b>			<b>32,550</b>		

*Source: Nexus Retail Survey, January 2016*

- 4.116 A plan illustrating the location and use of each unit in the town centre (as defined by Experian GOAD) is provided at **Appendix C**.
- 4.117 Figure 4.6 shows the change in Hucknall's composition before the recession in 2006, immediately following the recession in 2011, and the most recent survey undertaken in January 2016.
- 4.118 As explained above the data has been sourced from the previous 2011 Retail Study by WYG and the 2006 Retail Study by GVA Grimley.

Figure 4.6 | Hucknall Town Centre Composition in 2006, 2011 and 2016



Sources: GVA Grimley 2006 Ashfield Retail Study, WYG 2011 Ashfield Retail Study and Nexus Retail Survey January 2016

### Convenience Goods Units

- 4.119 The current level of convenience stores (at the time the January 2016 Nexus Survey was completed) is below the national average level of provision. The existing nine convenience retail units make up 5.9% of the town centre’s quantum of retail units, and are provided over a total of 5,940 sq m of floorspace. Both the number of units and quantity of floorspace represents a decrease in the percentage convenience retail units from both 2006 (15 units) and 2011 (11 units).
- 4.120 The number of convenience units in Hucknall (5.9%) is below the UK average of 8.6%.
- 4.121 Since 2011, Cunnington and Son (Butchers) at 2a Annesley Road has closed down and the unit remains vacant. Additionally, Farm Direct at 1 Central Walk has ceased operation and the unit remains vacant. P E Johnson Newsagent has opened at 4a the High Street and an electric cigarette retailer, called ‘Eco Vape’, has opened up at 31a the High Street.

- 4.122 The large Tesco Extra (6,465 sq m) store on Ashgate Road acts as a key anchor for the town centre. Although importantly it is located outside of the designated town centre boundary. The January 2016 Nexus Retail Survey estimated that approximately 3,825 sq m of the Tesco Extra is dedicated to the sale of convenience goods. This figure has been used as part of our assessment of the overall level of convenience floorspace in the town centre, and is therefore a large contributor to the current provision.
- 4.123 Other key anchors include the national convenience operators; Jack Fultons and Greggs, which are both located on the High Street.
- 4.124 The provision of convenience goods is generally concentrated around the centre of the High Street, in close proximity to the large Wilko and Post Office. The number of convenience operators reduces towards the western and eastern edges of the High Street.

### Comparison Goods Units

- 4.125 Comparison retailers occupy 46 units in Hucknall, making up 30.1% of the total number of town centre retail units. This percentage is only slightly below the national average of 32.1%. In terms of dedicated comparison floorspace, Hucknall encompasses 11,630 sq m, or 35.7% of total town centre floorspace. This floorspace percentage is in line with the national average of 35.9%.
- 4.126 Several multiple comparison retailers are located in the town centre. Of note is the large Tesco Extra, which comprises approximately 1,075 sq m of floorspace selling comparison goods, including; pharmaceuticals and electrical goods. Further, there are two Boots Chemists that both are located on the High Street; one is 340 sq m in size, while the other is less than half this size, occupying a 120 sq m unit.
- 4.127 When considering this against the 2011 figures, there has been a decrease in the percentage of comparison good units by 5.0%. The amount of dedicated comparison floorspace has significantly increased attributed to the data collection approach adopted for the Tesco Extra unit in the 2011 Retail Study, noting that no comparison floorspace was attributed to the store. As an overall percentage of town centre composition the amount of comparison floorspace has remained relatively static – 39.7% in 2011 compared to 35.7% in 2016.

### Retail Services

- 4.128 The 2011 Retail Study reported that retail services account for 11.0% of outlets (13 units) and 5.9% of current floorspace (1,210 sq m), which at that time compared to respective national averages of 13.2% and 7.0%.

- 4.129 In comparison, the 2016 Nexus Survey identified a total of 22 retail service units in the town centre, making up 14.4% of Hucknall Town Centre units.
- 4.130 The introduction of a number of Hair and Beauty Salons, particularly on Watnall Road, is attributed to this increase in retail service units within the town. Additionally, the new dog grooming shop at 33 Watnall Road has taken over the lease from a comparison provider.
- 4.131 The level of retail service is aligned with national averages – on average 14.3% of UK town centre units are retail service.

### Leisure Services

- 4.132 The percentage of leisure service in Hucknall has remained relatively stable since the 2011 Retail Study was completed – representing 16.0% of total units in 2011 and 17.0% in 2016. Notably, there have been a number of new cafes opened since 2011 – Costa Coffee and the Vanilla Coffee House.
- 4.133 When assessing the results against national averages, Hucknall has an under provision of leisure services with 17.0% compared to the national average of 22.7%. Similarly, in terms of floorspace the quantum is lower than the average UK figures, as 14.4% of Hucknall's floorspace is dedicated to leisure and 23.5% is the national average.
- 4.134 In comparison to the other main centres, Sutton and Kirkby, Hucknall has a significant provision of Public Houses; with a total of five located within this relatively small town centre. During the stakeholder engagement the popularity of the Half Moon Public House on South Street was highlighted to Nexus. Furthermore, the Public Houses are centrally located with a number having frontages to the High Street.
- 4.135 Also during Stakeholder engagement, the enthusiasm of the Costa Coffee to become involved and support in the community was emphasised. The Costa Coffee only recently opened and occupies a 110 sq m unit centrally located on the High Street.

### Financial and Business Services

- 4.136 The financial and business service sector has a higher percentage of units in comparison to the national average; 17.6% in Hucknall compared to the national average of 10.7%.
- 4.137 When comparing the level of financial and business service provision against the 2011 figures, the percentage of units in this category has increased slightly from 15.1% to 17.6%.

4.138 Most notably, there are a significant number of Estate Agents in Hucknall, and a number of these units have recently opened. At present there is a total of seven Estate Agents within the town centre, accommodated over 720 sq m of floorspace. All of the Estates Agents occupy properties with High Street frontages.

### Other Units

4.139 There is only a small number, three in total, of 'other' or miscellaneous retail units identified in the Hucknall Town Centre.

4.140 The Royal Mail Sorting Office at 59 High Street occupies a 430 sq m unit directly behind the post office<sup>91</sup>. Further to this, there are two taxi operators, one on Chapel Street (off the High Street) and the other on Baker Street. Only A2B Taxi's was operating at time the 2011 Study was undertaken, whereas Bell's Taxis has opened since 2011.

### Summary

4.141 Hucknall is well provided in terms of comparison goods retailers, with a level of provision that is generally aligned with the national average. The convenience goods sector is slightly underprovided in terms of units when compared to UK averages, however, in terms of dedicated floorspace it is above UK wide figures.

### **Vacancies**

4.142 The Retail Survey completed by Nexus in January 2016 identified approximately 13.1% of vacant floorspace across 20 units within the Hucknall Town Centre, totalling 3,820 sq m.

4.143 When considering vacancy rates it is higher in terms of both percentage of units and percentage of floorspace compared to national averages.

4.144 Furthermore, the vacancy rate in Hucknall has increased since 2011 when only 12 units were vacant (10.1%), totalling 1,515 sq m or 7.3% of total town centre floorspace. Again, it is important to recognise this increase is somewhat attributable to the town centre boundary used during the Retail Survey; as nine of the currently vacant units sit outside the designated town centre boundary.

4.145 It is important to acknowledge the significant amount of redevelopment currently occurring in Hucknall. Of note are the cleared and currently vacant sites at the northern portion of Baker Street (adjacent to Mill Yard), in addition to the Byron Community Project taking place in the old 780 sq m

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<sup>91</sup> Given its location the sq m floorspace and unit has been included as an 'other' unit.

Cinema Building at the eastern end of the High Street. These projects are representative of an evolving town centre offer and once complete they will positively contribute to the vitality of the centre.

- 4.146 Once the public realm and pedestrianisation works are complete the level of vacancy in the town centre is likely to drop. The better-quality shopping environment and improved accessibility that will result from the Council-led scheme will enhance the amount of footfall in the area.

## Customers' Views and Behaviour

- 4.147 The Household Survey undertaken by NEMS provides useful insights on the customer views of Hucknall, as well as how often and why customers visit the town centre. Figure 4.7 sets out a summary of the key findings as they relate to the vibrancy and vitality of Hucknall.

**Figure 4.7 | NEMS Household Response Summary for Hucknall**

Question	Total Percentage Response		Respondents from Zone 3 (location of Hucknall)	
<b>Visits Hucknall Most Often</b>	35.4%		91.7%	
<b>Frequency of Visits to Hucknall *</b>	Daily	7.3%	Daily	8.5%
	Two times a week	11.1%	Two times a week	18.7%
	Once a week	25.3%	Once a week	35.3%
	Once a fortnight	16.0%	Once a fortnight	18.1%
<b>Typical Mode of Transport to Hucknall *</b>	Car	71.4%	Car	61.4%
	Bus	6.5%	Bus	4.8%
	Walk	15.7%	Walk	32.4%
<b>Main Reason for Visiting Hucknall *</b>	Choice and range of shops	31.8%	Choice and range of shops	32.3%
	Strength of supermarket	4.1%	Strength of supermarket	0.00%
	Choice of leisure services	4.5%	Choice of leisure services	3.2%
	Choice of services	12.5%	Choice of services	12.6%
	Close to home	19.9%	Close to home	38.8%
	Close to work	5.7%	Close to work	0.7%

**Source:** NEMS Household Survey, January 2016

\* These percentages are taken from those who respondents who identified that they visit Hucknall the most often.

- 4.148 35.4% of all respondents from the Study Area confirmed they visited Hucknall most often; this is compared to 50.6% stating they visit Sutton most often and only 14.1% identifying Kirkby as their most frequented centre.
- 4.149 As predicted, respondents from Zone 3 (the centre containing Hucknall) visit Hucknall most often. 91.7% of Zone 3 respondents stated they visited Hucknall most often. A much smaller percentage of Zone 3 respondents specified they visited the other Ashfield centres; with only 4.7% visiting Sutton most often and 3.5% Kirkby.

- 4.150 The main reason respondent's visit Hucknall is because of the choice and range of shops (31.8% of total respondents and 32.3% of those who reside in Zone 3). The strength of the supermarket (the Tesco Extra) was not identified by many respondents as their main reason to visit Hucknall.
- 4.151 Only 7.3% of those who frequent Hucknall most often visit daily. The majority of respondents visit no more than once a week (81.6%).

### **Stakeholder Engagement**

- 4.152 In terms of the overall health of Hucknall, the 2015 Christmas period was identified as prosperous. However, concern at the increasing number of Betting Shops was highlighted.
- 4.153 Since the opening of the Tesco in 2003, it has often been blamed as the cause of a number of shop closures on the High Street. Visitors to Hucknall often stop by the Tesco but seldom venture into the town centre itself. High rents were highlighted as a common complaint of shop owners in the town centre.
- 4.154 The public reception to the Hucknall High Street upgrade scheme was highlighted to Nexus. The scheme; which is currently under development and includes the pedestrianisation of the High Street (from Baker Street and Watnall Road), initially received mixed public views. However, since construction commenced public opinion is becoming more positive. Notably, there have been no significant complaints with regards to any disruptions caused by the construction. The pedestrianisation will allow Cafes and Restaurants to offer their clientele outdoor seating onto the High Street. Support for this was noted as it could contribute to a lively and positive High Street environment.
- 4.155 Additionally, the recent refurbishment of some of the town's Public Houses (Half Moon and The Plough and Harrow) has enhanced the vitality of the High Street environment in the evening. The Half Moon hosts a number of events that provide opportunities for residents to take part in community life.
- 4.156 The quality of the street environment was described as 'reasonable'. Shop owners as well as the Council are recognised in putting effort into the maintenance of shop fronts and the general High Street environment.
- 4.157 Improvements to signposting were noted as a way to improve accessibility in and around the town. In particular, the Annesley Road Local Shopping Centre has never had a road sign, meaning visitors may never know how to access the centre. Another concern was links between the Railway Station, the top of the High Street (Market Place) and the Tesco. This is of particular concern for the elderly and less abled.

- 4.158 Of note, the community have recently rallied behind the volunteer-led community project, the 'Bryon Project', which involves the redevelopment of the 1930's Bryon Theatre at the eastern end of the High Street. The building has the potential to be an asset to the town centre and the community. The project has currently frozen due to lack funds. However, just in February 2016 a fundraising bike ride event was run.

### **Retailer Representation**

- 4.159 The Venuescore ranking identifies Hucknall as being a 'Minor District' centre with a retail offer that is ranked below Kirkby, Bulwell, Arnold, and Sutton.
- 4.160 We have reviewed the number of national and independent retailers which are present within the Hucknall Town Centre. Hucknall comprises only one of the top 31 Experian GOAD defined major retailers (Tesco). This reflects its position on the Venuescore list of retail rankings (above).

### **Pedestrian Flows**

- 4.161 During the site visits to Hucknall completed in early 2016, pedestrian activity was observed and considered against levels of footfall across different parts of the centre. The greatest levels of pedestrian traffic were evident along the High Street, being the connecting route between the Tesco Extra in the southwest and the Hucknall Library and Market Place in the northeast of the centre.
- 4.162 The north-eastern stretch of the High Street benefits from steady pedestrian traffic throughout the day and into the evening as a consequence of its food, drink and service offer. The location of the Tesco Extra, being set back from the High Street prime pitch, means that the footfall that is attracted to this large retailer does not result in footfall along the High Street.
- 4.163 The high proportion of Public Houses attracts a generous amount of night time foot traffic to the town centre. The popular Half Moon maintains activity at the north-western part of the High Street into the evening.

### **Accessibility**

- 4.164 Hucknall Railway Station is within walking distance of the town centre and provides services throughout Ashfield and Nottinghamshire (and into central London). Of note, Nottingham City Centre can be reached in a 25 minute journey from the Hucknall terminus on trains operated by East Midlands Trains. In addition, the Hucknall Nottingham Express Transit (NET) Tram offers quick transport options between Nottingham and Hucknall, where the terminus adjoins the Hucknall Train Station. The Hucknall station also provides interchange with the Robin Hood line, as well as

- being a Park and Ride. We are also aware that included in the new road scheme, being brought forward as part of the town centre improvements, a new bus terminus will be established just off the High Street.
- 4.165 The NEMS Household Survey identified that 71.4% of respondents across the Study Area travel to Hucknall Town Centre by car, only 6.5% by bus, minibus or coach and a further 15.7% walk.
- 4.166 The main town centre car parks include (ordered from highest provision to lowest):
- Piggins Croft – 322 medium stay car parking spaces (max 4 hours)
  - Hucknall Leisure Centre – 136 free car parking spaces (Leisure Centre users only)
  - Market Place – 67 short stay (max 2hours) car parking spaces
  - Yorke Street – 16 long stay (max 12 hours) car parking spaces
- 4.167 The 322 car parking available within the Piggins Croft Car Park (located just behind the Wilkinsons) is well utilised by virtue of its central location just off the High Street.
- 4.168 As mentioned earlier, Ashfield Council has made the first hour of parking within their car parks free for the first hour. This has been done to boost the attractions of the District's centres to shoppers and visitors.
- 4.169 There is no on-street parking available on the High Street, and it is only once you travel further south down the intersecting streets, such as Watnall Road and Station Road that there are some short stay (max 30 minute) on-street spaces available.

### **Perception of Safety**

- 4.170 The High Street represents a tight grain of linear development. Additionally, there are a minimal number of vacant units along this frontage. In consequence to both of these factors, the High Street provides a relatively safe and open environment.
- 4.171 Natural surveillance from footfall is high along the High Street throughout daylight hours. A mix of community facilities (Public Houses) and Restaurants / Take Aways help the town centre to maintain a degree of activity during evening hours.
- 4.172 In addition, CCTV cameras cover the High Street, Annesley Road, Baker Street, Market Place, South Street, Central Walk, Watnall Road, Duke Street, Portland Road, Titchfield Street, Ogle Street and the Piggins Croft car park and help to reassure visitors that it is a safe place to be.

- 4.173 In contrast, the area surrounding the Tesco Extra and the junction of Spring Street and Annesley Road lack any defined streetscape. As a result these areas may feel unsafe and attract a higher level of anti-social behaviour.
- 4.174 When assessing the past three years of crime data (sourced from the Nottingham Police<sup>92</sup>) it becomes clear that for Hucknall the most common crime that may impact the feeling of safety in the town centre is anti-social behaviour. Recent reports (2015) in the local news give details of how the local Police have been proactive in attempts to reduce the amount of crime in the area, in particular anti-social behaviour<sup>93</sup>.

### **Environmental Quality**

- 4.175 The prime focus of the town; the High Street can be described as relatively attractive, especially the area around the St Mary Magdalene Church and the Market Place.
- 4.176 In general, the quality of the town centre environment is tidy, with limited amounts of litter in the street. Some functional street furniture in the centre contributes to a welcoming public realm.
- 4.177 A Hucknall Town Centre Masterplan was produced in 2008 and identified a number of strengths and weaknesses in the town centre's built environment. Notably, the historic Market Place and High Street performs well and provides a safe and pleasurable town centre environment. The views down the High Street towards the church are potentially very attractive. However, the outlying streets that adjoin the High Street are of poorer quality and lack clear delineation.
- 4.178 The current level of traffic, including heavy goods vehicles using the High Street, creates congestion and an unpleasant environment for pedestrians and shoppers. Congestion on the High Street is further induced as a consequence of the lack of rear delivery areas for the retail units. Recognition of this problem has resulted in the High Street improvements currently underway, with a target completion date in April / May 2017. Pedestrianisation will provide additional space for market stalls within the town centre.
- 4.179 The overall ambition of the pedestrianisation scheme is to:
- Reduce congestion;
  - Create an attractive shopping centre;
  - Attract new retailers; and

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<sup>92</sup> UK Crime Statistics, available at <http://www.ukcrimestats.com>

<sup>93</sup> 'Hucknall police report record drop in burglaries and thank community for their help', Hucknall Dispatch, 18 June 2015

- Promote the regeneration of Hucknall.

4.180 Responses collected by Nexus during stakeholder engagement indicated that the proposal to pedestrianise the High Street has received mixed reviews by the community. The mixed public opinion is comparable to other town centre pedestrianisation schemes and is considered to be caused by the fact that people enjoy car-free public realms when they are pedestrians, but also appreciate the benefits of being able to park close to retail units to complete quick top-up trips at their convenience.

### Summary

- 4.181 The current vacancy rate in Hucknall is much higher than it has been in the past (currently sitting at 13.1%). However, the significant amount of rebuilding and redevelopment within the town centre is attributable for a number of these vacancies.
- 4.182 The current scheme to pedestrianise the High Street is underway and once completed it will dramatically change the retail environment of the centre and how it is experienced by shoppers. The increased use of the area for market stalls is also likely to increase footfall.
- 4.183 Since the 2011 Retail Study there has been a significant increase in retail service outlets within the town centre. A number of the new units are Hair and Beauty Salons.
- 4.184 The location of the Tesco Extra, outside of the town centre boundary, does not support linked trips into the town centre. The connections are poor and improvements could see an increase in foot traffic along the High Street.
- 4.185 Hucknall is the second most frequented town centre in the District after Sutton, which is considered to be the main retail destination for Ashfield.

## Kirkby-in-Ashfield (or Kirkby)

### Introduction

- 4.186 Kirkby-in-Ashfield (or Kirkby) is identified as the smallest of the three main settlements in Ashfield District, and is designated as a 'District Centre' in the adopted Local Plan (2002), as well as the Preferred Approach Local Plan. Similarly, Kirkby Town Centre is also categorised as a 'Minor District Centre' by Javelin Venuescore.
- 4.187 The town centre of Kirkby is located within Zone 2 in the centre of the defined Study Area.
- 4.188 The town is located approximately 5 km to the south of Sutton, 11 km to the north-east of Hucknall, 9 km to the south-west of Mansfield, and 22 km to the north-west of Nottingham.
- 4.189 Kirkby has a linear town centre with two adjoining pedestrianised streets. Recent improvements to the civic square have created an attractive public realm environment that is used for the Kirkby Outdoor Market which runs four days a week in the fully pedestrianised part of Lowmoor Road. There is a single large anchor – the new large Morrisons situated on the former Ashfield Precinct site in the north eastern corner of the centre.
- 4.190 The retail focus of Kirkby is concentrated along Station Street and Lowmoor Road/Kingsway, however, the District Shopping Centre boundary extends to include several outlying streets; the southern part of Ellis Street, the western part of Diamond Avenue; the northern section of Hodgkinson Road; and the large Morrisons store.

### Diversity of Uses

- 4.191 We have reviewed the diversity of uses accommodated in the Kirkby Town Centre (by number, type and quantum of floorspace provided) and summarise our findings below.
- 4.192 The 2016 Nexus Retail Survey identified that there was a total of 135 retail units in the town centre, comprising a total gross floorspace of 20,618 sq m. The results of this assessment are set out in Figure 4.8.
- 4.193 A GOAD plan illustrating the location and use of each unit in the town centre (as defined by Experian GOAD) is provided at **Appendix C**.

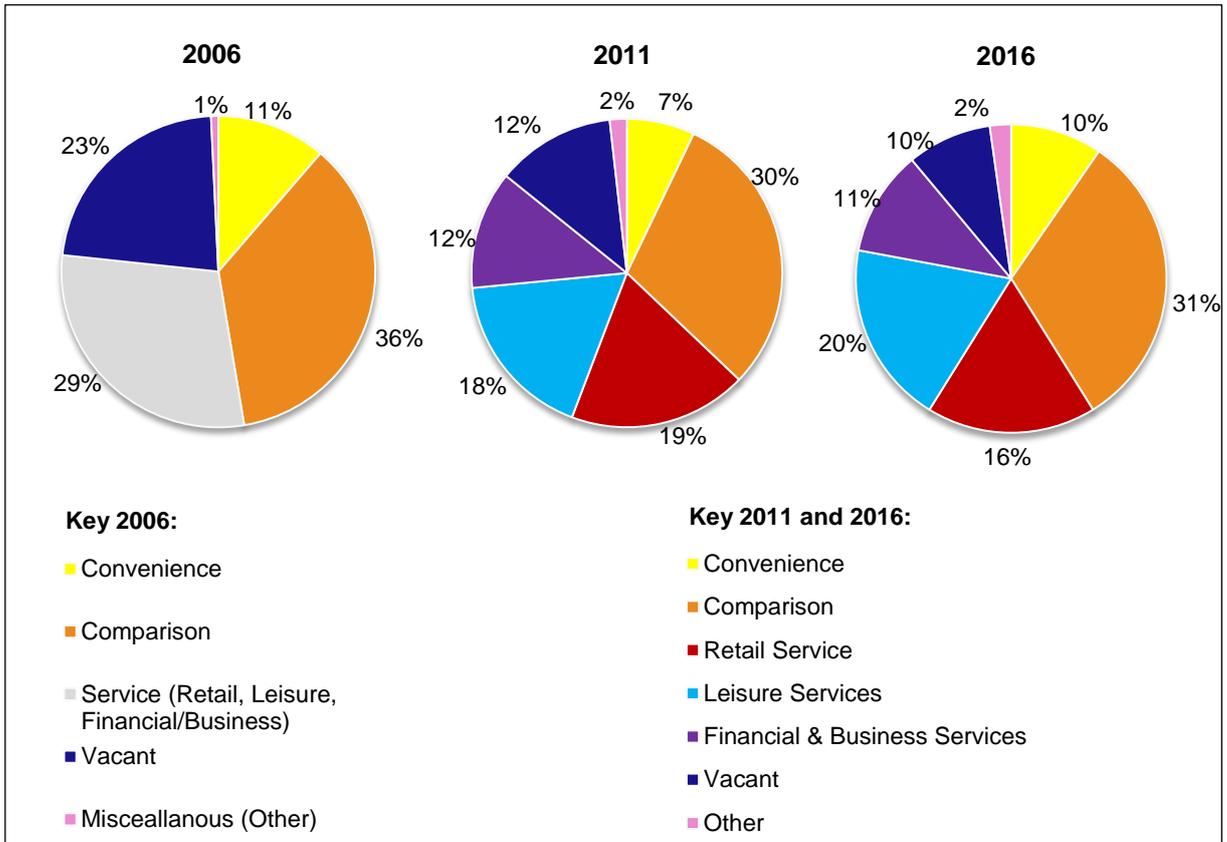
**Figure 4.8 / Kirkby Town Centre Composition (Jan 2016)**

	Units (no.)	Units (%)	Units U.K Avg. (%)	Floorspace (sq m)	Floorspace (%)	Floorspace U.K Avg. (%)
<b>Convenience</b>	13	9.6%	8.6%	6,218	30.2%	15.2%
<b>Comparison</b>	42	31.1%	32.1%	5,920	28.7%	35.9%
<b>Retail Service</b>	22	16.3%	14.3%	2,150	10.4%	7.5%
<b>Leisure Services</b>	27	20.0%	22.7%	3,510	17.0%	23.5%
<b>Financial and Business Services</b>	15	11.1%	10.7%	1,460	7.1%	8.1%
<b>Vacant</b>	13	9.6%	11.3%	1,230	6.0%	9.2%
<b>Other</b>	3	2.2%	0.1%	130	0.6%	0.1%
<b>TOTAL</b>	<b>135</b>			<b>20,618</b>		

*Source: Nexus Retail Survey, January 2016*

4.194 The pie charts in Figure 4.9 show the change in Kirkby's composition before the recession in 2006, immediately following the recession in 2011, and the most recent survey undertaken in January 2016. As already acknowledged earlier in this report, this data has been sourced from the previous 2011 Retail Study by WYG and the 2006 GVA Grimley Study, which were each guided by different town centre boundaries.

**Figure 4.9 / Kirkby Town Centre Composition in 2006, 2011 and 2016**



**Sources:** GVA Grimley 2006 Ashfield Retail Study, WYG 2011 Ashfield Retail Study and Nexus Retail Survey January 2016

### Convenience Goods Units

4.195 Figure 4.8 shows that the current number of convenience retail stores in Kirkby is just above the national average level of provision. Thirteen convenience retail units make up 9.6% of the town centre’s quantum of retail units provided over a total of 6,218 sq m. This represents an increase in the percentage of convenience units in the town centre from the 2011 Study when convenience units occupied 7.1% of the total units, but, a decrease from 2006 figures, which identified convenience retail stores as 11.3% of the total units. Noting, the 2006 Retail Study was based on the GOAD plan boundaries, while the 2011 Study included only those within the town centre boundary as defined in the Local Plan.

4.196 The existing provision consists of four national convenience goods retailers. These are:

- Morrisons – providing approximately 3,700 sq m of convenience floorspace;
- Farmfoods – operating from a 1,600 sq m unit on Station Road;

- Thorntons – which has a 1,200 sq m unit (this includes a Post Office) on Lowmoor Road. Thornton's was not in operation at the time the 2011 Retail Study was completed;
- McColls trades out of a 310 sq m store on the Kingsway (this was classified in the 2011 Study as Retail Service); and
- Additionally, there is a 650 sq m Aldi located just outside of the town centre boundary (as defined by GOAD and the Local Plan) and as such it is considered to be an 'edge-of-centre' location.

4.197 The opening of the Morrisons in 2014 has had a significant impact on the level of convenience representation in the town centre. The popularity of the supermarket is evident when reviewing the results of the NEMS Household Survey; in which 11.2% of respondents identified the strength of the supermarket as the main reason for visiting Kirkby.

### Comparison Goods Units

4.198 At present, comparison units account for 31.1% of all Kirkby's retail units. This level of representation is aligned with the national average of 32.1%.

4.199 As evident from Figure 4.9, the percentage of comparison units making up the town centre has increased slightly from 30.1% in 2011 to 31.1% in 2016. This increase (albeit very slight) is in contrast to UK national average trends – as the national average of comparison provision has decreased from a 2011 average of 33.4% to 32.1% in 2016.

4.200 Also of significance, the expansive Morrisons makes a noteworthy contribution to the level of comparison floorspace in Kirkby. This superstore is set out over 4,930 sq m with approximately 1,200 sq m dedicated to comparison goods, in addition to the Morrisons Pharmacy.

4.201 Only a small number of "high street" comparison retailers have a presence in the town centre – these are Boots (11 Lowmoor Road), Superdrug (Unit 7 Lowmoor Road) and Boyes (15 Lowmoor Road). Notably, the Boyes at 15 Lowmoor Road, is a large format store – 1,270 sq m, offering a variety of discounted home wares and DIY products, toys, clothes and stationery. The Co-Operative Pharmacy at 48a Lowmoor Road has changed name since the 2011 Retail Study to the Well Pharmacy. Well Pharmacies are still considered the third largest overall pharmacy chain after Boots and Lloyds Pharmacy in the UK.

4.202 There are a total of four Charity Shops in Kirkby, three of which are located on Station Street and the other 'The Samaritans' on the Kingsway. The presence of Charity Shops along the retail prime pitch is typical of a 'District Centre' of this size.

- 4.203 The composition of comparison retailers, and most notably the limited number of national multiples, is reflective of Kirkby's role as a 'District Centre' in the regional retail hierarchy.

### Retail Services

- 4.204 There has been a slight decrease in the representation of retail service outlets since the 2011 Study, which identified 18.6% of total town centre units were retail service. The 2016 provision accounts for 16.3% of the total town centre units; a composition that is above the national average of 14.3%.
- 4.205 The percentage of town centre floorspace occupied by retail service uses has increased from 9.8% in 2011 to 10.4% in 2016. This suggests that larger format retail service units have opened in Kirkby, making up for the loss in unit figures.
- 4.206 The most dominant service retailers in Kirkby are Health and Beauty providers, accounting for 11 of the 26 retail units. The majority of the Health and Beauty units are situated on or around the pedestrianised area of Lowmoor Road.
- 4.207 In addition to the significant provision of Health and Beauty services, other retail services on offer in Kirkby include; two Funeral Service providers, a Dog Groomer, Chiropodist, Dry Cleaner and Post Office.

### Leisure Services

- 4.208 The percentage of leisure units has slightly increased from 17.7% in 2011. The current level of leisure services on offer in Kirkby is only marginally below the UK national average of 22.7%, as 20.0% of the units in Kirkby offer leisure services (27 units).
- 4.209 The most common type of leisure services provided in Kirkby are Take-Away outlets, accounting for 13 of the 27 units. Following this, there are a total of five Cafes, and two Betting Offices. A relatively high provision of Cafes are available in Kirkby given its size – as there are nine Cafes in Sutton and seven in Hucknall; and both are much larger town centres.
- 4.210 Within the town centre there are two Public Houses – the Nag's Head on Lowmoor Road and the newly opened The Regent Wetherspools (opening in 2014) on Diamond Avenue. This low provision of eat-in Restaurant and Bar offering is considered representative of Kirkby's 'District Centre' ranking.

## Financial and Business Services

- 4.211 The representation of the financial and business service sector in Kirkby is generally aligned with UK averages in terms of number units and floorspace. 11.1% of Kirkby's town centre units are occupied by financial and business service providers. The units are accommodated over 7.1% of the total floorspace. Similarly, the UK averages for this sector are – 10.7% of total units spread over 8.1% of total floorspace.
- 4.212 The percentage of financial and business service units has remained relatively unchanged from the time the 2011 Survey was completed. In 2011, 12.4% of total units were identified as financial and business service units, and this percentage figure has only marginally decreased to 11.1% in January 2016.
- 4.213 Even though the level of provision, in terms of percentage of financial and business units, has more or less remained the same, the operators have changed – with Natoli Business Services opening at 33 Kingsway in the unit where Compacc (a retail service) was trading in 2011, and Eazi Move closing down at 17a Kingsway (the unit being taken over by Sweet as Candy). This level of change represents activity in the Kirkby financial and business services market.

## Other Units

- 4.214 Supplementing the retail service accommodated within the town centre of Kirkby, there are a total of three identified other (miscellaneous) uses; the KDCS Heritage Centre on Kingsway and two taxi hire units, A2B Taxis on Station Street, and Taxis in Ashfield at 18 Kingsway.
- 4.215 Taxis in Ashfield at 18 Kingsway opened in a previously vacant unit (identified as vacant in the 2011 Survey). In consequence, this has increased the number of identified other units from two to three.
- 4.216 These identified miscellaneous units make up 2.2% of the overall town centre provision of retail.

## Summary

- 4.217 The retail offer in Kirkby is diverse and dominated by sole traders rather than national operators. The variety of the goods and services available in the town support its role as an important destination for local residents to purchase basic goods and services.
- 4.218 Most notably, the opening of the large 4,895 sq m Morrisons, and 1,270 sq m Boyes, has significantly increased the level of provision and corrected the imbalance of convenience units accommodated within the centre that was identified as part of the 2011 WYG Retail Study.

- 4.219 There are currently four national convenience outlets in the town centre (Morrisons, McColls, Thornton's and Farmfoods).
- 4.220 A significant number of new comparison traders have opened in the town centre since 2011. These units concentrated towards the western end of Station Street, and include a new large format Pet Store and retailer of Gaming and Electrical Equipment.

### **Vacancies**

- 4.221 At the time Nexus completed their Retail Survey in January 2016, Kirkby had a vacancy rate of 9.6%, comprising 13 units over 1,230 sq m of floorspace. This is notably lower than the national average of 11.3%, and a substantial reduction from historical peaks.
- 4.222 Prior to the recession, the 2006 GVA Grimley Study identified that Kirkby had a vacancy rate of 22.6%, which dropped in 2011 (identified by WYG in their Retail Study) to 12.4% following the recession.
- 4.223 The vacant units are spread throughout the town centre. However, there is a particular concentration in the area surrounding the junction of Station Street, Kingsway and Lowmoor Road, with a total of five vacant units located in this part of Kirkby.
- 4.224 The 2007 Masterplan for Kirkby acknowledged the high vacancy rate and attributed this to competition from other centres, particularly Sutton, a poor shopping environment, and an over-representation of convenience shopping.
- 4.225 Since the publication of the Masterplan in 2007, Kirkby has dramatically reduced the number of vacant retail units in the town centre. Of note, the majority of the vacant units were demolished as part of the redevelopment of the Ashfield Precinct and construction of the new Morrisons foodstore. As a result, the number of vacant units in the centre reduced from 33 vacancies in 2010 (3,445 sq m) to 14 vacancies in 2011 (1,865 sq m). Subsequent to the opening of the new Morrisons, overall vacancy rates in the town centre continue to decline as shown by the reduction from 14 vacant units in 2011 to 13 in 2016.
- 4.226 As explained above, some vacancy is expected in town centres as it represents churn. A number of units that were vacant at the time the 2011 Survey was completed are now occupied. For example, Ashfield Taxis at 18 Kingsway, Kirkby Sales and Exchange (Computer Games) at 78-80 Station Street and Owensons Hair at 24 Lowmoor Road are all operating out of units that were identified as vacant in 2011.

4.227 Further to this, recent town centre improvements include:

- (1) The recent completion of the Kirkby Town Centre traffic improvement scheme in late 2015 and early 2016, which are expected to improve accessibility and as a result increase shopping visits to the town centre; and
- (2) Upgraded Civic Square; improving the attraction of the pedestrianised part of the town centre and providing an enhanced shopping environment.

4.228 As such, it is anticipated that the vacant units, especially those on the pedestrianised part of Lowmoor Road, are likely to attract new retailers seeking opportunities.

### Customers' Views and Behaviour

4.229 The Household Survey undertaken by NEMS sought to identify how frequently respondents visited particular centres and what their views were in respect of the centres they did visit.

4.230 We summarise the principal findings of the survey in respect to those questions of relevance to the health of Kirkby in Figure 4.10.

**Figure 4.10 | NEMS Household Response Summary for Kirkby**

Question		Total Percentage Response		Respondents from Zone 2 (Location of Kirkby)	
<b>Visits Kirkby Most Often</b>		14.1%		62.3%	
<b>Frequency of Visits to Kirkby *</b>	Daily	11.1%	Daily	10.4%	
	Two times a week	33.2%	Two times a week	45.0%	
	Once a week	34.4%	Once a week	36.4%	
	Once a fortnight	6.1%	Once a fortnight	5.1%	
<b>Typical Mode of Transport *</b>	Car	75.1%	Car	61.3%	
	Bus	3.8%	Bus	2.1%	
	Walk	17.2%	Walk	32.6%	
<b>Main Reason for Visiting Kirkby *</b>	Choice and range of shops	29.4%	Choice and range of shops	36.6%	
	Strength of supermarket	11.2%	Strength of supermarket	14.9%	
	Choice of leisure services	2.2%	Choice of leisure services	1.5%	
	Choice of services	11.1%	Choice of services	5.0%	
	Close to home	18.6%	Close to home	27.1%	
	Close to work	9.0%	Close to work	7.1%	

**Source:** NEMS Household Survey, January 2016

\* These percentages are taken from those who respondents who identified that they visit Kirkby the most often.

- 4.231 The NEMS Household Survey identifies that out of the main town centres in Ashfield, Kirkby is the least frequented by the respondents within the Study Area, with only 14.1% stating they visit Kirkby the most often. This is expected given it is the smallest of the main town centres in the District.
- 4.232 Additionally, 62.3% of those respondents within Zone 2 (being the Zone that Kirkby is located within) identified that they visit Kirkby most often. Again, an unsurprising result that is aligned with the assumption that Kirkby is a local centre that provides key retail services to the local community but faces difficulty in attracting visitors from a wider catchment area.
- 4.233 In terms of how often these respondents visit the town centre, the results illustrate that the majority of people visit between one or two times a week – over 80% of respondents.
- 4.234 A much smaller number visit daily – just over 10%. However, this is a comparatively high number of daily visits (when compared to the figures for both Sutton and Hucknall), and attributed to Kirkby's function in providing for the local needs of the community.
- 4.235 The attraction of the new Morrisons is evident when reviewing the NEMS results, as 11.2% of total respondents and 14.9% of Zone 2 respondents said their main reasons for visiting Kirkby is the strength of the supermarket. This is comparatively higher when considered against the same question asked of respondents who visit the other centres the most often. For example, for Sutton, only 4.6% of respondents identified the strength of the supermarket as the main reason for visiting.

### **Stakeholder Engagement**

- 4.236 During stakeholder engagement it became evident that the new Morrisons has been a success since opening in January 2012. Its success has resulted in a major shift in the centre. Most noticeable is an increase in footfall along the prime pitch; considered to be a consequence of the variety of goods and services available in the Morrisons – butcher, fish monger, along with a bakery, deli, florist, electrical goods and chemist. A Co-Operative was previously located within the Ashfield Precinct and offered a much more limited range of good and services, with a dominance towards convenience goods.
- 4.237 The Town Centres and Markets Manager highlighted the popularity of the Outdoor Market situated on Market Place (Lowmoor Road). A variety of traders participate in the Outdoor Market selling an assortment of products and services to meet the day-to-day needs and requirements of residents and visitors. A regular traditional market takes place every Tuesday, Thursday, Friday and Saturday. During 2015 the Outdoor Market was revitalised following the construction of a new plaza. The plaza space is available for hire by Community Groups.

- 4.238 The Town Centres and Markets Manager explained ambitions to further enhance the market offer; including collaboration with local schools to engage local young people and give them the opportunity to run a stall for a period of time. Enhancing the online profile of the Outdoor Market was also identified as a potential opportunity to increase awareness of the shopping opportunities provided at the market.
- 4.239 When discussing general performance, stakeholder engagement suggested Kirkby is considered to be fulfilling its role as a small 'District Centre'.

### **Retailer Representation**

- 4.240 Kirkby currently accommodates two of the top 31 Experian GOAD defined major retailers (Boots the Chemist and Superdrug). The Boots is located centrally within the pedestrianised zone of Lowmoor Road and the Morrisons (old Ashfield Precinct). The Superdrug store is also close by on Lowmoor Road. There is a concentration of chemists in this area as a result of its close proximity to several medical facilities – Two Doctor's Surgeries, a Health Centre and Dental Surgery.
- 4.241 The town centre accommodates a large Morrisons, Co-Operative Funeralcare Services, as well as Natwest, Lloyds, and Barclays banks. Other national retailers include a Ladbrokes, William Hill and a Farmfoods.
- 4.242 The relatively low national retailer representation is reflective of Kirkby's 'District Centre' position in the retail hierarchy.
- 4.243 The Venuescore UK Shopping Venue Rankings classifies Kirkby as a 'Minor District Centre' in the region, ranked 1,167th of all the centres surveyed (dropping 182 places since 2013). This is a weighted ranking that takes into account the proportion of national multiple retailers represented in each centre.

### **Pedestrian Flows**

- 4.244 Nexus observed pedestrian flows in the Kirkby Town Centre while completing their site visits over the course of the Retail and Leisure Study in early 2016.
- 4.245 A healthy footfall was seen in the Market Place and around the junction of Lowmoor Road with Station Street. In particular, the market stalls were active and appear to attract a significant amount of foot traffic and general activity to this part of the town. The recent improvements to this area provide for a pleasant environment and a number of people were seen sitting and enjoying the space.

- 4.246 Pedestrian flows are comparatively higher in the western section of Urban Road / Station Street between the Aldi and the Market Place than the eastern section past the Morrisons, where the predominant land use is residential.
- 4.247 Pedestrian flows in the Ashfield Precinct (the location of the Morrisons) were low and considered to be as a consequence of the large surface car park that dominates this site. Notably, the previous Retail Study (2011) also noted low pedestrian flows in this area.

### **Accessibility**

- 4.248 Kirkby has an out-dated road network, meaning that many of the town centre roads are comparatively narrow and different road users are forced to contest for space – such as businesses, through-traffic, visitors, shoppers and residents.
- 4.249 Kirkby has experienced issues with vehicle journey time delays in the centre of the town. Time delays have mainly affected westbound traffic along Station Street.
- 4.250 In an attempt to address congestion issues, a number of schemes have been implemented. The Council and County Council have been working in partnership to improve traffic flows along Station Street. In February 2016, the County Council's Transport and Highways Committee finished the Kirkby Town Centre traffic improvement scheme. The £500,000 investment programme involved highway changes by re-routing traffic in the Kirkby Town Centre, namely along Pond Street, Ellis Street and Station Street. This included the activation of the new signal system at the Ellis Street and Station Street junction was activated, with Ellis Street operating a new one-way arrangement allowing traffic to flow southbound to the Station Street junction. Phase one was completed at the end of 2015 and involved alterations to the junction at Portland Street and Station Street, and a new one-way system eastbound at Pond Street.
- 4.251 These improvements will take time to influence the shopping patterns of the Study Area respondents, and therefore, our results in January 2016 may not fully reflect the eventual trading patterns.
- 4.252 Kirkby station is located on the fringe of centre and offers good access to Nottingham. The station is served by the East Midlands Trains and connects Worksop with Nottingham. A train journey from Kirkby to Nottingham would take less than 25 minutes. Furthermore, to travel by train from Kirkby to Hucknall would take less than ten minutes, and Kirkby to Sutton Parkway involves a train journey of no more than five minutes.

- 4.253 With regards to other opportunities for public transport the town centre is well served by bus services. However, the town centre does not benefit from a designated bus terminus, meaning buses can only be boarded and disembarked at road-side bus stops.
- 4.254 When considering the availability of car parking spaces for shoppers, an over provision of surface car parks is available in the town centre. In addition to the circa 100 car parks provided by the Morrisons foodstore, other spaces are found in the following locations:
- Festival Hall Car Park – 71 long stay spaces
  - Hodgkinson Road Car Park – 66 long stay spaces
  - Ellis Street Car Park – 29 short stay spaces
  - Hucknall Leisure Centre – 136 free car parking spaces (for Leisure Centre users only)
- 4.255 As previously noted, all Council car parking spaces are provided with the first hour free (as of November 2015).
- 4.256 The availability of car parking in the town centre is reflective of the most popular mode of transport used by visitors to the centre. The NEMS Household Survey identified that 75.1% of respondents across the Study Area who visit Kirkby travel to the centre by car, a further 17.2% walk and only 3.8% travel by bus, minibus or coach (refer to Figure 4.10f).
- 4.257 Additionally, a high percentage of those respondents who reside in Zone 2, meaning they live very close to the town centre, still drive to the town centre (61.3%). A very minimal percentage; 2.1%, travel by bus, minibus or coach.
- 4.258 That said, a total of 32.6% of Zone 2 respondents stated they typically walk into the town centre. Again, this is representative of the town centre's role and function as an easily accessible local centre offering basic goods and services to the local community.

### **Perception of Safety**

- 4.259 In general, Kirkby Town Centre has high perception of safety. The prime pitch and key retail frontages (Station Street, Lowmoor Road and Ellis Street) are active, well-lit and are provided with plentiful natural surveillance from footfall and a good supply of active frontages. The presence of CCTV assists with the high perception of safety.
- 4.260 Most notably, the frequency of the Outdoor Market (four times per week) further improves the perception of safety in this pedestrianised area as it attracts additional 'eyes on the street' and supports the creation of community spirit amongst retailers and business owners. The new civic

square (completed in 2015) is well-designed and contributes to the perception of safety in this area.

- 4.261 In terms of night-time activity, there are a limited number of activities that attract visitors to the town centre after 5pm. The Nag's Head is a popular destination for evening social activity the town. Now with the addition of the popular The Regent Wetherspoon immediately across the road from The Nag's Head the concentration of night-time activity in this area will only be higher.
- 4.262 As evident when reviewing the crime statistics kept by the Nottingham Police<sup>94</sup>, the rates of anti-social behaviour in Kirkby show a decreasing trend. Ashfield Council have been working proactively with the local Police to reduce anti-social behaviour in the town centre, especially in the area adjoining the Nag's Head and The Regent Wetherspoons, which form the focus of night-activity in the town.

### **Environmental Quality**

- 4.263 The newly completed Civic Square and public realm improvements along Lowmoor Road represent a significant improvement in the quality of the shopping environment in Kirkby. These public realm improvements include new street furniture and a large piece of public art. As a result this public plaza and events area is both well-utilised by the market traders and helps attract a decent amount of footfall.
- 4.264 In February 2016, the Council's Forward Planning Team granted more than 20 businesses operating in the Kirkby Town Centre an 80% discretionary grant for traditional renovations to shop fronts, and up to a 50% discretionary grant for minor works to shop fronts. The grants recognised the key function that shop fronts play in the town centre's character and quality. The preservation and enhancement of traditional architectural details help to define the character of the town and provide an enhanced shopping experience and streetscene. While these recent schemes have significantly improved the townscape quality of Kirkby, the Council recognises that further public realm improvements are required on the other key roads and gateways within the town centre boundary.

### **Summary**

- 4.265 Kirkby has experienced a significant reduction in the number of vacant units in the past ten years aided by the Morrisons development. Since the recession the vacancy rate has continued to decrease and now sits below the UK average of 11.3% at 9.6%.

<sup>94</sup> UK Crime Statistics, available at <http://www.ukcrimestats.com>

- 4.266 The comparison provision has increased over the past ten years, and now sits at 42 units, or 31.1%, though this remains just below the national average of 32.1%. The opening of the Morrisons has had a significant impact on the provision of comparison goods within the town centre and helping to increase to just below the UK average provision. Morrisons is performing well in its role as an anchor development for the centre.
- 4.267 With regards to diversity of uses, Kirkby has historically accommodated an above average level of convenience retail. However, in recent years this imbalance has been somewhat corrected, and the current level of provision generally aligned with UK averages (9.6% versus 8.6%).
- 4.268 The decrease in convenience units and increase in comparison retailers suggests improvements to the overall shopping offer in the town centre.
- 4.269 The role of Kirkby to provide a variety of retail offerings is recognised in the Preferred Approach Local Plan, which outlines the following vision with regards to the diversity of uses in the town centre – “a good range of everyday services and shopping requirements”.
- 4.270 The redevelopment of the new Civic Square in 2014 has enhanced the overall shopping environment and the regular market proves popular with local residents and helps to attract footfall to the centre.

## Network of district, local shopping centres and shopping parades

- 4.271 In addition to completing health checks for Ashfield's four main centres Nexus has also appraised the local shopping centres and shopping parades in the District. The emerging Local Plan (Preferred Approach Local Plan) highlights the importance of local shopping centres in serving the day-to-day needs of the community, especially for those members of the community who are less mobile. Paragraph 4.64 of the Local Plan Preferred Approach identifies that local shopping centres and shopping parades should be comprised of small scale development that supports the local community without threatening the vitality and viability of town centres.
- 4.272 At a national level, the NPPF points out the importance of strong neighbourhood centres for the overall performance of an area or district.
- 4.273 Outram Street, Annesley Road, Watnall Road, Huthwaite, Stanton Hill and Jacksdale are recognised in the adopted Local Plan and Preferred Approach Local Plan as 'Local Shopping Centres'. The villages of Annesley Woodhouse, Selston, Skegby and Underwood are referred to as 'Minor Shopping Centres' in the adopted Local Plan and 'Shopping Parades' in the Preferred Approach Local Plan. Each centre and parade has been given consideration within this Retail and Leisure Study as they provide small concentrations of retail and leisure activity which are of local neighbourhood value.
- 4.274 In order to assist with local policy formulation Nexus has studied each of Ashfield's existing centres to identify the most appropriate role for those centres in a consolidated local hierarchy of district, local shopping centres and shopping parades. A 'health' assessment of each of the local shopping centres is provided in **Appendix D**. The assessment comprises an overview of the role and function of each centre, and the broad composition of uses in each (as ascertained by our surveys of January 2016) are also provided.

## Pipeline Developments

- 4.275 In accordance with the duty to cooperate, as prescribed in Paragraph 178 of the NPPF, Nexus has worked in collaboration with the Ashfield District Council to contact neighbouring local planning authorities to identify future capacity and pipeline schemes within competing centres. The pipeline schemes of interest are those of a nature and scale, which could have the effect of consolidating their retail offer and enhancing their market share.
- 4.276 A number of future retail developments have been highlighted in the following local Council jurisdictions.
- 4.277 **Nottingham City**, which is identified as the Regional Retail Capital, and ranked seventh by Javelin Venuescores in respect to retailer representation, currently has a significant number of forthcoming retail developments; either underdevelopment or sitting unimplemented with planning permission. Of particular significance is the Victoria Centre project on Huntingdon Street. The Victoria Centre project obtained planning permission in July 2014 and is currently under construction. Once complete it will provide a mix of retail, leisure and office floorspace, in addition to a three level multi-storey car park and a new bus station. The total net gain in retail floorspace is estimated at 37,000 sq m. Moreover, there are a further four projects in Nottingham City that will deliver between 1,500 and 4,500 sq m of new retail floorspace. The Nottingham City Core Strategy (adopted in September 2014) allocates a total of 18 sites within the District for new retail development. A new Land and Planning Policy (LAPP) document is currently under development and adoption anticipated in 2017. The emerging policies may impact upon the prevailing retail environment in Nottingham, and in consequence the surrounding districts.
- 4.278 Mansfield Town Centre is identified by Javelin Venuescores as a Regional Centre. **Mansfield District** has an up to date Retail Update Report for 2014/2015. The Mansfield Retail and Leisure Study 2014 report indicated a likely need for additional capacity of 25,200 sq m for comparison goods and approximately 2,300 sq m for convenience goods by 2031. Additionally, the contact person at the Mansfield District Council provided a useful list of recent planning permissions and recent issues. Of particular significance is the mixed use town centre development at Belvedere Street / Quaker Way in Mansfield. This site extends to 0.48 hectares (a significant size for a town centre location). In addition, two new Aldi stores are planned for in Mansfield. A recent (2015) permission granted to a new Aldi store at Sherwood Oaks Business Park, on the outskirts of Mansfield Town Centre. Additionally, another Aldi store was permitted in 2014 and construction has begun at a location on the A60, Leeming Street South between Mansfield and Mansfield Woodhouse.

- 4.279 The representative contacted at **Amber Valley District** provided to us a comprehensive list of planning permissions submitted to the local authority since 2011 – the list includes both approvals and refusals. Taking account of only those which either have planning permission and / or are under construction, the following is of significant - in April 2015 the proposed redevelopment of the American Adventure Theme Park in Shipley obtained planning permission. This private developed led project is said to deliver up to 307 residential units, retirement provision, neighbourhood retail, business, leisure/assembly/training and garden centre uses, pub and hotel/conference facility health and care uses. With regards to pure retail, the permitted (at September 2015) extension to the Aldi at High Street, Heanor, will deliver 2,311 sq m of new food retail floorspace. Another planning permission was also granted in 2015, proposed the extension of the existing B&M Home Store on Chapel Street in Belper. Also of note, several recent planning permissions (post 2014) have been granted for extensions to existing food retail outlets, including the Tesco Superstore on the High Street in Heanor
- 4.280 Correspondence with representatives at the **Newark and Sherwood District** identified that with regards to pending retail applications there are only two considered to be of significance. The Council is currently considering proposals to deliver a 2,884 sq m (net) of out-of-centre convenience superstore in Newark. The District Council is in the process of receiving advice on the acceptability of the proposal in retail planning terms. Secondly, there is also a pending application to vary a condition of an existing planning permission at Northgate. The proposed amendment would relax the restriction to bulky goods placed to allow for the sale of convenience retail. The proposal does not however result in any increase in retail floorspace. This application was refused by the planning committee in February 2015, and an appeal is currently underway. The Council are embarking on a Review of the Local Plan. An Issues Paper was published for Consultation in October 2015. A new Town Centre and Retail Study as part of the plan review is soon to be commissioned.
- 4.281 Representatives from the **Broxtowe Borough Council** confirmed to Nexus that there are currently no significant applications under consideration by the local authority. Moreover, there are no substantial developments occurring in the Borough under permitted development rights. As part of the emerging Local Plan, the local authority may consider allocating retail sites within town centres, or at edge of centre locations. It is not anticipated that any out-of-centre locations will be allocated.

- 4.282 **Bolsover District Council** is currently in the process of commissioning a new combined Retail and Leisure in collaboration with North East Derbyshire and Chesterfield Borough Councils. This will assess the capacity for future retail development. Additionally, Bolsover will also be consulting on a new draft Local Plan in September 2016. At present, there are no significant retail or leisure developments with planning permission or under construction. Notwithstanding this, a number application for changes of use to retail or service uses have been permitted since 2011, suggesting there is some level of demand for new retail and leisure uses.
- 4.283 Representatives from the **Gedling Borough Councils** confirmed to Nexus that there have been no significant retail or leisure developments obtain planning permission since 2014. The most significant being an unimplemented planning permission for up to 2,800 new retail, financial and professional services, food and drink, takeaways, non-residential institutions and leisure uses at Teal Close, Carlton.

## Conclusion

- 4.284 Nexus conducted health checks in each of the recognised town centres (Sutton, Hucknall and Kirkby), identifying the changes in vacancy rates and retail/service composition before, during and after the recession in addition to analysis of customer behaviour, retailer representation, rental values, pedestrian flows, accessibility, perception of safety and environmental quality. Brief audits were also completed for smaller local shopping centres. The results of which are set out in **Appendix D**.
- 4.285 The findings indicate that the majority of the centres are fulfilling their designated roles and functions as expected for their position the District retail hierarchy (as defined in the Local Plan and the Preferred Approach Local Plan). Of note, each of the key town centres (Sutton, Hucknall and Kirkby) has a large format multi-channel supermarket either in, or in close proximity to the core of the centre. These large stores offer a variety of goods, and services, meaning they often attract a lot of visitors.
- 4.286 A number of retail developments are currently proposed across the District's neighbouring authorities. Of particular significance are those planned for Nottingham City Centre and Mansfield City Centre given (as will be explained later in this Study) they attract a significant proportion of Ashfield market share.

## 5.0 Population and Expenditure

### Introduction

- 5.1 We identify below how we assess the current population and available convenience and comparison retail expenditure within the Study Area, as well as the methodology for forecasting the available expenditure across the plan period. This data has informed our quantitative model of available retail capacity in the Study Area, along with the NEMS household telephone survey, which we go on to discuss in Section 6.

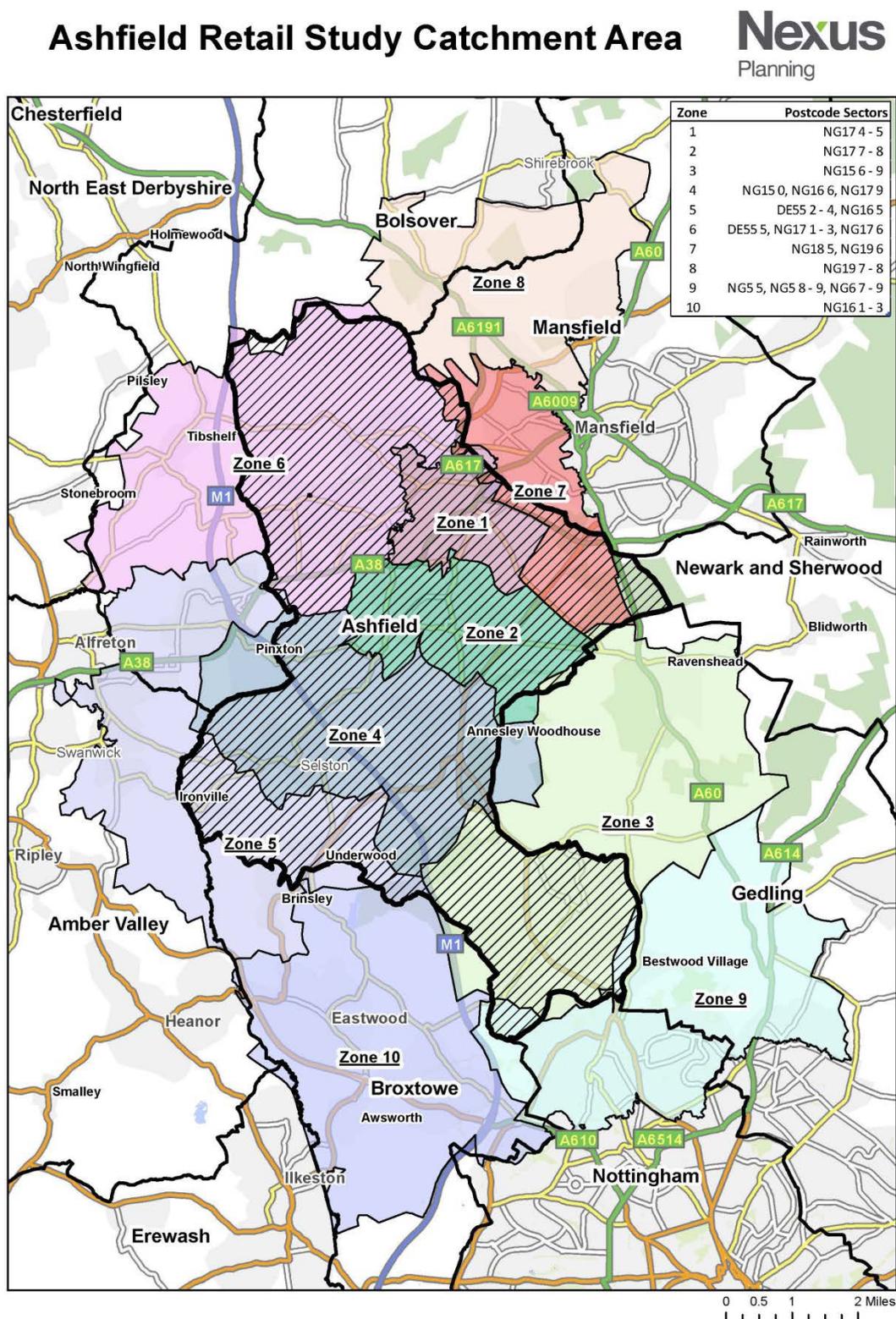
### Defined Study Area

- 5.2 A key task of this Study is to review previous findings relating to shopping patterns within the local area, most notably the household survey undertaken to inform the previous WYG Retail Study Update produced in 2011, identifying any significant variations in shopping patterns over the past five years that may have resulted from recent retail investments in the vicinity of the Study Area or wider changes in nationwide shopping habits.
- 5.3 The previous 2011 Study comprised of 10 zones which covered broadly covered the Ashfield District boundary, as well as surrounding areas within Bolsover, Mansfield, Newark and Sherwood, Gedling, Nottingham, Broxtowe, Erewash, Amber Valley and North East Derbyshire where shoppers may be attracted to Ashfield's retail and leisure offer.
- 5.4 Nexus has adopted the same study area as the 2011 Study in order to enable before and after comparisons and to allow us to robustly identify any emerging trends in shopping patterns across the Study Area. Figure 5.1 shows the definitions of the survey zones by postal sector, whilst Figure 5.2 overleaf shows the geographical extent of the Study Area. This plan is included in a larger format at **Appendix A**.

**Figure 5.1 | Definitions of Survey Area Zones**

Survey Zone	Postcode Sectors
Zone 1   Sutton	NG17 4 - 5
Zone 2   Kirkby	NG17 7 - 8
Zone 3   Hucknall	NG15 6 - 9
Zone 4   Ashfield Central	NG15 0, NG16 6, NG17 9
Zone 5   Ashfield West	DE55 2 - 4, NG16 5
Zone 6   Ashfield North	DE55 5, NG17 1 - 3, NG17 6
Zone 7   Mansfield Fringe	NG18 5, NG19 6
Zone 8   Mansfield North	NG19 7 - 8
Zone 9   Nottingham Fringe	NG5 5, NG5 8 - 9, NG6 7 - 9
Zone 10   Ashfield South	NG16 1 - 3

Figure 5.2 | Survey Area Zones



## Study Area Population

- 5.5 Nexus has utilised in-house data sourced from the Experian Micromarketer G3 system to calculate the baseline population data (2015 estimates) in the absence of up to date Local Authority housing figures.
- 5.6 Experian's population dataset utilises the 2011 Census release, and projects forwards using growth rates derived from ONS population projections and current age and gender estimates. These are accepted as the industry standard basis for long term retail planning.
- 5.7 We have taken a base date of 2016 (the year of the Study), calculating population and retail expenditure forward to 2021, 2026 and 2032 in accordance with Ashfield's emerging Local Plan and NPPF guidance.
- 5.8 At 2016, the defined Study Area is estimated to contain a resident population of approximately 315,080, rising by 8.4% to 341,595 at 2032 (equating to 26,515 additional residents).

**Figure 5.3 | Population across the Study Area by Zone**

Zone	2016	2021	2026	2032
Zone 1   Sutton	17,640	18,265	18,816	19,470
Zone 2   Kirkby	21,111	21,842	22,483	23,086
Zone 3   Hucknall	39,863	41,013	42,131	43,206
Zone 4   Ashfield Central	20,060	20,610	21,036	21,347
Zone 5   Ashfield West	29,632	30,383	31,167	31,913
Zone 6   Ashfield North	38,731	39,881	40,804	41,839
Zone 7   Mansfield Fringe	20,570	20,891	21,117	21,329
Zone 8   Mansfield North	19,716	19,961	20,268	20,564
Zone 9   Nottingham Fringe	69,752	71,754	74,165	77,304
Zone 10   Ashfield South	38,005	39,303	40,378	41,537
Total	315,080	323,903	332,365	341,595

**Source:** Experian Micromarketer G3

- 5.9 The resident population (and by extension, the resident expenditure available to facilities within Ashfield) is not distributed evenly across the Zones of the defined Study Area, which is to be expected of any sample of a population. 22.1% of the residents across the Study Area reside in Zone 9 (Nottingham Fringe), while the lowest proportion of resident was Zone 1 (Sutton) with 5.6%.

## Retail Expenditure

- 5.10 Retail expenditure data (in the form of convenience and comparison goods expenditure per capita) has also been sourced from the in-house Experian Micromarketer G3 system. The data takes account of the socio-economic characteristics of the local population to provide local consumer expenditure calculations. Experian is a robust source of population and expenditure data that is widely used for calculating retail capacity across the industry.
- 5.11 Expenditure data from Experian is provided at a base year of 2014 in 2012 prices (as is every subsequent monetary value) and has been projected forward using per capita growth forecasts derived from the latest Experian Planner Briefing Note 13 (October 2015).

**Figure 5.4 | Retail Expenditure Forecasts**

Year	Convenience growth rates	Comparison growth rates
2014	-1.8%	5.5%
2015	-0.2%	5.3%
2016	0.1%	3.2%
2017	0.3%	2.9%
2018	0.1%	3.0%
2019	0.1%	3.0%
2020	0.1%	3.0%
2021	0.1%	3.0%
2022	0.1%	3.0%
2023	0.1%	3.2%
2024	0.1%	3.2%
2025	0.1%	3.2%
2026	0.1%	3.2%
2027	0.1%	3.2%
2028	0.1%	3.2%
2029	0.1%	3.2%
2030	0.1%	3.2%
2031	0.1%	3.2%
2032	0.1%	3.2%

**Source:** Table 1a, Experian Retail Planner Briefing Note 13, October 2014

- 5.12 As identified in Figure 5.4, Experian forecasts suggest that convenience goods expenditure has fallen in 2014 and (to a lesser extent) 2015, as a result of a trend towards more price conscious shopping patterns and the growth of high street discounters such as Lidl and Aldi, as discussed in further detail in Section 2. Marginal growth is now anticipated in the convenience goods sector with a consistent 0.1% growth per annum forecast over the period 2018-2032.

- 5.13 Comparison expenditure is shown to have risen by 5.5% and 5.3% in 2014 and 2015 respectively, before levelling off between 2018 and 2022. Experian forecasts a steady growth of 3.2% per annum over the period 2023-2032 as comparison retailers incorporate newer technologies, innovations and formats (including 'click and collect') in order to respond to the increasing competition from internet shopping.
- 5.14 Experian note that long term forecasts should be treated with caution and subject to regular reviews, given the wide range of factors that can impact on the broader economy.

### Non-Store Retailing or Special Forms of Trading

- 5.15 Special forms of trading (SFT) are defined by Experian as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies and are discussed in detail in 'Growth in E-Tailing (or E-Commerce)' in Section 2.
- 5.16 Experian Retail Planner Briefing Note 13 (October 2015) provides estimated forecasts of internet and other SFT, which allows for us to 'strip out' any expenditure that survey respondents indicate are made by SFT and utilise Experian's recommendations. This ensures that the proportion of SFT accounted for in our modelling increases in line with Experian forecasts as opposed to remaining constant at current levels.

**Figure 5.5 | 'Adjusted' Special Forms of Trading Market Share Forecasts**

Year	Convenience growth rates	Comparison growth rates
2016	3.0%	12.4%
2021	4.4%	15.0%
2026	5.1%	15.0%
2032	6.0%	14.5%

**Source:** Appendix F, Experian Retail Planner Briefing Note 13, October 2014

- 5.17 Many stores offer online sales, but source goods from regular store's stock as is often the case for convenience goods, where employees will carry out online orders from store's shelves each morning before they open to the general public. These orders are then delivered by dedicated vans at each store and as such the online expenditure is attributed to tangible stores. Experian provides 'adjusted' figures, cited above at Figure 5.5, which make an allowance for these online sales derived from individual stores so as to ensure that the expenditure is counted as 'available' spend within the Study Area.

## Convenience Goods Expenditure

- 5.18 Projecting forward available expenditure per capita and population growth for each survey zone in 2016, 2021, 2026 and 2032, we are able to estimate the total available convenience and comparison goods expenditure.

**Figure 5.6 | Total Available Convenience Goods Expenditure across the Study Area**

2015	2021	2026	2032	Growth 2016-2032
£607.8 m	£620.1 m	£634.7 m	£649.9 m	£42.1 m

**Source:** Table 2a, Appendix F

- 5.19 As identified in Figure 5.6 above, in 2015 it is estimated that the resident population of the Study Area spent £607.8m on convenience goods, which is expected to increase by £42.1m (6.9%) to £649.9m by 2032. Across the Study Area, this total available convenience expenditure is split across two sub-categories, with 82% of spending attributed to main food shopping trips and 12% attributed to 'top-up' shopping trips (as derived from the NEMS Household Survey on a zone by zone basis).

## Comparison Goods Expenditure

- 5.20 Experian provides expenditure estimates divided into eight sub-categories of comparison goods, to allow for more detailed investigations of available expenditure. Bulky goods categories include 'DIY', 'Electrical' and 'Furniture', while non-bulky goods are made up of 'Books, CDs and DVDs', 'Chemist Goods', 'Clothing & Footwear', 'Small Household Goods' and 'Toys and Recreational Goods'.

**Figure 5.7 | Total Available Comparison Goods Expenditure across the Study Area**

2015	2021	2026	2032	Growth 2016-2032
£767.6 m	£886.9 m	£1,063.2 m	£1,327.3 m	£559.6 m

**Source:** Table 8, Appendix F

- 5.21 Applying the increases in population and comparison goods expenditure per capita, Figure 5.7 above estimates that the resident population of the Study Area generated £767.6m of comparison goods expenditure in 2015, rising to £1,327.3m in 2032 (an increase of £559.6m or 72.9%).

## Summary

5.22 The Study Area has a resident population of 315,080 at 2016, rising to 341,595 by 2032. It is estimated that, at 2016, the population generates £607.8m (convenience goods) and £767.6m (comparison goods) of resident expenditure, which is expected to increase to £649.9m and £1,327.3m (respectively) at 2032.

5.23 The base data in this section is then utilised, in conjunction with our analysis of the market shares of retailers across the Study Area in Section 6 below, to inform our subsequent analysis of retail expenditure capacity in Section 7.

## 6.0 Original Market Research

### Introduction

- 6.1 In carrying out this Study, we have gathered empirical evidence through undertaking a household telephone survey in order to provide up-to-date information on local shopping patterns across the Survey Area, including the trade draws of particular town centres, leisure destinations and both outdoor and indoor markets. It is acknowledged that there are potential limitations with such datasets, which are restricted by the number of surveys that can be carried out across the Study Area, as well as the length of the household questionnaire itself. As such, the results are understood to provide a broad indication of the market shares of retail and leisure destinations across the Study Area.
- 6.2 Nexus has partnered with specialist consultancy NEMS Market Research Ltd in order to identify shopping patterns, preferences and trends through a comprehensive household telephone survey of residents across the Study Area. This data provides the underlying structure of our quantitative retail capacity modelling, which is used to calculate the capacity for new retail floorspace across the Study Area over the plan period.

### Household Telephone Survey

- 6.3 The previous WYG Retail Study 2011 Update commissioned a household telephone survey (NEMS, August 2011) of 1,000 respondents across a Study Area of ten zones. We have adopted the previous Study Area in order to allow for direct comparisons and better assess the local trends in shopper preferences between 2011 and 2016.
- 6.4 The shopping patterns that result from the household survey provide the basis of the calculations of the retail expenditure at each retail destination by extrapolating the total available expenditure provided by Experian MMG3 (as discussed in Section 5, above). The household survey also provides details of linked trips between various destinations, the use of other town centre facilities, the most popular means of travel to each centre and the frequency of visits.
- 6.5 As noted at paragraph 6.1 above, one limitation of the household survey is that the results may underestimate trade to smaller centres. In order to counter this, we ask respondents for the destination that they last made a purchase so as to record more infrequent purchases including drive-by and impulse shopping that is more likely to be at smaller centres and stand-alone stores.
- 6.6 The full tabulations of the results of the household telephone survey are provided at **Appendix E**.

## Convenience Shopping Patterns

- 6.7 The 2011 WYG Retail Study update identified that 31.3% of the total convenience goods expenditure generated within the Study Area was spent within Ashfield District at August 2011. Our updated household telephone survey indicated that this has subsequently risen to 36.6%, as of January 2016.
- 6.8 Focussing on each town centre individually, we note that the 2011 Study provided overall market shares that included out-of-centre stores that were within close proximity to the centres. This is understandable, as customers are unlikely to be fully aware of specific retailer's locations with regards to the designated town centre boundary. Nonetheless, for completeness we provide at Figure 6.1 the proportion of convenience goods shopping trips directed to retail destinations (where 'Central stores' include town centre and edge of centre retailers) in each of Sutton, Kirkby and Hucknall.

**Figure 6.1 | Convenience Study Area Market Share by Destination (%)**

Destination	WYG Market Share	Nexus Market Share	
	2011	2016	
		Central stores	Inc. Non-Central stores
Sutton	15	10	15
Kirkby	3	8	8
Hucknall	11	0	11
Ashfield District	<b>31.3</b>	<b>36.6</b>	

**Source:** Appendix F and WYG, Retail Study 2011 Update

- 6.9 Sutton and Hucknall have maintained a relatively constant market share of convenience shopping trips in the five years since the previous Retail Study. The majority of this convenience expenditure is spent at the key anchor stores of Asda (9.0%) and Aldi (4.6%) in Sutton and Tesco (5.2%) and Aldi (4.8%) in Hucknall.
- 6.10 Kirkby's market share has more than doubled since the 2011 study from 3% to 8%. The majority of trips within Kirkby are made to Morrisons and Aldi, with market shares of 5.5% and 2.1% respectively. This increase can largely be accounted for by the development of the Morrisons foodstore, which opened in 2011. It is also noteworthy that the majority of Kirkby's convenience market share is located within the town centre.

**Figure 6.2 | Convenience Expenditure Market Share by Zone (%)**

Zones	Sutton		Kirkby		Hucknall		Others		Total	
	2011	2016	2011	2016	2011	2016	2011	2016	2011	2016
1	70	68	-	9	-	0	-	23	-	100
2	28	23	33	71	-	0	-	6	-	100
3	-	1	-	1	67	69	-	29	-	100
4	16	11	13	37	14	8	57	44	100	100
5	-	7	-	0	-	1	-	92	-	100
6	53	60	-	3	-	0	-	37	-	100
7	11	7	-	1	-	0	-	92	-	100
8	-	4	-	0	-	0	-	96	-	100
9	-	0	-	0	-	3	-	97	-	100
10	-	0	-	0	-	2	-	98	-	100

**Source:** Appendix F and WYG, Retail Study 2011 Update

- 6.11 The 2011 WYG Study differs from ours in that it only provided convenience goods market share figures for the zones immediately surrounding Sutton, Kirkby and Hucknall, which were considered to be each centres 'sphere of influence'. As such, we are unable to provide a thorough assessment of the changes of convenience goods spending patterns for each zone.
- 6.12 A significant number of trips to Sutton originate from Zones 1 (Sutton) and 6 (Ashfield North), as would be expected, whilst Kirby draws the vast majority of its Study Area expenditure from Zones 2 (Kirkby) and 4 (Ashfield Central). Hucknall retains the majority of convenience expenditure from Zone 3 (Hucknall).
- 6.13 It is relevant to note that whilst Sutton shows a marginal reduction in convenience market share in its own Zone 1 (70% to 68%) there has been an increase of 7% (from 53% in 2011) in the immediately adjoining Zone 6. Kirkby, as previously noted, has significantly increased its convenience market share from Zones 4 (from 13% in 2011 to 37% in 2016) and Zone 2 (33% to 71%). Notably, only 6% of convenience spending by residents of Zone 2 is claimed by retailers outside of Sutton and Kirkby.
- 6.14 Whilst Figure 6.1 identifies that Hucknall has maintained a constant market share of convenience expenditure across the Study Area, Figure 6.2 notes that convenience spending in Hucknall from residents of Zone 4 has fallen from 14% in 2011 to 8% in 2016.

## Comparison Shopping Patterns

- 6.15 Figures 6.3 and 6.4 identify the market share of comparison goods spending broken down by centre and zonally, comparing the results of the 2011 and 2016 household surveys. In 2016, it was found that Ashfield District claimed 18.4% of comparison goods expenditure across the Study Area, a decrease of 1.7% from 20.1% in 2011.
- 6.16 Broken down by destination, Figure 6.3 identifies that the comparison expenditure market shares of Sutton and Kirkby in 2016 fell by 1.7% and 0.6% respectively from their 2016 market shares. However, Hucknall claimed an increased comparison goods market share of 5.6% in 2016 (an increase of 0.5% from 5.1% in 2011).

**Figure 6.3 | Comparison Expenditure Market Share by Destination (%)**

Year	WYG Market Share		Nexus Market Share	
	2011		2016	
			Central stores	Inc. Non-Central stores
Sutton	13	9	11	
Kirkby	2	1	1	
Hucknall	5	4	6	
Ashfield District	<b>20.1</b>	<b>18.4</b>		

*Source: Appendix F and WYG, Retail Study 2011 Update*

**Figure 6.4 | Comparison Expenditure Market Share by Zone (%)**

Zones	Sutton		Kirkby		Hucknall		Others		Total			
	2011		2016		2011		2016		2011		2016	
	2011	2016	2011	2016	2011	2016	2011	2016	2011	2016		
1	50	39	-	3	-	0	-	58	-	100		
2	28	27	11	8	-	0	-	65	-	100		
3	3	1	-	1	31	31	-	67	-	100		
4	17	19	7	4	4	5	72	72	100	100		
5	8	8	-	2	-	1	-	89	-	100		
6	37	32	-	1	-	1	-	66	-	100		
7	16	8	-	0	-	0	-	92	-	100		
8	9	8	-	0	-	0	-	92	-	100		
9	-	0	-	0	-	1	-	99	-	100		
10	-	1	-	0	-	2	-	97	-	100		

*Source: Appendix F and WYG, Retail Study 2011 Update*

- 6.17 As for convenience market shares above, Sutton retains a strong comparison expenditure market share across Zones 1 (Kirkby) and 6 (Ashfield North), as well as Zones 2 (Kirkby) and 4 (Ashfield Central) where residents are likely drawn by the lack of comparison goods facilities towards the

centre of Ashfield and in Kirkby, which does not claim more than 10% of the available comparison goods expenditure from any zone.

- 6.18 Figure 6.4 above identifies that Sutton has significantly reduced the comparison expenditure drawn from Zone 1, from 50% in 2011 to 37% in 2016, whilst Kirkby has seen a reduction in market share in both Zones 2 and 4 (the only zones for which comparable 2011 data is available).

## Market Share Analysis

Figure 6.5 | Comparison Expenditure Market Share by Destination (%)

Destination	Market Share by Category (%)												Total Market Share (all retail)
	Convenience Spending			Comparison Spending									
	Main Food	Top-up	Total	Clothing	Books etc.	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total	
Sutton	16.3	8.4	<b>14.8</b>	8.2	7.5	13.8	10.9	12.9	4.8	33.0	9.5	<b>11.0</b>	12.7
Kirkby	8.0	8.9	<b>8.2</b>	0.6	1.7	0.3	0.0	6.9	0.1	0.9	8.1	<b>1.4</b>	4.4
Hucknall	11.4	11.5	<b>11.4</b>	1.3	6.2	6.2	9.4	10.6	8.9	6.0	2.8	<b>5.7</b>	8.2
Others in Ashfield	0.7	8.7	<b>2.2</b>	0.0	0.3	0.1	0.2	2.7	0.2	1.0	0.3	<b>0.3</b>	1.1
Ashfield Sub-Total	<b>36.4</b>	<b>37.4</b>	<b>36.6</b>	<b>10.1</b>	<b>15.8</b>	<b>20.4</b>	<b>20.5</b>	<b>33.1</b>	<b>14.1</b>	<b>40.9</b>	<b>20.7</b>	<b>18.4</b>	<b>26.4</b>
Others in Study Area	37.2	40.6	<b>37.8</b>	19.3	13.6	24.5	14.9	26.7	4.9	25.9	25.2	<b>18.6</b>	27.1
Outside the Study Area	26.4	22.0	<b>25.5</b>	70.6	70.6	55.1	64.6	40.2	81.0	33.2	54.1	<b>63.1</b>	46.5
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: Appendix F

- 6.19 Convenience spending is categorised by Experian as low-cost, everyday food, beverages and perishable items that consumer are unlikely to be willing to travel far to buy. Convenience shopping trips are divided into two sub-categories, main food shopping and top-up shopping, which is more likely to be sourced locally to resident's homes or place of work.
- 6.20 Across the Study Area, Ashfield caters for 36.4% of main food trips and 37.4% of top-up trips. The majority of main food expenditure (16.4%) is spent in Sutton, while Hucknall receives 11.4% of main food convenience expenditure. Sutton is identified as having a lower top-up market share (8.4%) than main food, while Kirkby (8.9%) and Hucknall (11.5%) cater for a greater proportion of top-up spending.

- 6.21 Experian provides expenditure estimates divided into eight sub-categories of comparison goods, which can be grouped as bulky goods: ‘DIY’, ‘Electrical’ and ‘Furniture’, and non-bulky goods: ‘Books, CDs and DVDs’, ‘Chemist Goods’, ‘Clothing & Footwear’, ‘Small Household Goods’ and ‘Toys and Recreational Goods’.
- 6.22 As identified in Figure 6.5 above, Sutton captures a greater comparison goods market share than Kirkby and Hucknall for all Experian comparison goods market shares with the exception of electrical goods (4.8%), where Hucknall draws 8.9% of all expenditure across the Study Area. Hucknall is identified as catering for a wide mix of comparison goods shopping (with the exception of clothing and furniture) due in part to a strong presence of independent traders in the town centre, supported by the large Tesco Extra on Ashgate Road.
- 6.23 Kirkby provides a limited comparison goods offer, only showing notable market shares of chemist goods expenditure (6.9%) and furniture goods expenditure (8.1%).
- 6.24 Sutton holds a clothing and footwear market share of 8.9%, far higher than Kirkby (0.6%) and Hucknall (1.3%) which both provide a very limited clothing and footwear offer. Sutton is also shown to be bringing in a significant market share of 33.0% of all DIY expenditure across the Study Area, due to the presence of the B&Q Warehouse on Mansfield Road.
- 6.25 25.5% of convenience goods expenditure is ‘lost’ from the Study Area, while 63.1% of comparison goods expenditure from residents of the Study Area is spent outside of the Study Area. This is referred to as ‘Study Area Leakage’.

**Figure 6.6 | Study Area Leakage by Destination (%)**

Destination	Study Area Leakage by Category (%)										Total Leakage
	Convenience Spending					Comparison Spending					
	Main Food	Top-up	Clothing	Books etc.	Household	Recreation	Chemist	Electrical	DIY	Furniture	
Nottingham	1.0	0.9	33.3	29.8	15.1	21.4	8.9	18.7	5.4	16.6	14.3
Mansfield	6.5	6.4	20.2	21.3	21.9	17.7	13.2	37.9	8.7	13.9	12.3
Others outside the Study Area	19.1	14.4	17.5	19.9	18.1	25.3	19.3	25.4	19.0	23.5	19.9
<b>Total Leakage from the Study Area</b>	<b>26.6</b>	<b>21.7</b>	<b>71.0</b>	<b>71.0</b>	<b>55.1</b>	<b>64.4</b>	<b>41.4</b>	<b>82.0</b>	<b>33.1</b>	<b>54.0</b>	<b>46.5</b>

**Source:** Appendix F

- 6.26 Notably, in terms of leakage, Ashfield District is bordered to the Northeast and Southeast by Mansfield and Nottingham respectively (as well as Chesterfield and Derby further afield, although the survey shows that these centres have less of a retail draw on residents of Ashfield District).
- 6.27 Figure 6.6 above identifies that Nottingham and Mansfield drew 14.3% and 12.3% of the total available expenditure from the Survey Area. Of this, convenience leakage was focussed on Mansfield, which drew 6.5% of all main food trips and 6.4% of all top-up trips from residents across the Study Area. Combined, Nottingham and Mansfield account for over 50% of Study Area expenditure on clothing goods, media (such as books and CDs) and electrical goods, though it is interesting to note that Nottingham and Mansfield draw comparatively little DIY expenditure from the Study Area. 8.4% of DIY trips from the Study Area are made to Arnold Town Centre and the nearby Daybrook Retail Park.
- 6.28 Figure 6.6 shows that four out of every five pounds spent on electrical goods by residents across the Study Area are spent at retail destinations outside of the Study Area. Likewise, there is seen to be a high degree of leakage of clothing goods expenditure (71.0%), books and CDs (71.0%) and toys and recreational goods (64.4%), while over half of all small household goods and furniture is purchase outside of the Study Area.

### **Summary**

- 6.29 Ashfield's market share of convenience goods expenditure has increased from 31.3% in 2011 to 36.6% in 2016, while retained comparison goods expenditure has fallen from 20.1% in 2011 to 18.4% in 2016.
- 6.30 Of particular note, Kirkby has seen a significant increase in convenience market share (or 'claw back') of 8% at 2016 from 3% in 2011. This can largely be accounted for by the continued success of the Morrisons foodstore development of the Precinct area, which has gained a total market share of 5.5% of convenience trade across the Study Area since opening in 2011.

## 7.0 Retail Capacity

### Introduction

- 7.1 One of the key aims of this Study is to provide recommendations on the capacity for new retail floorspace over the plan period to 2032. We would caution long term projections as the UK economy is volatile and external national and international factors can influence the wider performance of the economy, which can have trickle down effects on local shopping patterns. One such example has been the trend toward convenience discounters (such as Lidl and Aldi) in response to the period of economic downturn between 2008 and 2013.
- 7.2 We would also note that an identified retail capacity across the Study Area does not necessarily equate to justification for new retail floorspace in and of itself (especially in out-of-centre locations), and any such development would be required to be assessed in line with national policy in terms of impacts on the vibrancy and vitality of town centres, the potential to prejudice to emerging town centre developments and the sequential 'town centre first' approach to site selection.
- 7.3 Detailed quantitative retail capacity tables are enclosed at **Appendix F**.

### Methodology

- 7.4 Retail capacity modelling follows a consistent, robust methodology which can incorporate a number of various assumptions and datasets:

$$\text{Expenditure (£m)} - \text{Turnover (£m)} = \text{Surplus or Deficit (£m)}$$

- 7.5 Experian MMG3 census software is used to provide localised expenditure per capita per annum for various forms of retail spending. These figures are then projected forwards on the basis of population growth, changes in expenditure over time and Special Forms of Trading (SFT) such as internet shopping.
- 7.6 The turnover of existing retailers across the Study Area is calculated on the basis of average sales densities, or turnover, per square metre. Various retail planning sources such as Verdict UK Food & Grocery Company Briefing Reports and Mintel Retail Rankings provide average (or benchmark) sales densities for all national multiple retailers.
- 7.7 The surplus or deficit equates to the difference between the available retail expenditure across the Study Area and the turnover of the existing facilities within the Study Area. If the total turnover is greater than the available expenditure then the model would identify an oversupply of retail floorspace, whilst a surplus of expenditure would suggest capacity for additional retail floorspace.

7.8 Once the surplus or deficit of expenditure is calculated, it is then presented in floorspace figures (using average sales density assumptions) in order to demonstrate the findings within a 'real world' context. Often surplus figures are presented under a number of different scenarios representing various retailers, For example, considering convenience spend, discount retailers (such as Aldi and Lidl) operate at a lower sales density than the 'big 4' (Tesco, Asda, Sainsbury's and Morrisons).

### **Capacity for Future Convenience Goods Floorspace**

- 7.9 For robustness, when assessing the capacity for new convenience retail floorspace we adopt a constant market share in line with findings of the latest household survey (i.e. that Ashfield District will continue to draw 36.6% of all convenience goods expenditure across the Study Area) on the basis of the comparable strength of offer of the surrounding centres.
- 7.10 In addition to allowing for growth in retail expenditure over the plan period (as considered in Section 5), we utilise data provided within the Experian Retail Planner Briefing Note in order to take account of forecast growth in efficiencies in retailers trading (for example, through the adoption of new technologies and more efficient use of available floorspace). Floorspace efficiencies are estimated to have a greater impact on comparison retailers than convenience retailers over the plan period as the rise of food discounting continues to subdue projected efficiencies in turnover of existing convenience retail floorspace.
- 7.11 We go on to make a number of statistical assumptions through the quantitative capacity exercise in order to account for a number of variables:
- Utilising a 'goods based' approach, we strip out expenditure for non-food comparison goods such as clothing, household goods, CDs, DVDs and other media that are now commonly sold at major foodstores. These assumptions are made in line with floorspace figures sourced from Verdict UK, Ashfield District Council's Retail Floorspace Surveys or, where data is not available, Nexus professional judgement based on site visits.
  - We also make assumptions as to the gross to net sales floorspace of each store, again utilising Ashfield District Council's Retail Floorspace Survey where available, or Nexus professional judgement.
  - Finally, we consider whether foodstores are likely to attract any additional 'inflow' from outside of the Study Area. Based on the localised nature of convenience food shopping and the extent of the Study Area it is unlikely that convenience destinations within Ashfield draw a significant amount of trade from outside of the Study Area. Nonetheless, we have attributed an inflow of

- 3% to the larger convenience destinations (e.g. Tesco Extra, Ashgate Road at Hucknall) to account for trade from commuters and other visitors to the town centres.
- 7.12 We then go on to calculate the anticipated turnover of all major convenience goods operators on the basis of the published company sales data, referred to as 'benchmark' turnover. 'Benchmark' turnover is calculated from national average 'sales densities' (turnover per square metre) from sources such as Verdict UK Food & Grocery Company Briefing Reports and Mintel Retail Rankings. By comparing the turnover estimates derived from the findings of the household survey (total available expenditure distributed on the basis of each destinations market share) to the benchmark turnovers, we are able to establish where stores are trading above (overtrading) or below (under trading) company averages. For stores located outside of designated town centres, surplus expenditure over and above benchmark turnover is considered to be available as this suggests that existing convenience goods providers in the Study Area are stretched and overproviding to meet the existing need.
- 7.13 As smaller convenience retailers and local traders may not publish annual turnover figures and there is not standardised dataset available, local town centre stores are assumed to be trading in line with the findings of the household survey (at 2016), or 'at equilibrium'. We provide a detailed assessment of this benchmark exercise measuring the performance of convenience retailers at Table 5, **Appendix F**.
- 7.14 On the basis of the household survey, we identify that convenience stores within Ashfield turnover an estimated £222.5m, significantly higher than the benchmark turnover of £165.9m at 2016. This overtrade equates to £56.6m of additional expenditure across the Study Area, or 34.1% above company averages. In particular, £21m of overtrading is derived from the Asda, Priestic Road in Sutton while the Aldi stores at Station Road in Sutton and Ashgate Road in Hucknall are identified as overtrading by £20.9m and £22.6m respectively.
- 7.15 Notwithstanding the above, the anchor Co-operative foodstores in the local shopping centres of Selston, Huthwaite and Stanton Hill are each undertrading below company averages by £4.8m, £0.5m and £1.7m respectively, which suggests that the markets outside of the three primary centres of Sutton, Kirkby and Hucknall in Ashfield do not provide sufficient convenience goods expenditure to support the foodstores at company average trading levels.

**Figure 7.1 | Convenience Goods Surplus in Ashfield District**

Year	Turnover (£m) <sup>1</sup>	Available Expenditure (£m) <sup>2</sup>	Inflow (£m)	Surplus Expenditure (£m)
2016	165.9	222.5	3.6	60.2
2021	165.1	227.0	3.7	65.6
2026	164.9	232.4	3.7	71.2
2032	164.9	237.9	3.8	76.8
Study Area Market Share (%)		36.6		

<sup>1</sup> Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 13 (October 2015)

<sup>2</sup> Assumes constant market share claimed by Ashfield District facilities at 36.6% from Study Area

**Source:** Table 6a, Appendix F

- 7.16 Tying the methodology together, Figure 7.1 above identifies a surplus of £60.2m expenditure in 2016, rising to £65.6m in 2021 taking account of increases population, expenditure and floorspace efficiencies. Surplus is estimated to grow to £71.2m by 2026 and £76.8m at 2032.
- 7.17 We then consider committed, emerging and extant permissions for new convenience retail floorspace across the District. These equate to a net convenience floorspace of 293 sq m and an estimated turnover of £2.2m.

**Figure 7.2 | Convenience Goods Floorspace Capacity in Ashfield District**

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min <sup>1</sup>	Max <sup>2</sup>
2016	60.2	2.2	58.0	4,500	5,600
2021	65.6	2.2	63.4	4,900	6,200
2026	71.2	2.2	69.0	5,300	6,700
2032	76.8	2.2	74.7	5,800	7,300

<sup>1</sup> Average sales density assumed to be £12,502 per sq m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2014

<sup>2</sup> 50% of residual expenditure assumed to be consumed by leading four supermarkets (£13,018/sq m) and 50% assumed to be consumed by discount operators (£7,635 per sq m) as identified by Verdict 2014 and Mintel 2015. This equates to £8,907/sq m.

**Source:** Table 6d, Appendix F

- 7.18 As shown in Figure 7.2 above, taking account of committed turnover, we identify a residual turnover of £58.0m at 2016, rising to £63.4m at 2021, £69.0m at 2026 and £74.7m at 2032. Using average sales densities to cater for minimum (a large supermarket operator) and maximum (a combination of discount foodstores and larger supermarket operators) scenarios, we calculate that there is capacity for between 4,500 sq m and 5,600 sq m convenience goods floorspace at 2016, rising to between 4,900 sq m and 6,200 sq m at 2021, between 5,300 sq m and 6,700 sq m at 2026 and between 5,800 sq m and 7,300 sq m at 2032.

## Capacity for Future Comparison Goods Floorspace

- 7.19 The methodology for calculating capacity for comparison goods floorspace differs from that used to model capacity for convenience goods floorspace. The principle reason for this is that there are no robust, industry standard benchmark sales densities for calculating the turnover of smaller independent retailers that typically make up the majority of the comparison provision of town centres (although it is noted that Mintel Retail Rankings do provide published sales densities for national multiple comparison retailers). Moreover, the trading levels of comparison retailers can fluctuate significantly depending on a number of localised variables, most notably the location of the retailer relative to similar providers (as customers are likely to link multiple comparison goods trips and retailers in close proximity to each other provide a greater draw).
- 7.20 As such, we adopt the approach that comparison goods retailers across the Study Area are trading 'at equilibrium' at 2016 (which adopts the survey derived turnover) and examine capacity by measuring the growth in available expenditure to 2032.
- 7.21 We also make the assumption that the three primary town centres, being Sutton, Kirkby and Hucknall, as well as larger comparison goods destinations such as the East Midlands MacArthur Factory Outlet Centre at South Normanton, derive 10% of additional turnover from visitors and commuters outside of the Study Area. This additional expenditure equates to £8.9m of additional turnover, or 1.2% of additional expenditure.

**Figure 7.3 | Comparison Goods Surplus in Ashfield District**

Year	Turnover (£m) <sup>1</sup>	Available Expenditure (£m) <sup>2</sup>	Inflow (£m)	Surplus Expenditure (£m)
2016	149.8	140.9	8.9	0.0
2021	165.1	162.8	10.2	8.0
2026	182.1	195.2	12.3	25.4
2032	201.0	243.7	15.3	58.0
Study Area Market Share (%)		18.4		

<sup>1</sup> Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 13 (October 2015)

<sup>2</sup> Assumes constant market share claimed by Ashfield District facilities at 18.4% from Study Area

**Source:** Table 26a, Appendix F

- 7.22 Based on the survey findings, we estimate that comparison goods retailers within Ashfield District turnover £149.8m, or 18.4% of available comparison goods expenditure in the Study Area. We adopt a constant market share, assuming that the performance of comparison retailers within Ashfield continues to be commensurate with its current market share. This equates to a total turnover of £201.0m by 2032.

- 7.23 Taking account of inflow, population and expenditure growth and forecast floorspace efficiencies, we identify a surplus expenditure of £8.0m at 2021, rising to £25.4m by 2026 and £58.0m at 2032.
- 7.24 As with convenience capacity modelling, we have taken account of committed comparison retail goods floorspace which equates to just 89 sq m, or £0.4m of committed comparison goods turnover.

**Figure 7.4 | Comparison Goods Floorspace Capacity in Ashfield District**

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min <sup>1</sup>	Max <sup>2</sup>
2021	8.0	0.4	7.6	1,300	2,000
2026	25.4	0.4	25.0	3,700	5,900
2032	58.0	0.4	57.6	7,800	12,300

<sup>1</sup> Average sales density assumed to be £5,500 per sq m which Nexus considers to be towards the upper end of what could be achieved in Ashfield District

<sup>2</sup> Average sales density assumed to be £3,500 per sq m which Nexus considers to be towards the lower end of what could be achieved in Ashfield District

**Source:** Table 6d, Appendix F

- 7.25 Figure 7.4 above identifies a residual available spend of £7.6m at 2021, rising to £25.0m at 2026 and £57.6 at 2032. We go on to utilise average sales densities for high street retailers to provide assumed minimum floorspace estimates and average sales densities for bulky goods retailers to provide maximum comparison goods floorspace capacity estimates.
- 7.26 This available residual spend equates to an estimated comparison goods floorspace capacity of between 1,300 sq m and 2,000 sq m at 2021, between 3,700 sq m and 5,900 sq m at 2026 and between 7,800 sq m and 12,300 sq m at 2032.

## 8.0 Leisure

### Introduction

- 8.1 The leisure market has undergone drastic structural changes over the past few years. The economic downturn of 2008 to 2013 significantly changed consumers spending behaviours. Even though overall spending was down, the popularity of going to the cinema or theatre has steadily increased, as has eating out at restaurants, cafés, or purchasing takeaway meals. Additionally, as the health and fitness world flourishes, the number of fitness centre memberships has steadily increased. ONS reported that in 2006 average weekly spend on 'sports admissions, subscriptions, leisure class fees and equipment hire' was £5.80 and in 2014 it had increased to £6.90. Further commentary on recent and emerging leisure trends s included in Section 2 of this report.
- 8.2 This section of the Retail and Leisure Study provides a concise analysis of current and predicted trends influencing the leisure sector.

### Methodology

- 8.3 The results of the NEMS Household Survey offer an indication of locations/facilities where residents of the Study Area satisfy their leisure needs. As such, the survey enables us to analyse patterns of travel and potential deficiencies (those that are qualitative in nature) in Ashfield's leisure provision.
- 8.4 The modelling of future commercial leisure needs cannot be based upon the same quantitative model used to estimate retail need (as we have done in Section 7 by estimating future expected expenditure). As an alternative, Nexus considers that a more fitting methodology is to appraise Ashfield's existing provision against recognised sector 'standards' or 'benchmarks'. The completion of this 'benchmarking exercise' allows us to establish deficits and where some gaps in the provision of existing facilities may be.
- 8.5 There is a limited collection of uses within the leisure market for which reliable data can be obtained. These include; gyms and leisure centres, cinemas, and ten pin bowling. The general reason such information is made available for these types of uses is on the basis that they require proportionally larger properties, and by virtue of their size land parcels/sites may need to be identified through the development plan process and land allocated accordingly.
- 8.6 Public houses, restaurants, clubs, are typically accommodated in smaller units. By the very nature of their size the market can generally deliver units of this size unaided by intervention by the development plan process through allocations. Moreover, in light of the fact some uses

benefit from permitted development rights (of which some became permanent in early April 2016) with regards to change of use, means that the supply of these uses is not specifically managed or controlled by the planning process (i.e. they do not necessitate planning permission).

### **Existing Ashfield Market Share by Leisure Sector**

- 8.7 The NEMS household survey (completed in June 2016) included 18 questions which asked respondents to describe their leisure activities and habits. It is the responses to these questions (Questions 36 to 54), which are penitent to our understanding of leisure trends and needs in Ashfield. The breakdown of the answers to these questions is set out in full within **Appendix E**.
- 8.8 It is important to acknowledge that residents of neighbouring districts, including; Nottingham, Mansfield, Bolsover, North East Derbyshire, Amber Valley, Broxtowe, Gelding and Newark and Sherwood, may visit Ashfield to satisfy some of leisure (and shopping) requirements, and residents of Ashfield may similarly visit the adjoining districts for the same reason. In response to this, the Study Area (from which respondents were engaged) boundary encompasses areas further than Ashfield. Figure 5.2 in Section 5 which illustrates the boundary of the identified Study Area, also included in a larger format at **Appendix A**.
- 8.9 In the following sections we summarise and interpret the responses given to questions 36 to 54, paying particular attention to the responses as they relate to distance travelled to leisure facilities, as well as general levels of satisfaction with Ashfield's provision of leisure.

### **Participation in Leisure Activities**

- 8.10 In the first instance it is important to have an understanding of the participation rates and general popularity of leisure activities across the Study Area. In Question 36 of the household survey NEMS asked respondents to identify all of the leisure activities they participated in (respondents were allow to identify as many options as they wished).
- 8.11 Figure 8.1 scrutinises participation rates across all ten zones.

**Figure 8.1 | Participation in Leisure Activities by Zone (%)**

	Total	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10
<b>Health and Fitness</b>	14.5%	12.7%	21.7%	19.1%	9.2%	8.0%	15.8%	8.8%	8.3%	20.6%	8.3%
<b>Leisure Centre Activities</b>	18.6%	9.8%	21.2%	30.1%	14.9%	21.4%	19.9%	8.7%	13.3%	17.8%	17.5%
<b>Cinema</b>	45.2%	33.6%	51.0%	58.0%	40.1%	38.8%	42.8%	46.5%	38.0%	44.5%	48.2%
<b>Restaurant</b>	74.2%	64.5%	73.2%	80.8%	64.3%	76.0%	78.4%	71.3%	70.8%	71.3%	80.5%
<b>Pub /Bars</b>	55.7%	58.2%	48.8%	58.0%	41.2%	41.5%	53.2%	48.4%	57.2%	61.0%	70.9%
<b>Nightclub</b>	7.2%	2.8%	9.9%	5.4%	2.9%	6.5%	5.7%	10.0%	6.6%	10.8%	6.6%
<b>Social Club</b>	7.4%	1.5%	13.8%	10.6%	5.9%	3.8%	10.5%	13.7%	6.9%	5.3%	4.6%
<b>Ten Pin Bowling</b>	13.9%	10.6%	17.8%	17.4%	14.8%	24.3%	12.1%	11.9%	10.4%	9.7%	13.3%
<b>Bingo</b>	4.0%	5.0%	2.8%	4.0%	6.3%	3.5%	2.9%	5.1%	6.4%	3.6%	3.2%
<b>Theatre / concert hall</b>	46.0%	38.8%	45.2%	52.0%	36.8%	50.7%	48.2%	31.1%	41.6%	41.7%	60.5%
<b>Museum / Art Galleries</b>	29.9%	25.6%	23.6%	23.9%	27.3%	20.6%	33.1%	19.6%	27.9%	36.6%	41.4%
<b>Running / Cycling / outdoor activities</b>	20.3%	25.2%	26.6%	31.9%	22.2%	8.5%	23.6%	10.8%	23.6%	16.5%	18.0%
<b>(None mentioned)</b>	9.8%	8.5%	10.4%	8.0%	10.6%	11.4%	8.3%	9.9%	11.8%	10.9%	9.0%

*Source: Question 36 of the NEMS Household Survey, Appendix E*

8.12 As evident in Figure 8.1, the most popular single activity is to visit restaurants, which 74.2% of Study Area respondents indicated they do so on at least an occasional basis. The second most popular activity is visiting pubs / bars, which was identified by 55.7% of respondents. Following this, 46.0% identified they visited theatres and concert halls and 45.2% the cinema. Visiting nightclubs, bingo halls and social clubs, appear to be the least popular activities.

### **Leisure Centre and Health and Fitness**

8.13 33.1% of the Study Area participates in leisure centre and/or health and fitness centre activities. Of those who participate, 33.9% of Study Area residents carry out those activities within the Ashfield District. Further to this, the District retains 53.8% of its own resident’s trips to such facilities, with facilities in Sutton showing to be particularly popular – Sutton attracts 24.9% of Ashfield resident’s trips.

8.14 Of the 46.2% trips made by Ashfield residents to destinations outside the District, popular locations include the Alfreton Leisure Centre, and the DW Sports Fitness in the Portland Retail Park in Mansfield; both located outside of the Study Area.

8.15 Overall, the District attracts 30.5% of all trips to indoor sports and health and fitness facilities from residents across the wider Study Area (Zones 7 – 10). This suggests that there is some degree of draw from facilities in Ashfield for residents living outside of the District. Of note is the Lammas Leisure Centre in Sutton, attracting 10.4% of all trips throughout the Study Area. While the Hucknall Leisure Centre attracts 9.2%.

**Figure 8.2 | Study Area Market Share for Leisure Centre or Health and Fitness by Zone (%)**

Zone	Ashfield District Total	Sutton (Zones 1 & 6)	Kirkby (Zone 2)	Hucknall (Zone 3)	Ashfield District (Other)	Mansfield Town Centre	Alfreton Leisure Centre, Church St, Alfreton	Elsewhere	Total
1	75.5%	63.2%	5.1%	3.4%	3.8%	9.6%	0.0%	14.9%	100.0%
2	72.8%	45.3%	19.4%	5.3%	2.8%	0.0%	0.0%	27.2%	100.0%
3	54.1%	0.0%	0.0%	52.7%	1.4%	1.9%	0.0%	44.0%	100.0%
4	45.1%	16.0%	13.7%	0.0%	15.4%	0.0%	24.0%	30.9%	100.0%
5	44.0%	21.6%	6.1%	3.0%	13.3%	0.0%	21.1%	35.0%	100.0%
6	42.6%	42.6%	0.0%	0.0%	0.0%	2.9%	17.4%	37.0%	100.0%
<b>Ashfield District Average</b>	<b>53.8%</b>	<b>24.9%</b>	<b>5.1%</b>	<b>19.5%</b>	<b>4.4%</b>	<b>2.0%</b>	<b>8.7%</b>	<b>35.5%</b>	<b>100.0%</b>
7	8.8%	4.4%	4.4%	0.0%	0.0%	45.6%	0.0%	45.6%	100.0%
8	6.9%	6.9%	0.0%	0.0%	0.0%	12.1%	5.2%	75.9%	100.0%
9	11.3%	0.0%	0.0%	8.9%	2.5%	0.0%	0.0%	88.6%	100.0%
10	3.5%	0.0%	0.0%	3.5%	0.0%	0.0%	0.0%	96.6%	100.0%
<b>Study Area Average</b>	<b>33.9%</b>	<b>14.3%</b>	<b>3.0%</b>	<b>13.5%</b>	<b>3.1%</b>	<b>3.4%</b>	<b>5.1%</b>	<b>57.6%</b>	<b>100.0%</b>

Source: Question 37 of NEMS Household Survey, Appendix E

## Cinemas

8.16 45.2% of Study Area residents make cinema trips. At present there are no dedicated cinema screens located within the Ashfield District. Although it is important to acknowledge the Byron Cinema and the on-going efforts of the community to refurbish and reinstate the unoccupied cinema.

8.17 There are three large cinemas outside the Study Area that attract the largest percentage of the area's residents. These are (listed from largest to smallest):

- a. Cineworld, Nottingham City Centre – 14 screens

- b. Showcase Cinema, Nottingham City Centre – 12 screens
  - c. Odeon, Mansfield Leisure Park – 8 screens
- 8.18 The attractiveness of the ease of access and parking provision available at the Odeon in the Mansfield Leisure Park is evident when analysing NEMS Household Survey Results. On average 57.4% of residents in the Ashfield District are most likely to visit this Odeon.
- 8.19 Moreover, the 14 screen Cineworld complex in the Nottingham City Centre is also very popular, attracting 18.0% of respondents. It is those residents who live in Zone 3 (Hucknall) in particular who are attracted towards this cinema (30.7% of respondents). The short travel time between Hucknall and Nottingham is likely to be a key influencing factor attracting the Zone 3 residents to Nottingham. Journeys from Hucknall Town Centre to this cinema take on average 30 minutes if travelling by public transport (train, tram or bus) or private car.
- 8.20 When asked how frequently they visit the cinema identified, the most common responses were various as follows – at least once a month (25.5%); every two months (21.6%); every three months (17.6%); and every six months (20.6%).
- 8.21 Figure 8.3 illustrates the cinema locations that the residents of the Study Area visit, and showcases the significant draw the large Odeon cinema complex in Mansfield has.

**Figure 8.3 | Study Area Market Share for Cinemas by Zone (%)**

Zone	Ashfield District	Cineworld, Nottingham (14 screens)	Showcase Cinema, Nottingham (12 screens)	Odeon, Mansfield Leisure Park (8 screens)	Mansfield Town Centre	Elsewhere	Total
1	0.0%	0.0%	2.3%	55.3%	39.1%	3.4%	100.0%
2	0.0%	8.0%	3.1%	65.1%	19.8%	4.0%	100.0%
3	0.0%	30.7%	16.5%	49.1%	0.0%	3.7%	100.0%
4	0.0%	0.0%	12.0%	60.1%	15.0%	12.9%	100.0%
5	0.0%	2.1%	4.6%	46.1%	16.9%	30.3%	100.0%
6	0.0%	0.0%	0.0%	71.1%	3.7%	25.2%	100.0%
<b>Ashfield District Average</b>	<b>0.0%</b>	<b>11.0%</b>	<b>7.7%</b>	<b>57.4%</b>	<b>10.7%</b>	<b>13.3%</b>	<b>100.0%</b>
7	0.0%	0.0%	0.0%	85.5%	9.6%	4.9%	100.0%
8	0.0%	13.0%	0.0%	75.8%	7.3%	3.9%	100.0%
9	0.0%	35.0%	20.0%	18.7%	1.6%	24.7%	100.0%
10	0.0%	29.5%	34.8%	6.4%	2.2%	27.1%	100.0%
<b>Study Area Average</b>	<b>0.0%</b>	<b>18.0%</b>	<b>13.0%</b>	<b>45.2%</b>	<b>7.4%</b>	<b>16.5%</b>	<b>100.0%</b>

*Source: Question 39 of NEMS Household Survey, Appendix E*

## Restaurants

- 8.22 A total of 74.2% of Study Area residents make restaurant trips, making it the most popular leisure activity of respondents. Restaurants within the District retain around 40% of Ashfield residents' trade.
- 8.23 When assessing the popularity of restaurants within the District it is evident that residents make use of the restaurants available in close proximity to their home. For example, Sutton is popular with residents of Zone 1 and 6 in particular, attracting 38.4% and 13.3% of trips from these Zones, whilst Hucknall is most visited by residents of Zone 3 (the Zone which Hucknall is located in) attracting over 19.0% of all resident's trips.
- 8.24 Further afield the restaurants of both Mansfield and Nottingham City Centre are also popular with residents of Ashfield. 21.7% of Ashfield residents identified their last visit to a restaurant was in Nottingham City Centre, and a further 15.8% said they last went to a restaurant in Mansfield Town Centre.

8.25 When assessing the household survey results it is obvious that Sutton is the most popular destination within the District for residents of the wider Study Area (Zones 7-10). Whereas, Hucknall and Kirkby fail to attract much patronage from anywhere outside of the District, or the local area.

**Figure 8.4 | Study Area Market Share for Restaurants by Zone (%)**

Zone	Ashfield District Total	Sutton (Zones 1 & 6)	Kirkby (Zone 2)	Hucknall (Zone 3)	Ashfield District (Other)	Mansfield Town Centre	Nottingham City Centre	Elsewhere	Total
1	53.3%	38.4%	4.6%	1.7%	8.6%	19.8%	12.0%	14.9%	100.0%
2	62.4%	29.2%	26.7%	1.0%	5.5%	20.2%	7.6%	9.8%	100.0%
3	28.2%	0.0%	0.0%	19.0%	9.1%	7.1%	50.2%	14.5%	100.0%
4	40.5%	16.9%	9.5%	0.0%	14.1%	11.9%	11.1%	36.5%	100.0%
5	25.7%	6.7%	3.3%	0.0%	15.6%	17.8%	14.0%	42.6%	100.0%
6	38.8%	13.3%	6.6%	1.0%	17.9%	21.6%	12.3%	27.3%	100.0%
<b>Ashfield District Average</b>	<b>38.1%</b>	<b>13.3%</b>	<b>6.9%</b>	<b>5.5%</b>	<b>12.4%</b>	<b>15.8%</b>	<b>21.7%</b>	<b>24.4%</b>	<b>100.0%</b>
7	11.8%	8.7%	1.0%	0.0%	2.1%	66.2%	8.5%	13.5%	100.0%
8	10.3%	7.0%	0.0%	0.0%	3.3%	55.1%	3.1%	31.5%	100.0%
9	1.1%	0.0%	0.0%	0.0%	1.1%	3.0%	75.4%	20.5%	100.0%
10	6.0%	0.0%	0.0%	2.0%	3.9%	0.0%	37.8%	56.3%	100.0%
<b>Study Area Average</b>	<b>22.8%</b>	<b>8.1%</b>	<b>3.8%</b>	<b>3.2%</b>	<b>7.7%</b>	<b>16.2%</b>	<b>33.9%</b>	<b>27.2%</b>	<b>100.0%</b>

*Source: Question 41 of NEMS Household Survey, Appendix E*

### Bars, Pubs and Nightclubs

8.26 55.7% respondents regularly visit pubs and bars. Naturally, the vast majority of these trips are carried out close to home, with a large percentage of respondents in each zone choosing to visit their local facility.

8.27 Over half of the visits to bar, pubs and nightclubs by Ashfield residents are made within the District itself, with Ashfield retaining 56.5% of all resident trips. As with restaurants, it is the facilities in Sutton that attract the largest share of Study Area residents outside of Ashfield attracting 10.4% of trips from residents in Zone 7 and 1.7% of residents from Zone 9.

8.28 Figure 8.5 demonstrates the spread of bars, pubs and clubs across Ashfield and beyond; and most notably illustrates the draw of such facilities that are situated close to home.

**Figure 8.5 | Study Area Market Share for Bars, Pubs and Nightclubs by Zone (%)**

Zone	Ashfield District Total	Sutton (Zones 1 & 6)	Kirkby (Zone 2)	Hucknall (Zone 3)	Ashfield District (Other)	Mansfield Town Centre	Nottingham City Centre	Elsewhere	Total
1	70.7%	54.9%	9.4%	0.0%	6.4%	16.1%	8.1%	5.1%	100.0%
2	47.3%	17.2%	27.3%	0.0%	2.8%	43.1%	3.5%	6.1%	100.0%
3	64.5%	1.0%	0.0%	47.3%	16.2%	1.0%	6.2%	28.3%	100.0%
4	67.5%	3.8%	16.4%	0.0%	47.3%	4.4%	7.0%	21.1%	100.0%
5	38.4%	3.1%	2.0%	0.0%	33.3%	2.3%	19.1%	40.2%	100.0%
6	51.2%	35.8%	0.0%	0.0%	15.3%	18.7%	3.1%	27.0%	100.0%
<b>Ashfield District Average</b>	<b>56.5%</b>	<b>18.1%</b>	<b>6.3%</b>	<b>13.6%</b>	<b>18.6%</b>	<b>12.6%</b>	<b>7.3%</b>	<b>23.6%</b>	<b>100.0%</b>
7	13.2%	10.4%	1.4%	0.0%	1.4%	70.7%	10.2%	5.9%	100.0%
8	5.2%	1.5%	2.2%	0.0%	1.5%	49.6%	4.2%	41.0%	100.0%
9	7.1%	1.7%	1.1%	3.0%	1.3%	0.0%	22.1%	70.8%	100.0%
10	13.2%	0.0%	1.2%	6.5%	5.5%	0.0%	15.6%	71.2%	100.0%
<b>Study Area Average</b>	<b>32.3%</b>	<b>10.0%</b>	<b>3.7%</b>	<b>8.3%</b>	<b>10.3%</b>	<b>13.2%</b>	<b>12.3%</b>	<b>42.2%</b>	<b>100.0%</b>

*Source: Question 43 of NEMS Household Survey, Appendix E*

## Ten Pin Bowling

8.29 Currently, there are no ten pin bowling facilities in the District (see Figure 8.6), or the Study Area. However, there are several outside the Study Area. The list below sets out those facilities / centres which respondents to the NEMS Household Survey identified as the facility / centre they most recently visited to go ten pin bowling:

- a. Mansfield Superbowl, Stockwell Gate, Mansfield (44.5%)
- b. Ten Pin, Clifton Boulevard, Nottingham (29.6%)
- c. 1st Bowl, Derby Road, Ilkeston (11.2%)
- d. Alfreton Town Centre (5.3%)
- e. Chesterfiled Bowl, Storfoth Lane, Chesterfield (3.4%)
- f. 1st Bowling, Nottingham (1.5%)
- g. Derby City Centre (0.9%)

h. Mansfield Town Centre (0.5%)

8.30 It is important to note that while the results displayed at Figure 8.6 indicate that the Ashfield District attracts 4.5% of ten pin bowling trips originating from Zone 4, these trips are likely to be to a small bowling facility in a public house or similar, or, it could also be a once off pop-up bowling experience. There are no dedicated ten pin bowling facilities in Ashfield.

8.31 The household survey revealed that the Mansfield Superbowl was the main trip attractor; attracting 55.8% of Ashfield residents, and 44.5% of the Study Area as a whole.

8.32 With regards to frequency of visits, it is interesting to note that 60.7% of respondents stated they visited a ten pin bowling facility no more than once every six months.

8.33 Figure 8.6 sets out the household survey results as they relate to ten pin bowling.

**Figure 8.6 | Study Area Market Share for Ten Pin Bowling by Zone (%)**

Zone	Ashfield District (Zones 1 - 6)	1 <sup>st</sup> Bowl, Ilkeston	Mansfield Superbowl	Ten-Pin, Clifton Boulevard, Nottingham	Elsewhere	Total
1	0.0%	0.0%	100.0%	0.0%	0.0%	100.0%
2	0.0%	0.0%	100.0%	0.0%	0.0%	100.0%
3	0.0%	3.4%	8.4%	76.5%	11.7%	100.0%
4	4.5%	0.0%	68.9%	0.0%	26.6%	100.0%
5	0.0%	15.2%	63.9%	0.0%	20.9%	100.0%
6	0.0%	0.0%	53.1%	0.0%	46.9%	100.0%
<b>Ashfield District Average</b>	<b>0.5%</b>	<b>4.7%</b>	<b>55.8%</b>	<b>19.6%</b>	<b>19.3%</b>	<b>100.0%</b>
7	0.0%	0.0%	100.0%	0.0%	0.0%	100.0%
8	0.0%	0.0%	0.0%	0.0%	16.0%	16.0%
9	0.0%	0.0%	0.0%	100.0%	0.0%	100.0%
10	0.0%	71.3%	0.0%	14.8%	13.9%	100.0%
<b>Study Area Average</b>	<b>0.3%</b>	<b>11.2%</b>	<b>44.5%</b>	<b>29.6%</b>	<b>14.4%</b>	<b>100.0%</b>

Source: Question 45 of NEMS Household Survey, Appendix E

## Bingo

8.34 The District comprises small Bingo facilities in Kirkby, Selston, Pinxton, Jacksdale and Underwood. There are a number of other facilities beyond the District but within the Study Area. Of note, Gala Bingo on Hucknall Road, Nottingham is a popular venue, particularly for those located in Zone 3.

- 8.35 Only 40 of the 1,000 participants (or 4.0%) in the household survey stated that they had recently played bingo, and as such, the sample size is considered to be too small to base any meaningful analysis on.
- 8.36 Gala Bingo facilities in Nottingham are the most popular destinations for Study Area residents, being frequented by 36.7% of respondents. Beyond the Study Area, popular venues are primarily located within the Mansfield Town Centre. Gala Bingo in Mansfield attracts 15.3% and Mansfield Town Centre attracts 15.6% of the market share.
- 8.37 Figure 8.7 illustrates the survey results.

**Figure 8.7 | Study Area Market Share for Bingo by Zone (%)**

Zone	Ashfield District (Zones 1 - 6)	Gala Facilities in Nottingham	Gala, Albert Street, Mansfield	Mansfield Town Centre	Elsewhere	Total
1	0.0%	0.0%	30.3%	69.7%	0.0%	100.0%
2	21.5%	0.0%	0.0%	56.9%	21.5%	100.0%
3	0.0%	63.5%	0.0%	0.0%	36.5%	100.0%
4	53.3%	33.3%	0.0%	13.4%	0.0%	100.0%
5	79.8%	0.0%	0.0%	0.0%	55.7%	135.4%
6	0.0%	0.0%	69.3%	30.7%	0.0%	100.0%
<b>Ashfield District Average</b>	<b>19.6%</b>	<b>22.8%</b>	<b>14.0%</b>	<b>22.4%</b>	<b>21.3%</b>	<b>100.0%</b>
7	0.0%	0.0%	34.4%	36.3%	29.3%	100.0%
8	0.0%	0.0%	50.9%	11.6%	37.4%	100.0%
9	0.0%	100.0%	0.0%	0.0%	0.0%	100.0%
10	0.0%	22.8%	0.0%	0.0%	54.1%	76.8%
<b>Study Area Average</b>	<b>9.8%</b>	<b>36.7%</b>	<b>15.3%</b>	<b>15.6%</b>	<b>22.6%</b>	<b>100.0%</b>

Source: Question 47 of NEMS Household Survey, Appendix E

## Theatres, Galleries and Museums

- 8.38 The extensiveness and quality of Nottingham City Centre’s cultural offering makes it the most popular destination for visiting arts and culture facilities (namely theatres, galleries and museums). The NEMS Household Survey confirmed that Nottingham City Centre secures 62.8% of all trips to such attractions which originate within the Study Area. It also accounts for a similar level of such trips undertaken by residents of Ashfield – with 55.9% of Zones 1 to 6 respondents stating they last went to Nottingham City Centre.

8.39 The low level of cultural provision in Ashfield becomes very clear when assessing the household survey results. The District itself retains only 0.4% of such trips.

8.40 In Figure 8.8 we summarise the responses to the household survey as they relate to this activity.

**Figure 8.8 | Study Area Market Share for ‘Theatres, Galleries and Museums’ by Zone (%)**

Zone	Ashfield District (Zones 1 - 6)	Mansfield Town Centre	Nottingham Town Centre	Elsewhere	Total
1	0.0%	41.4%	40.2%	18.4%	100.0%
2	0.0%	16.8%	55.4%	27.9%	100.0%
3	0.0%	0.0%	77.3%	22.7%	100.0%
4	0.0%	14.1%	51.7%	34.1%	100.0%
5	2.5%	8.9%	61.2%	27.4%	100.0%
6	0.0%	19.3%	37.0%	43.7%	100.0%
<b>Ashfield District Average</b>	<b>0.4%</b>	<b>13.6%</b>	<b>55.9%</b>	<b>30.1%</b>	<b>100.0%</b>
7	0.0%	47.6%	35.1%	17.3%	100.0%
8	0.0%	51.5%	32.3%	16.2%	100.0%
9	0.0%	0.0%	81.8%	18.2%	100.0%
10	0.0%	0.0%	75.2%	24.8%	100.0%
<b>Study Area Average</b>	<b>0.2%</b>	<b>11.8%</b>	<b>62.8%</b>	<b>25.1%</b>	<b>100.0%</b>

*Source: Question 49 of NEMS Household Survey, Appendix E*

## Running, Cycling & Outdoor Activities

8.41 20.3% of Study Area residents participate in outdoor exercise activities, with the vast majority of trips carried out close to home.

8.42 50% of the residents of Ashfield identified that they undertake such activities within the District itself. Residents in the wider Study Area (Zones 7 to 10) are unlikely to visit Ashfield for running, cycling or outdoor activities.

8.43 With regards to how frequently, over 50% of survey respondents identified they would participate in such activities more than once a week.

**Figure 8.9 | Study Area Market Share for ‘Running, Cycling & Outdoor Activities’ by Zone (%)**

Zone	Ashfield District Total	Sutton (Zones 1 & 6)	Kirkby (Zone 2)	Hucknall (Zone 3)	Ashfield District (Other)	Mansfield Town Centre	Nottingham City Centre	Elsewhere	Total
1	62.9%	57.9%	5.0%	0.0%	0.0%	0.0%	0.0%	37.1%	100.0%
2	45.9%	5.8%	40.1%	0.0%	0.0%	33.0%	2.6%	18.5%	100.0%
3	49.9%	0.0%	0.0%	49.9%	0.0%	4.8%	12.1%	33.3%	100.0%
4	39.8%	0.0%	25.5%	0.0%	14.3%	0.0%	0.0%	60.2%	100.0%
5	45.3%	0.0%	0.0%	0.0%	45.3%	0.0%	0.0%	54.7%	100.0%
6	53.1%	44.1%	0.0%	0.0%	9.0%	3.6%	0.0%	43.3%	100.0%
<b>Ashfield District Average</b>	<b>49.9%</b>	<b>17.1%</b>	<b>9.8%</b>	<b>16.9%</b>	<b>6.1%</b>	<b>7.5%</b>	<b>4.5%</b>	<b>38.1%</b>	<b>100.0%</b>
7	0.0%	0.0%	0.0%	0.0%	0.0%	60.1%	0.0%	39.9%	100.0%
8	0.0%	0.0%	0.0%	0.0%	0.0%	35.3%	0.0%	64.7%	100.0%
9	0.0%	0.0%	0.0%	0.0%	0.0%	31.6%	15.1%	53.3%	100.0%
10	5.6%	0.0%	0.0%	0.0%	5.6%	0.0%	13.9%	80.6%	100.0%
<b>Study Area Average</b>	<b>30.9%</b>	<b>10.4%</b>	<b>5.9%</b>	<b>10.3%</b>	<b>4.2%</b>	<b>15.4%</b>	<b>6.8%</b>	<b>46.9%</b>	<b>100.0%</b>

*Source: Question 51 of NEMS Household Survey, Appendix E*

## Additional Leisure Facilities

- 8.44 The significant majority of respondents in Ashfield District (68.3%) did not identify any type of additional leisure facility that they would like to see more of, stating that they either ‘did not know’ what additional facilities could be provided (13.0%), or that there were not any they wished to identify (55.3%).
- 8.45 Of the leisure facilities identified, a swimming pool was one of the most popular responses from Ashfield residents (6.2%). Furthermore, 6.5% identified a cinema and 5.1% more children’s facilities / activities. Another popular choice was a bowling alley (1.5%).
- 8.46 The popularity of swimming as a leisure activity is evident given it is the most requested leisure facility Ashfield resident’s wish to see more of. This result is particularly interesting in light of the fact there are already a number of public swimming pools located within three of the Council owned and operated facilities Leisure Centres; Lammas Leisure Centre in Sutton, Edgewood Leisure Centre in Hucknall, and the Hucknall Leisure Centre. In mid-2015 the Council trailed a new free swimming programme offering free admission to Lammas Leisure Centre in Sutton and Edgewood Leisure Centre for anyone under 17 years old. Moreover, it is vital to note that it

is only those residents in Kirkby (Zone 2) and the wider District that identified they wished for additional swimming pool provision. Festival Hall Leisure Centre in Kirkby does not offer a swimming pool. It is this specific shortfall that may be the cause for this high result.

8.47 Acknowledging the shortfall in provision of a dedicated cinema or bowling alley facilities within the Borough, it is unsurprising to find that these are two of the most requested facilities.

8.48 The NEMS Household Survey Results are summarised in Figure 8.10.

**Figure 8.10 | Leisure facilities which Ashfield Respondents wish to see more of (%)**

Leisure Activity	Sutton (Zones 1 & 6)	Kirkby (Zone 2)	Hucknall (Zone 3)	Elsewhere in the Ashfield District (Zones 4 & 5)	Ashfield Average
<b>Cinema</b>	5.0%	5.6%	9.2%	6.3%	<b>6.5%</b>
<b>Ten Pin Bowling Alley</b>	0.6%	1.3%	2.8%	1.6%	<b>1.5%</b>
<b>Swimming Pool</b>	1.3%	20.6%	1.7%	9.3%	<b>6.2%</b>
<b>More Children's Facilities/ Activities</b>	4.1%	5.9%	4.1%	6.7%	<b>5.1%</b>
<b>None</b>	63.1%	48.3%	53.1%	51.2%	<b>55.3%</b>
<b>Do Not Know</b>	9.7%	8.4%	17.5%	15.2%	<b>13.0%</b>

*Source: Question 53 of NEMS Household Survey, Appendix E*

### Capacity for Additional Leisure Facilities

8.49 Due to the nature of the leisure market we have chosen to adopt a different assessment methodology from that used to analyse the quantitative capacity in the retail market. The motives for this departure primarily relate to the degree to which the leisure market is disintegrated. However, the lack of reliable data for a number of leisure uses (public houses, clubs etc.) has also influenced this decision; as the data available is not sufficient and would not represent credible information from which we can base our assessment.

8.50 As explained earlier the findings of the NEMS Household Survey permit an assessment of the market share secured by facilities within the District and the wider Study Area for a variety of leisure sectors. In order to supplement this qualitative assessment of the attractiveness of the Study Area's facilities, Nexus have drawn on national data.

8.51 As such, we have completed a 'benchmarking' exercise by referencing the estimated increases in the Study Area population. The results of the 'benchmarking' exercise have been used to

inform our conclusions with regards to the prospective future need for additional commercial leisure facilities in Ashfield.

### Estimated Study Area Population

- 8.52 Within Section 5 of this Retail and Leisure Study we set out our assessment of how the Study Area's population will grow at regular year intervals from 2016 to 2032 (i.e. at 2016, 2021, 2026, and 2032). We have calculated the population within each postal code sector using Experian Micromarketer G3 data and projected forwards using Cambridgeshire County Council population forecasts.
- 8.53 The outcomes of our estimation exercise suggest that in 2016 the zones within the Study Area will have a resident population of approximately 315,080 people and by 2032 this population will grow to 341,595. The estimated 2032 population represents an increase of 8.4%, equating to 26,515 additional residents.
- 8.54 Considering the Ashfield District in isolation (Zones 1 to 6) the population is estimated at approximately 167,037 at 2016 and is estimated to increase to 180,861 or by 13,824 persons by 2032. This represents an increase of 8.0%.
- 8.55 Figure 8.11 sets out in full our population forecast for the reporting periods to 2032.

**Figure 8.11 | Study Area Population by Survey Zone (2016 to 2032)**

Zone	2016	2021	2026	2032
1	17,640	18,265	18,816	19,470
2	21,111	21,842	22,483	23,086
3	39,863	41,013	42,131	43,206
4	20,060	20,610	21,036	21,347
5	29,632	30,383	31,167	31,913
6	38,731	39,881	40,804	41,839
<b>Ashfield Total</b>	<b>167,037</b>	<b>171,994</b>	<b>176,437</b>	<b>180,861</b>
7	20,570	20,891	21,117	21,329
8	19,716	19,961	20,268	20,564
9	69,752	71,754	74,165	77,304
10	38,005	39,303	40,378	41,537
<b>Total</b>	<b>315,080</b>	<b>323,903</b>	<b>332,365</b>	<b>341,595</b>

**Source:** Experian Micromarketer G3 data

## Health and Fitness

- 8.56 A February 2015 report from Savills<sup>95</sup> identified that the level of health and fitness clubs in the UK is higher than it has ever been before, with more clubs and more members. In terms of membership rates across the whole of the UK, Savills estimate that 13.2% of the UK's population are registered members of private health and fitness clubs. In 2014 the membership rate was 12.6%. As at February 2015 Savills estimates that there were 6,112 fitness facilities in the UK.
- 8.57 Similarly, the Leisure Database Company's most up to date research (of June 2015)<sup>96</sup> suggests that there were in the region of 6,312 health and fitness clubs operating across the UK at 2015. We have taken an average of these two estimations, which gives a figure of 6,212.
- 8.58 At the time these estimations were produced the UK population was projected at 64.6 million<sup>97</sup>, and therefore, we calculate there to be on average one club for every 10,399 persons. Our calculations are summarised in Figure 8.12.
- 8.59 When estimating the potential requirement for additional health and fitness facilities in Ashfield, we have considered only the capacity within the District itself (Zones 1 to 6), rather than the wider Study Area (Zones 7 to 10). The reason for this is because the average person is likely to seek out and attend such facilities that are close to home (i.e. typical customer behaviour). Moreover, such trips are likely to be completed by a single person on a regular basis - i.e. several times per week. The type and frequency of trips varies greatly to cinema or ten pin bowling activities. Visits to these kinds of leisure facilities are more often than not completed on a much less frequent basis and undertaken by groups of people and/or families. In consequence to the purpose of visit and frequency participants in cinema or ten pin bowling activities are more willing to travel further distances.
- 8.60 There are a total of seven publically owned and operated leisure centre complexes in the District – the largest being The Lamma Leisure Centre in Sutton. The research completed by Nexus has also identified eight private health and fitness clubs in the District, of varying sizes. This brings the total health and fitness centre provision to 15 in the District. It is also important to note that there may be a limited number of smaller clubs which have not been identified as part of our assessment.
- 8.61 Taking account of the fact the assessment considers more mainstream facilities with larger memberships; it would appear that the current provision of 15 is sufficient for meeting likely demand. Notwithstanding this, our appraisal has made it evident that there is a very small

<sup>95</sup> 'The UK's health and fitness sector', Savills online, 27 February 2016

<sup>96</sup> State of the UK Fitness Industry 2015, Leisure Database Company, June 2015

<sup>97</sup> As identified by the Office for National Statistics 2014-Based National Population Projections 25 June 2015 data release

representation of national multiple private gyms within the District, with only three in total – Flex Fitness and Ladies Fitness Wellness both in Sutton, and Peak Physique in Kirkby. It should therefore be recognised that there may be an underlying qualitative need for additional facilities of this nature and scale. Of note, recent trends, as identified by both Mintel and Savills, in health and fitness indicate a rise in the popularity of budget private gyms<sup>9899</sup>.

8.62 On the basis of the current rates of participation (e.g. 332 out of the 1,000 survey participants or 33.2%), we have identified there to be modest capacity for additional facilities in the period to 2032. In light of the modesty of this capacity we foresee that market forces will be capable of bringing forward these new uses in areas of demand through the development management process (planning applications). To summarise, there is no specific need for identified site allocations to provide for these facilities.

**Figure 8.12 | Health and Fitness Centre Requirement in the Ashfield District**

Year	Ashfield Population (Zones 1-6)	Typical Population Required to Support Centre	Potential No. of Clubs Supported by Study Area
2016	167,037	10,399	16
2021	171,994	10,399	17
2026	176,437	10,399	17
2032	180,861	10,399	18

Note: Typical population to support a health and fitness club derived from the Leisure Database Company research (2015)

## Cinema

8.63 Currently, there are no cinema screens in Ashfield. However, a combined total of 26 screens are currently provided at cinema complexes in Nottingham (operated by Showcase and Cineworld), with a further eight screens located within the Odeon in the Mansfield Retail Park.

8.64 In the year 2015, data kept by the British Film Institute specified a total of approximately 171.9 million cinema admissions in the UK in 2015 – the third highest annual admission count for the past decade<sup>100</sup>. Taking account of this spike in admissions, we have looked back at the data kept by the British Film Institute since 2006 to produce an average. This calculation delivers an average of 166.5 million cinema admission per year. In order to estimate the average number of admissions per year we have taken the approximate UK population in 2015 of 65.1 million<sup>101</sup>,

<sup>98</sup> 'Health and Fitness Clubs – UK', Mintel, July 2015

<sup>99</sup> 'The UK's health and fitness sector', Savills online, 27 February 2016

<sup>100</sup> 'The Box Office 2015 - BFI Research and Statistics', British Film Institute, April 2016

<sup>101</sup> As identified by the Office for National Statistics' 2015-Based National Population Projections 23 June 2016 data release

and generated a figure which suggests there were on average 2.6 admissions per person per year over the last decade.

- 8.65 The UK Cinema Association specifies that in 2015 there were a total of 4,115 cinema screens throughout the UK<sup>102</sup>. Again, we have looked back at the past ten years of data held by the UK Cinema Association in order to produce a ten year average. The production of an average allows us to produce a figure which may, in reality, better represent the 'right' number of screens to meet market demand. Our calculations results in an average figure of 3,790 screens.
- 8.66 Taking into account the estimations provided by both the British Film Institute and the UK Cinema Association, it is suggested that on average each cinema screen demands 43,931 admissions per year.
- 8.67 As we explained earlier on in this section, at this time there are no cinema screens located within Ashfield. Furthermore, it is important to recognise that the results of the household survey suggest that cinema provision is the most sought after additional leisure facility; with 6.5% of Ashfield residents stating cinemas (refer Figure 8.10). Against this background, the nil provision is certainly something that could be improved upon.
- 8.68 Through the application of our benchmarking exercise we have produced an estimate that from the District's 2016 population (167,037) there would be on average 451,000 cinema admissions in the year 2016, and that by 2032 this would increase to around 488,325. Following this, we have taken the assumed number of visits per screen and produced a finding that around 12 screens could be supported over the period to 2032. Figure 8.13 conveys our findings.
- 8.69 The benchmarking exercise suggests that there is no current qualitative shortfall in the provision of cinema screens at 2032 (based on a current provision of 34 screens). However, the existing facilities in Nottingham and Mansfield are located outside of Study Area and so are likely to attract custom from the wider surrounding areas. Accordingly, we would suggest that there is a qualitative case for developing a small multiplex cinema in Ashfield. Engaged discussions with cinema operators is required to better understand the commercial reality of this and their requirements, as well as any future cinema requirements might be met in the locality.
- 8.70 We note the on-going community efforts at part of The Byron Project, with the objective of reinstating the old theatre in Hucknall.

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<sup>102</sup> 'UK cinema industry infrastructure', UK Cinema Association, Retrieved online in April 2016

**Figure 8.13 | Cinema Screen Requirement in the Study Area**

Year	Ashfield Population (Zones 1-6)	Number of Cinema Visits Per Person	Attendance	Number of Admissions Required to Support Screen	Screens Supported by the Study Area
2016	167,037	2.7	451,000	43,931	10
2021	171,994	2.7	464,384	43,931	11
2026	176,437	2.7	476,380	43,931	11
2032	180,861	2.7	488,325	43,931	12

Note: Number of cinema trips per person and number of admission per screen derived from BFI and UK Cinema Association data.

## Ten Pin Bowling

- 8.71 Mintel are a global and award-winning provider of Market Research, who provides information on trends and insight in the leisure sector. In terms of data on ten pin bowling trends in the UK they are one of the only providers. As such we have looked to Mintel research to provide a general indication of the average number of ten pin bowling lanes per resident in the UK.
- 8.72 In 2011 Mintel identified a total of 5,773 bowling lanes throughout the UK<sup>103</sup>. Taking into account the UK population at the time this data was produced (63.3 million) and assessing this against the 2011 provision of ten pub bowling lanes; results in a figure of one bowling lane per every 10,965 persons. The analysis completed by Nexus is included in Figure 8.14.
- 8.73 There is currently no ten pin bowling facility operating in the Study Area, while also mentioning the fact that the results of the NEMS Household Survey, which are set out in Figure 8.6, suggests Ashfield retains 4.5% of Zone 4 trips. However, we believe these trips would be to either a small bowling provision within a public house or a pop up bowling experience. Whilst residents of the Study Area are able to access additional bowling facilities in Mansfield and Nottingham, Nexus do believe that lack of any provision in the Study Area is not reflective of what would be reasonably be expected.
- 8.74 Figure 8.14 indicates that, based on the assumed benchmark, we calculate that around 16 lanes could be supported in the Study Area in the period up to 2032. This is a very modest increase of one new bowling alley from the 2016 estimation of 15.
- 8.75 It is generally accepted that ten pin bowling patronage in the main is reducing. Notwithstanding this, we do consider that there is an insufficiency in provision across the Study Area. The

<sup>103</sup> 'Tenpin Bowling – UK', Mintel, November 2011

provision of an additional bowling facility in Ashfield would fill a geographic gap between the nearest ten pin facilities at Nottingham to the east and Mansfield to the north.

**Figure 8.14 | Ten Pin Bowling Requirement in the Study Area**

Year	Ashfield Population (Zones 1-6)	Typical Population Required to Support One Ten Pin Bowling Lane	Potential Number of Lanes Supported by Ashfield District Area
2016	167,037	10,965	15
2021	171,994	10,965	16
2026	176,437	10,965	16
2032	180,861	10,965	16

Note: Typical number of persons required to support a bowling lane derived from Mintel research

## Conclusion

- 8.76 As part of this Retail and Leisure Study, Nexus has measured Ashfield's existing leisure provision against 'benchmarks' in order to ascertain whether there are any existing shortfalls in provision.
- 8.77 Visiting restaurants was identified as the most popular activity for residents of the District, followed by visiting pubs and club, theatres and concert halls and then the cinema. Visiting nightclubs, bingo halls and social clubs were less popular.
- 8.78 There are no dedicated cinema screens in the Ashfield District and, as such, the Mansfield Odeon attracts 57.4% of all cinema trips made by residents of the District.
- 8.79 Residents make around 40% of their restaurant trips to restaurants located in the District itself, and the District retains 53.8% of its own resident's trips to health and fitness facilities.
- 8.80 The Mansfield Superbowl was identified as the most popular bowling facility by Ashfield resident's, attracting over 55% of trips from residents of the District.
- 8.81 Based on the benchmarks identified by Nexus (utilising independent data sets), it was calculated that the District could support a number of new health and fitness clubs at 2032 as well as the introduction of a ten pin bowling alley.
- 8.82 In light of the fact there are no cinema screens within the Study Area, we have identified there could be some scope for a small scale cinema complex (or screen) to meet the qualitative shortfall in the provision of cinema screens at 2032.

## 9.0 Recommendations and Future Retail Strategy

### Introduction

9.1 This Retail and Leisure Study has been instructed in order to form the evidence base to support the emerging Ashfield Local Plan (up to 2032) in accordance with national policy requirements.

9.2 Specifically, Paragraph 23 of the NPPF indicates that local planning authorities should:

- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- Define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- Promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- Allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;
- Allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre; and
- Set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres.

- 9.3 In addition, paragraph 26 of the NPPF indicates that local planning authorities may set their own local threshold for retail, leisure and office developments outside of town centres for which an impact assessment would be required.
- 9.4 The national policy position has informed the Study and the requirements, where relevant, are considered in relation to Ashfield District below.

## **Retail Strategy**

- 9.5 Ashfield District's role within the wider region is strongly influenced by the large urban centres of Mansfield to the east and Nottingham to the south, as well as Derby and Chesterfield to the west and, to a lesser extent, Sheffield to the north. In 2016, Mansfield Town Centre and Nottingham City Centre accounted for 12.3% and 14.3% of all retail expenditure from the Survey Area, reflecting the continued draw of these larger centres to the residents of Ashfield District and the surrounding hinterland.
- 9.6 Within this geographic context, Ashfield centres have responded well since the recession and our health checks and stakeholder consultation supports Sutton, Hucknall and Kirkby's continued function and role providing primarily for residents of the District, noting that Sutton also caters to a wider, sub-regional market, particularly in terms of convenience offer. Ashfield District provides for 24.6% of all retail spending across the Study Area (at 2016), a marginal decrease from 25.1% in 2011. This is considered to be reflective of the decline in comparison goods offer across the District.
- 9.7 Retailers in Ashfield retained a market share of 36.6% of available convenience goods expenditure from across the Study Area, an increase of 5.3% since the previous survey in 2011. 18.4% of all comparison expenditure is presently retained across the Study Area, falling from 20.1% in 2011.
- 9.8 Sutton has a convenience goods market share of 15% (67% of which was to central retailers, while 33% was to non-central stores) and a comparison goods market share of 11% (where 80% was made to central retailers and 20% was made to non-central locations). This shows no change in the convenience market share since the previous study in 2011, and a small decline in comparison market share.
- 9.9 Hucknall drew 11% of convenience goods expenditure across the Study Area (5% of which was to central stores, while 95% was to non-central stores) and 6% of comparison goods expenditure (69% to central retailers, while 31 % was to non-central stores). Since 2011, there have been no changes to Hucknall's convenience market share and a marginal increase of 1% in the comparison market share.

- 9.10 The convenience market share of Kirkby has increased by 5% since 2011, from 3% to 8% (96% of which was to central stores, while 4% was to non-central retailers). This increase can almost entirely be attributed to the development of the Morrisons foodstore on the Precinct site. With regards to comparison goods expenditure, Kirkby had a market share of 1% (86% to central retailers, while 14 % was to non-central stores), down from 2% in 2011.
- 9.11 The retail capacity analysis undertaken at Section 7 identifies a capacity for between 5,800 sq m and 7,300 sq m of new convenience goods net retail floorspace in Ashfield in the long term (at 2032) and between 7,800 sq m and 12,300 sq m of new comparison goods net retail floorspace at 2032.
- 9.12 Additionally, the benchmark turnover exercise undertaken for the quantitative convenience retail capacity assessment (see Table 5, **Appendix F**) identifies overtrading of convenience foodstores in each of the Districts three primary centres, being Sutton, Kirkby and Hucknall. Smaller centres including Selston, Huthwaite and Stanton Hill showed notable undertrading compared to company averages, suggesting insufficient capacity for additional convenience retail provision.
- 9.13 In terms of leisure facilities, Section 8 identified both quantitative and qualitative capacity for a cinema within the District. In addition, we have identified potential qualitative capacity for a budget oriented health and fitness facility, noting the nationwide rise in popularity of this format. Nonetheless, it is important to recognise that this capacity is subject to private market forces dictating demand in order to meet any identified quantitative or qualitative gaps in leisure provision across the District.

### **Spatial Capacity for Retail Floorspace**

- 9.14 The most recent town centre and regeneration strategies in Ashfield are the 'Masterplans for Sutton in Ashfield and Kirkby in Ashfield' (2007) and the Urbed 'Hucknall Town Centre Masterplan' (2009) which, whilst relatively dated in policy terms (predating the publication of the NPPF), provide a useful context for the on-going public improvement works being carried out across the three primary centre and informed the findings of the previous WYG Retail Study (2011).

### **Sutton**

- 9.15 The 2007 masterplan and 2011 Study make specific reference to the development of the market square and public realm improvements, but focuses retail development towards the existing Asda site and adjoining area. A mixed-use development is proposed, comprising a replacement Asda foodstore and a significant quantum of comparison goods floorspace (as well as additional parking and a potential bus station).

- 9.16 The 2011 Study acknowledged that the Asda store was performing well at the time (and is still shown to be trading at £21m over company averages in 2016) and that it would be unlikely that the site could be developed without affecting the operations of the store. We feel that this continues to be the case and that the site is likely to be unavailable for development in the short to medium term.
- 9.17 The Conservative Club on Fox Street, adjoining the Asda, was presented as a potential site for the redevelopment of the Sutton Indoor Market before the decision was made to retain and renovate the existing market site in The Idlewells Shopping Centre. As such, the circa 2,000 sq m site would be available for locating new town centre retail floorspace. This would have the added advantage of better integrating the (currently outwards-facing) Asda foodstore into the town centre.
- 9.18 The Sutton College site at High Pavement and Parliament Street was also identified as a potential development site, and we would agree that this site is suitably located within the town centre where a mixed use redevelopment could link with the Market Place to provide an anchor store drawing shoppers to the underutilised south west of the town centre. However, like the Asda site, the college is currently occupied and would only appear to be realistic as a longer term aspiration which would not serve the immediate capacity for between 4,500 sq m and 5,600 sq m of new convenience goods net retail floorspace at 2016.
- 9.19 We note that both the Asda and Sutton College sites are currently allocated for mixed-use redevelopments, including retail floorspace within Policy SKA1 of the Ashfield Local Plan Preferred Approach. We understand that at the time the 2007 Masterplan was produced, there was a realistic potential of the college relocating and Asda redeveloping its current site. However, since the 2008 recession these proposals have been placed on hold; nonetheless, in the long term these sites remain aspirational development sites for the Council.
- 9.20 Additionally, it is important to acknowledge that the Masterplan is in the early stages of review and will inform the production of the emerging Local Plan. The revised Masterplan is likely to identify further potential development sites, which could deliver important new retail development for the town.

### **Hucknall**

- 9.21 As previously mentioned, Nottinghamshire County Council are currently undertaking the Hucknall Town Centre Improvement Scheme (HTCIS), which will comprise a new road from Station Road/Ashgate Road to Baker Street/Annesley Road and the pedestrianisation of the High Street between Baker Street and Watnall Road.

- 9.22 In terms of potential sites for development, the 2011 Study and the 2009 Urbed masterplan both identify the Piggins Croft car park to the north of the town centre (adjoining the High Street, Watnall Road and South Road) for a potential large scale regeneration scheme that would incorporate the existing B&M and Wilko stores to provide a comprehensive retail-led development with active retail frontages integrating the area with the High Street.
- 9.23 Specifically considering current patterns of shoppers to out-of-centre facilities at Tesco and Aldi, we agree that this site would be suitable for redevelopment to provide a town centre anchor store with better links to the High Street, though we note the inherent difficulties in acquiring the site from the current occupiers.
- 9.24 The Hucknall Liberal Club, located in a prominent position to the north of the High Street has recently become vacant and is available for purchase. The pending pedestrianisation of the centre would provide a prime opportunity for redevelopment, though based on the constrained nature of the existing floorplate this site may be more suitable for a small mixed-use or residential development that would introduce more shoppers to the centre and increase the vibrancy and vitality of the centre.
- 9.25 Emerging Policy HA1 of the Ashfield Local Plan Preferred Approach allocates the land adjoining Bolsover Street for residential development and associated improvements to link to the town centre. We would agree that the site would be suitable for improved connections to the town centre that would increase the accessibility between the centre and the out-of-centre retail units on Ashgate Road (notably Tesco and Aldi).

### **Kirkby**

- 9.26 A number of key regeneration proposals for Kirkby that were presented in the 2007 masterplan have been implemented, notably the 2011 development of the Morrisons foodstore at the precinct area, the pedestrianisation of Lowmoor Road and the new market square.
- 9.27 Our site visits and health check of the town centre identified the vacant unit and Council car park on Ellis Street as a suitable location for a larger retail development that would integrate the market square and Morrisons development with the smaller retail units located along Station Street, which were seen to benefit from steady pedestrian traffic throughout the day.
- 9.28 The land to the south of Ellis Street and west of Pond Street was previously identified (in both the 2007 masterplan and the previous Study) as a possible location for a mixed use, retail, office and residential development, and as noted above, remains the most suitable site to focus new retail development.

- 9.29 The occupation of the long-vacant Regent building by Wetherspoons in 2013 was key to regenerating the 'Kingsway Gateway' to the east of the town centre identified in the 2007 masterplan, however, a number of vacancies were concentrated on the corner of Station Street and Kingsway during our recent site visits. There is very little prospect of a comprehensive redevelopment of this area but the number of vacancies in close proximity to each other warrants monitoring.
- 9.30 The emerging Ashfield Local Plan Preferred Approach (January 2016) allocates the Ellis Street/ Pond Street site for redevelopment, as well as the Festival Hall site, and the site of the Original Factory Shop department store including the adjoining public car park between Station Street and Lindley's Lane. This site, whilst not currently available, would provide an anchor to the west of the centre and support the pedestrian circuit that has emerged along Station Street towards the edge-of-centre Aldi foodstore.

### **Recommendations**

- 9.31 In terms of convenience goods provision, there is immediate capacity (between 4,500 sq m and 5,600 sq m at 2016) for approximately one large foodstore or two to three smaller format foodstores, with an additional foodstore to come forward over the course of the plan period.
- 9.32 Nonetheless, we would stress that the market dictates when these developments would come forward and considering the current development programme of the major foodstores, capacity does not necessarily equate to demand.
- 9.33 There are a number of sites identified within the District's centres that would be suitable for a major foodstore development, specifically Sutton College in Sutton, Piggins Croft in Hucknall and Ellis Street and Lindley's Lane in Kirkby. However, based on their current occupation, we would question their availability for short term delivery to meet the current capacity for new convenience retail floorspace.
- 9.34 The former Conservative Club at Fox Street in Sutton is a suitable and available town centre location for a retail development; although we note that given the likely scale of development that could be accommodated on this site, it may not be possible to facilitate a major foodstore development and the site would likely be more suited to a smaller foodstore or a comparison goods retailer alongside the adjoining Asda.
- 9.35 There is also significant capacity identified for comparison floorspace over the plan period (between 7,800 sq m and 12,300 sq m at 2032), as well as notable qualitative gaps in provision, likely to be due to the draw of the comparison offer of both Mansfield and Nottingham. Ashfield District retained just 10.1% of clothing spend across the Study Area, highlighting the lack of such retailers in the District's centres; in particular Sutton, which would

- be expected to provide a greater clothing offer for local residents, though not to the same extent as Mansfield or Nottingham, which provide a retail offer for the wider region.
- 9.36 The Districts three primary centres are not confined by typical constraints to town centre expansion, such as natural watercourses or orbital ring roads, should a comprehensive retail-led development come forward. However, from our health checks and associated assessments of Sutton, Kirkby and Hucknall, we note the each centre is constrained in terms of the small size of available units within the centres, which are often required to be combined in order to attract potential retail occupiers. This is particularly notable in Hucknall where the lack of suitable town centre units has led to a situation where 95% of convenience goods expenditure is to out-of-centre retailers (at 2016). Further symptomatic of this, The Idlewells Shopping Centre in Sutton has been carrying out works amalgamating such units in order to specifically cater to retailers that require larger and more flexible town centre units.
- 9.37 In light of the above, we would recommend that the aforementioned development sites remain openly allocated as suitable for either convenience or comparison retail development, which would meet the identified shortfalls in town centre provision. In addition we would recommend encouraging the amalgamation of units (where there is little, or marginal, loss of net retail floorspace) in order to encourage investment in the Districts centres.
- 9.38 Whilst we have identified capacity for additional convenience goods floorspace over the plan period, given the existing convenience offer in each of the three primary centres (notably Asda and Aldi in Sutton, Tesco Extra and Aldi in Hucknall and Morrisons and Aldi in Kirkby), we consider that each centre is well catered for and would not recommend ascribing the capacity to any specific centre or site. We also identify additional capacity for comparison floorspace over the medium to long term and, as with convenience goods floorspace, we would suggest that the market dictates the most commercially suitable site to come forward across the District, having regard to the need for the quantum of floorspace to be aligned with the retail hierarchy.
- 9.39 Whilst noting the convenience and comparison retail floorspace capacity and the absence of large – immediately available – town centre sites for retail developments, we would stress that, in accordance with national planning policy and guidance, applications for retail developments outside of the designated Primary Shopping Area boundaries would need to be considered in accordance with the sequential approach and standard impact assessment methodology (above the locally set threshold). This approach will need to be carefully balanced in order to ensure that the vitality and viability of the Districts designated centres are not undermined whilst catering for the identified retail capacity.

## Retail Hierarchy

- 9.40 The previous 2011 Study and the emerging Ashfield Local Plan Preferred Approach (January 2015) identifies the following hierarchy of centres across Ashfield District:
- **Sutton-in-Ashfield** | Sub Regional Centre;
  - **Hucknall** | Major District Centre;
  - **Kirkby-in-Ashfield** | District Centre;
  - **Outram Street, Stanton Hill, Annesley Road, Watnall Road, Huthwaite and Jacksdale** | Local Shopping Centres; and
  - **Annesley Woodhouse, Selston, Skegby and Underwood** | Shopping Parades
- 9.41 As identified in Figure 6.5, the total market share of each centre (for all retail spending) supports the conclusion that each centre serves a different role within the District. Sutton has an identified market share of 12.7% of all retail expenditure, whilst Hucknall receives 8.2% and Kirkby takes just 4.4%. This variation in scale and offer is also supported by the quantum of retail floorspace in each centre (43,320 sq m, 32,550 sq m and 20,198 sq m, respectively).
- 9.42 Sutton's composition and, in particular, the draw of its convenience offer and quantum of national multiple comparison retailers is representative of its function and role as a Sub-Regional Centre. Hucknall is identified as the second most frequented centre in Ashfield, with the Tesco Extra foodstore providing a significant draw supporting its role as a Major District Centre. Kirkby, by comparison, was shown to feature a limited number of national multiple retailers and key anchor stores (with the notable exception of Morrisons) and caters for a smaller, more local catchment as a District Centre
- 9.43 As such, we would agree with the above town centre designations and retail hierarchy as proposed in the emerging Ashfield Local Plan Preferred Approach (January 2015), which is based upon the recommendations provided by WYG in their 2011 Retail Study.
- 9.44 We would not recommend any changes to the proposed town centre boundaries of either Sutton or Hucknall, although we note that this may become necessary in the future should a major retail-led development come forward on one of the aforementioned sites that would materially alter the established shopping patterns.
- 9.45 With regards to Kirkby, we note the draw of the Aldi foodstore at Lane End and the associated pedestrian flows along Station Street, which indicate that the store effectively serves as an anchor to the west of the centre. The household survey established that the store is currently trading very well (46% over company average) and our health checks identified the significant footfall both to and from the store, with shoppers seen to be taking advantage of the car parking

provision and walking into the town centre to carry out linked shopping trips to town centre stores. This linked trade is indicative of the Aldi store serving a town centre function and should be encouraged. As such, we would recommend extending the Kirkby Town Centre boundary to the west of the existing boundary to incorporate the Aldi into the town centre.

9.46 We have also considered the appropriateness of the defined Primary Shopping Areas for each of the town centres. The 2011 Study recommended the following:

- **Sutton** – to include; Idlewells Shopping Centre, Asda store, Market Street, Brook Street, Langton Road, Market Place, High Street, Low Street, Forest Street (to Halfords), and Portland Square.
- **Hucknall** – to include; entire length of High Street; include the market place and the Piggins Croft area of the District Centre.
- **Kirkby** – to include; Station Street from the vacant Haldanes store to the Precinct Road then incorporating the former Ashfield Precinct, Lowmoor Road but also following Pond Street to include the land behind the Kirkby Factory Shop with northern parts of Kingsway.

9.47 On the basis of our 2016 survey and assessment we endorse the recommendations made in the 2011 Study.

9.48 Additionally, the 2011 Study suggested the addition of Primary and Secondary Frontages for Sutton, Kirkby and Hucknall. The suggested frontages have been put forward in the emerging Ashfield Local Plan Preferred Approach (January 2015). For Sutton the proposed Primary Frontages are focused around (and inside) The Idlewells Shopping Centre and the adjoining Low Street. This is considered appropriate in light of the fact the Shopping Centre performs the role of the strategic focus of retail development in the town. Whereas Outram Street and Brook Street are fittingly recommended to be Secondary Frontages, where greater diversity of uses may be appropriate.

9.49 The recommended Primary and Secondary Frontages for both Hucknall and Kirkby, by virtue of their size and road network, are a lot smaller and linear in nature. In Hucknall the focus of retail development should be directed towards the Market Square (the key social space in the town), and therefore, the western portion of the High Street should be designated as the Primary Shopping Frontage. Similarly, in Kirkby it is suitable to focus retail uses around the new Civic Square. As such, the recommendation is for Lowmoor Road to become the Primary Shopping Frontage and the adjoining Station Street, and for the northern tip of the Kingsway to perform the role of the Secondary Shopping Frontage.

9.50 Plans for Sutton, Kirkby and Hucknall illustrating our recommendations are included as **Appendix G**. The plans detail both the adopted Town Centre Boundaries taken from the 2002

Local Plan, as well as those proposed within the 2011 Retail Study, which are representative of our recommendations. In addition, the recommended Primary Shopping Areas, as well as the Primary and Secondary Frontages are shown, and again reflect the recommendations made in the 2011 Study.

- 9.51 We have also reviewed the boundaries of the Local Shopping Centres, as identified within the Proposals Map of the adopted Local Plan 2002, and would not propose any amendments to the current boundaries.
- 9.52 In addition to the Town Centre Boundaries, Primary Shopping Areas, Primary and Secondary Frontages for Sutton, Kirkby and Hucknall identified above, we would recommend that the Council clearly identifies the boundaries of each of the designated Local Shopping Centres and Local Parades on the emerging Policies Map so as to assist developers and applicants when considering sites for retail and other town centre developments.

### **Local Retail Impact Thresholds**

- 9.53 The previous retail study considered the performance of each of the District's primary centres and recommended the following local thresholds for retail, leisure and office uses:
- Sutton | 500 sq m;
  - Hucknall and Kirkby | 300 sq m; and
  - Local shopping centres and out-of-centre locations | 200 sq m.
- 9.54 In accordance with national planning policy, retail, office and leisure developments greater than 2,500 sq m proposed in edge-of-centre and out-of-centre locations will be subject to the assessment of the impact criteria set out by paragraph 26 of the NPPF.
- 9.55 Where appropriate, Local Authorities are entitled to identify local thresholds in accordance with the following considerations identified within the NPPG ('Ensuring the vitality of town centres', Paragraph 16):
- scale of proposals relative to town centres;
  - the existing viability and vitality of town centres;
  - cumulative effects of recent developments;
  - whether local town centres are vulnerable;
  - likely effects of development on any town centre strategy; and
  - impact on any other planned investment.

- 9.56 In addition to considering the retail hierarchy recommended above, it is important to note the average unit size across the three centres, which identifies relatively little variation with the average town centre unit measuring 220 sq m in Sutton, 213 sq m in Hucknall and 153 sq m in Kirkby.
- 9.57 Despite the improvements in vitality and viability that have resulted from the significant Morrisons investment in Kirkby, the centre remains vulnerable to edge-of-centre and out-of-centre retail developments as evidenced by the consistently strong performance of the edge-of-centre Aldi foodstore (notwithstanding the fact that the Aldi has since established itself as part of the town centre, as reflected in our recommendations above).
- 9.58 We have also taken account of the on-going consolidation of a number of units within The Idlewells Shopping Centre in Sutton, which reflects our understanding that the current retail market favours larger and more flexible units that might fall between the 500 sq m and 300 sq m thresholds previously recommended for Sutton and Kirkby and Hucknall.
- 9.59 Given the relative shortage of 300 - 500 sq m units in Sutton and the edge-of-centre and out-of-centre location of The Broad Centre and other larger retailers to the south east of the centre, along Station Road, we find that Sutton is potentially vulnerable to the development of 300 - 500 sq m units that would directly compete with the town centre offer, jeopardising the vitality and viability of the centre. Whilst our health checks and site visits to each of the centres identified that they are all on a positive curve, we remain of the opinion that the Council should be cautious about any edge-of-centre or out-of-centre retail development.
- 9.60 We would therefore conclude that each of the three primary centres are potentially vulnerable to competing edge-of-centre and out-of-centre retail developments of 300 sq m and above, and that the threshold for Sutton should be brought in line with that of Hucknall and Kirkby.
- 9.61 As such, we recommend a flat locally **set threshold of 300 sq m** across the District's three main centres.
- 9.62 We would stress that whilst the locally set threshold would require the submission of an impact assessment for all edge-of-centre and out-of-centre developments exceeding the recommended threshold of 300 sq m, national guidance dictates that the impact test should be undertaken in a proportionate and locally appropriate way, commensurate to the scale of development proposed. The level of detail would typically be agreed with Council officers during the pre-application process in order to avoid overly onerous requirements that may otherwise restrict and delay development opportunities from coming forward.