Martintonks

BASSETLAW RETAIL STUDY

prepared for

Bassetlaw District Council

MAIN REPORT

May 2009

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Glossary

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1.0 Executive Summary

1.1 Retail and leisure are dynamic sectors of the economy. Martin Tonks of MT Town Planning was commissioned by Bassetlaw DC in September 2008 to prepare this boroughwide retail study to inform the Local Development Framework (LDF) process and to try and ensure policies are supportive whilst directing these dynamic sectors. The study also provides guidance for considering planning applications and proposals for retail and commercial leisure development.

1.2 The development plan (LDF) must respond quickly to ever changing consumer preferences within the retail and leisure sectors. The LDF should therefore attempt to realise locally the objectives of PPS6 in enhancing consumer choice, supporting efficient, competitive and innovative retail and leisure sectors and improving accessibility.

1.3 In order to accommodate and direct development pressure new town centre and edge-of-town centre sites are identified in this report. Recommendations are also made for the two main town centres on suitable boundaries for shopping frontages, the extent of the Primary Shopping Areas (PSA) and the wider town centre boundaries in order to direct retail development and prioritise the most appropriate frontages for retail and leisure use.

1.4 The study determines the health of the main centres of Worksop and Retford using PPS6 indicators of vitality and viability and establishes the need for new comparison and convenience goods shopping floorspace in these centres and the district as a whole in the period to 2021.

1.5 Worksop town centre has a varying performance on the PPS6 indicators of vitality and viability. The main strength is the attractive shopping environment from Newcastle Avenue to the Priory Centre (Bridge Street, while relatively pleasant, is starting to look dated); the semi-pedestrianisation (which should be made complete); and partially covered Priory Shopping Centre. Worksop has a large walk in population and good accessibility by bus and car and the linear nature of the centre makes orientation easy. The centre has a reasonable mixture of national and independent retailers and below average vacancy rates. There is a good supporting service offer in particular banking and financial services.

1.6 The main weakness of Worksop town centre is the limited diversity and the limited range and choice of shops. There is no anchor department store or superstore to generate footfall for the centre and the two out-of-centre supermarkets and the out-of-centre retail park draw trade away from the centre. The catchment area is restricted by larger competing centres, Sheffield, Meadowhall and Doncaster in particular. The town has no cinema and the evening economy is limited. The business survey recorded declining business / investor confidence. There is also a perceived car parking problem amongst the business community.

1.7 Worksop as a town is well served by convenience shopping facilities including a Tesco superstore, a Sainsbury superstore, a Netto, Aldi and an Iceland. In addition there is the Marks and Spencer Simply Food, the town centre shops and regular outdoor market, and smaller shops distributed throughout town all taking up available expenditure. In addition there is a proposed Tesco relocation to a site much nearer the town centre, although still out-of-centre, that should increase linked trips to the centre. There is also a smaller Sainsbury Local store that recently opened on Newcastle Avenue. Together with the proposed Tesco store this will greatly improve the qualitative offer in Worksop.

1.8 Worksop's market share of convenience spending within the Primary Catchment Area (PCA) has remained static since 2004 and there is very little leakage from the town itself. As a result of the current offer and the ‘limited capacity’, there is not a great short-term quantitative need for additional convenience goods floorspace in Worksop. However, by 2016 there may be a quantitative need for 5,700 sq m (net) of additional town centre floorspace or a small supermarket with a net convenience goods sales area of around 1,700sq m. And by 2021 there may be a need for 6,900 sq m (net) of town centre convenience goods floorspace or 2,100 sq m (net) of supermarket floorspace i.e. a medium-sized supermarket.

1.9 Overall, convenience stores in Worksop are trading above expected levels but this is skewed by the existing Tesco store, and Netto and Aldi stores to a lesser extent, which are all overtrading, whereas other stores are undertrading relative to expected levels based on national company averages. Any new convenience goods floorspace in Worksop which is promoted on the basis of quantitative need should be located within the town centre to complement the existing provision. Proposals outside the town centre / retail hierarchy of an inappropriate scale are likely to fail one or more of the PPS6 (3.4) policy tests.

1.10 Worksop is well served by comparison shopping facilities including the town centre, retail parks and non-food floorspace in superstores. In addition there is the market and smaller specialist shops distributed throughout town. Worksop's market share of comparison spending within the study area stands at c. 30% including retail parks and smaller centres and has declined slightly since 2004. However, the town has a high retention rate within the PCA for comparison goods other than clothes and fashion items.

1.11 As a result of the current offer and the ‘limited capacity’ and likely increase in internet sales, there is no immediate quantitative need for any significant additions to the comparison goods floorspace in Worksop. Even in the short to medium-term (2011 and 2016) there is no quantitative need for additional comparison goods floorspace in

Worksop. Only by 2021 is there any quantitative need and this is only very modest for c. 1,500 sq m (net) of additional town centre comparison goods floorspace.

1.12 However, it is possible that not all commitments will be built out as they are mostly for bulky goods floorspace for which there is little demand at the moment and two schemes are subject to legal agreements. This would then release more capacity to support town centre proposals. In addition, it is possible that a small market share increase of 2% might be achieved within the town centre and this would increase capacity in the medium term (2016) to 3,300 sq m (net) and 6,500 sq m (net) in the long term (2021). Any new comparison goods floorspace in Worksop which is promoted on the basis of quantitative need should be located within or around the town centre to complement the existing provision.

1.13 Although Retford is a smaller centre than Worksop it performs much better on many PPS6 indicators of vitality and viability. The main strength is the attractive historic shopping streets that give the centre a strong sense of place and arrival and orientation is easy due to the linear nature. The centre also has a main pedestrianised street. There is a good walk in population and the centre also has good accessibility by bus and car. For a town of this size Retford has a good mixture of national and quality independent retailers and there are two nearby supermarkets providing car parking and generating linked trips to the centre. The local market is also very popular. There is also a good range of supporting financial services and the town centre boasts two theatres. Retford has below average vacancy rates and relatively strong yields for a small centre and reasonable rental levels.

1.14 The town centre has a few weaknesses the main being the limited diversity such as the lack of a cinema and the weak office market. There is no anchor department or variety store although the supermarkets compensate for this to a certain extend. The Catchment area is restricted by larger competing centres and Doncaster in particular but also Sheffield, Meadowhall, Worksop, Lincoln and Gainsborough to a lesser extent. The business survey recorded declining business / investor confidence. There are also perceived car parking problem amongst business community and the railway station is too far from the centre to generate shopping trips. There are also no remaining large development site due to the compact nature of the historic street pattern.

1.15 Retford is well served by convenience shopping facilities including a Morrisons superstore, an Asda supermarket, a Netto, Aldi, and an Iceland. In addition there are the town centre shops and traditional market, and smaller shops distributed throughout the town all taking up available expenditure. Despite this Retford's market share of convenience spending within the catchment area has declined since 2004. There is very little leakage from the town itself but in the surrounding secondary catchment area (SCA) there are now new competing superstores in Doncaster and Gainsborough that have increased leakage.

1.16 There is some current capacity for additions to the convenience goods floorspace in Retford and a small supermarket could be supported largely on the basis of the overtrading at the out-of-centre Morrisons superstore. By 2021 this capacity has grown to a medium sized supermarket (c.2,200 sq m net), however, as this would be at the expense of new town centre floorspace a better strategy would be to support a small to medium sized supermarket (c. 1,500 sq m net). Any new convenience goods floorspace in Retford which is promoted on the basis of quantitative need should be located within or close to the town centre to complement the existing provision.

1.17 Retford has a reasonable comparison goods offer for a small town centre with a regular market and smaller specialist shops distributed throughout town. There is a good supporting superstore offer but the retail warehouse offer is very limited. The town has a reasonable retention rate within the PCA for comparison goods other than clothes.

1.18 As a result of the 'limited capacity', there is no immediate or short-term (2011) quantitative need for any significant additions to the comparison goods floorspace in Retford. The exception might be town centre floorspace as the assessment identifies a generous sales density for the centre suggesting a degree of possible overtrading but this should only be used to support other town centre floorspace, not sequentially inferior developments.

1.19 In the medium-term by 2016 there is a quantitative need for 300 sq m (net) of additional town centre comparison goods floorspace and in the long term (2021) there is a quantitative need for 1,300 sq m (net) of additional town centre comparison goods floorspace. Any new comparison goods floorspace in Retford which is promoted on the basis of quantitative need should be located within or around the town centre to complement the existing provision.

1.20 The study identifies possible development sites in both Worksop and Retford to accommodate some if not all of this quantitative need over the plan period as far as 2021. National expenditure forecasts are not available beyond 2016 therefore longer term quantitative need (2026) is not identified in the study and it is recommended that the study is updated before 2016.

1.21 It is recommended that both Worksop and Retford are designated as town centres in the LDF with perhaps Worksop being differentiated with the description as a major town centre rather than designating Retford as a district centre to achieve the hierarchy. The study provides guidance on recommended town centre and PSA boundaries in both centres. It also provides guidance on the designation of primary and secondary frontages in these centres

1.22 There are also local centres within Bassetlaw that need to be designated to protect them from out-of-centre proposals and to ensure that development that takes place there is of an appropriate scale. The study also provides some policy guidance on the appropriate scale of development in these smaller local centres / parades and protecting them from out-of-centre competition such as large petrol filling station shops (PFSS).

1.23 Guidance is also provided on retail warehousing such as including a definition of bulky goods within policies to resist attempts to relax planning conditions. It is also recommended that the Council review the policies on shop frontages and hot food takeaways to reflect the changed Use Classes Order. The Council might also want to consider a new policy on PFSSs and reviewing the policy on guiding / encouraging retail development in the countryside to ensure it is compliant with the policy tests in PPS6. PFSSs can undermine local and village centres and proposals require careful consideration. Likewise garden centres and farm shops can grow into more than local attractions competing with local shops if they are not carefully planned and controlled.

1.24 Finally, in drafting all policies for the LDF the Council should be mindful of guidance in PPS1 that advises that LPAs need not replicate the policy guidance contained in PPGs and PPSs other than where local interpretation is needed and then they should only refer to the specific policy guidance and tests. This will make the final LDF document shorter and easier to read and use by members of the public.

1.25 The overall conclusion of the study is that the challenge for Bassetlaw DC is to enable the two main centres to compete more effectively with competing centres. This will involve protecting the centres from further out-of-centre development that competes directly with the centres and weakens their offer. It will also involve identifying new sites in both centres for town centre uses. In Worksop town centre there is the need to identify sites for a medium sized supermarket, further town centre non-food floorspace, anchored by a small department or variety store, and possibly a site for a town centre cinema to help foster the evening economy. In Retford there is the need to identify sites for a small to medium sized supermarket but there is no great need for additional non-food floorspace with the possible exception of bulky goods floorspace. The implementation of these and other recommendations within this report will greatly improve the offer for local residents and will also help both town centres to compete much more effectively with competing centres and retail destinations.

2.0 Introduction

2.1 Martin Tonks of MT Town Planning was appointed by Bassetlaw District Council in October 2008 to carry out a retail study of their two main shopping centres of Worksop and Retford and their catchment areas. The purpose was to bring up to date the evidence base, conclusions and recommendations of the 2004 Bassetlaw Retail Study, carried out for the Council by England & Lyle, in order primarily to:

- replace the current outdated study;
- inform the Core Strategy and subsequent components of Bassetlaw's Local Development Framework (LDF);
- take account of new national and regional planning guidance;
- take into account recent development and new commitments;
- help in the management of the town centre; and,
- assist in the consideration of planning applications.

2.2 The consultant's brief indicates the objectives for the new study are to carry out the following in a manner consistent with the requirements and guidance of PPS6:

2.2.1 To assess the **need** for additional retail development in Bassetlaw Borough in terms of:

a) quantitative need for additional floorspace, for a) comparison and b) convenience shopping, in the short-term (up to 2011), medium-term (by 2016), long-term (by 2021) and, so far as practicable, very long term (by 2026); and,

b) qualitative need.

2.2.2 As part of this assessment to consider scenarios with higher house-building projections.

2.2.3 To carry out **health checks** of the vitality and viability of the two main centres.

2.2.4 Identify qualitative gaps in provision in the two centres.

2.2.5 Recommend where further retail growth should be directed.

2.2.6 Advise on the boundaries of the retail core (Primary Shopping Areas in PPS6 parlance) and town centre boundaries of Worksop and Retford.

2.2.7 Recommend priorities for action planning and investment.

2.2.8 Provide advice on policies and proposals for inclusion in the LDF.

2.2.9 Assess the competitiveness of the two main centres in relation to the main competing centres of Gainsborough, Newark, Mansfield, Doncaster, Sheffield and Meadowhall.

2.2.10 Consider the impact of continued growth in etailing on retail capacity in the two main centres.

2.2.11 Consider the impact of the out-of-centre retail parks and supermarkets on the two main centres.

2.3 To achieve these objectives and inform the update a 1,000 household telephone survey was commissioned (using a similar study area and subzones as the survey for the 2004 study). In addition visitor surveys (250 sample) were undertaken by NEMS market research to determine the extent of the catchment area of the two centres and also town centre business surveys were undertaken by NEMS (175 sample). The Study also draws on information compiled by the Council. In addition, information and reports were purchased from a number of sources to inform the study including:

a) Experian Business Strategies (EBS) expenditure and demographic profiles for each of the seven zones that comprise the study area;

b) Experian Goad Catchment Area and Business Categories Reports for Worksop and Retford town centres; and,

c) an extract from the Focus database of retailer requirements for premises in the two town centres.

2.4 This information has been brought together in the following report which is structured as follows:

section 3	summarises retail floorspace provision in the two town centres and their catchment areas, as well as detailing the main changes since the 2004 Retail Study;
section 4	presents the health check of Worksop town centre and concludes with a SWOT analysis of the centre;
section 5	presents the health check of Retford town centre and concludes with a SWOT analysis of the centre;
section 6	outlines the methodology of the quantitative assessments;
section 7	details the quantitative assessment for convenience goods in Worksop, with reference to appended tables;
section 8	presents the convenience goods quantitative assessment for Retford;

section 9	details the quantitative assessment for comparison goods in Worksop, with reference to appended tables;
section 10	presents the comparison goods quantitative assessment for Retford;
section 11	considers qualitative gaps in provision with reference to the health checks, retailer demand / requirements and quantitative assessments; and,
section 12	the final section presents the conclusions and recommendations of the study.

2.5 The consultant's brief indicates the objectives for the new study are to carry out the following in a manner consistent with the requirements and guidance of PPS6:

2.6 Attached as appendices are: the study area map (Appendix 1), quantitative assessment tables (Appendices 2 & 3) and market share tables (Appendix 5) and a report of survey (Appendix 4) highlighting the main findings of the household survey and changes in shopping patterns since 2004.

3.0 Bassetlaw Shopping Provision

3.1 Bassetlaw district was created in 1974 when the Boroughs of East Retford and Worksop and their Rural District Councils were merged into a new authority. The district has a population of c. 112,000 people and is located in the north of Nottinghamshire in the East Midlands region. However, in many respects it forms an extension of the Yorkshire and Humberside region as the district is closer to Sheffield and Doncaster than Nottingham 28 miles to the south. This is reflected in shopping patterns within the district with most people looking to these Yorkshire towns and surrounding retail parks / malls / outlets for their non-food shopping requirements rather than Nottingham or smaller East Midland centres such as Lincoln, Mansfield or Chesterfield.

3.2 Worksop in the west of the district is the main administrative centre of Bassetlaw district and the largest town in Bassetlaw with a population of c. 40,000. The town centre once served the surrounding mining communities of the northern East Midlands coalfield but now the local economy revolves around retail, distribution, manufacturing, education and health. The East Midlands Regional Plan (2009) designates Worksop as a sub-regional centre along with Mansfield, Newark, Chesterfield and Ashfield. Major retail facilities in Worksop include the Priory Shopping Centre and Sandy Lane Retail Park. In addition there are two large out-of-centre superstores.

3.3 According to Goad, Worksop town centre has c. 68,900 sq m of commercial floorspace of which 32,000 (46%) is occupied by comparison goods retailers, 6,100 sq m (9%) is occupied by convenience goods retailers, 25,400 sq m (37%) is occupied by services and 5,500 sq m (8%) is vacant. In comparison to the Goad UK averages there is an over-representation of comparison goods floorspace (UK 39%), an under-representation of convenience goods floorspace (UK 14%), service floorspace is around the UK average level and vacancies are slightly below,

3.4 The visitor and household surveys indicate that Worksop draws most of its trade from the town itself and the former mining communities to the north and west including Carlton, Whitwell and Creswell particularly for convenience goods. However, the catchment area for both categories of goods is curtailed by the proximity of competing centres. For convenience goods these include Doncaster to the north, Retford to the east, Mansfield to the south and Dinnington and Clowne to the west. For comparison goods, for which people are prepared to travel further albeit on less frequent trips, there are the same competing centres plus Sheffield and Meadowhall that are the main destinations for leakage, and Doncaster Lakeside Outlet Centre to a lesser extent. The retail park at Sandy Lane in Worksop is the largest bulky goods facility for some distance and draws some trade from further afield including Retford where there are few comparable outlets.

3.5 Retford in the east of the district is the second largest town in Bassetlaw with a population of c. 22,000. The eastern part of the District does not have the same mining history as the west and the town centre serves the surrounding rural communities which tend to be smaller settlements with fewer local facilities than the former mining villages in the west of the district. The East Midlands Regional Plan designated Retford as an ‘other retail and service centre of sub-regional significance. There are few retail facilities in Retford outside the town centre other than a Focus DIY store, There are two large supermarkets on the periphery of the town centre that help retain local convenience goods expenditure.

3.6 According to Goad, Retford town centre has c. 55,200 sq m of commercial floorspace of which 19,800 (36%) is occupied by comparison goods retailers, 14,000 sq m (25%) is occupied by convenience goods retailers, 18,800 sq m (34%) is occupied by services and 2,750 sq m (5%) is vacant. In comparison to the Goad UK averages there is an under-representation of comparison goods floorspace (UK 39%), an over-representation of convenience goods floorspace (UK 14%), service floorspace is just below the UK average level and vacancies are well below, The over-representation of convenience goods floorspace in the centre is accounted for by the inclusion of the two edge / out-of-centre supermarkets (Asda and Morrisons) within the Goad town centre boundary / survey area.

3.7 The visitor and household surveys indicate that Retford draws most of its trade from the town itself and the surrounding rural communities. However, like Worksop, the catchment area for both categories of goods is curtailed by the proximity of competing centres and particularly for non-food. For convenience goods these include Doncaster to the north, Gainsborough to the east, Newark and Ollerton to the south and Worksop to the west. For comparison goods, there are the same competing centres plus Doncaster Lakeside Outlet Centre and to a lesser extent Sheffield and Meadowhall, Lincoln, Mansfield and Newark. The bulky goods retail warehouse offer in Retford is very limited and there is a high leakage rate for these classes of goods that normally generate fairly localised shopping patterns.

3.8 The Regional Plan did not designate any lower tier centres in Bassetlaw. Whilst the retail provision in smaller settlements is non-existent in many hamlets it is quite extensive in some larger villages, particularly the former mining villages such as Harworth, Langold and Carlton. On the fringes of the former mining area is the traditional village centre of Tuxford and nearby Markham. The largest village in the rural east of the District is Misterton.

3.9 There are also smaller local centres and Parades within the two main towns of Worksop and Retford that are not designated as local centres in the Local Plan. In Worksop there are four distinct local centres that are not designated in the Local Plan – Raymoth Lane, Prospect Hill, Manton and Gateford Road. The latter is a sporadic extension of the town centre to the north enroute to the Tesco store and Sandy Lane

Retail Park but it is now home to a modern Aldi store. Raymoth Lane is a small purpose built local centre anchored by a Tesco Express that recently opened to serve new residential development in the north of Worksop. Prospect Hill is anchored by a Sainsburys Local store, previously a Jackson's convenience store, and there are some adjacent units. Manton is a small parade in the east of the town anchored by a small convenience store and serving an area suffering social exclusion. There are no comparable suburban local centres in Retford other than Ordsall anchored by a small Co-op store.

3.10 In addition to losing trade to towns in neighbouring authorities, there is also some inflow into Bassetlaw and Worksop in particular. Worksop draws considerable convenience and comparison goods trade from Whitwell and Creswell that are both in NE Derbyshire administrative area. It also draws some trade from the Anston area of adjoining Rotherham MBC. However, much of this inflow expenditure is going to the out-of-centre supermarkets and retail park as much as the town centre.

4.0 Worksop Town Centre Health Check

4.1 One of the Government's primary objectives in Planning Policy Statement 6 (PPS6, 2005) is to sustain and enhance the vitality and viability of town centres. Vitality and viability are terms used to describe the overall health of a town centre. Vitality refers to how busy different parts of the town centre are at different times of the day, whilst viability reflects the ability of a town centre to attract continuing investment so that it can be maintained, improved and changed to meet new needs.

4.2 A detailed audit of the vitality and viability of Worksop town centre is set out in this section. PPS6 lists the indicators which are to be used for monitoring the health of town centres:

1. diversity of uses;
2. the amount of edge / out-of centre retail / leisure / office floorspace;
3. potential capacity for expansion;
4. retailer representation and intentions to change representations;
5. shopping rents;
6. proportion of vacant street level property;
7. commercial yields on non-domestic property;
8. pedestrian flows;
9. accessibility;
10. customer views and behaviour;
11. perception of safety and crime; and
12. state of the town centre environmental quality.

4.3 These indicators are considered in the same order and draw upon additional information and indicators. The conclusions of the health check are summarised in a SWOT analysis of strengths, weaknesses, opportunities and threats.

Introduction

4.4 Worksop is located in the East Midlands region but in many respects forms an extension of the Yorkshire and Humberside region as the town is closer to Sheffield and Doncaster than Nottingham 28 miles to the south. The town centre once served the surrounding mining communities of the North Notts coalfield but now the local economy revolves around retail, distribution, manufacturing, education and health. The town is the administrative centre of Bassetlaw District Council created in 1974 when the Boroughs of East Retford and Worksop and their Rural District Councils were merged into a new authority. Major retail facilities in the town include the Priory Shopping Centre and Sandy Lane Retail Park. In addition there are two large out-of-centre superstores.

Diversity of Uses

4.5 These indicators are considered in the same order and draw upon additional information and indicators. The conclusions of the health check are summarised in a SWOT analysis of strengths, weaknesses, opportunities and threats.

4.6 In addition to shopping, the town centre performs important roles in:-

- entertainment, culture and leisure;

- administration;
- religion; and,
- housing in and around the town centre.

4.7 The town centre has a good range of shops and services for a centre of this size as outlined in the retailer representation section. The household telephone survey found that 77% of Worksop residents combined their shopping trip to the town centre with at least one other purpose. Personal business (banks, building societies, post office, etc) was the most common response (63%). Other reasons for combined trips included visiting a restaurant, pub or other social place (32%), visiting / meeting friends / family (26%), visiting the market (23%) and visiting the retail park (19%) although the main facility at Sandy Lane is around a mile from the centre. Combined trips with other leisure activities were less frequent – library (12%), sports activities (9%), and theatre (5%).

4.8 The shops in the centre are supported by a good range of business and financial services and retail services. Business and financial services includes building societies which are over-represented as are other business services but legal services and business goods were under-represented. Retail services include hair and beauty salons, opticians, dry cleaners and photo processing. Overall this group of businesses was over-represented in Worksop town centre relative to UK averages but there were variations between classes, for example, vehicle rental and repairs were over-represented as were photo studios, opticians and hair salons. However, clothing and fancy dress hire, filling stations, TV hire and video / DVD hire were all under-represented.

4.9 The centre also has a good range of pubs, bars and daytime cafes, and some restaurants, although most of the latter are on the periphery of the centre. The Experian Goad report for the centre (July 2008) recorded a below average provision of leisure services (cafes, restaurants, bars, pubs, etc.) but provision varied within this classification. There was above average provision of cafes but under-provision of restaurants. Pubs were over-represented as were night clubs but bars under-represented.

4.10 The town's main indoor sports and recreational facility is shared with a school and is over a mile from the centre with limited opportunities for linked trips for shopping, eating out, and drinks and so doesn't really add to the diversity.

4.11 There is no cinema provision in the town centre the nearest being Sheffield or Doncaster so this is a major gap in provision. A cinema is planned in the north of the town but the site is 200m beyond the railway station and so is too far to spin off significant levels of linked trips with the town centre. There is a theatre closer to the centre that has a good programme of plays and events but is too small to benefit the evening economy significantly.

4.12 The town's single main tourist attraction is Worksop Priory located some distance from the centre. The main Library is located on Memorial Avenue on the edge of the town centre.

4.13 The limited leisure facilities in the heart of the town centre is a concern identified in the visitor survey with 50% of respondents stating the town needed a cinema, 26% stated a bowling alley, 9% a theatre and 9% a swimming pool.

4.14 The main administrative function of the town centre relates to the District Council. The Town Hall and civic offices on Potter Street are a significant generator of footfall and of lunchtime expenditure by employees in town centre businesses. Otherwise at present the office sector is limited and localised.

4.15 The primary role of the town centre is as a shopping centre, however, it does have other roles and in particular as a service and administrative centre. The current leisure offer is very limited and dispersed and the evening economy is mainly alcohol related. The lack of a cinema and large theatre is a particular problem in encouraging linked trips with the centre although the new cinema proposals will address this to some extent. Overall the centre is not very diverse and planned developments are too peripheral to greatly benefit the vitality and viability of the centre. The centre performs below average on this PPS6 indicator.

The Amount of Edge / Out-of-Centre Floorspace

4.16 The main edge / out-of-centre retailing facilities are located to the north-west of the Town Centre. The main superstores are the recently extended J Sainsbury's unit at High Grounds (3,367 sq m net) and the existing Tesco store at Gateford Road (3,076 sq m net).

4.17 In terms of comparison goods retail floorspace, Sandy Lane Retail Park provides the main location for out-of-centre retail floorspace. The retail park includes Currys, Carpet Right, Comet, B&Q, Wickes and Peter Storey Carpets. These units have a total net floorspace of 5,982 sq m and there is a planning consent (subject to a legal agreement to extend this retail park).

4.18 Closer to the Town Centre there are a small number of relatively large freestanding retail outlets, including Halfords at Carlton Road and Matalan at Eastgate. At the southern end of the town centre there is the former Glynn Webb DIY warehouse that is vacant and adjoining Chiltern Mills shop.

4.19 Leisure provision in the Town Centre is limited and the main leisure centre is shared with a school some distance from the centre. Surrounding the centre there are a few small private gyms, as well as parks and playing fields, sports pitches and allotments. There is no cinema in the town but one is planned for an out-of-centre site.

4.20 In addition to the out-of-centre superstores and retail warehouses the main problem for Worksop is the competing centres and their surrounding retail parks and facilities. In particular Sheffield and the Meadowhall Centre and to a lesser extent Doncaster and the Lakeside Outlet Centre. There are also competing centres in other direction restricting the catchment of the centre including Mansfield and Nottingham to the south, Lincoln and Gainsborough to the east, Rotherham to the NW and Chesterfield to the SW. Overall Worksop town centre does not perform well on this PPS6 indicator.

Potential Capacity for Expansion

4.21 There are a number of potential opportunities for new developments within and surrounding Worksop Town Centre. Much of the Town Centre area is within the Worksop Conservation Area that can restrict some development and rear servicing required by many multiples is not possible in much of the centre. Despite this there are a number of infill / redevelopment sites on Bridge Street and elsewhere in Worksop.

4.22 The Local Plan identifies the former hospital site on Memorial Avenue for retail development and part of this edge-of-centre site remains to be redeveloped. The Local Plan also identifies the bus depot and a small site on Newcastle Avenue for retail development. The bus depot is attached to the central bus station which will constrain development along with the elongated shape. A site further along Newcastle Avenue has been developed for a Sainsbury Local store.

4.23 There are also two large redevelopment opportunities in the centre itself. The surface car park behind the Priory Centre has already been partially decked and this could be extended to release more of the car park for development. There is also the potential to extend the site over the canal as there are a number of vacant buildings located there although this is elongating the town centre and getting further away from the primary frontages. The car park also fronts onto the canal itself and this could be the focus of an attractive new development.

4.24 The second site is the current market site and adjoining car park that wraps itself around the town hall. The site could incorporate the former Glynn Webb DIY unit and the health centre building on the corner of Bridge Street and Newgate Street. Obviously the market, surface car parking and any occupied buildings would have to be relocated centrally but the site could create a southern anchor to balance the northern anchor formed by the Priory Centre. The site does have some current access constraints that would also have to be addressed.

4.25 Outside the Town Centre area the main development opportunity is the Tesco relocation site to the north of the railway line. Whilst this is out-of-centre it is close enough to generate some linked trips with the centre and is certainly a lot closer than the current Tesco. A cinema is also planned further afield but is too far too generate many linked trips with bars and restaurants even at the northern end of the centre.

4.26 In the business survey very few respondents had plans to refit, extend or improve their premises (4%), 6% intended to relocate within new premises within the centre and 1% intended to close but the vast majority (87%) had no plans. This perhaps reflects the uncertainty of the national economic climate as much as local conditions in Worksop town centre. Overall, as a result of the wider redevelopment opportunities in and around the centre Worksop scores quite well on this PPS6 indicator.

Retailer Representation

4.27 The local plan designates the primary frontages stretching from Watson Road along Bridge Place, incorporating the Priory Centre and the entire length of Bridge Street to Potter Street but it is clear from the retailers and businesses present along these roads that many of them are secondary frontages with high vacancy levels and some charity shops. The biggest concentration of multiples and the highest footfall is in the Priory Centre and on the adjacent pedestrianised section of Bridge Place / Street between Ryton Place and Newcastle Avenue / Street. This area between Ryton Place and Newcastle Avenue / Street, including the pedestrianised Bridge Street and Priory Centre forms the Primary Shopping Area (PSA) in Worksop town centre.

4.28 The PSA is where the highest footfall and zone A rents will be achieved and this is where the majority of the town centre's 131 national retail multiples and major stores are to be found. Experian Goad identify 11 of the 30 key national retailers in Worksop including Argos, Boots, Burtons, Carphone Warehouse, Clintons, Dorothy Perkins, Superdrug, Vodafone, WH Smith, Wilkinsons and Woolworths (the national closure took place after survey date). M&S are also a key attractor but the new unit in the Priory Centre Marks is a Simply Food format.

4.29 Multiples account for around one third of units in the centre but over half the floorspace which is a typical pattern as multiples tend to occupy larger units than independents. Multiples also tend to occupy the primary frontages where pedestrian movement (footfall) is highest. The number of national multiples represented therefore decreases away from the PSA although a number of major high street banks / building societies including HSBC, Nat West, Nationwide, Halifax and Barclays, are located on Bridge Street to the South of Newcastle Avenue.

4.30 There is a diverse representation of smaller independent and specialist shops in the secondary frontages along Bridge Street away from the PSA. There are also a number of side roads leading from the pedestrianised Bridge Street / Bridge Place which are characterised by a lower level secondary retail offering, public houses and takeaways.

4.31 To the south of Bridge Street, at its junction with Potter Street, the area is characterised by a number of cafes, estates agents, solicitor's offices and lower order retailers such as discount and charity shops. This area of the town centre is also the location of Worksop Market and Bassetlaw Council offices.

4.32 The market itself was quite popular with 60% of visitors visiting it, although 17% did say infrequently, and there were above average satisfaction levels with the frequency and location of the market, the only complaints were with the quality of goods on sale. Suggested improvements included more stalls (41%), a better variety of stalls (31%) and relocation (17%).

4.33 The Experian Goad Report for Worksop (July 2008) records 367 retail / business units in the town centre of which 32 (8.7%) are convenience and 136 (37.1%) comparison. In addition there were 60 retail services (hair salons, opticians, travel agents, etc.), 65 leisure services (bars, cafes, restaurants, pubs, etc.) and 38 financial and business services. In terms of representation compared to national averages the two categories of shops were around the UK average as were financial and business services, retail services were slightly over-represented and leisure services slightly under-represented.

4.34 In terms of floorspace taken up in the centre, comparison shops (46%) were above the UK average (39%), indicating the occupation of above average size units by non-food shops, whilst convenience shops (9%) were below the UK average (13.7%). Financial and business services (7.9%) were also below the UK average (9%) indicating they too were occupying below average size units for that type of business. Like the number of units taken up by retail services the amount of floorspace (9.9%) was also above the UK average (6.8%) but leisure services were slightly under-represented.

4.35 With regard to specific classes of convenience goods frozen food shops were over-represented in Worksop as were grocers / delicatessens, butchers and shoe repair shops. Under-represented convenience goods included fishmongers, supermarkets, greengrocers, indoor markets and bakers. Despite the lack of an anchor supermarket visitors in the street survey indicated that they thought the centre had a good choice of food shops and supermarkets (scoring 131 on a 100 average index where 200 is the maximum score and 0 the minimum).

4.36 Visitors also thought the choice of non-food and clothes shops was quite good (scoring 131 on a 100 average index). Under-represented comparison goods operators according to the Goad survey include booksellers, music and video recordings, photographic equipment, garden and DIY shops. Over-represented non-food shops included carpets and flooring, furniture, office supplies and vehicle accessories. The main suggested improvement to the town centre in the visitor survey was more fashion and clothes shops with several respondents naming specific multiple retailers currently unrepresented in Worksop.

4.37 The business survey recorded a decline in business confidence in the centre in the last year particularly compared to the earlier studies with 57% stating it had declined and only 18% stating it had improved. However, only 15% of respondents reported currently poor trading performance and 35% reported it had declined in the last year whilst only 26% reported an improvement. Overall future business confidence in the centre looks like improving according to 32% of respondents with only 19% expecting a decline. Clearly there are mixed fortunes in the centre at the moment and business confidence has taken a dip but local businesses are still optimistic about the future.

4.38 Worksop has fallen slightly in national rankings since 2007. The 2009 Javelin Venuescore that measures centres on the number and quality of their multiple offer scores Worksop at 91 but the centre has fallen in the national rankings from 256th in 2007 to the current 263rd. The table below shows the rankings of competing centres.

Table 3.1 Javelin Venuescore rankings for Worksop Sub-Region Area

Centre	Javelin Venuescore	National Rank
Nottingham	458	7
Lincoln	264	31
Sheffield	257	38
Doncaster	236	45
Meadowhall	226	49
Mansfield	148	143
Chesterfield	145	150
Worksop	91	256
Retford	56	434
Gainsborough	51	474

Source 2009 Javelin Venuescore

4.39 The Javelin rankings have to be considered with a degree of caution because they only measure the quality of the multiple offer. There are also some anomalies as the Lakeside outlet park doesn't perform very well due to the presence of branded outlets rather than high street multiples. Some centres such as Gainsborough and Retford have a comparable convenience goods offer to Worksop in terms of floorspace that is more central therefore this adds to the attractions of those centres. However, overall the rankings provide a useful indicator of where Worksop stands in the regional retail hierarchy.

4.40 The Focus Database of retailer requirements lists requirements from 15 businesses for premises in Worksop town centre. These have to be treated with caution as sometimes requirements are on a regional rather than centre by centre basis and two of them are now located in the Priory Centre so unlikely to require additional / larger premises. The Focus list includes Debenhams (smaller Desire format – mainly clothes), T J Hughes, Pets at Home, Phones 4 U, Frankie & Benny's, Textiles Direct and B&M (discount variety store). Other requirements are mainly discount orientated as well as two charity shops. In addition consultations with agents active in the town centre indicate two possible requirements from Zara and Pizza Hut. These retailers / leisure operators require units of varying sizes ranging from 25 sq m net up to 14,000 sq m net (TJ Hughes) within the Town Centre.

4.41 Overall the centre has quite a good retail offer for a town of this size although it could be improved if there was an in / edge-of-centre supermarket to generate higher footfall. The quality and range of shops could also be improved as the current offer is slightly discount orientated. There is reasonable retailer demand for representation in Worksop considering the national economic climate. Worksop town centre therefore scores above average on this PPS6 indicator.

Shopping Rents

4.42 According to CRE Colliers who publish estimated rental information for the main centres in the UK Zone A rents[1] per square metre (psm) in Worksop, have remained relatively constant at £650 psm (£60 per square foot (psf)) since 2005. In the last decade, rental rates have fluctuated from a low of £45psf in 1997 / 1998 to the current high of £60 psf.

4.43 In terms of competing centres, Sheffield and Meadowhall have experienced rental growth in the last decade with zone A rental rates in Sheffield City Centre of £235psf and £400psf at Meadowhall. The regional centre of Nottingham 25 miles to the south has experienced a similar general increasing trend in rents with City Centre retail rents in 2008 at £250 psf. Mansfield, also to the south of Worksop, has experienced rising zone A rents from 1987 onwards to the current rent of £125 psf (double that of retail space in Worksop Town Centre).

4.44 The rental values in Worksop Town Centre are similar to those found in neighbouring Retford, where rents have remained relatively constant since 2003 when they rose to £60psf from £50 psf.

4.45 In the business survey businesses were asked to rate Worksop on various criteria and these were converted to 100 average index for comparison. This indicated that affordable rent was regarded as a limited benefit to Worksop town centre as a business location (110 on the 100 average index) behind accessibility, variety of shops and the local market. Conversely, rents and overheads were reported as the fourth highest problem in the centre after low footfall, availability of car parking and security issues although nearly half the respondents (49%) could not list a single disadvantage.

4.46 Overall, the rental levels for Worksop appear appropriate to the size and offer of the centre relative to the regional shopping hierarchy. These levels are comparable with nearby Retford. Rents in higher order centres, such as Mansfield, Nottingham and Sheffield are greater, given the shopping offer of these centres, levels of footfall and the range and quality of facilities on offer. Worksop town centre therefore performs around average on this PPS6 indicator.

Proportion of Vacant Street Level Property

4.47 The Experian Goad Survey for Worksop Town Centre in July 2008 recorded approximately 367 retail / business units within the centre of which 36 were vacant, a vacancy rate of 9.8%. This is below the UK average of 10.4%. In terms of floor area, approximately 5,536 sq m of vacant floorspace, of various use class is available in Worksop Town Centre, which represents 8% of the total available floorspace. This is around the UK average of 8.4%, however, much of this can be attributed to the vacant former Glyn Webb DIY unit at the Mayfair Centre, which is on the periphery of the town centre.

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[1] Zone A rentals are the rents achieved for the first 6 metres (20 ft) of shop floorspace (sales area) from the shop entrance in primary frontages

4.48 Since the Goad survey was undertaken Woolworths has closed as part of the national closure programme. Whilst most vacancies are peripheral and in smaller units in the secondary frontages, there are six unoccupied units in the Priory Centre and extension although the marketing agents (Fisher Hargreaves Proctor) report that all but two of these vacant units are under offer.

4.49 In comparison to past vacancy levels, vacancy rates have risen although this is always to be expected following a major retail development such as the Priory Centre extension. The Experian Goad survey of August 2004 recorded a vacancy level then of 5.5% well below the then national average.

4.50 Whilst vacancy rates have increased slightly since the 2004 Bassetlaw Retail Study, they still remain under the 10.4% national average particularly if the Priory Centre offers are taken into consideration. The town centre therefore performs just above average on this PPS6 indicator.

Commercial Yields on Non-Domestic Property

4.51 The commercial yield on a property investment is calculated by dividing the annual rent by the capital value of a property and expressing this as a percentage. The yield represents the return to the investor for risk taking. A low yield indicates a strong centre as investors are prepared to wait longer for a return on their investment.

4.52 The July 2008 Valuation Office Agency (VOA) Property Market Report indicates yields have fallen from 9% in 2000 to 7.5% in 2007 to 7% in 2008. However, current information from Estates Gazette Interactive (Egi) suggests yields of around 9% for Worksop Town Centre, which have been relatively stable since 2000. Consultations with commercial agents suggest the Egi estimate is more likely to reflect current market conditions, including falling property and land prices and reductions in rents that are all expected to impact on yields. Agents expect that there will be a slight increase in yields in Worksop over the next one to two years until the property market stabilises.

4.53 The Egi regional average yield for East Midlands / South Yorkshire is c. 7.5%. This reflects the range of shopping destinations and centres that can be found in the region from lower order town centres to the higher order cities, such as Sheffield and Nottingham and the out-of-centre Meadowhall which are all anchored by department stores and higher order retailers. The larger centres have yields of between 5% (Nottingham and Meadowhall) and 6% (Sheffield) depending upon their attractiveness to the market.

4.54 The Egi rental yield of 9% for Worksop is considered appropriate for the size and retail offer of the centre relative to the regional retail hierarchy. It demonstrates that investors do not have long term confidence in the centre as a retail destination but are prepared to invest in the medium term (up to 2021) if the valuations match the 9% yield. The centre therefore performs slightly below average on this PPS6 indicator.

Pedestrian Flows

4.55 The highest pedestrian flows (footfall) within Worksop Town Centre are found along the pedestrianised sections of Bridge Place and Bridge Street as well as the adjacent Priory Centre i.e. the PSA / primary frontages where Zone A rentals are the highest. Within this area, footfall is highest at the northern end of Bridge Place, in proximity to the Priory Centre.

4.56 There is a hill towards the southern end of Bridge Street and footfall is low except on market days. There is also confusion as to pedestrian priority along upper Bridge Street due to time restricted car access, haphazard disabled parking arrangements and poor legibility in the street scene. However, orientation is easy due to the linear nature of the centre.

4.57 There are no obvious circuits in Worksop due to the predominantly linear nature of the town centre. Whilst pedestrians may venture down one of the side streets, they are likely to return to Bridge Street the same way. The one exception is the Priory Centre where a complete circuit of retail frontages can be achieved without turning back on oneself.

4.58 The car parks and bus station are the main generators of footfall. The railway station is too far out to generate many linked trips. Within the centre there are no major anchors such as supermarkets or department / variety stores to attract footfall so the main anchor is the collective offer of the Priory Centre stores. The visitor survey undertaken before Woolworths closed recorded the shop as the third main attraction in the centre after M&S Simply Food and Iceland but ahead of Dorothy Perkins, Wilkinsons, New Look and Matalan. The market is also a key attractor on the days it trades despite reducing the number of car parking spaces at the southern end of the town centre.

4.59 Some businesses (19%) reported low footfall as a problem in the business survey although 49% couldn't think of any problems with the centre. Footfall does appear to decline away from the primary frontages, however, overall the centre appears to perform reasonably well on this indicator despite the lack of major anchor stores. The combined offer at the Priory Centre acts as a northern anchor for the centre and on market days the market itself draws people down secondary streets to the southern end of the town. Overall footfall is around expected levels in a centre of this size and Worksop performs around average on this PPS6 indicator.

Accessibility

4.60 There is good ease of movement around the centre due to the pedestrianisation and this was reflected in positive responses in the visitor survey. However, there is pedestrian / vehicle conflict caused by priority confusion in the southern part of Bridge Street and 88% of visitors felt the entire street should be pedestrianised. Although the business survey recorded this as a fairly low priority for investment, it is understood that Council Officers have received greater support from retailers for such a step than was reflected in the survey.

4.61 Orientation within the centre is easy due to the linear nature and scored well on the visitor survey (150 on a 100 average index). Signage appears to be more than adequate and also scored well on the visitor survey (140) although observations from site visits found that public toilets were not clearly signposted. (The availability of toilets scored just above average at 103.)

4.62 There is good walk-in access from surrounding residential areas that merge into the centre in most direction. The visitor survey recorded 27% of visitors having walked to the centre.

4.63 Worksop does not have the benefit of a covered central bus station enjoyed by towns of a similar size. Instead a collection of bus stops on Hardy Street act as the main public transport hub. It is however close to the Primary Shopping Area with regular services to surrounding suburbs and outlying villages. Services to more distant destinations are less frequent. The visitor survey recorded 22% of visitors having arrived by bus.

4.64 The railway station located to the north of the centre is within walking distance of the centre and there are frequent services to Sheffield, Nottingham, Retford and Lincoln. The recently re-opened Robin Hood line serves rural villages to the south of the town and helps attract visitors. The visitor survey recorded 3% of visitors having arrived by train.

4.65 Road access around the centre is good with a southern bypass and radial roads leading to it. However, there is no internal ring road (like Retford) and combined with poor signage this makes finding the centre and its car parks quite hard for unfamiliar visitors. Despite this, in the visitor survey access by all modes was regarded as good although most respondents were regular visitors, as was the availability of parking.

4.66 There appears to be adequate parking within the centre but locating the main car parks at the Priory Centre and Memorial Avenue is not easy for visitors unfamiliar with the centre. The business survey recorded much greater concern about the availability of parking.

4.67 Overall, access to, from and within Worksop Town Centre is quite good, with the level of pedestrian accessibility to the retail core a particular advantage to the Town Centre. The centre is more difficult to approach for the unfamiliar visitor but it predominantly serves local needs so this is not a major weakness. The centre therefore performs above average on this PPS6 indicator.

Customer Views and Behaviour

4.68 Business survey questionnaires were completed by 100 (30%) of the 330 businesses in Worksop town centre. Some of the questions in the business survey were the same as a previous business survey undertaken in Worksop in two previous years that allows a degree of comparison for these questions. In addition a visitor survey was also undertaken by NEMS Market Research with a sample of 125 respondents.

4.69 Retail businesses were slightly over-represented amongst respondents to the business survey – 58% of respondents compared to 46% of businesses in the centre recorded in the Experian Goad category report. Most respondents were long established businesses – 59% over ten years and a further 11% over five years. In terms of why businesses were located in Worksop town centre (Q7) most were for commercial reasons – the local market, accessibility, high footfall and proximity of other businesses. Together the responding businesses employed c. 1,000 people of whom over half worked full time.

4.70 In terms of positive aspects of Worksop as a location, responses to Q13 indicated accessibility and the strength of the local market as the main benefit, followed by the variety of shops, local workforce and the presence of other businesses. Respondents were also asked to rank various aspects of the centre and these indicated that the most positive aspect was the safety during the daytime (127 on an average 100 index). Other positive aspects included street cleaning (126), the upkeep and appearance of older buildings (126), town centre management and maintenance (125), co-operation between businesses (125) and the quality of parks and open spaces (119). Negative aspects of Worksop as a business location included the lack of events (93), the limited leisure offer (97), the lack of interest from the Council / Local Authorities (98) and security and crime (97). On balance businesses reported far more positive aspects than negative.

4.71 In response to Q19 on what improvements to the centre businesses would like to see security measures such as CCTV and policing was ranked highest (151) followed by car parking improvements (145), an effective town centre forum (138), better marketing and promotion (136), an events and special promotions programme (131), business support / advice (124) and better delivery arrangements (124).

4.72 The visitor survey recorded that most respondents were fairly frequent visitors (88% weekly or more often) but didn't spend very long in the centre (72% no more than 2 hours). Nearly half the visitors (46%) had travelled by car, 27% had walked and 22% came on the bus. The most common reason for visiting was non-food shopping (mentioned by 59% of visitors in a multiple response Q4) followed closely by food shopping (44%), meeting friends / relatives (16%), visiting the bank / building society (10%), eating out (10%) and browsing / window shopping (9%).

4.73 Positive aspects of the centre rated by visitors included the range of banks and financial services (153 on a 100 average index), the ease of walking around (150) and the variety of places to eat and drink (147). Other positive aspects included access by bus (144), access by car (142) and signposting within the centre. There was only one negative issue raised in the visitor survey responses and that was the quality of the market (84) although the frequency and location both scored positively.

4.74 Overall the business and visitor surveys recorded generally positive views of the centre although there are clearly some problems with the centre such as safety and security, the quality of the market and availability of parking. The town centre management team was seen as a positive aspect of the centre by businesses although the suggestions for investment in events programmes, better marketing and promotion suggest the business community want to see the team performing a wider role. The town is clearly an attractive place to visit and shop in as recorded in the positive responses in both surveys. There are many positive aspects to the centre recognised by businesses and visitors alike and on balance, the centre performs reasonably well on this PPS6 indicator.

Perception of Safety and Crime

4.75 National crime statistics from 2006 / 2007 confirm that the Bassetlaw District area has a higher incidence of most forms of recorded crime than the national average. However, these statistics are for the whole administrative area not just Worksop town centre. CCTV has been installed in all public areas of the Town Centre including pedestrianised Bridge Street, the Priory Centre and the Bus Station and this might deflect crime away from the central areas to more peripheral parts of the centre / town. The centre itself has little evidence of vandalism or graffiti often associated with high crime areas.

4.76 The visitor survey recorded 84% of respondents felt safe in the centre during the day. 25% of respondents also visited at night mainly to go to pubs (94%) and / or eating out (32%) and / or late night shopping (10%). Most of these evening visitors (68%) felt safe in the evening too and those who didn't gave fear for their personal safety as the main reason for not feeling safe.

4.77 The business survey also recorded most businesses felt the centre was safe during the daytime (scoring 127 on a 100 average index) but less so in the evening (102 just above average). The business survey also recorded security problems (8%) as the third biggest problem for businesses in the centre after low footfall (23%) and car parking (10%), however, 49% of respondents couldn't think of any problems with the centre. Security improvements such as more policing / CCTV were recorded as the highest priority for investment in the business survey.

4.78 There appears to be a slight security problem in Worksop although this may be no worse than any other shopping centre as it is part of a national problem. For shoppers during the daytime there appear to be no major security problems, however, the low numbers visiting at night and the feeling of insecurity amongst some who do suggests there is a problem in the evening although again this is not unique to Worksop. Overall the centre performs around average for this PPS6 indicator.

State of the Town Centre Environmental Quality

4.79 The central area of Worksop, particularly the pedestrianised Bridge Street, forms a pleasant high street shopping environment with a number of attractive buildings (albeit with some in need of repair and renovation). The majority of the town centre except the Priory Centre is part of a conservation area. The Priory Centre extension is a useful addition to the town although the older adjoining mall is beginning to look tired. There is good quality paving along Bridge Street (the design of which is beginning to look dated) although the street furniture and extensive areas of planting do clutter some sections.

4.80 The approach to the centre varies between directions but is generally weak. From the southern bypass visitors are signposted along Newcastle Avenue where commercial uses announce the arrival before the road cuts across the pedestrianised Bridge Street. From the north there is an even poorer sense of arrival as secondary frontages sporadically continue for some distance out of the centre although the birdsfoot junction (Victoria Square) and canal bridge do mark the beginning of the centre proper. The approach from the east via the Priory along Memorial Avenue presents the most attractive entrances and best sense of arrival with the library and small retail park marking the beginning of the centre.

4.81 The visitor survey recorded generally high satisfaction levels (well above 100 on a 100 average index) with the quality of the town centre environment. The overall attractiveness of the centre scored 126 as did the cleanliness of the centre (126), the condition of buildings in the centre scored even better (130) as did the design of shop fronts (130), the condition of the pedestrianised areas (130), the condition of the open spaces in the centre (128) and design of paved surfaces (131).

4.82 The business survey recorded priorities for investment but environmental improvement did not score as highly as other areas such as security and car parking. This reflected the generally high scores given to environmental issues in the centre by businesses as environmental improvements were given a lower priority presumably because the current state of the town centre environment is considered more than satisfactory. The redevelopment of the market area for new shopping floorspace was ranked as the 8th priority, improved street cleaning 9th, shop front improvements 10th, pedestrianisation of Bridge Street 11th and streetscape improvements to Bridge Street 12th.

4.83 Overall Worksop town centre has a reasonably pleasant pedestrianised high street shopping environment with a few quality buildings and scores quite well on this PPS6 indicator.

Conclusions

4.84 The primary role of the town centre is as a shopping centre but it does perform other roles such as a service and administrative centre. The current leisure offer is very limited and the lack of a cinema is a major weakness. Overall the centre is not very diverse and planned developments are too peripheral to greatly benefit the vitality and viability of the centre. The centre has below average diversity.

4.85 The town centre has no anchor superstores and there are two out-of-centre superstores and a retail park. There is no cinema in the town and no central leisure centre either. In addition in close proximity there are higher tier competing centres and their surrounding retail parks and facilities. Worksop town centre does not perform well on this PPS6 indicator.

4.86 There are two large potential development sites at either end of the centre and a number of infill opportunities. As a result Worksop town centre scores quite well on this PPS6 indicator.

4.87 Overall the centre has a reasonable retail offer for a town of this size other than the lack of an anchor supermarket perhaps. The quality and range of shops could also be improved as the current offer is slightly discount orientated. There is also some retailer demand for representation in Worksop. Worksop town centre therefore scores above average on the PPS6 retailer representation indicator.

4.88 Rental levels for Worksop town centre appear appropriate to the size and offer of the centre relative to the regional shopping hierarchy and therefore the centre performs around average on this PPS6 indicator.

4.89 Vacancy rates have increased slightly since the 2004 Bassetlaw Retail Study but they still remain under the 10.4% national average. In addition one large peripheral vacancy is skewing the vacant floorspace figures. The town centre therefore performs just above average on this PPS6 indicator.

4.90 Yields in Worksop town centre have remained constant and are appropriate for the size and retail offer of the centre relative to the regional retail hierarchy. However, at 9% they demonstrate investors do not have long term confidence in the centre as a retail destination. The centre therefore performs slightly below average on this PPS6 indicator.

4.91 Footfall is high in the PSA but it does decline away from here except on market days. The combined offer at the Priory Centre acts as an anchor for the centre but there is no department store or superstore to generate additional footfall. Overall footfall is around expected levels in a centre of this size and Worksop performs around average on this PPS6 indicator.

4.92 Access to, from and within Worksop Town Centre is quite good, with the level of pedestrian accessibility to the retail core a particular advantage to the Town Centre. The centre is more difficult to approach for the unfamiliar visitor but it predominantly serves local needs so this is not a major weakness. There is a particular problem with finding available parking but on balance Worksop performs above average on this PPS6 indicator.

4.93 The business and visitor surveys recorded generally positive views of the centre although there are clearly some problems with the centre such as safety and security, the quality of the market and availability of parking but on balance Worksop performs reasonably well on this PPS6 indicator.

4.94 There appears to be some security and personal problem in Worksop although this may be no worse than any other shopping centre as it is part of a national problem. Overall the centre performs around average for this PPS6 indicator.

4.95 Worksop town centre has a reasonably pleasant, albeit dated and cluttered, semi-pedestrianised high street shopping environment with a few quality buildings and scores quite well on this PPS6 indicator.

4.96 Overall the centre has a mixed performance on the PPS6 indicators of vitality and viability. Probably the main weakness is the lack of diversity and fairly limited shopping offer with no anchor supermarket or department store. However, the centre also has many strengths recognised by visitors and businesses alike.

SWOT

Strengths

- Attractive high street shopping environment
- Semi-pedestrianised PSA
- Large walk in population and good accessibility by bus and car
- Reasonable mixture of national and independent retailers
- Below average vacancy rate
- Good service offer in particular banking and financial services
- Linear centre with easy orientation
- The Priory Centre covered mall
- The market
- Reasonable rental levels
- CCTV
- Civic offices generating lunchtime footfall
- Town Centre Management Team
- Development Opportunities

Weaknesses

- Limited diversity
- Limited range and choice of shops
- No anchor department store or superstore
- Two out-of-centre supermarkets and out-of-centre retail park
- Catchment area restricted by larger competing centres
- Lack of cinema and limited evening economy
- Declining business / investor confidence
- Perceived car parking problem amongst business community
- Security problems for business community
- Weak office market
- Limited Town Centre Management Budget restricting service provision
- Sporadic poor quality frontages along Gateford Road
- Poor approach and sense of arrival from some directions
- Distance to railway station

- Difficulty of approaching centre for unfamiliar visitors

Opportunities

- Improved linkages to new Tesco / Cinema site
- Development site(s)
- Full pedestrianisation of Bridge Street and updating/decluttering of streetscape
- Consolidate town centre around PSA core
- Relocate and enhance (popular) market
- Growing population within catchment area
- Develop Events Programme
- Establish evening economy area to north of centre

Threats

- Failure to bring development sites forward and increase investor / operator confidence in the centre
- Loss of key anchor stores due to national closure / contraction programmes
- Failure to link / connect new Tesco / Cinema to town centre
- Continued expansion Meadowhall and other out-of-centre destinations
- Development proposals in Sheffield city centre and other competing centres

5.0 Retford Town Centre Health Check

5.1 A health check was also undertaken for Retford town centre using the PPS6 indicators of vitality and viability. Unfortunately there is less commercial information available for this smaller town centre than Worksop therefore the health check relies to a greater extent upon site visits, survey responses, information from local agents and Council monitoring of floorspace, vacancies and other indicator information. The PPS6 indicators are considered in the same order as for Worksop. The conclusions of the health check are summarised in a SWOT analysis of strengths, weaknesses, opportunities and threats.

Introduction

5.2 Retford is an historic market / coaching town dating back to the mediaeval period when it was a bridging point over the River Idle and was granted a charter. Much of the town centre still follows the mediaeval street pattern and many of the red brick houses have pan-tile roofs that gives the town a distinctive character. Unlike Worksop 8 miles to the west the industrial revolution largely bypassed Retford with the town remaining a market town and service centre for surrounding rural areas, although Retford was connected to the canal and then the railway network. The town was once the administrative centre of East Retford Borough and Rural District Councils but both were merged into Bassetlaw District Council in 1974 and now the town only has a localised service role. In addition to the town centre there are two edge / out-of-centre superstores and a Focus DIY retail warehouse.

Diversity of Uses

5.3 In addition to shopping, the town centre performs important roles in:-

- entertainment, culture and leisure;
- local administration;
- religion; and,
- housing in and around the town centre.

5.4 The town's new indoor sports and recreational facility is shared with a school and is over a mile from the centre with limited opportunities for linked trips for shopping, eating out, and drinks and so doesn't really add to the diversity. The main administrative function of the town centre relates to local services and offices of the District Council and the office sector in the town is also very localised and limited.

5.5 The town centre has a good range of shops and services for a small centre as outlined in the retailer representation section. The household telephone survey found that 90% of Retford residents combined their shopping trip to the town centre with at least one other purpose. Personal business (banks, building societies, post office, etc) was the most common response (83%). Other reasons for combined trips included visiting the market (69%), visiting a restaurant, pub or other social place (48%) and visiting /

meeting friends / family (41%). Combined trips with other leisure activities were also fairly frequent – library (33%), sports activities (17%) and theatre (16%).

5.6 The shops in the centre are supported by a good range of business and financial services and retail services. Business and financial services includes banks and building societies which are over-represented as are legal services but other business services, employment agencies, business goods and printing / copying were under-represented. Retail services include hair and beauty salons, opticians, dry cleaners and photo processing. Overall this group of businesses was slightly under-represented in Retford town centre relative to UK averages but there were variations between classes, for example, clothing and fancy dress hire, clothes alterations, photo studios, opticians and hair salons were over-represented. However, filling stations, vehicle repairs, TV hire and video / DVD hire were all under-represented. The centre also has a good range of pubs but bars, cafes and restaurants were under-represented in the centre according to the Experian Goad report for the centre (August 2008).

5.7 There is no cinema provision in the town centre, the nearest being Doncaster or Sheffield, so this is a gap in provision. However, the Majestic Theatre in the heart of the centre was very popular in the household and visitor surveys reflecting the varied programme of plays and events and this will benefit the evening economy. There is a second smaller theatre in Retford on Wharf Road so the town is well provided for. The town has a tourist information office and there is a published self-guided heritage trail that takes in the main historic streets and buildings. The main Library is located on Churchgate at the northern end of the town centre.

5.8 The lack of a cinema was not reflected in the score given to the leisure facilities in the town centre which scored positively (130 on a 100 average index). However in response to a question on what leisure facilities they would like to see in the centre in the visitor survey 18% of respondents stating the town needed a cinema, 12% stated facilities for children and 10% stated a sports / leisure centre although 57% could not suggest any improvements.

5.9 The primary role of the town centre is as a shopping centre, however, it does have other roles and in particular as a service centre for residents and surrounding rural communities. The current leisure offer is very limited and the lack of a cinema (although there are very few towns the size of Retford with cinemas) is a particular problem in encouraging linked trips with the centre although Retford does have the benefit of a popular theatre. Overall the centre is reasonably diverse for a town of this size and performs around average on this PPS6 indicator.

The Amount of Edge / Out-of-Centre Floorspace

5.10 There are two edge / out-of-centre supermarkets / superstores but both are close enough to the centre to generate combined trips and shoppers are given sufficient time to make that trip. In fact the Morrisons store, despite being on the opposite side of Amcott Way and the river to the town centre, is well connected by an attractive riverside walk. Parking is not free at either store but shoppers can reclaim their parking fee with a modest level of purchases. There is also an out-of-centre retail warehouse occupied by Focus DIY close to Morrisons but otherwise the bulky goods offer is limited to smaller specialist stores in and around the town centre.

5.11 Leisure provision in the town centre is limited and the main leisure centre is shared with local schools and is some distance from the centre. Surrounding the centre there are several places of worship, a few small private gyms, as well as parks, playing fields and sports pitches. There is no cinema in the town but there is a very popular theatre.

5.12 The main problem for Retford is the competing centres and their surrounding retail parks and facilities. In particular Doncaster and the Lakeside Outlet Centre and to a lesser extent Sheffield and the Meadowhall Centre as well as Lincoln and Gainsborough that draw shoppers from the rural areas to the east of Retford. There are also competing centres in other directions restricting the catchment of the centre including Mansfield and Nottingham to the south and Worksop to the west (which is the destination for a significant share of the bulky goods market). Overall Retford town centre performs reasonably well on this PPS6 indicator due to the good connectivity of the edge / out-of-centre superstores and the distance to the nearest competing centres.

Potential Capacity for Expansion

5.13 Retford does not have many obvious expansion sites due to the physical constraints of the surrounding residential areas, the ‘ring road’, canal and river. In addition the historic street pattern and small building plots constrain development opportunities. The Local Plan identifies the site now occupied by Aldi and there has been recent award winning development around the new bus station and before that the Bridgegate Centre but there are no remaining sites of similar size. There are a few small infill sites and the only expansive site, with the benefit of a canal frontage, is a former council depot now occupied by a builders’ merchant / yard. Some of the surface car parks may lend themselves to development if in turn replacement spaces can be found.

5.14 In the business survey very few respondents had plans to refit, extend or improve their premises (7%), 4% intended to relocate within new premises within the centre and 3% intended to close but the vast majority (84%) had no plans. This perhaps reflects the uncertainty of the national economic climate as much as local conditions in Retford town centre. Overall, as a result of the limited redevelopment opportunities in and around the centre Retford scores below average on this PPS6 indicator.

Retailer Representation

5.15 The local plan designates the primary frontages stretching from Cannon Square along the eastern side of the Market Square and Carolgate as far as East Street. Whilst there are some multiple retailers and businesses present on the square eastern side of the Market Square the main concentration of multiples and the highest pedestrian movement (footfall) is to be found on the pedestrianised Carolgate. Therefore the pedestrianised section of Carolgate from the square to East Street probably forms the primary frontages but eastern side of the square is a contiguous secondary frontage. The Primary Shopping Area (PSA) in Retford town centre therefore comprises the area currently designated as primary frontages on the Local Plan proposals map i.e. it includes the contiguous secondary frontages on the east side of the market square (actually designated primary in the local plan).

5.16 The PSA is where the highest footfall and zone A rents will be achieved and this is where the majority of the town centre's 95 national retail multiples and major stores are to be found. Experian Goad identify 11 of the 30 key national retailers in Retford including Argos, Boots, Burtons, Clarks, Clintons, Dorothy Perkins, New Look, Superdrug, WH Smith, Wilkinsons and Woolworths (the national closure took place after survey date).

5.17 Multiples account for 39% of units in the centre but 60% of the floorspace which is a typical pattern as multiples tend to occupy larger units than independents. Multiples also tend to occupy the primary frontages where footfall is highest. The number of national multiples represented therefore decreases away from the PSA.

5.18 There is a diverse representation of smaller independent and specialist shops in the secondary frontages along Bridgegate, Churchgate, Chapelgate and Grove Street. There are also a number of side roads leading from the pedestrianised Carolgate such as Spa Lane and Exchange Street which are characterised by a lower level secondary retail offering, public houses and takeaways.

5.19 The market place is a very attractive square and the market was quite popular with 62% of visitors shopping there, although 12% did say infrequently, and there were very high satisfaction levels with all aspects of the market.

5.20 There has been recent development on Spa Lane in a parade adjoining the new bus station. Although this high quality development comprises modern units attractive to multiple retailers it has mainly been occupied by local shops despite being anchored by an Iceland store. Other recent additions to the historic town centre include the new Aldi at the southern end of Carolgate and the older Bridgegate Centre. All these recent additions to the town centre have been designed and built out to a high standard reflecting the conservation area status of most of the centre.

5.21 The Experian Goad Report for Retford (August 2008) records 242 retail / business units in the town centre of which 18 (7.4%) are convenience and 105 (43.4%) comparison. In addition there were 29 retail services (hair salons, opticians, travel agents, etc.), 44 leisure services (bars, cafes, restaurants, pubs, etc.) and 32 financial and business services. In terms of representation compared to national (Goad) averages the number of non-food shops were over-represented and food shops under-represented. Financial and business services, retail services and leisure services were all around UK average levels of representation.

5.22 In terms of floorspace taken up in the centre, comparison shops (35%) were below the UK average (39%) whilst convenience shops (25.3%) were above the UK average (13.7%) although this is considerably skewed by the inclusion by Goad of the two edge / out-of-centre superstores in the town centre survey area. Financial and business services (12.2%) were also above the UK average (9%) indicating they too were occupying above average size units for that type of business. Retail services and leisure services were both slightly below the UK average for those classes of business.

5.23 With regard to specific classes of convenience goods health foods were over-represented in Retford as were frozen food shops and butchers. Under-represented convenience goods included convenience stores, fishmongers, greengrocers, indoor markets and shoe repair shops. Visitors in the street survey indicated that they thought the centre had a very good choice of food shops and supermarkets (scoring 144 on a 100 average index).

5.24 Visitors also thought the choice of non-food and clothes shops was quite good (scoring 131 on a 100 average index). Under-represented comparison goods operators according to the Goad survey include antique shops, music and video recordings, photographic equipment, garden and DIY shops, toy shops and motor accessories. Over-represented non-food shops included booksellers, carpets and flooring, furniture, office supplies, second hand shops, phone shops and textiles. The main suggested improvement to the town centre in the visitor survey was more fashion and clothes shops with several respondents naming specific multiple retailers currently unrepresented in Retford such as Marks and Spencer, Primark and Next.

5.25 The business survey recorded a decline in business confidence in the centre in the last year with 41% stating it had declined and only 18% stating it had improved. Overall future business confidence in the centre looks like improving according to 33% of respondents with fewer (25%) expecting a decline. Clearly there are mixed fortunes in the centre at the moment and business confidence has fallen but many local businesses are still optimistic about the future.

5.26 Retford has fallen slightly in national rankings since 2007. The 2009 Javelin Venuescore that measures centres on the number and quality of their multiple offer scores Retford at 91 but the centre has fallen in the national rankings from 383rd in 2007 to the current 434th. Table 3.1 in the previous section shows Retford has an inferior multiple offer in comparison to most of its competing destinations in the sub-region although in terms of supermarket provision the centre has quite a good offer. In addition the multiples in Retford are complemented by a quality independent offer missing from many of the competing centres.

5.27 The Focus Database of retailer requirements lists requirements from 11 businesses for premises in Retford town centre. As indicated earlier, these requirements have to be treated with caution as sometimes they are on a regional rather than centre by centre basis and one of them (Costa) has recently located on Carolgate so is unlikely to require additional / larger premises. The Focus list includes Debenhams (smaller

Desire format – mainly clothes) and Pets at Home. Other requirements are mainly discount orientated such as Poundland as well as three charity shops. Consultations with agents active in the town centre didn't identify any additional requirements.

5.28 Overall the centre has quite a good retail offer for a small town and in particular its supermarket offer that generates footfall for the rest of the centre. The range of multiple retailers could be improved but the limited representation is complemented by a quality independent offer that adds to the overall range and character of the centre. There is limited retailer demand for representation in Retford perhaps reflecting the national economic climate. Retford town centre therefore scores above average on this PPS6 indicator.

Shopping Rents

5.29 According to CRE Colliers who publish estimated rental information for the main centres in the UK £650 psm (£60 psf) Zone A rents are achieved in Retford which is comparable to the larger centre of Worksop although these rental levels are lower than competing centres such as Doncaster (£130 psf) and Lincoln (£140 psf).

5.30 The business survey indicated that affordable rent was regarded as a benefit of Retford town centre as a business location behind accessibility, variety of shops and the local market. Businesses were asked to rate Retford on various criteria including rents / rates and they gave it a 125 score on a 100 average index. Conversely, rents and overheads were reported as the second highest problem in the centre after low footfall although nearly half the respondents (49%) could not list a single disadvantage.

5.31 Overall, the rental levels for Retford appear appropriate to the size and offer of the centre relative to the regional shopping hierarchy. These levels are comparable with nearby Worksop which is a higher tier centre. Retford town centre therefore performs above average on this PPS6 indicator.

Proportion of Vacant Street Level Property

5.32 The Experian Goad Survey for Retford Town Centre in August 2008 recorded approximately 242 retail / business units within the centre of which 14 were vacant, a vacancy rate of 5.8%. This is well below the UK average of 10.4%. In terms of floor area, approximately 2,750 sq m of vacant floorspace, of various use class is available in Retford Town Centre, which represents 5% of the total available floorspace. Again this is well below the UK average of 8.4%.

5.33 Since the Goad survey was undertaken Woolworths has closed as part of the national closure programme. Whilst most vacancies are peripheral and in smaller units in the secondary frontages, the vacant former Woolworths building fronting onto the market square is very prominent. However, overall the centre performs well on this PPS8 indicator.

Commercial Yields on Non-Domestic Property

5.34 The commercial yield on a property investment is calculated by dividing the annual rent by the capital value of a property and expressing this as a percentage. The yield represents the return to the investor for risk taking. A low yield indicates a strong centre as investors are prepared to wait longer for a return on their investment.

5.35 The July 2008 Valuation Office Agency (VOA) Property Market Report indicates yields in Retford have fallen from 9% in 2007 to 8% in 2008 after remaining constant at 9% since 2000. These levels are higher than those recorded for Worksop by VOA (7%) although Egi suggest the VOA Worksop yield may be understated. Agents report too few published transactions in Retford to confirm the accuracy of the VOA estimates for Retford, however, the 8% yield for Retford demonstrates that investors do have some confidence in the centre as a retail destination as demonstrated by the full occupancy of the most recent development on Spa Lane (although there are two charity shops in this block). The centre therefore performs slightly above average on this PPS6 indicator particularly considering its size and limited catchment.

Pedestrian Flows

5.36 The highest pedestrian flows (footfall) within Retford Town Centre are found along the pedestrianised Carolgate i.e. the PSA / primary frontages where Zone A rentals are the highest. Within this area, footfall is highest at the junction with Spa Lane. However, on market days there is also high footfall at the northern end of Carolgate where it enters the market square.

5.37 There are no obvious circuits in Retford due to the predominantly linear nature of the town centre. Whilst pedestrians may venture down one of the side streets they are likely to return to the main spine of Carolgate the same way. The one exception is the Bus Station where visitors may enter the centre via Grove Street, particularly if they are going to the market or Bridgegate Centre, and return via Spa Lane. The car parks, including the edge / out-of-centre supermarket car parks, and the bus station are the main generators of footfall. The railway station is too far via an indirect route to generate many pedestrian linked trips.

5.38 Within the centre itself there are no major anchors such as supermarkets or department / variety stores to attract footfall so the main anchor is the collective offer on Carolgate and perhaps the concentration of larger stores close to Wilkinsons (Peacocks, Home Bargains and B & M). The visitor survey undertaken before Woolworths closed recorded the shop as the fifth main attraction in the centre after New Look, Peacocks, Home Bargains and Wilkinsons. Other popular stores included Dorothy Perkins, Costa Coffee and Boots. The market is also a key attractor on market days (Thursday and Saturday) but at other times Cannon Square to the north of the market square appears very quiet and peripheral.

5.39 Some businesses (26%) reported low footfall as a problem in the business survey although 49% couldn’t think of any problems with the centre. Footfall does appear to decline away from the primary frontages, however, overall the centre appears to perform reasonably well on this indicator despite the lack of major anchor stores. However, the proximity of two large supermarkets within walking distance of the centre compensates somewhat and on market days the market itself draws people into the town. Overall footfall is above expected levels for a centre of this size in most frontages, and the PSA in particular, and Retford performs above average on this PPS6 indicator.

Accessibility

5.40 There is good ease of movement around the centre due to the pedestrianisation and this was reflected in positive responses in the visitor survey. Orientation within the centre is easy due to the linear nature and scored well on the visitor survey (152 on a 100 average index). Signage appears to be more than adequate and also scored well on the visitor survey (142). Walk-in access from nearby residential areas in some directions is restricted by the surrounding road network – Amcott Way and Arlington Way form a partial ring road to the north and east of the centre. The street survey recorded 35% of visitors having walked to the centre.

5.41 Retford has the benefit of a modern central bus station on Spa Lane with an enclosed waiting area and electronic information boards. The station provides regular bus services to surrounding suburbs and outlying villages. Services to more distant destinations are less frequent. Despite the proximity of the bus station to the PSA via the pedestrianised Spa Lane, the visitor survey recorded only 3% of visitors having arrived by bus. However, in the visitor survey bus services to the centre scored well (152 on a 100 average index) and in the business survey 52% of respondents reported good bus services were a benefit to their business.

5.42 The railway station located to the north of the centre is within walking distance of the centre although the route is not obvious for the unfamiliar visitor. The station is on the East Coast mainline and there are services to London, Leeds and York and frequent local services to Sheffield, Newark, Worksop and Lincoln. The visitor survey recorded 2% of visitors having arrived by train.

5.43 Road access around the centre is good with Amcott Way and Arlington Way forming a partial inner ring road from which town centre car parks are signposted, visible and clearly accessible. In the visitor survey access by car was regarded as good (145 on a 100 average index) as was the availability of parking (140). In the business survey accessibility for staff and customers was seen as a key strength of the centre but the availability of parking was considered to be poor by 25% and very poor by 21%.

5.44 Retford is a flatter town than Worksop and in theory cycling should be easier but the survey recorded only 2% of respondents arriving by bike. It is possible that the busy inner ‘ring road’ formed by Amcott Way and Arlington Way discourages cycle access from some directions.

5.45 Overall, access to, from and within Retford Town Centre is quite good, with the level of pedestrian accessibility to the retail core a particular advantage to the Town Centre. The centre therefore performs well on this PPS6 indicator.

Customer Views and Behaviour

5.46 Business survey questionnaires were completed by 76 (33%) of the 230 businesses in Retford town centre. In addition a visitor survey was also undertaken by NEMS Market Research with a sample of 125 respondents.

5.47 Retail businesses were slightly under-represented amongst respondents to the business survey – 42% of respondents compared to 51% of businesses in the centre recorded in the Experian Goad category report. Most respondents were long established businesses – 59% over ten years and a further 18% over five years. In terms of why businesses were located in Retford town centre (Q7) most were for commercial reasons – the local market, accessibility, high footfall and proximity of other businesses. Together the responding businesses employed c. 700 people of whom over 400 worked full time.

5.48 In terms of positive aspects of Retford as a location, responses to Q13 indicated accessibility and the strength of the local market as the main benefit, followed by the road network, local workforce, the presence of other businesses and the variety of shops. Respondents were also asked to rank various aspects of the centre and these indicated that the most positive aspect was the parks and opens spaces (163 on a 100 average index) that reflects the quality of the town centre environment and the proximity of Kings Park with the river running through it.

5.49 Other positive aspects of Retford town centre recorded in the business survey included safety during the daytime (155), street cleaning (152) and town centre management and maintenance (148). In fact businesses in Retford were much more positive about their town centre than businesses in Worksop and all responses were well above the 100 average. The least positive aspect of the centre was the leisure and entertainment offer (102).

5.50 In response to Q19 on what improvements to the centre businesses would like to see better marketing and promotion was ranked highest (147), an effective town centre forum (144), improved car parking (140) and security measures such as TV and policing (137).

5.51 The visitor survey recorded that most respondents were fairly frequent visitors (78% weekly or more often) but didn’t spend very long in the centre (69% no more than 2 hours). Over half the visitors (57%) had travelled by car, 35% had walked and only 2% came on the bus. The most common reason for visiting was non-food shopping (mentioned by 48% of visitors in a multiple response Q4) followed closely by food shopping (41%), visiting the bank / building society (29%), browsing / window shopping (26%), meeting friends / relatives (24%), work (11%) and eating out (5%).

5.52 Positive aspects of the centre rated by visitors included access by bus (152 on a 100 average index), the ease of walking around (152) and the variety of places to eat and drink (148). Other positive aspects included the range of banks and financial services (146), access by car (145), the choice of food shops and supermarkets (144) and signposting within the centre (142). Like responses to a similar question in the business survey, visitors did not give negative scores to any aspect of the centre.

5.53 Overall the business and visitor surveys recorded very positive views of the centre with very few problems mentioned. Like Worksop, the town centre management team was seen as a very positive aspect of the centre by businesses although the suggestions for priority investment in better marketing and promotion and a more effective town centre forum suggest the business community want to see the team performing a wider role. The town is a very attractive place to visit and live in as recorded in the positive responses in both surveys. There are many positive aspects to the centre recognised by businesses and visitors alike with very few negative comments and Retford town centre performs very well on this PPS6 indicator.

Perception of Safety and Crime

5.54 National crime statistics from 2006 / 2007 confirm that the Bassetlaw District area has a higher incidence of most forms of recorded crime than the national average. However, these statistics are for the whole administrative area not just Retford. CCTV has been installed in the town centre and there is little evidence of vandalism or graffiti often associated with high crime areas.

5.55 The visitor survey recorded 94% of respondents felt safe in the centre during the day. 32% of respondents also visited at night mainly to go to pubs (83%) and / or eating out (55%) and / or to get a take-away meal (35%) and / or late night shopping (23%) and / or to visit the theatre (13%). Nearly all of these evening visitors (90%) felt safe in the evening too and those who didn't gave the presence of threatening individuals / groups as the main reason for not feeling safe.

5.56 The business survey also recorded most businesses felt the centre was safe during the daytime (scoring 155 on a 100 average index) and slightly less safe in the evening (130). The business survey also recorded very few security problems in the centre although security improvements such as more policing / CCTV were recorded as the fourth highest priority for investment. Overall the centre performs quite well on this PPS6 indicator.

State of the Town Centre Environmental Quality

5.57 The historic town centre of Retford forms a very pleasant shopping environment with interesting streets following the mediaeval street pattern, the impressive market square and numerous attractive buildings. The majority of the town centre is part of a conservation area. The bus station and Spa Lane development is an attractive addition to the town although there are some less successful recent additions on parts of Carolgate. There is good quality paving along Carolgate and the street furniture and planting is mainly limited to the wider parts of this pedestrianised street so is not excessive.

5.58 The approach to the centre is generally good from most directions, the centre is clearly defined and there is a strong sense of arrival and within the centre a strong sense of place. The centre is clearly delineated by the canal to the south, the river and Kings Park to the west, Amcott Way to the north and Arlington Way to the east. Arriving from the west visitors' sense of arrival is heightened by the elevated bridge over the river from where views of St Swithun's church suddenly open up. Similarly, arriving from the south visitors' sense of arrival is heightened by the elevated canal bridge. Unlike many towns there are not views of service areas from the partial inner 'ring road' formed by Amcott Way and Arlington Way. Within the centre orientation is easy due to the linear nature of the streets and there are several landmark buildings and nodes to aid navigation such as the town hall in the market square, St Swithun's church and the new bus station building.

5.59 The visitor survey recorded very high satisfaction levels (well above 100 on a 100 average index) with the quality of the town centre environment. The overall attractiveness of the centre scored 136 as did the cleanliness (136), the condition of buildings in the centre scored even better (141) as did the design of shop fronts (137), the condition of the pedestrianised areas (140), the condition of the open spaces in the centre (136) and design of paved surfaces (131).

5.60 The business survey recorded priorities for investment but environmental improvements did not score as highly as other areas such as marketing and promotion and a more effective town centre forum. This reflected the generally high scores given to environmental issues in the centre by businesses as environmental improvements were given a lower priority presumably because the current state of the town centre environment is considered to be very good.

5.61 Overall Retford's historic town centre is a very attractive shopping centre with an attractive market square and pedestrianised historic streets, lined with numerous quality buildings that are well maintained, and so the centre performs very well on this PPS6 indicator.

Conclusions

5.62 The primary role of the town centre is as a shopping centre but it does perform other roles such as a service and minor administrative centre. The current leisure offer is limited and the lack of a cinema is a weakness as is the distance to the main leisure centre. However, the centre does have the benefit of a popular theatre and it is debateable whether the town is large enough to support a cinema. Overall the centre is not particularly diverse even for a small town.

5.63 The town centre has no anchor superstores although the two edge / out-of-centre superstores are close enough to generate linked pedestrian trips. There is no cinema in the town and no central leisure centre either. In addition in close proximity there are higher tier competing centres and their surrounding retail parks and facilities. Retford town centre does therefore perform fairly average on this PPS6 indicator.

5.64 There are no large potential development sites, only a few infill opportunities and the historic buildings and street patterns may make expansion in situ difficult for some businesses. The recent development around the new bus station may have taken up all the current demand as there are very few retail requirements for the centre. Overall Retford town centre does not perform well on this PPS6 indicator.

5.65 Overall the centre has a reasonable retail offer for a town of this size and has the benefit of two supermarkets within walking distance of the centre. The quality and range of shops is very good with national multiples complemented by quality independents. Retford town centre therefore scores above average on the PPS6 retailer representation indicator.

5.66 Rental levels for Retford are comparable to the higher tier centre of Worksop and are quite good for a town of this relative to the regional shopping hierarchy. Excessive rents did not appear to be a major issue in the business survey therefore the centre performs above average on this PPS6 indicator.

5.67 Vacancy rates are very low and well under the national average therefore the town centre also performs well on this PPS6 indicator.

5.68 Yields in Retford town centre have recently fallen having remained static for some years before that and are appropriate for the size and retail offer of the centre relative to the regional retail hierarchy. However, at 8% they demonstrate investors do not have long-term confidence in the centre as a retail destination. The centre therefore performs around average on this PPS6 indicator.

5.69 Footfall is high in the PSA but it does decline away from here except on market days. The combined offer on Carolgate around the Wilkinsons store acts as an anchor for the centre but there is no department / variety store to generate additional footfall. Overall footfall is above expected levels in a centre of this size helped probably by the proximity of two large supermarkets and Retford performs above average on this PPS6 indicator.

5.70 Access to, from and within Retford Town Centre is quite good by all modes of transport perhaps with the exception of rail due to the distance to the train station by an indirect route. However, the centre does have the benefit of a modern attractive bus station. There is a perceived problem amongst the business community about the availability of car parking but on balance Retford performs above average on this PPS6 indicator.

5.71 The business and visitor surveys recorded very positive views of the centre although there may be a slight problem with business confidence perhaps reflecting the national rather than local situation but on balance Retford performs well on this PPS6 indicator.

5.72 There are no apparent personal safety and security problems in Retford and the centre performs above average on this PPS6 indicator.

5.73 Retford is a historic town and the shopping centre follows the mediaeval street pattern. There is a strong sense of arrival and place and orientation is aided by the quality buildings and open spaces in the town. Retford town centre performs very well on this PPS6 indicator.

5.74 Overall the centre performs well on most of the PPS6 indicators of vitality and viability. Probably the main weakness is the lack of diversity. However, the centre also has many strengths recognized by visitors and businesses alike. In particular the attractive historic environment makes the town centre an attractive place to spend time in. The centre also performs well on commercial indicators such as yields, rents and vacancies levels. Retford town centre displays strong indicators of vitality and viability.

SWOT

Strengths

- Attractive historic shopping streets
- Strong sense of place and arrival
- Pedestrianised PSA
- Walk in population and good accessibility by bus and car
- Good mixture of national and quality independent retailers
- Below average vacancy rate
- Good service offer in particular banking and financial services
- Linear centre with easy orientation
- Attractive public realm, open spaces and nearby park
- Proximity of two edge / out-of-centre supermarkets generating footfall
- The market
- Small theatre with good programme of performances
- Reasonable rental levels
- Relatively strong yields for a small centre
- Low vacancy rates
- CCTV
- Town Centre Management Team
- Good Events Programme

Weaknesses

- Limited diversity
- Weak office market and only localised administrative functions
- No anchor department or variety store
- Catchment area restricted by larger competing centres
- Lack of cinema
- Declining business / investor confidence
- Perceived car parking problem amongst business community
- Limited Town Centre Management Budget restricting service provision

- No large development site(s)
- Distance / route to the railway station

Opportunities

- Growing population within catchment area
- Infill sites and one potential large redevelopment site with canalside frontage
- Increase marketing and promotion activities
- Develop effective town centre forum

Threats

- Failure to increase investor / operator confidence in the centre
- Loss of key stores due to national closure / contraction programmes
- Continued expansion of competing centres and out-of-centre destinations.

6.0 Methodology for Quantitative Assessment

6.1 The methodology for both comparison and convenience goods follows a standard approach that is based on PPS6 guidance (para 2.34) and subsequent Secretary of State decisions (Birmingham and Burnham) that indicate there are three sources of quantitative need although the extent to which they are drawn upon varies for the two broad goods categories and between the two centres:

1. Growth in expenditure over and above inflation. This is calculated by multiplying population figures by expenditure per head figures from Experian Business Strategies (EBS) for the study area and projecting this forward to a design year. Allowances for existing and planned floorspace to increase their turnover are then deducted from this growth to arrive at a potential surplus to support new floorspace;

2. Increased market share within the catchment area arising from an improved offer and clawback of leakage; and,

3. Overtrading in existing stores. This is gauged by comparing market share derived turnovers with expected or benchmark turnovers extracted from published company averages, however, it is only undertaken for out-of-centre stores[2].

6.2 The methodology adopted to identify market share and quantitative need for new comparison / and convenience goods development is a Retail Capacity Study. This is based upon new market share / survey information in the study area from a 1,000 sample household survey. This is supplemented with 2007 expenditure data / projections (from EBS), 2001 Census and 2006 mid-year estimates / projections, and store turnovers from 2008 Retail Rankings and 2008 Verdict Grocery Report. The approach to retail capacity studies is a logical step-by-step progression of sequences set out in the appended tables for the two broad goods categories - convenience and comparison.

Source One: Identify Expenditure Growth

Study Area and Catchment Area

6.3 The study area is very similar to the 2004 study (Appendix 1, Map 1). This was based on the findings of the visitor survey carried out ahead of the household survey. However, two of the five postcode-based zones were divided to create seven zones on the basis that the visitor surveys in Worksop and Retford recorded people from these zones shopping in different destinations. The Worksop zone was therefore divided into two based around the urban area of Worksop itself and another zone based around Whitwell and Creswell. The Harworth Bawtry zone was also divided into two zones

[2] Overtrading in town centres can benefit the vitality and viability of that centre and should not be redirected to support proposals on sequentially inferior sites. It should only be used to support new development in the town centre itself.

based around these two settlements with the latter extending as far east as Gringley. In addition zone 6 based around Markham and Tuxford in the 2004 study was extended westwards to include Ollerton as this was the main shopping centre in that area, particularly for food. The 2008 zones shown on Map 1 in Appendix 1 are as follows:

1. Zone 1 based on the urban area of Worksop extending to include the rural former mining area to the north and incorporating postcode sectors S80 1 & 2, S81 0 / 7 / 8 & 9.
2. Zone 2 based around the former mining settlements of Harworth and Bircotes and extending north towards Doncaster and incorporating postcode sectors DN11 8 & 9.
3. Zone 3 based around the former mining villages of Whitwell and Creswell and incorporating postcode sectors S80 3 & 4.
4. Zone 4 based around Anston to the west of Worksop and extending northwards to include the South Yorkshire mining settlement of Dinnington (in Rotherham MBC administrative area) incorporating postcode sectors S25 1 / 2 / 4 & 5.
5. Zone 5 based around Retford but extending west as far as the A1 / A614 corridor and as far as the Trent and incorporating postcode sectors DN22 0 / 6 / 7 / 8 & 9.
6. Zone 6 based around Markham and Ollerton and incorporating postcode sectors NG22 0 & 9.
7. Zone 7 based on the rural area to the north of Retford including Bawtry (in Doncaster MBC administrative area) and stretching east to include Gringley and incorporating postcode sectors DN10 4 / 5 & 6.

6.4 The household survey indicated that for convenience goods zones 1 (Worksop) and 3 (Whitwell and Creswell) form the primary catchment area (PCA) for Worksop and zone 2 (Harworth and Bircotes) and zone 4 (Anston and Dinnington) form the secondary catchment area (SCA). The shopping patterns are similar for comparison goods although Worksop does not draw as much trade from zone 3 where there is considerable leakage to Sheffield / Meadowhall in particular. Again zones 2 and 4 form the SCA for comparison goods in Worksop.

6.5 The Retford PCA for convenience goods is formed by zone 5 alone. Zones 6 and 7 form a weak SCA for Retford and this SCA overlaps with that of other centres such as Doncaster, Gainsborough and Ollerton. Retford also draws most of its comparison goods trade from zone 5 and very little from elsewhere. The PCA for Retford for comparison goods is again formed by zone 5 alone with zones 6 and 7 forming a weak SCA shared with competing centres.

Population and Expenditure Information and Projections

6.6 Population information for the study area based on the 2001 Census and 2006 estimates are projected forward to 2026 using the 2006 ONS mid-year projections as extracted by EBS. This is compared with the Council's own population projections to confirm its accuracy.

6.7 The expenditure per head information on convenience and comparison goods is also extracted from EBS Retail Planner Reports and projected forward to 2011, 2016 and 2021. EBS extract the base year information from actual expenditure as recorded in the 2007 ONS Family Expenditure Survey. EBS national forecast projections end at 2016 although the forecasts can be carried forward beyond this date to 2021 if treated with caution, however, to do this as far as 2026[3] is not considered robust.

6.8 The EBS expenditure figures include small amounts of expenditure spent in non retail outlets such as mail order / internet shopping, trade counters, vending machines, etc. referred to as special forms of trading (SFT) and in the 2004 study SFT were removed. However, in this study SFT are retained as the survey allows respondents to state they purchase various goods on the internet and / or at the market so their market share can be assessed at the local level rather than applying national average SFT figures.

Calculate Current and Future Available Expenditure

6.9 The 2007 expenditure levels are projected forward to 2008 (base year), 2011 and 2016 using forecasts recommended by EBS in Retail Planner Brief 6.0. EBS's national forecasts end at 2016 and in order to forecast expenditure growth to 2021 the 2008 to 2016 forecasts were projected forward a further five years. For convenience goods the EBS forecasts are 0.2% pa to 2016. For comparison goods the EBS forecasts are 0.5% pa to 2012 and 1.3% pa to 2016.

6.10 This identifies the first source of retail expenditure capacity i.e. expenditure growth. However, not all of this expenditure is available to support new floorspace in the town centres as allowances have to be made for some expenditure to continue leaking from the study area to higher order competing centres and (at the periphery) nearer centres. This leakage is identified in the following market share analysis stage. In addition turnover growth (efficiency improvements) in current floorspace over and above the rate of inflation (held constant by 2007 prices) has to be taken into account[4].

Source Two: Leakage

Calculate Market Share

6.11 The market shares of the main centres, supermarkets and retail parks, for both goods categories are derived from the household survey divided into postcode sector based

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[3] 2026 is the last year for which EBS provide local population projections although the national expenditure forecasts end at 2016

[4] Other claims on quantitative need such as planned floorspace (commitments) and allowances for re-occupied vacant units are taken into account once the entire quantitative need from all three sources is calculated.

subzones that reflect the responses to the town centre shopper / visitor questionnaire survey.

6.12 The questionnaire asks detailed shopping destination questions for 14 sub-categories or classes of expenditure. For convenience goods this is broken down into mainfood and top-up expenditure as the latter forms an important source for local and / or smaller convenience stores. The household survey indicates that in the study area around 70% of expenditure is spent at the mainfood destination and 30% at top-up destinations. The results are set out in Appendix 5, Tables F to J.

6.13 For comparison goods the survey broke this down into various classes of goods to assist the qualitative understanding. An overall comparison goods market share was calculated (Table L) by weighting the survey result for each sub-category / class according to the proportion of expenditure spent upon it locally as set out in the EBS Retail Planner Reports. The results are set out for the various classes of comparison goods in Appendix 5, Tables M to Z.

6.14 Once overall market shares are calculated for the two broad goods categories (convenience and comparison) and their constituent classes of goods, they can be compared to the results of earlier surveys to identify any potential areas for increased market share through the claw back of leaking expenditure.

Source Three: Overtrading

6.15 Overall current and future (2008, 2011, 2016 and 2021) turnover levels are estimated for comparison and convenience goods floorspace from national company averages published in Mintel 2008 Retail Rankings and also by Verdict. This is then compared with the expected turnover of existing stores based on the market share analysis (identified in the Source Two Leakage stage) to identify areas of overtrading. However, as stated before, with regard to the SoS Burnham decision only overtrading from out-of-centre foodstores will be regarded as a source of quantitative need as overtrading at in-centre and at edge-of-centre stores can contribute to the vitality and viability of the town centre.

6.16 The turnovers are calculated by multiplying the net floorspace (or sales area) by the national company average sales density (£'s per square foot). The turnover figures are adjusted to take account of VAT (and petrol sales in the case of larger supermarkets). The turnovers of shops in the various centres are amalgamated to identify the likely level of turnover of the centres. Likewise the overall comparison goods turnovers of retail parks are also amalgamated to arrive at expected turnover levels for retail warehousing. For convenience goods the major supermarkets are treated individually and the smaller convenience businesses in the shopping centres and local / village centres are amalgamated.

6.17 Once the overall expected or benchmark turnovers have been calculated for the current and planned floorspace these can be compared to expenditure levels retained locally as derived from the survey based market share analysis to identify the third source of retail capacity - overtrading.

Overall Quantitative Need

6.18 Overall quantitative need is calculated for plan years (2011, 2016 & 2021) within the study period by:

1. Calculating expenditure growth and deducting from it the proportion of expenditure likely to be spent elsewhere based on Worksop and Retford's current market share within the study area for convenience and comparison goods expenditure;

2. Adding an allowance for increased market share in the form of clawed back leakage with reference to improvements in the local offer and also that of competing centre; and,

3. Adding any identified overtrading in out-of-centre stores.

6.19 Before identified quantified need can be used to support new retail floorspace proposals existing claims against it have to be deducted. These include an allowance for existing floorspace to improve their turnover efficiency over and above the rate of inflation that is held constant by a 2007 price base. A rate of between 0% and 2.8% pa is used depending upon the type of goods and the strength of the centre.

6.20 Other claims on identified quantified need include commitments – planned floorspace in the form of developments with existing planning consents that have yet to be built out.

6.21 The amount of floorspace that can be supported by the remaining identified capacity is calculated using average sales densities. For convenience goods two scenarios are calculated – the amount of town centre floorspace based on the current town centre average sales densities and also the amount of supermarket floorspace based on an average of the 'big four' operators. For comparison goods only the current town centre average sales densities are used to calculate the amount of floorspace that can be supported.

6.22 Extreme caution is required in interpreting the quantitative need for new retail floorspace beyond 2016 and the assessment has not considered quantitative need in 2026, as suggested in the brief, due to the unavailability of national expenditure forecasts beyond 2016 and the unreliability of estimates beyond 2021.

7.0 Worksop Convenience Goods Assessment

Conclusions of the 2004 Study

7.1 The 2004 study found no immediate quantitative need for significant additions to convenience goods floorspace in Worksop. However, by 2016 it recommended there might be a quantitative need for another small sized supermarket (900 sq m net) in the town arising largely from expenditure growth and the overtrading in the two out-of-centre superstores.

2008 Shopping Patterns

7.2 As explained earlier, the study area for this assessment is similar to the 2004 study area – see Map 1 in Appendix 1. For both convenience and comparison goods zones 1 (Worksop) and 3 (Whitwell and Creswell) very much form the PCA for Worksop although the draw from zone 3 for non-food is weaker. The SCA is formed by zones 2 (Harworth and Bircotes) and 4 (Anston and Dinnington).

7.3 The convenience goods market share analysis is shown in Tables F to J in Appendix 5 and they can be compared to the results in the 2004 Study that indicates mainfood shopping patterns have only changed marginally. The Worksop Sainsbury has increased market share slightly and the Worksop Tesco has decreased although it was still the most popular destination in zone 1.

7.4 Leakage to Doncaster remains at a comparable level although some has switched from the Asda to Tesco store. The mainfood market share for the Co-op at Bircotes in zone 2 where much of the leakage to Doncaster originates has also decreased. The Kwik Save store in Worksop has closed and the Safeway at Dinnington is now a Tesco and has increased its market share slightly.

7.5 The 2004 study does not state the percentage of convenience goods delivered. In 2008 1.3% of mainfood shopping expenditure was accounted for by deliveries. In terms of top-up shopping, the trend was a slight increase in market share for the large supermarkets at the expense of the smaller stores / centres.

Expenditure Growth

7.6 The most recent population data available was obtained, and projected forward to the required dates of 2011, 2016 and 2021, as well as 2008 (Table A in Appendix 2). For the reasons set out in the previous section the assessment has not considered quantitative need beyond 2021.

7.7 Expenditure per head figures were obtained from EBS for the seven zones that comprise the study area and were projected forward using the EBS forecasts in EBS

Retail Planner 6.1. EBS forecast 0.2% per annum (pa) growth for per capita[5] convenience expenditure between 2008 and 2016[6].

7.8 Table C shows the total available expenditure for convenience goods in the study period, calculated by multiplying the population figures by the expenditure figures. This indicates that within the study area there is forecast to be £8.4m growth between 2008 and 2011 and £5.4m growth in the Worksop catchment area. In the period from 2008 to 2016 there will be £22.8m growth in the study area, including £14.3m growth in the Worksop catchment area, and in the period to 2021 this increases to £38.2m growth in the study area and £23.7m growth in the Worksop catchment area.

7.9 These amounts of expenditure growth cannot be assumed to be all available to support additional retail floorspace in Worksop over the relevant periods. There are other sources of quantitative need to take into account as well as the claims on this such as for turnover efficiency improvements, commitments and reoccupied vacancies. In addition expenditure growth from the SCA zones 2 and 4 cannot really be used to support new convenience goods floorspace in Worksop and it is likely that a small percentage of the growth will continue to leak from the PCA, as 3% of current expenditure in zone 1 (Worksop) does and 29% in zone 3 (Whitwell and Creswell).

Leakage

7.10 This source of quantitative need is not drawn upon in this convenience goods quantitative assessment because the present level of leakage from zone 1 is so low – c. 3%. There is greater leakage from zone 3 (Whitwell and Creswell) but much of this is to nearby Clowne where there is a (24 hour) Tesco superstore and an Aldi. In total 16% of convenience goods expenditure from the PCA (zones 1 and 3) is spent outside the PCA elsewhere in the study area and beyond.

7.11 Some of this leakage from the PCA will be associated with journeys to work and / or combined with other regular trips out of Worksop, and much is from peripheral parts of the PCA including the rural area to the north and around Whitwell and Creswell. The level of leakage is so low that no allowance is made here for an increase in market share in the PCA from the current level.

Overtrading

7.12 Overtrading, or undertrading, is calculated for main centres and food stores in Worksop by comparing expected levels of turnover with turnover levels derived from the household survey. The expected turnover of existing convenience floorspace is shown in Table 1, calculated with reference to national company average sales densities recorded in the 2008 Verdict Grocery Retailers Report for the larger supermarkets and Mintel's 2008 Retail Rankings for other retailers.

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5 Growth in annual expenditure per person

6 This national EBS forecast of 0.2% pa is also used for the period to 2021.

7.13 Estimated inflow expenditure to Worksop convenience retailers from households living outside the catchment / study area is shown in Table 1. The estimates were informed by the 2008 visitor survey that indicate the catchment is very localised hence an allowance of only 5% inflow expenditure.

7.14 Estimated actual turnovers, derived from the household survey, are also shown in Table 1 and potential over / undertrading has been calculated by deducting the expected turnover from study area households from the household survey based turnover and is shown in the penultimate column of the table. Whilst several stores are found to be overtrading significantly the highest in percentage terms is at the out-of-centre Tesco store and to a lesser extent at the Aldi store and this is included in the quantitative need assessment in Appendix 2 Table 2.

Convenience Goods Capacity Assessment

7.15 Table 2 shows the convenience goods assessment in the period 2008 to 2021. There is no expenditure growth in the base year. No claim is made against leakage that can be realistically clawed back to support quantitative need in Worksop due to the high retention level within the PCA. There is £22.5m overtrading in out-of-centre supermarkets (Tesco and Aldi) that can be used to support new convenience goods floorspace in sequentially preferable locations within Worksop and this is the only source of quantitative need in 2008.

7.16 Table 2 shows that by 2011 there is forecast to have been some expenditure growth and when this is added to overtrading in out-of-centre supermarkets (with an allowance for turnover efficiency) there is a forecast potential capacity of £25.6m. In 2016 there has been further expenditure growth and when this is added to overtrading in out-of-centre supermarkets there is a forecast potential capacity of £30.9m. The final column in Table 2 shows the position in 2021 when there is further expenditure growth and when this is added to overtrading in out-of-centre supermarkets there is a forecast potential capacity of £36.5m.

7.17 Not all of this potential capacity is available to support new convenience goods floorspace in Worksop as there are existing claims on it including commitments (shown in Table 3) and turnover efficiency improvements in existing floorspace over and above the rate of inflation held constant by 2007 prices (shown in Table 4). In addition there is vacant floorspace in the town centre (shown in Table 3) that also has claim on potential capacity.

7.18 Commitments shown in Table 3 include the Tesco relocation and the Sainsbury Local store on Newcastle Avenue (this is now trading). At a national company average sales density the net increase in Tesco floorspace arising from the relocation will have a turnover of £4.5m (95% of its total turnover) drawn from the catchment area and the Sainsbury proposal is expected to have a turnover of £2.3m.

7.19 In addition there are the existing vacancies in the town centre. If 12% (the current percentage of convenience floorspace in the town centre) of these are re-occupied by convenience operators at a town centre average sales density this would account for £1.4m of the identified capacity assuming that, as with current town centre floorspace, around 5% of trade came from beyond the Study Area.

7.20 The assessment in Table 4 indicates that in the base year of 2008 once existing claims such as commitments, re-occupied vacancies and turnover efficiency improvements are taken into account there is £14.3m remaining capacity to support new convenience goods floorspace. At a town centre average sales density this surplus would support around 4,000 sq m (net) of additional town centre floorspace, or at an average supermarket sales density around 1,200 sq m (net) of additional floorspace.

7.21 By 2011 once existing claims are taken into account there is £16.7m remaining capacity to support new convenience goods floorspace. At a town centre average sales density this surplus would support around 4,600 sq m (net) of additional town centre floorspace, or at an average supermarket sales density around 1,400 sq m (net) of additional floorspace.

7.22 Table 4 indicates that in 2016 once existing claims are taken into account there is £20.8m remaining capacity to support new convenience goods floorspace. At a town centre average sales density this surplus would support around 5,700 sq m (net) of additional town centre floorspace, or at an average supermarket sales density around 1,700 sq m (net) of additional floorspace.

7.23 Finally Table 4 indicates that in 2021 once existing claims are taken into account there is £25.3m remaining capacity to support new convenience goods floorspace. At a town centre average sales density this surplus would support around 6,900 sq m (net) of additional town centre floorspace, or at an average supermarket sales density around 2,100 sq m (net) of additional floorspace.

Conclusions

7.24 Worksop is well served by convenience shopping facilities including a Tesco superstore, a Sainsbury superstore, a Netto, Aldi and an Iceland. In addition there is the Marks and Spencer Simply Food, the town centre shops and regular outdoor market, and smaller shops distributed throughout town all taking up available expenditure. In addition there is a proposed Tesco relocation to a site much nearer the town centre, although still out-of-centre, that should increase linked trips to the centre. There is also a smaller Sainsbury Local store that recently opened on Newcastle Avenue. Together with the proposed Tesco store this will greatly improve the qualitative offer in Worksop.

7.25 Worksop's market share of convenience spending within the PCA has remained static since 2004. There is very little leakage from the town itself (c. 3%, Appendix 5 Table

H). As a result of the current offer and the ‘limited capacity’, there is not a great short-term (2011) quantitative need for additional convenience goods floorspace in Worksop. However, by 2016 there may be a quantitative need for 5,700 sq m (net) of additional town centre floorspace or a small supermarket with a net convenience goods sales area of around 1,700sq m. And by 2021 there may be a need for 6,900 sq m (net) of town centre convenience goods floorspace or 2,100 sq m (net) of supermarket floorspace i.e. a medium-sized supermarket. For the reasons set out in the previous section regarding the unavailability of national expenditure projections beyond 2016 no assessment has been undertaken for 2026.

7.26 Overall, stores in Worksop are trading above expected levels but this is skewed by the existing Tesco store, and Netto and Aldi stores to a lesser extent, which are all overtrading, whereas other stores are undertrading relative to expected levels based on national company averages. Any new convenience goods floorspace in Worksop which is promoted on the basis of quantitative need should be located within the town centre to complement the existing provision. Proposals outside the town centre / retail hierarchy of an inappropriate scale are likely to fail one or more of the PPS6 (3.4) policy tests. Section 11 considers qualitative need issues further.

8.0 Retford Convenience Goods Assessment

Conclusions of the 2004 Study

8.1 The 2004 study found no immediate quantitative need for significant additions to convenience goods floorspace in Retford. However, by 2016 it recommended there might be a quantitative need for another small sized supermarket (1,000 sq m net) in the town arising largely from expenditure growth and the overtrading in the two out-of-centre superstores.

2008 Shopping Patterns

8.2 As explained in the previous section, the study area for this assessment is similar to the 2004 study area – see Map 1 in Appendix 1. For both convenience and comparison goods zone 5 (Retford) alone forms the PCA for Retford. The SCA is formed by zones 6 (Markham and Ollerton) and 7 (Bawtry and Gringley) although this is a very weak catchment shared with more dominant competing centres, particularly Doncaster to the north.

8.3 The convenience goods market share analysis is shown in Tables F to J in Appendix 5 and they can be compared to the results in the 2004 Study. However, zone 6 (Markham and Ollerton) has been extended in the 2008 study so they are not directly comparable. In 2004 Retford had a market share of 76% in its catchment area for convenience goods but this has fallen to 63% in 2008 and this is not entirely accounted for by the extended zone 6 (where there is a new Tesco store). The 2004 study also included zone 2 (Harworth and Bircotes) in the Retford catchment and there has been an increase in leakage to Doncaster from this zone since then. There is also increased leakage from zone 7 (Bawtry and Gringley) to Doncaster as well as Gainsborough, since 2004.

Expenditure Growth

8.4 The population data was projected forward to the required dates of 2011, 2016 and 2021, as well as 2008 (Table A in Appendix 2). (For the reasons set out earlier the assessment had not considered quantitative need beyond 2021.) The EBS expenditure per head figures were also projected forward using the EBS forecast growth rate of 0.2% pa up to 2016[7].

8.5 Table C shows the total available expenditure for convenience goods in the study period, calculated by multiplying the population figures by the expenditure figures. This indicates that within the study area there is forecast to be £8.4m growth between 2008 and 2011 and £3m growth in the Retford catchment area. In the period from 2008 to 2016 there will be £22.8m growth in the study area, including £8.5m growth in the

[7] This national EBS forecast of 0.2% pa is also used for the period to 2021.

Retford catchment area, and in the period to 2021 this increases to £38.2m growth in the study area and £14.5m growth in the Retford catchment area.

8.6 These amounts of expenditure growth cannot be assumed to be all available to support additional retail floorspace in Retford over the relevant periods. There are other sources of quantitative need to take into account as well as the claims on this such as for turnover efficiency improvements, commitments and reoccupied vacancies. In addition expenditure growth from the SCA zones 6 and 7 cannot really be used to support new convenience goods floorspace in Retford and it is likely that a small percentage of the growth will continue to leak from the PCA, as 8% of expenditure in zone 5 (Retford) currently does.

Leakage

8.7 This source of quantitative need is not drawn upon in this convenience goods quantitative assessment because the present level of leakage from zone 5 is quite low at around 11% to elsewhere in the study area and beyond. Some of this leakage from the PCA will be associated with journeys to work and / or combined with other regular trips out of Retford. There will also be leakage from peripheral parts of the PCA including the rural area to the east around Wheatley for example which is closer to Gainsborough where a Tesco Extra has opened since 2004 and there is also a Morrisons store. Given the extent of the PCA the level of leakage is relatively low so no allowance is made here for an increase in market share from the current level.

Overtrading

8.8 Overtrading, or undertrading, is calculated for main centres and food stores in Retford by comparing expected levels of turnover with turnover levels derived from the household survey. The expected turnover of existing convenience floorspace is shown in Table 5, calculated with reference to national company average sales densities recorded in the 2008 Verdict Grocery Retailers Report for the larger supermarkets and Mintel's 2008 Retail Rankings for other retailers.

8.9 Estimated inflow expenditure to Retford convenience retailers from households living outside the catchment / study area is shown in Table 5. The estimates were informed by the 2008 visitor survey that indicate the catchment is very localised hence an allowance of only 5% inflow expenditure.

8.10 Estimated actual turnovers, derived from the household survey, are also shown in Table 5 and potential over / undertrading has been calculated by deducting the expected turnover from study area households from the household survey based turnover and is shown in the penultimate column of the table. The two supermarkets in Retford are found to be overtrading and the Morrisons superstore in particular and this is included in the quantitative need assessment in Tables 6 to 8.

Convenience Goods Capacity Assessment

8.11 Table 6 shows the convenience goods assessment in the period 2008 to 2021. There is no expenditure growth in the base year. No claim is made against leakage that can be realistically clawed back to support quantitative need in Worksop due to the high retention level within the PCA. There is £15.1m overtrading in out-of-centre supermarkets (Morrsions and Asda) that can be used to support new convenience goods floorspace in sequentially preferable locations within Retford and this is the only source of quantitative need in 2008.

8.12 Table 6 shows that by 2011 there is forecast to have been some expenditure growth and when this is added to overtrading in out-of-centre supermarkets (with an allowance for turnover efficiency) there is a forecast potential capacity of £18.1m. In 2016 there has been further expenditure growth and when this is added to overtrading in out-of-centre supermarkets there is a forecast potential capacity of £23.3m. The final column in Table 6 shows the position in 2021 when there is further expenditure growth and when this is added to overtrading in out-of-centre supermarkets there is a forecast potential capacity of £28.8m.

8.13 Not all of this potential capacity is available to support new convenience goods floorspace in Retford as there are existing claims on it such as turnover efficiency improvements in existing floorspace over and above the rate of inflation held constant by 2007 prices (shown in Table 8). In addition there is vacant floorspace in the town centre (shown in Table 7) that also has claim on potential capacity. If 11% (the current percentage of convenience floorspace in the town centre) of these are re-occupied by convenience operators at a town centre average sales density this would account for £0.4m of the identified capacity assuming that, as with current town centre floorspace, around 5% of trade came from beyond the Study Area. Currently there are no convenience goods commitments in Retford.

8.14 The assessment in Table 8 indicates that in the base year of 2008 once existing claims such as commitments, re-occupied vacancies and turnover efficiency improvements are taken into account there is £14.6m remaining capacity to support new convenience goods floorspace. At a town centre average sales density this surplus would support around 6,000 sq m (net) of additional town centre floorspace, or at an average supermarket sales density around 1,200 sq m (net) of additional floorspace.

8.15 By 2011 once existing claims are taken into account there is £17.2m remaining capacity to support new convenience goods floorspace. At a town centre average sales density this surplus would support around 7,000 sq m (net) of additional town centre floorspace, or at an average supermarket sales density around 1,400 sq m (net) of additional floorspace.

8.16 Table 4 indicates that in 2016 once existing claims are taken into account there is £21.6m remaining capacity to support new convenience goods floorspace. At a town centre average sales density this surplus would support around 8,700 sq m (net) of additional town centre floorspace, or at an average supermarket sales density around 1,800 sq m (net) of additional floorspace.

8.17 Finally Table 4 indicates that in 2021 once existing claims are taken into account there is £26.4m remaining capacity to support new convenience goods floorspace. At a town centre average sales density this surplus would support around 10,600 sq m (net) of additional town centre floorspace, or at an average supermarket sales density around 2,200 sq m (net) of additional floorspace.

Conclusions

8.18 Retford is well served by convenience shopping facilities including a Morrisons superstore, an Asda supermarket, a Netto, Aldi, and an Iceland. In addition there are the town centre shops and traditional market, and smaller shops distributed throughout the town all taking up available expenditure.

8.19 Retford's market share of convenience spending within the catchment area (PCA & SCA) has declined since 2004. There is very little leakage from the town itself (c. 11%, Appendix 5 Table H). There is however some current capacity for additions to the convenience goods floorspace in Retford and a small supermarket could be supported largely on the basis of the overtrading at the out-of-centre Morrisons superstore. By 2021 this capacity has grown to a medium sized supermarket (c. 2,200 sq m net), however, as this would be at the expense of new town centre floorspace a better strategy would be to support a smaller supermarket (c. 1,500 sq m net). Any new convenience goods floorspace in Retford which is promoted on the basis of quantitative need should be located within or close to the town centre to complement the existing provision. Section 11 considers qualitative need issues.

9.0 Worksop Comparison Goods Assessment

Conclusions of the 2004 Study

9.1 The 2004 study concluded that Worksop is well used for DIY and hardware and other bulky goods but there were high levels of leakage to Sheffield / Meadowhall and Doncaster. Overall within the study area 33% of non-food expenditure was spent within Worksop. The 2008 survey recorded a fall in market share to 28% although this was based on a more detailed survey. However, there has almost certainly been a fall in market share as the offer in competing centres has improved since 2004 and in addition internet sales have increased significantly for many classes of comparison goods.

Fashion Goods

9.2 This class of goods generates more frequent and distant shopping trips than most classes within comparison goods category and was divided into two questions asking about first and second choice destinations. Table P shows that Worksop (16.3%) appears to have increased its market share since 2004 (14%). Shopping patterns were similar to food shopping as Worksop enjoyed the greatest market share in PCA zones 1 (32.1%) and 3 (31.8%). However, the town centre enjoyed a greater market share in the SCA zone 4 (18%) than elsewhere in the catchment. In particular the market share was bolstered by the town centre's second choice destination status (Table N) for many residents in the wider study area. Sheffield city centre and The Meadowhall Centre combined were the main destinations for leakage from the Worksop catchment.

Toys, Games and Hobby Goods

9.3 Table Q shows that in 2008 19.9% of expenditure in the study area for this class of goods was spent in Worksop and in its PCA (zone 1) Worksop attracted 44% of expenditure and 37.5% in PCA zone 3 but only 10.5% in SCA zone 4. Worksop's market share in the other study area zones was much lower ranging from 0% in zone 7 to 8.9% in (SCA) zone 2. Destinations for leakage varied between zones but followed similar patterns to clothes shopping with Sheffield city centre and The Meadowhall Centre combined being the main destination for Worksop residents travelling out of the town to shop.

Books and Stationery Goods

9.4 Table R shows that in 2008 26.6% of expenditure in the study area for books and stationary goods was spent in Worksop. In zone 1 Worksop retained 61.5% of expenditure and 61.4% in zone 3 but only 15.7% in the SCA zone 4. Worksop's market share in the other study area zones was much lower ranging from 0% in zone 7 to 6% in SCA zone 2. Leakage for this class of goods was much lower than for other classes of comparison goods. Sheffield city centre and The Meadowhall Centre combined were the main destination for leakage from the Worksop catchment area.

CDs, DVDs, Tapes and Computer Games

9.5 One of the most striking results in 2008 was the 22.6% market share for etailing within the study area for this class of goods with variations between zones. Table S shows that in 2008 within the study area 17.1% of expenditure for this class of goods was spent in Worksop. In zone 1 Worksop attracted 41% of expenditure and 37.8% in zone 3 but only 5.7% in SCA zone 4. Worksop's market share in the other study area zones was much lower ranging from 0% in zone 7 to 3.6% in SCA zone 2. The main destination for leakage from the Worksop catchment area was again Sheffield city centre and The Meadowhall Centre.

Pharmacy Goods

9.6 This class of goods generates particularly localised shopping patterns, influenced by the presence of pharmacies often in close proximity to medical centres and / or anchoring local shopping centres / parades and, increasingly, within large supermarkets. Table T shows that in 2008 25.8% of expenditure for pharmacy goods and toiletries in the study area was spent in Worksop.

9.7 Table T shows that in 2008 27.7% of expenditure for pharmacy goods and toiletries was spent in Retford. In its PCA zone 1 Worksop town centre retained 58.7% of expenditure and a further 32.5% was spent elsewhere in zone 1 including the supermarkets that have pharmacy counters. 58.3% of expenditure in PCA zone 3 was also spent in Worksop town centre but only 12.8% in SCA zone 4. Worksop's market share in the other study area zones was much lower ranging from 0.7% in zone 5 to 6.8% in SCA zone 2.

Hardware and Tableware

9.8 The 2004 survey did not ask about shopping destinations for these goods so no comparison can be made. Table U shows that in 2008 23.8% of expenditure on hardware and tableware was spent in Worksop and overall 55.4% was retained within the study area. In PCA zone 1 Worksop retained 53.6% of expenditure, 43.1% in PCA zone 3 and 25.4% in SCA zone 4. Worksop's market share in the other study area zones was much lower ranging from 0% in zone 7 to 8.7% in SCA zone 2. There was relatively low leakage from Worksop (34%) and Sheffield city centre and The Meadowhall Centre combined were the main destinations in zones 1, 3 and 4.

Jewellery and Watches

9.9 This was another class of goods the 2004 survey did not ask a question about. Table V shows that in 2008 25.4% of expenditure for this class of goods was spent in Worksop and overall 44.5% was retained within the study area. In PCA zone 1 Worksop attracted 53.2% of expenditure, 56.9% in PCA zone 3 and 20.3% in SCA zone 4. Worksop's market share in the other study area zones was much lower ranging from 0% in zone 7 to 10.4% in SCA zone 2. Sheffield city centre and The Meadowhall Centre combined were the main destinations for leakage from zones 1, 3 and 4.

Soft Furnishings

9.10 This was another class of goods the 2004 survey did not ask a question about. Table W shows that in 2008 20.9% of expenditure on soft furnishings was spent in Worksop and overall 42.3% was retained within the study area. In PCA zone 1 Worksop retained 47.7% of expenditure, 36% in PCA zone 3 but only 14.1% in SCA zone 4. Worksop's market share in the other study area zones was much lower ranging from 0% in zone 7 to 8.5% in SCA zone 2. Leakage from Worksop (48.1%) was fairly high and again Sheffield city centre and The Meadowhall Centre combined were the main destination in zones 1, 3 and 4.

Electrical Goods

9.11 Both the 2004 and 2008 surveys asked about these goods so the results are comparable. The main difference between the 2004 and 2008 surveys was again the slightly higher market shares for Worksop (including the retail park) in 2008 and lower levels of leakage to all destinations. However, the 2004 study didn't identify a destination for 28% of expenditure so the results are still not directly comparable.

9.12 Like other bulky goods, electrical goods tend to generate localised shopping patterns influenced by the presence of specialist retail warehouses (e.g. Currys and Comet in Worksop) but a high proportion were also bought via the internet / mail order (12.5% in the study area). The retail warehouses in Worksop accounted for 28.7% of expenditure in the study area and drew significant trade from most zones reflecting a weaker offer elsewhere.

9.13 In zone 1 Worksop town centre accounted for 26.7% of expenditure and the retail parks 44.3%. In PCA zone 3 the Worksop retail parks had 51.6% market share but only 15.1% was spent in the town centre and in SCA zone 4 28.1 % was spent in the retail parks but only 11.2% in the town centre. Elsewhere in the study area the town centre's market share was fairly low ranging from 0% in zones 6 and 7 to 4.8% in SCA zone 2. In zones 1, 3 and 4 retail parks in Sheffield as well as the city centre were the most common destinations for leakage.

Furniture and Carpets

9.14 Both the 2004 and 2008 surveys asked questions about this class of (bulky) goods so the survey results are comparable. The main difference between the 2004 and 2008 surveys was again the slightly higher market shares for Worksop and Retford town centres in 2008 and lower levels of leakage to Lincoln and Meadowhall but higher leakage to Doncaster, Sheffield and Rotherham. However, the 2004 study doesn't identify a destination for 43% of expenditure that includes those who said they didn't buy these goods or that destinations varies that were factored out of the 2008 analysis so the results were still not directly comparable.

9.15 Like other bulky goods, furniture tends to generate localised shopping patterns often influenced by the presence of specialist retail warehouses, in the case of Worksop the stores at Burbage Lane (Currys, Comet, B&Q, Wickes and CarpetRight, etc.). However, there was also a town centre presence in the form of specialist retailers such as Eyres furniture store, Walmsleys and Rossingtons Carpets.

9.16 The specialist retail presence in the town centre was reflected in a higher market share than other bulky goods in all zones (25.3% in the study area) as shown in Table X and particularly in zone 1 (53.7%). A further 11.9% of zone 1 expenditure was spent at the retail park and 1.3% elsewhere in the zone giving a retention level of 64.9%. In the wider study area 41.7% of PCA zone 3 (Whitwell / Creswell) expenditure was spent in Worksop town centre and 15.5% in SCA zone 4. In zones 1, 3 and 4 retail parks in Sheffield as well as the city centre were the most common destination for leakage.

DIY Goods

9.17 This final class of (bulky) goods generated the most localised of shopping patterns with very low internet / mail order sales (1.6%). Both the 2004 and 2008 surveys asked questions about DIY shopping destinations so the survey results are comparable. The main difference between the 2004 and 2008 surveys was the slightly higher market share for Worksop in 2008 and lower levels of leakage to most destinations.

9.18 In zone 1 (Worksop) 32% of expenditure was spent in the town centre and 58.9% in the retail parks (B&Q and Wickes). An even higher percentage (64.6%) was attracted from PCA zone 3 (Whitwell / Creswell) to the Worksop retail parks but there was less expenditure spent in the town centre (22%). In SCA zone 4 17.9% of expenditure was spent in the town centre and 46.2% in the retail parks. In zone 1 there was more leakage to Doncaster than Sheffield which was a reverse of the shopping patterns for most classes of goods. In PCA zone 3 there was very little leakage and it was widely distributed.

Overall Comparison Goods Market Share

9.19 Tables K and L show that Worksop town centre draws most of its trade from zone 1, however, it also enjoys the greatest market share of any centre in zone 3 (Whitwell / Creswell) particularly when combined with the retail parks. Zone 3 therefore also forms part of the PCA of Worksop. Zone 4 (Anston / Dinnington) appears to be part of the

Sheffield / Meadowhall catchment but Worksop and Rotherham also significant draw trade from this zone, particularly for bulky goods, and in the case of Worksop it also forms part of the SCA. Zone 2 (Harworth / Bircotes) forms part of Doncaster's catchment area rather than Worksop which apart from some bulky goods expenditure only draws a small amount of trade from here. The PCA for Worksop for comparison goods is therefore formed by zones 1 and 3 and zone 4 forms a SCA although for the purposes of this study zone 2 is also treated as a (weak) SCA zone.

9.20 In terms of competing centres, Sheffield and Meadowhall are the main destinations for comparison goods leakage from the PCA and SCA zone 4. Doncaster including the Lakeside outlet centre is the main destination for leakage from SCA zone 2 (Harworth / Bircotes). Rotherham also draws some trade from SCA zones 4 (Anston / Dinnington) and 2 particularly for bulky goods as Rotherham has a strong retail park offer.

Expenditure Growth

9.21 The most recent population data available was obtained, and projected forward to the required dates of 2011, 2016 and 2021, as well as 2008 (Table A in Appendix 3). For the reasons set out in the Section 5 the assessment had not considered quantitative need beyond 2021.

9.22 Expenditure per head figures were obtained from EBS for the seven zones that comprise the study area and were projected forward using the EBS forecasts in EBS Retail Planner 6.1. EBS forecast 0.5% per annum (pa) growth for per capita comparison expenditure up to 2012 and 1.3% pa growth between 2008 and 2016[8].

9.23 Appendix 3 Table E shows the total available expenditure for comparison goods in the study period, calculated by multiplying the population figures by the expenditure figures. This indicates that within the study area there is forecast to be £19m growth between 2008 and 2011 and £12m growth in the Worksop catchment area. In the period from 2008 to 2016 there will be £93.1m growth in the study area, including £57.2m growth in the Worksop catchment area, and in the period to 2021 this increases to £157.2m growth in the study area and £96.2m growth in the Worksop catchment area.

9.24 These amounts of expenditure growth cannot be assumed to be all available to support additional retail floorspace in Worksop over the relevant periods. There are other sources of quantitative need to take into account as well as the claims on this such as for turnover efficiency improvements, commitments and reoccupied vacancies. In addition expenditure growth from the SCA zones 2 and 4 cannot really be used to support new comparison goods floorspace in Worksop and it is likely that a significant percentage of the growth will continue to leak from the PCA due to the strength of offer

[8] This national EBS forecast of 1.3% pa is also used for the period to 2021.

in competing centres such as Sheffield / Meadowhall, Doncaster / Lakeside and Rotherham. Currently around 43% of comparison goods expenditure leaks from the Worksop PCA formed by zones 1 and 3 (Whitwell and Creswell) so without an increase in market share this cannot be claimed as capacity in Worksop.

Leakage

9.25 This source of quantitative need is not drawn upon in this comparison goods quantitative assessment because of the strength of offer in higher tier competing centres such as Sheffield and Doncaster particularly for clothing and fashion goods for which people are prepared to travel a considerable distance. Worksop has a higher market share for other town centre goods as well as bulky goods although for some classes of goods the internet is taking an increasing market share. Nationally Experian forecast internet sales to grow from c. 8% of comparison goods in 2008 to around 12% by 2016. In addition, some of the leakage from the PCA will be associated with journeys to work and / or combined with other regular trips out of Worksop and the PCA is quite extensive so in the peripheral areas higher tier competing centres are fairly close in terms of time / distance. Therefore considering the above, no allowance is made here for an increase in market share in the PCA / SCA / study area from the current level.

Overtrading

9.26 Overtrading, or undertrading, is calculated for the town centre and retail parks / warehouses and large supermarkets in Worksop by comparing expected levels of turnover with turnover levels derived from the household survey. The expected turnover of existing comparison floorspace is shown in Table 9, calculated with reference to national company average sales densities recorded in the Mintel's 2008 Retail Rankings and 2008 Verdict Grocery Retailers Report for supermarkets.

9.27 Estimated inflow expenditure to Worksop comparison retailers from households living outside the catchment / study area is shown in Table 9. The estimates were informed by the 2008 visitor survey that indicate the catchment is very localised hence an allowance of only 5% inflow expenditure from beyond the study area.

9.28 Estimated actual turnovers, derived from the household survey, are also shown in Table 9 and potential over / undertrading has been calculated by deducting the expected turnover from study area households from the household survey based turnover and is shown in the penultimate column of the table. The town centre may be overtrading slightly as the sales density generated from the household survey appears higher than might be expected but no allowance is made for overtrading here and it is assumed there is equilibrium trading in the town centre. The greatest levels of overtrading appear to be in the retail warehouses and as these are the only and nearest such facilities for much of the study area this is not entirely surprising. Conversely the comparison goods floorspace in supermarkets appear to be undertrading but this may be due to their small size for superstores as well as possible under-recording in the household survey. Certainly the supermarkets were overtrading for convenience goods, particularly the Tesco store.

Comparison Goods Capacity Assessment

9.29 Table 10 in Appendix 3 shows the comparison goods assessment at 2008. There is no expenditure growth as this is the base year. Likewise there are no turnover efficiency improvements to deduct from the growth as this is the base year. No claim is made against leakage that can be realistically clawed back to support quantitative need in Worksop due to the strength of competing centres for clothes and fashion goods and also the likely growth of internet sales over the study period. There is £8.5m overtrading in out-of-centre retail warehouses that can be used to support new comparison goods floorspace in sequentially preferable locations within Worksop and this is the only source of quantitative need in 2008.

9.30 Claims on the quantitative need identified in Table 10 are shown in the table 11. These include commitments such as the Highground Estates Retail Park (subject to a legal agreement), adjacent to the out-of-centre Sainsbury superstore, Sandy Lane Retail Park extension (also subject to a legal agreement) and the Tesco relocation that will have an increased area given over to non-food. In addition there are 5,500 sq m (gross) vacant floorspace in the town centre. If 30% (the current percentage of comparison floorspace in the town centre) of this is re-occupied by comparison operators at a town centre average sales density this would account for £5.2m of the identified capacity assuming that, as with current town centre floorspace, around 5% of trade came from beyond the Study Area.

9.31 The assessment in Table 12 indicates that in the base year once commitments and re-occupied vacancies are taken into account there is no remaining capacity to support new comparison goods floorspace. Even in 2011 and 2016 by when there is forecast to have been some expenditure growth there is no quantitative need for new floorspace. This is because of a number of reasons including the low growth rate for comparison goods expenditure, an allowance for turnover efficiencies of 1% pa in existing floorspace and also the high level of committed floorspace. Only by 2021 is there sufficient quantitative need for new comparison goods floorspace in Worksop town centre and table 12 indicates this is not significant at around 1,500 sq m (net) or 2,200 sq m (gross) based on a town centre average sales density.

9.32 If not all the commitments are built out, and this is distinctly possible as two of them are for retail warehouses for which the current market is limited and they are both subject to legal agreements, then there will be additional capacity to support new floorspace. In addition the assessment makes no allowance for an increase in market share for Worksop within the study area on the basis of the growth in internet sales as well as the increasing strength of competing centres and destinations. However, if a modest market share increase of 2% was achieved increasing the town's market share within the study area to 32% (including smaller centres in Worksop) then there would be capacity for 3,300 sq m (net) of town centre floorspace by 2016 and 6,500 sq m (net) by 2021.

Conclusions

9.33 Worksop is well served by comparison shopping facilities including the town centre, retail parks and non-food floorspace in superstores. In addition there is the market and smaller specialist shops distributed throughout town. Worksop's market share of comparison spending within the study area stands at c. 30% including retail parks and smaller centres and has declined slightly since 2004. However, the town has a high retention rate within the PCA for comparison goods other than clothes and fashion items.

9.34 As a result of the current offer and the 'limited capacity' and likely increase in internet sales, there is no immediate quantitative need for any significant additions to the comparison goods floorspace in Worksop. Even in the short to medium-term (2011 and 2016) there is no quantitative need for additional comparison goods floorspace in Worksop. Only by 2021 is there any quantitative need and this is only very modest for c. 1,500 sq m (net) of additional town centre comparison goods floorspace.

9.35 However, it is possible that not all commitments will be built out as they are mostly for bulky goods floorspace for which there is little demand at the moment and two schemes are subject to legal agreements. This would then release more capacity to support town centre proposals. In addition, it is possible that a small market share increase of 2% might be achieved within the town centre and this would increase capacity in the medium term to 3,300 sq m (net) in the medium term (2016) and 6,500 sq m (net) in the long term (2021).

9.36 For the reasons set out in Section 5 regarding the unavailability of national expenditure projections beyond 2016 no assessment has been undertaken for 2026. Any new comparison goods floorspace in Worksop which is promoted on the basis of quantitative need should be located within or around the town centre to complement the existing provision. Section 10 considers qualitative need issues.

10.0 Retford Comparison Goods Assessment

Conclusions of the 2004 Study

10.1 The 2004 study concluded that Retford had a low market share for all classes of comparison goods with high levels of leakage to Doncaster and Sheffield / Meadowhall. Overall within the study area only 13% of non-food expenditure was spent in Retford. The 2008 survey recorded an increase in market share to 17% (including out-of-centre and small centre turnover) although this may be partly due to a more detailed survey that asked about more classes of comparison goods some of which generate particularly localised shopping patterns. However, there may well have been a slight increase in market share since 2004 as the local offer has improved qualitatively if not quantitatively.

Fashion Goods

10.2 This class of goods generates more frequent and distant shopping trips than most other classes of comparison goods. Appendix 3 Table P shows that Retford (12.2%) appears to have increased its market share for this class of goods since 2004 (7%). In the PCA (zone 5) Retford had a 28.5% market share and in the SCA zones 6 (17.9%) and 7 (10.1%) a slightly lower market share. Retford does not draw as much fashion / clothes expenditure from the wider study area as Worksop due to the weaker offer. Leakage was split between Doncaster / Lakeside (22.2%) and Sheffield / Meadowhall (20.5%) and Lincoln (11.4%) to a lesser extent.

Toys, Games and Hobby Goods

10.3 Table Q shows that in 2008 12.2% of expenditure for this class of goods in the study area was spent in Retford. In its PCA (zone 5) Retford attracted 36.2% of expenditure and 18.4% in zone 6 but only 2.6% in the other SCA zone 7. Retford's market share for toys and games in the other study area zones was negligible. The main destination for leakage from the Retford catchment area was Doncaster / Lakeside Outlet Centre.

Books and Stationery Goods

10.4 Table R shows that in 2008 24.7% of expenditure in the study area for books and stationary goods was spent in Retford. In its PCA (zone 5) Retford retained 65.7% of expenditure and 31.3% in zone 6 and 14% in the other SCA zone 7. Retford's market share in the other study area zones was much lower ranging from 0% in zone 4 to 6% in zone 2. There was much lower leakage for this class of goods and in Retford (zone 5) the limited leakage was split between Doncaster / Lakeside, Sheffield / Meadowhall and Lincoln.

CDs, DVDs, Tapes and Computer Games

10.5 Table S also shows that in 2008 14.9% of expenditure in the study area for this class of goods was spent in Retford. In its PCA (zone 5) Retford attracted 40.2% of expenditure but only 15.1% in SCA zone 7 and 7.7% in SCA zone 6. Retford's market share for CDs / DVDs in the other study area zones was negligible. The main destinations for leakage from Retford's catchment area were Sheffield / Meadowhall, Doncaster / Lakeside, Lincoln, Mansfield and Nottingham.

Pharmacy Goods

10.6 This class of goods generates particularly localised shopping. Table T shows that in 2008 27.7% of expenditure for pharmacy goods and toiletries in the study area was spent in Retford. In its PCA (zone 5) Retford retained 82.2% of expenditure and 28% in zone 6 and 9% in the other SCA zone 7.

Hardware and Tableware

10.7 The 2004 survey did not ask about shopping destinations for these goods so no comparison can be made. Table U shows that in 2008 17.7% of expenditure on hardware and tableware was spent in Retford 23.8% and overall 54.4% was retained within the study area. In its PCA (zone 5) Retford retained 48.4% of expenditure, 21.1% in zone 6 and 8% in the other SCA zone 7. Retford's market share in the other study area zones was negligible. There was relatively low leakage from Retford (38.9%) and zone 6 (39.5%) where 34.2% was spent in local shops / centres. Again leakage from Retford was split between Doncaster / Lakeside (13.6%), Sheffield / Meadowhall (7.2%) and Lincoln (5%).

Jewellery and Watches

10.8 This was another class of goods the 2004 survey did not ask a question about. Table V shows that in 2008 18.2% of expenditure for this class of goods was spent in Retford. In its PCA (zone 5) Retford attracted 52.4% of expenditure, 24.2% in zone 6 and 2.4% in zone 7. Retford's market share in the other study area zones was much lower ranging from 0% in zone 3 to 3.2% in zone 1 (Worksop). In Retford (zone 5) the main destinations for leakage were Doncaster / Lakeside (10.2%) and Sheffield / Meadowhall (12.4%).

Soft Furnishings

10.9 This was another class of goods the 2004 survey did not ask a question about. Table W shows that in 2008 16.7% of expenditure on soft furnishings was spent in Retford. In its PCA (zone 5) Retford retained 46.3% of expenditure, 19.6% in zone 6 and 13.6% in zone 7. Retford's market share in the other study area zones was negligible. In Retford (zone 5) leakage was split between Doncaster / Lakeside (10.9%), Sheffield / Meadowhall (7.8%) and Lincoln (8.9%).

Electrical Goods

10.10 Both the 2004 and 2008 surveys asked about these goods so the results are comparable. The main difference between the 2004 and 2008 surveys was the slightly higher market shares for Retford and lower levels of leakage to all destinations and particularly Doncaster. Like other bulky goods, electrical goods tend to generate localised shopping patterns influenced by the presence of specialist retail warehouses but a high proportion were also bought via the internet / mail order (12.5% in the study area).

10.11 Retford had a much lower retention level than Worksop reflecting its weaker offer for electrical goods as there are no retail parks / warehouses selling these goods in Retford. In zone 5 41.9% of expenditure was spent in the town centre but there was much lower retention in the SCA zones 6 (14.3%) and 7 (6.6%) and the market share in other zones was negligible. Overall in the study area Retford had a 13.9% market share and the main destination for leakage from the PCA was Worksop and the remaining leakage was widely distributed.

Furniture and Carpets

10.12 The main difference between the 2004 and 2008 surveys was the significantly higher market shares for Retford town centres and lower levels of leakage to Lincoln but higher leakage to Doncaster. Retford had a much lower retention level than Worksop reflecting its weaker offer for this class of goods. In addition there were no retail parks / warehouses selling furniture in Retford. In zone 5 51.3% of expenditure was spent in the town centre but there was much lower retention in the SCA zones 6 (14%) and 7 (7.1%) and the market share in other zones was negligible. Overall in the study area Retford had an 18.1% market share. Leakage from Retford was widely distributed but Worksop and Doncaster were the main destinations.

DIY Goods

10.13 Both the 2004 and 2008 surveys asked questions about DIY shopping destinations so the survey results are comparable. The main difference between the 2004 and 2008 surveys was the significantly higher share for Retford town centre and lower levels of leakage to most destinations. Retford still had a much lower retention level than Worksop reflecting its weaker offer for DIY goods. As there is only one retail warehouse selling DIY goods in Retford compared to two in Worksop. In zone 5 45.3% of expenditure was spent in the town centre and 24% in the retail parks but there was lower retention in the SCA zones 6 (19.5%) and 7 (10.4%) for the combined town centre / retail warehouse offer and the market share in other zones was negligible. Overall in the study area Retford town centre had a 15.3% market share and the retail park 8.1%. Worksop was the main destination for leakage from Retford.

Overall Comparison Goods Market Share

10.14 Retford town centre draws most of its trade from zone 5 and does not have the greatest market share of any centre in any other zone within the study area. The town centre does draw some trade from zone 6 (Markham / Ollerton) but this zone appears to form part of Mansfield's catchment more than Retford or Worksop. Retford draws less trade from zone 7 (Bawtry / Gringley) that really forms part of the catchment of Doncaster and Gainsborough to a lesser extent. The PCA for Retford for comparison goods is therefore formed by zone 5 alone with zones 6 and 7 forming a weak SCA shared with competing centres.

10.15 In terms of competing centres, the main destinations for comparison goods leakage from the PCA are Doncaster and the Lakeside. In addition there is significant trade lost to Lincoln, Gainsborough and Sheffield / Meadowhall. Worksop also draws some bulky goods expenditure from Retford which, apart from DIY, doesn't have a particularly good offer.

Expenditure Growth

10.16 The most recent population data available was obtained, and projected forward to the required dates of 2011, 2016 and 2021, as well as 2008 (Table A in Appendix 3). For the reasons set out in Section 5 of this report the assessment has not considered quantitative need beyond 2021.

10.17 Expenditure per head figures were obtained from EBS for the seven zones that comprise the study area and were projected forward using the EBS forecasts in EBS Retail Planner 6.1. EBS forecast 0.5% per annum (pa) growth for per capita comparison expenditure up to 2012 and 1.3% pa growth between 2008 and 2016[9].

10.18 Appendix 3 Table E shows the total available expenditure for comparison goods in the study period, calculated by multiplying the population figures by the expenditure figures. This indicates that within the study area there is forecast to be £19m growth between 2008 and 2011 and £7m growth in the Retford catchment area. In the period from 2008 to 2016 there will be £93.1m growth in the study area, including £35.9m growth in the Retford catchment area, and in the period to 2021 this increases to £157.2m growth in the study area and £61m growth in the Retford catchment area.

10.19 These amounts of expenditure growth cannot be assumed to be all available to support additional retail floorspace in Retford over the relevant periods. There are other sources of quantitative need to take into account as well as the claims on this such as for turnover efficiency improvements, commitments and reoccupied vacancies. In addition expenditure growth from the SCA zones 6 and 7 cannot really be used to support new comparison goods floorspace in Retford and it is likely that a significant percentage of the growth will continue to leak from the PCA due to the strength of offer in competing centres such as Doncaster / Lakeside, Sheffield / Meadowhall, Lincoln and Gainsborough. Currently around 53% of comparison goods expenditure leaks from the Retford PCA (zones 5) so without an increase in market share this cannot be claimed as capacity in Retford.

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9 This national EBS forecast of 1.3% pa is also used for the period to 2021.

Leakage

10.20 This source of quantitative need is not drawn upon in this comparison goods quantitative assessment because of the strength of offer in higher tier competing centres such as Doncaster, Sheffield, Lincoln, Mansfield and Gainsborough and particularly for clothing and fashion goods for which people are prepared to travel a considerable distance. Retford has a higher market share for other town centre goods but not bulky goods other than DIY due to the limited retail warehouse offer. Some of the leakage from the PCA will be associated with journeys to work and / or combined with other regular trips out of Retford and the PCA is quite extensive so in the peripheral areas higher tier competing centres are fairly close in terms of time / distance. In addition, for some classes of goods the internet is taking an increasing market share. Therefore considering the above, no allowance is made here for an increase in market share in the PCA / SCA / study area from the current level.

Overtrading

10.21 Overtrading, or undertrading, is calculated for the town centre and retail warehouses and large supermarkets in Retford by comparing expected levels of turnover with turnover levels derived from the household survey. The expected turnover of existing comparison floorspace is shown in Table 13, calculated with reference to national company average sales densities recorded in the Mintel's 2008 Retail Rankings and 2008 Verdict Grocery Retailers Report for supermarkets.

10.22 Estimated inflow expenditure to Retford comparison retailers from households living outside the catchment / study area is shown in Table 13. The estimates were informed by the 2008 visitor survey that indicate the catchment is very localised hence an allowance of only 5% inflow expenditure from beyond the Study Area. Estimated actual turnovers, derived from the household survey, are also shown in Table 13 and potential over / undertrading has been calculated by deducting the expected turnover from study area households from the household survey based turnover and is shown in the penultimate column of the table.

10.23 The town centre may be overtrading slightly as the sales density generated from the household survey appears higher than might be expected and is certainly higher than that identified in the 2004 study (although the Worksop sales densities are comparable) but no allowance is made for overtrading here and it is assumed there is equilibrium trading in the town centre. There is no overtrading in the retail warehouses either and the comparison goods floorspace in supermarkets appear to be undertrading. As a result there is no comparison goods overtrading in Retford to claim towards retail capacity and this source of quantitative need is note drawn upon.

Comparison Goods Capacity Assessment

10.24 Table 14 in Appendix 3 shows the comparison goods assessment at 2008. There is no expenditure growth as this is the base year. Likewise there are no turnover efficiency improvements to deduct from the growth as this is the base year. There is no expenditure growth as this is the base year and no turnover efficiency improvements to deduct from the growth as this is the base year. No claim is made against leakage that can be realistically clawed back or overtrading to support quantitative need in Retford. Therefore there is no immediate capacity or quantitative need in the town for new comparison goods floorspace.

10.25 Claims on the quantitative need identified in Table 14 are shown in the table 15. There are no commitments in Retford but there is vacant floorspace in the town centre that might be expected to be reoccupied. If 38% (the current percentage of comparison floorspace in the town centre) of these are re-occupied by convenience operators at a town centre average sales density this would account for £3.5m of the identified capacity assuming that, as with current town centre floorspace, around 5% of trade came from beyond the Study Area.

10.26 The assessment in Table 16 indicates that in the base year once commitments and re-occupied vacancies are taken into account there is no remaining capacity to support new comparison goods floorspace. Even in 2011 when there is forecast to have been some expenditure growth there is no quantitative need for new floorspace. This is because of a number of reasons including the low growth rate for comparison goods expenditure, an allowance for turnover efficiencies of 1% pa in existing floorspace and also the allowance for reoccupied vacancies. Only by 2016 is there sufficient quantitative need for new comparison goods floorspace in Retford town centre for around 900 sq m (net) or 1,200 sq m (gross) based on a town centre average sales density. By 2021 this quantitative need will have increased to 1,900 sq m (net) or 2,800 sq m (gross) as a result of further expenditure growth.

Conclusions

10.27 Retford has a reasonable comparison goods offer for a small town centre with a regular market and smaller specialist shops distributed throughout town. There is a good supporting superstore offer but the retail warehouse offer is very limited. The town has a reasonable retention rate within the PCA for comparison goods other than clothes.

10.28 As a result of the ‘limited capacity’, there is no immediate or short-term (2011) quantitative need for any significant additions to the comparison goods floorspace in Retford. The exception might be town centre floorspace as the assessment identifies a generous sales density for the centre suggesting a degree of possible overtrading but this should only be used to support other town centre floorspace, not sequentially inferior developments.

10.29 In the medium-term by 2016 there is a quantitative need for 900 sq m (net) of additional town centre comparison goods floorspace and in the long term (2021) there is a quantitative need for 1,900 sq m (net) of additional town centre comparison goods floorspace. For the reasons set out in Section 5 regarding the unavailability of national expenditure projections beyond 2016 no assessment has been undertaken for 2026. Any new comparison goods floorspace in Retford which is promoted on the basis of quantitative need should be located within or around the town centre to complement the existing provision. Section 10 considers qualitative need issues.

11.0 Qualitative Need for Additional Retail Floorspace

Worksop Convenience Goods

11.1 The visitor survey recorded fairly high satisfaction levels with the convenience goods offer in Worksop (131 on a 100 average index). However, it also recorded 48% of respondents shopping elsewhere for their mainfood shopping trips although 30% said they would shop at the relocated Tesco and a further 24% said they might so hopefully this will result in more linked trips with the town centre. The household survey recorded that the town centre only had 11% market share of convenience expenditure in Worksop (zone 1) and the edge-of-centre Netto had a 5% market share. Clearly there is scope for the town centre to take a greater market share if the offer can be improved.

11.2 The town centre health check indicates that a qualitative case exists for improvement to convenience floorspace provision in Worksop. Even following the relocation of the Tesco store to the Carlton Road site this is too far from the centre to be classed as an edge-of-centre site (beyond 300m from the PSA) and whilst it will generate more linked trips than the current store, there will still be a qualitative gap in central provision. The new Sainsburys Local store on Newcastle Avenue will also go some way to improving the town centre offer but there is potential for further convenience goods floorspace.

11.3 The quantitative assessment did not identify any significant capacity for new convenience goods floorspace in Worksop with the requirement for a medium sized supermarket by 2021 (c. 2,100 sq m). This should be developed in or very close to the town centre to generate footfall for other businesses that the current out-of-centre superstores can't. Such a supermarket would offer genuine choice and competition to the existing out-of-centre superstores in a more accessible location.

11.4 In addition to any new convenience goods floorspace in the centre, the market, which has lost market share in recent years, has the potential to return to stronger convenience retailing as part any redevelopment / relocation proposals at the southern end of the town centre. This could also help meet the identified qualitative need for an improved offer in the centre.

11.5 Any further investment in convenience goods floorspace in the town centre, including in a refurbished / relocated market, would improve market share and consumer choice in the most accessible location in the District. It is important, however, that the scale of any such provision does not undermine those local facilities elsewhere in the town such as the local centres and parades which are also easily accessible to residents by a choice of means of transport.

Worksop Comparison Goods

11.6 Worksop is reasonably well served for comparison shopping. It has a town centre which is performing reasonably well and a range of modern out-of-centre retail warehouses and a number of older established freestanding stores. However, the town centre has lost market share in recent years to internet sales in many comparison goods classes as well as to out-of-centre facilities and competing destination, in particular Meadowhall.

11.7 The household telephone survey showed that Worksop, including retail parks and out-of-centre facilities, retains around 30% of the study area's spending on comparison goods. Within its PCA formed by zones 1 and 3 Worksop retains 57% of expenditure. The level of expenditure retained varies between goods and the report of survey (Appendix 4) indicates the town retains more expenditure for bulky goods and smaller non-bulky items and less for fashion and clothing.

11.8 Comparisons with the earlier 2004 study are not always possible as the 2008 survey asked questions about far more classes of comparison goods. However, it is apparent the loss of market share to the internet is set to increase if national projections are correct and will be difficult to address for many classes of goods. The loss of expenditure to out-of-centre locations can be addressed through maintaining, and where necessary strengthening, policies directing future development and investment into the centre and controlling the ranges of comparison goods which can be sold from out-of-centre stores.

11.9 In terms of customer satisfaction with comparison shops within the town centre, the visitor and household telephone surveys showed that Worksop residents are generally satisfied with provision but that the range of shops and clothes in particular could be better.

11.10 The visitor survey recorded the now closed Woolworths as being one of the most popular stores in the centre. There is therefore a need to replace this variety store with a comparable attraction. There are very few variety stores in Worksop, and most are discount orientated, and an anchor department store would be a major attraction. TJ Hughes and Debenhams (Desire format) are reported to have requirements for Worksop and the addition of these stores would be a significant qualitative improvement to the centre. However, at the time of writing Debenhams are not trading particularly well and their once ambitious expansion plans have been reeled in.

11.11 Consultations with commercial agents suggests that there is an under provision of larger retail units and that there might be an under representation of fashion retailers and also those that are present may be trading from smaller than optimum sized units for a town centre the size of Worksop.

11.12 The evidence is therefore that consumers within Worksop and its catchment area presently have a reasonable choice of comparison goods shopping in a range of locations and in different types of retail formats which appears to meet many of their needs. The most notable qualitative deficiency is in fashion retailing. There is a less significant deficiency in retailers of other town centre goods including toys, games and hobby goods; CDs, DVDs, tapes and computer games; and, soft furnishings and the need for these should also be met in town centre.

11.13 Outside the town centre the town is already well served by existing and proposed retail warehouses and the Council have to date resisted attempts to relax restrictive bulky goods planning conditions. PPS6 indicates that bulky goods can be retailed from town centres and new town centre formats have been introduced by some operators to achieve this. Therefore it is not necessary to identify new sites for bulky goods retail warehousing in the LDF.

11.14 It is also unnecessary to identify sites for comparison goods based on a constant market share. However, there is a qualitative deficiency in clothes and fashion goods outlets in Worksop for which there is the greatest level of leakage to competing centres. Therefore an allowance for a small increase in market share from 30% to 32% can be made that increases medium term capacity (2016) to 3,300 sq m (net) and to 6,500 sq m in the long term. (Any greater increase in market share is probably unrealistic given the increasing market share of internet sales in all classes of goods including clothes and fashion.) This should be directed to sites in the town centre and not used to promote sequentially preferable sites that will compete with and undermine the town centre.

Retford Convenience Goods

11.15 The visitor survey recorded fairly high satisfaction levels with the convenience goods offer in Retford (144 on a 100 average index) and 42% of respondents used the centre for their mainfood shopping trips and a further 34% used the nearby Asda or Morrisons (which are actually included in the Goad town centre survey area boundaries). The household survey recorded the town centre had a 10% market share of convenience expenditure in Retford (zone 5) and a further 85% market share was spent at the edge / out-of-centre Asda and Morrisons stores. There is not really a great deal of potential to capture further convenience goods expenditure in the town centre.

11.16 The town centre health check indicates that only small qualitative improvements are required to the convenience floorspace provision in Retford. The quantitative assessment identified a degree of capacity for new convenience goods floorspace in Retford with the requirement for a medium sized supermarket (c. 2,200 sq m (net) maximum). However, this was largely based on overtrading at the Morrisons store in particular, and the Asda to a much lesser extent, so if this cannot be provided in a sequentially preferable site to these stores then it should not be supported. Both the

Asda and Morrisons stores, although technically out-of-centre as they are beyond 300m from the PSA, generate significant levels of linked trips with the town centre. To comply with guidance in PPS6 any supermarket proposals would also have to be demonstrated that it was of an appropriate scale and it would not elevate Retford above its current sub-regional status within the retail hierarchy.

Retford Comparison Goods

11.17 Retford is reasonably well served by comparison shops for a small town centre that are performing reasonably well but the bulky goods offer in the town centre is limited with only one modern out-of-centre retail warehouse. Certainly the town centre appears to be performing a lot better than recorded in the previous 2004 study. However, the town's PCA will have lost increasing trade to internet sales in many comparison goods classes and competing destination such as Doncaster and the nearby Lakeside Outlet Centre continue to enjoy a significant market share in Retford's PCA.

11.18 The household telephone survey showed that the Retford, including retail warehouses and out-of-centre facilities, retains just under 17% of the study areas spending on comparison goods. Within its PCA formed by zone 5 Retford retains c. 47% of expenditure. The level of expenditure retained varies between goods and the report of survey (Appendix 4) indicates the town retains more expenditure for smaller non-bulky items and less for fashion, clothing and bulky goods.

11.19 Comparisons with the earlier 2004 study are not always possible as the 2008 survey asked questions about far more classes of comparison goods. However, it is apparent the loss of market share to the internet is set to increase if national projections are correct and will be difficult to address for many classes of goods. The loss of some expenditure to competing centres can be addressed by an improved offer, for example, if central sites can be found for additional bulky goods retail warehouses.

11.20 In terms of customer satisfaction with comparison shops within the town centre, the visitor and household telephone surveys showed that Retford residents are generally satisfied with provision (scoring 131 on a 100 average index) but that the range of shops and clothes in particular could be better.

11.21 The visitor survey recorded the now closed Woolworths as being the fourth most popular store in the centre. There is therefore a need to replace this variety store with a comparable attraction. There are no reported requirements of comparable variety stores and the town is probably too small to attract a department store. Consultations with commercial agents indicate there is a reasonable range of unit sizes in the centre but there is an under representation of national fashion retailers.

11.22 Consumers within Retford and its catchment area presently have a reasonable choice of comparison goods shopping. The most notable qualitative deficiency is in fashion retailing followed by bulky goods. There is a less significant deficiency in retailers of other town centre goods including toys, games and hobby goods; CDs, DVDs, tapes and computer games; and, soft furnishings and the need for these should also be met in town centre. However, less central sites may have to be considered for future bulky goods provision.

12.0 Conclusions and Recommendations

Retail Context

12.1 Worksop in the west of the district is the main administrative centre of Bassetlaw district and the largest town in Bassetlaw with a population of c. 40,000. Retford in the east of the district is the second largest town in Bassetlaw with a population of c. 22,000. Worksop also has an out-of-centre retail park and two superstores whereas there is only one Retail Warehouse in Retford but the town's two supermarkets are close enough to the centre to generate linked trips.

12.2 Worksop draws most of its trade from the town itself and the former mining communities to the north and west including Carlton, Whitwell and Creswell particularly for convenience goods. Retford draws most of its trade from the town itself and the surrounding rural communities. The catchment area for both centres is curtailed by the proximity of competing centres – in particular Sheffield and Meadowhall for Worksop, and Doncaster and the Lakeside Outlet Centre for Retford. In addition to losing trade to towns in neighbouring authorities, there is also some inflow into Bassetlaw and Worksop in particular from the nearby NE Derbyshire administrative area.

Worksop Town Centre Health Check

12.3 The overall conclusion of the health check is that the town centre has a mixed performance on the PPS6 indicators of vitality and viability. Probably the main weakness is the lack of diversity and fairly limited shopping offer with no anchor supermarket or department store. However, the centre also has many strengths recognized by visitors and businesses alike, in particular the attractive high street shopping environment.

Retford Town Centre Health Check

12.4 The overall conclusion of the health check is that the town centre performs well on most of the PPS6 indicators of vitality and viability. Probably the main weakness is the lack of diversity. However, the centre also has many strengths such as the attractive historic environment makes the town centre an enjoyable place to spend time in. The centre also performs well on commercial indicators such as yields, rents and vacancies levels. Retford town centre displays strong indicators of vitality and viability.

Quantitative Need: Convenience Goods

12.5 Worksop is well served by convenience shopping facilities including two superstores, smaller discount supermarkets and freezer shops and there is a new M&S Simply Food in the town centre along with specialist independents and the regular outdoor market. In addition there is a proposed Tesco relocation to a site much nearer the town centre, although still out-of-centre, that will increase linked trips to the centre. There is also a smaller Sainsbury Local store proposal on Newcastle Avenue. Together the two new stores will greatly improve the qualitative offer in Worksop.

12.6 Worksop's market share of convenience spending within the PCA has remained static since 2004. There is very little leakage from the town itself and as a result of the current offer and the ‘limited capacity there is no immediate quantitative need for any significant additions to the convenience goods floorspace in Worksop. However, by 2016 there may be a quantitative need for 5,700 sq m (net) of additional town centre floorspace or a medium sized supermarket with a net convenience goods sales area of around 1,700sq m. And by 2021 there may be a need for 6,900 sq m (net) of town centre convenience goods floorspace or 2,100 sq m (net) of supermarket floorspace.

12.7 Retford is well served by convenience shopping facilities including a Morrisons superstore, an Asda supermarket, a Netto, Aldi and an Iceland. In addition there are, the town centre shops and traditional market, and smaller shops distributed throughout the town all taking up available expenditure. Retford's market share of convenience spending within the catchment area has declined since 200 although there is very little leakage from the town itself. There is however some current capacity for new convenience goods floorspace in Retford and a small to medium sized supermarket could be supported in a town centre location largely on the basis of the overtrading at the out-of-centre Morrisons superstore.

Qualitative Need: Convenience Goods

12.8 The visitor survey recorded satisfaction levels with the convenience goods offer in both towns although Worksop had a much higher percentage of visitors shopping out-of-town for mainfood than Retford. Clearly there is scope for Worksop town centre to take a greater market share if the offer can be improved and this will not be addressed by the Tesco relocation. The quantitative assessment identified capacity for a medium sized supermarket <u>in the town centre</u> by 2016 if it can be demonstrated that it would not impact negatively on existing retailers in the town centre itself and most trade would be drawn from the two out-of-centre superstores. Such a development would improve the quality of offer in the town centre, encourage more linked trips and thus increase footfall. The redevelopment / refurbishment / relocation of Worksop market could also help meet the identified qualitative need for an improved offer in the centre.

12.9 The visitor survey recorded fairly high satisfaction levels with the convenience goods offer in Retford (144 on a 100 average index) and 42% of respondents used the centre for their mainfood shopping trips and a further 34% used the nearby Asda or Morrisons (which are actually included in the Goad town centre survey area boundaries). The household survey recorded the town centre had a 10% market share of convenience expenditure in Retford (zone 5) and a further 85% market share was spent at the edge / out-of-centre Asda and Morrisons stores. There is not really a great deal of potential to capture further convenience goods expenditure in the town centre.

12.10 Only small qualitative improvements are required to the convenience floorspace provision in Retford. The quantitative assessment identified a degree of capacity for new convenience goods floorspace in Retford with the requirement for a small to medium sized supermarket. However, this is largely based on overtrading at the Morrisons so if this cannot be provided in a sequentially preferable site to this store then it should not be supported.

Quantitative Need: Comparison Goods

12.11 Worksop is well served by comparison shopping facilities including the town centre, retail parks and non-food floorspace in superstores. In addition there is the market and smaller specialist shops distributed throughout town. Worksop's market share of comparison spending within the study area has declined slightly since 2004. However, the town has a high retention rate within the PCA for comparison goods other than clothes.

12.12 As a result of the current offer and the 'very limited capacity' and likely increase in internet sales, there is no immediate quantitative need for any significant additions to the comparison goods floorspace in Worksop. Even by 2021 there is only a quantitative need for c. 1,500 sq m (net) of additional town centre comparison goods floorspace. However, with a small 2% increase in market share that is considered possible given the current limited offer in clothes and fashion goods, there is a quantitative need for c. 3,500 sq m (net) of additional town centre comparison goods floorspace by 2016 and 6,500 sq m (net) by 2021. Any new comparison goods floorspace in Worksop which is promoted on the basis of quantitative need should be located within or around the town centre to complement the existing provision.

12.13 Retford has a reasonable comparison goods offer for a small town centre with a regular market and smaller specialist shops distributed throughout town. There is a good supporting superstore offer but the retail warehouse offer is very limited. The town has a reasonable retention rate within the PCA for comparison goods other than clothes.

12.14 There is only 'limited capacity' in Retford so there is no immediate or short-term (2011) quantitative need for any significant additions to the comparison goods floorspace. In the medium term by 2016 there is a quantitative need for 300 sq m (net) of additional town centre comparison goods floorspace in Retford and 1,300 sq m (net) by 2021. Any new comparison goods floorspace in Retford which is promoted on the basis of quantitative need should be located within or around the town centre to complement the existing provision.

Qualitative Need: Comparison Goods

12.15 Consumers within the Borough and its catchment area presently have a good choice of comparison goods shopping in a range of locations and in different types of retail formats which appear to meet most of their needs. The most notable qualitative deficiency is in fashion retailing.

12.16 Bassetlaw is well served for comparison shopping, including the two town centres, retail parks and retail warehouses. However, both centres and Worksop in particular have lost market share in recent years to internet sales in many comparison goods classes as well as to out-of-centre facilities and competing destination.

12.17 Worksop retains more expenditure for bulky goods and smaller non-bulky items and less for fashion and clothing. The loss of expenditure to out-of-centre locations can be addressed through maintaining, and where necessary strengthening, policies directing future development and investment into the centre and controlling the ranges of comparison goods which can be sold from out-of-centre stores. Worksop residents are generally satisfied with provision but consider that the range of shops and clothes in particular could be better. There is a less significant deficiency in retailers of other town centre goods including toys, games and hobby goods; CDs, DVDs, tapes and computer games; and, soft furnishings and the need for these should also be met in town centre.

12.18 Outside the town centre the town is already well served by existing and proposed retail warehouses and the Council have to date resisted attempts to relax restrictive bulky goods planning conditions. PPS6 indicates that bulky goods can be retailed from town centres and new town centre formats have been introduced by some operators to achieve this. Therefore it is not necessary to identify new sites for bulky goods retail warehousing in the LDF. However, it is necessary to identify sites for town centre expansion for both comparison and convenience goods over and above that identified in the Local Plan much of which has now been built out.

12.19 For a small town centre Retford is reasonably well served by comparison shops that are performing quite well but the bulky goods offer in the town centre is limited with only one modern out-of-centre retail warehouse. The visitor and household telephone surveys showed that Retford residents are generally satisfied with provision (scoring 131 on a 100 average index) but that the range of shops and clothes in particular could be better.

12.20 Consumers within Retford and its catchment area presently have a reasonable choice of comparison goods shopping. The most notable qualitative deficiency is in fashion retailing followed by bulky goods. Whilst PPS6 (3.16) indicates bulky goods may be sold from town centres, less central sites may have to be considered for future bulky goods provision due to the lack of town centre sites.

Recommendations

Worksop Town Centre

12.21 In terms of priorities, the town centre is lacking a supermarket / store to generate footfall as the two supermarkets in Retford do. Whilst Tesco relocation will improve linkages on the current store, it is still too peripheral to generate significant linked trips.

12.22 The quantitative need assessment didn't identify sufficient capacity for a third superstore in the town, only a medium sized supermarket in the town centre by 2016. This should only be developed in the town centre if it can be demonstrated it is likely to divert most trade from the two out-of-centre stores, rather than existing town centre shops, and in turn it will generate significant footfall to offset any impact on the centre.

12.23 The fashion offer within the catchment area needs to be improved through the attraction of national multiples which are currently unrepresented or under-represented in the town centre. This is probably best achieved through new development anchored by a department store or large variety store. Whilst there are vacancies in the centre these are not in units that will be attractive to national multiples.

12.24 In addition the town centre needs to diversify further which will be best achieved through the attraction of a small cinema into the town centre and also the encouragement of office development in and around the centre. Whilst there is consent for a new cinema in a less than satisfactory out-of-centre location, an alternative or additional facility in the town centre will not have to demonstrate (additional) need. It would greatly add to the evening economy and the overall diversity of the centre.

12.25 Central office development generates footfall for shops and businesses and also helps foster the early evening economy. Whilst the Council has identified employment land and sites in more peripheral locations, allocations for B1 only development in and around the centre might also be considered.

12.26 Sites identified in the Local Plan that remain unbuilt and current infill sites will not be sufficient to accommodate this new development and new sites need to be considered. The most obvious site is the further extension of the Priory Centre onto the car park to form a canalside development area as recommended in the 2004 Retail Study. A second site is the current market place incorporating the health centre, car parks and former Glynn Webb unit. Both development sites involve considerable relocation issues but, unlike infill and remaining Local Plan sites, they are of a size that a developer will consider viable and attractive to the market.

12.27 PPS6 also recommends primary and secondary frontages are identified along with the Primary Shopping Area boundary and the town centre boundary. The primary frontages in the Local Plan are too extensive and include some very secondary areas particularly to the southern end of Bridge Street. It is therefore recommended that only the Priory Centre and adjacent sections of Bridge Place / Street from Ryton Place to

Newcastle Avenue are designated as primary frontages. The remaining Local Plan primary frontages can be redesignated as secondary frontages along with the secondary frontages shown as retail core on the proposals map (with the probable exception of those to the north of Victoria Square that are too peripheral).

12.28 PPS6 (Annex A Table 2) advises the PSA comprises the primary frontages and contiguous secondary frontages. The problem with an extensive PSA is that this is the boundary from which the 300m (maximum) distance for out-of-centre sites is drawn from so an extensive PSA can result in very peripheral sites being considered as edge-of-centre thereby elongating the centre further. It is therefore recommended that to the north of the centre the contiguous secondary frontages as far as Ryton Place are included in the PSA.

12.29 Defining the end of the contiguous secondary frontages to the south of Newcastle Avenue is less obvious as there are a number of national multiples and high street banks in the area but Bridge Street rapidly becomes very secondary with charity shops and vacancies. The recommended point to end the PSA is after Poundstretcher and Yorkshire Bank on the opposite side of Bridge Street. This would mean that some high street banks and the post office are included in the PSA but that the PSA doesn't extend too far and allows some of the high street banks to be included in the designation.

12.30 In the primary frontages and PSA the Council should encourage retail uses only and discourage A2 to A5 uses. In the contiguous secondary frontages within the PSA the Council might permit a percentage of A2 and A3 uses. Only in the peripheral secondary frontages might the Council consider A4 and A5 uses. The Council will also have to consider which areas of the town are best suited for promoting evening economy uses such as bars, pubs and clubs. These should be the areas least likely to have an impact on the daytime economy as well as residential amenity. Cafe bars which become late night bars / night clubs are particularly useful in merging the daytime economy into the evening economy.

12.31 Finally the Council need to consider the town centre boundaries. One of the recommendations of the 2004 study was that these were too extensive and needed to be drawn in. The problem with an extensive town centre boundary is that this is the boundary from which PPS6 (Annex A Table 2) recommends the 300m (maximum) distance for out-of-centre sites for non retail uses is drawn from. An extensive town centre boundary can have the effect of elongating the town centre.

12.32 It is recommended that the town centre boundary be drawn at Victoria Square in the north to Newgate Street in the south. This will incorporate the main secondary frontages. The boundary also needs to be drawn to the east and west to include secondary shopping frontages but exclude all other uses currently included in the Local Plan town centre boundary. Watson Road and Queen Street form the most obvious boundaries to the east and to the west the town centre should not extend beyond Allen Street i.e. incorporating the bus depot site within the centre.

Retford Town Centre

12.33 Retford has enjoyed the benefit of fairly recent retail development and the quantitative need is less pressing than in Worksop. Retford also has the benefit of two edge / out-of-centre supermarkets in close proximity that generate significant footfall. The traditional market in Retford is also more successful than the Worksop market and the centre is more diversified relative to its size with the exception of the limited administrative function.

12.34 The quantitative need assessment does identify longer term capacity for both convenience and comparison goods. There is also a qualitative need to improve the bulky goods offer. Unfortunately the few infill sites and remaining unbuilt Local Plan sites are insufficient to accommodate this. One potential site is the builders' yard on the former council depot site. This is a quasi retail use that could be easily relocated to an employment site and the site developed for town centre / retail uses.

12.35 Like Worksop, Retford town centre needs to diversify further which will be best achieved through the attraction of office development in and around the centre to compensate for the lack of administrative functions in the town. In addition a small cinema might be attracted to the town centre to help foster the evening economy and complement the two theatres in the centre.

12.36 The Retford primary frontages in the Local Plan are too extensive. It is therefore recommended that only Carolgate from the Market Square to East Street are designated primary frontages and the remaining Local Plan primary frontages (the east side of Market Square) redesignated as secondary frontages. These secondary frontages on Market Square could be included in the PSA as they are contiguous and do include some multiples (but also some charity shops). The remaining frontages shown as retail core on the proposals map can be redesignated as secondary frontages.

12.37 In the primary frontages and PSA the Council should encourage retail uses only and discourage A2 to A5 uses. In the contiguous secondary frontages within the PSA the Council might permit a percentage of A2 and A3 uses. Only in the peripheral secondary frontages might the Council consider A4 and A5 uses.

12.38 Finally the Council needs to consider the town centre boundaries which currently are too extensive as shown on the Local Plan proposals map and include all of Kings Park and the out-of-centre Morrisons store. It is recommended that the town centre boundary be drawn at Cannon Square in the north to Wharf Road in the south. This will incorporate the main secondary frontages. The boundary also needs to be drawn to the east and west to include secondary shopping frontages (retail core on the proposals map) such as Bridgegate, Grove Street and Spa Lane but exclude all other uses.

The Retail Hierarchy

12.39 It is recommended that both Worksop and Retford are designated as town centres with perhaps Worksop being differentiated with the description as a major town centre rather than designating Retford as a district centre to achieve the hierarchy.

12.40 There are also local centres within Bassetlaw that need to be designated to protect them from out-of-centre proposals and to ensure that development that takes place there is of an appropriate scale. This is beyond the scope of this study but certainly the centres at Harworth, Langold, Carlton, Tuxford, Markham, Misterton, Ordsall, Manton, Raymoth Lane, Prospect Hill and Gateford Road are all worthy of consideration of local centre status within the hierarchy.

12.41 Local centres should be protected by policies in the LDF from out-of-centre and edge-of-centre convenience proposals above 100 sq m, including shops in petrol filling station shops (PFSSs), unless need and minimal impact can be demonstrated and the sequential approach satisfied.

Other Policy Considerations

12.42 Guidance in PPS1 advises that LPAs need not replicate the policy guidance contained in PPGs and PPSs but must provide a local interpretation. It is therefore suggested that existing policies that replicate the PPS6 (3.4) policy tests such as need, appropriate scale, sequential approach, impact and accessibility are examined to see if they do add any local interpretation or simply replicate the national guidance.

Local Shopping Facilities

12.43 Below the retail hierarchy there may be individual shops in villages or suburbs that provide important local services but are too small to designate as Local Centres. Such facilities might be protected along with local centres from threats such as PFSSs and inappropriate scales of development by suitable policies.

12.44 In small local centres / parades it is doubtful whether more than one convenience store is of an appropriate level of development and can be supported. With regard to single shops in urban areas it is recommended these are restricted to 100 sq m to ensure they serve a local area and do not compete with local centres and larger parades. The Council might also consider a separate policy on PFSSs.

Shop Fronts

12.45 The Council might consider a policy to encourage appropriate fascias and advertising on shop buildings and to restrict shutters. Whilst these can't be controlled in premises with existing shutters new premises and / or proposals for alterations to frontages for shuttering might restrict the type of shuttering to the more transparent / less obtrusive variety and ensure they are opened during daytime regardless of whether the business is open or not.

Hot Food Takeaways

12.46 The Council might also consider a policy on hot food takeaways that can blight centres through dead frontage during the daytime when they are closed and shutters are down. The LDF also needs to amend the frontages policy to comply with the revised 2005 Use Classes Order that subdivides the old A3 category into three new classes.

12.47 This has implications for the shop frontages policies and the Council might want to place limits on the amount of non-A1 in primary frontages, the amount of A2 to A4 in secondary frontages and only permit new A5 in tertiary frontages up to a certain percentage of frontages, subject to the other provisions of policy S15. A 25% maximum threshold is suggested for A5 units in tertiary (peripheral secondary) frontages on the basis that over concentrations of takeaways can be oppressive during the daytime, present a poor image, generate smells and attract anti-social behaviour and can discourage other investment.

Existing and Proposed Retail Warehousing

12.48 Nationally there has been the development of fashion parks in former bulky goods retail parks which can compete directly with town centres. It is therefore recommended that the LDF discourages the relaxation of bulky goods restrictions. With regard to new retail warehousing PPS6 (3.16) indicates that all goods can be retailed from town centres, however, it is clear in Retford that floorplates of the size required by many bulky goods operators could not be accommodated in any new central development and edge-of-centre sites may have to be considered. It is therefore recommended that a new policy be included in the LDF to define bulky goods as bulky electrical goods, furniture and carpets and DIY and that goods such as toys, stationary, soft furnishings and pets products are excluded from this definition.

Retail Development in the Countryside

12.49 The Local Plan contains a policy that permits certain forms of retail development in rural locations. This policy should be amended to reflect guidance in PPS6 on the policy tests including need, appropriate scales of development, sequential approach, impact and accessibility or alternatively it might not be carried forward to the LDF as it could encourage unwanted development, for example, elsewhere in the UK a number of garden centres have been converted to supermarkets. Where rural retail development might be encouraged is in areas that could be classed as food deserts such as rural villages that have lost their village shops. Here farm shops retailing predominantly local produce can be of great benefit.

Overall Conclusion

12.50 The challenge for Bassetlaw DC is to enable the two main centres to compete more effectively with competing centres. This will involve protecting the centres from further out-of-centre development that competes directly with the centres and weakens their offer. It will also involve identifying new sites in both centres for town centre uses. In Worksop town centre there is the need to identify sites for a medium sized supermarket, further town centre non-food floorspace, anchored by a small department or variety store, and possibly a site for a town centre cinema to help foster the evening economy. In Retford there is the need to identify sites for a small to medium sized supermarket but there is no great need for additional non-food floorspace with the possible exception of bulky goods floorspace. The implementation of these and other recommendations within this report will greatly improve the offer for local residents and will also help both town centres to compete much more effectively with competing centres and retail destinations.

Glossary of Terms

A1 shops; A2 financial and professional services; A3 restaurants and cafes; A4 drinking establishments; A5 hot food takeaways	Use classes as defined by the Town & Country Planning Act (Use Classes Order) 1987 and 2005 amendments
Catchment Area	Geographical area surrounding a shopping centre or destination where that centre usually has the highest market share and draws most of its trade from
Commitments	Unimplemented developments with extant planning permission.
Comparison goods	Comparison retailing is the provision of items not obtained on a frequent basis. These include clothing, footwear, household and recreational goods.
Convenience goods	Convenience retailing is the provision of everyday essential items, including food, drinks, newspapers / magazines and confectionery.
Convenience shop	A shop retailing predominantly food / convenience goods and, for the purposes of unrestricted trading on Sundays under the Sunday Trading Laws, with a maximum sales area of 280 sq m
District centre	A group of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library. Identified in the Bassetlaw Local Plan or, when adopted, the Bassetlaw Core Strategy.
Edge of centre	For retail purposes, a location that is well connected to and within easy walking distance (i.e. up to 300 metres) of the primary shopping area. For all other main town centre uses, this is likely to be within 300 metres of a town centre boundary.
Etailing	Electronic (internet) retailing.
Equilibrium trading	Centres / shops turning over at expected or benchmark level i.e. no overtrading or undertrading.
Leakage	Expenditure lost to competing centre outside catchment area
Local centres	A range of small shops of a local nature, serving a small Catchment that might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Identified in the Bassetlaw Local Plan or, when adopted, the Bassetlaw Core Strategy.
Out-of-centre	A location which is not in or on the edge of a centre but not necessarily outside the urban area.
Out-of-town	An out-of-centre development outside the existing urban area.
Overtrading.	Surveys indicate centres or individual stores are trading above expected or benchmark levels
PPS6	Planning Policy Statement 6, Planning for Town Centres.

Primary frontages	The most important shopping frontages of the town centre. Most have a high proportion of shops. Identified in the Bassetlaw Local Plan.
Primary Shopping Area	Area where retail development is concentrated comprising the primary and contiguous secondary frontages.
Regional and sub-regional shopping centres	Out-of-centre shopping centres which are generally over 50,000 square metres gross retail area, typically comprising a wide variety of comparison goods stores.
Retail park	An agglomeration of at least 3 retail warehouses.
Retail warehouses	Large stores specialising in the sale of household goods (such as carpets, furniture and electrical goods), DIY items and other ranges of goods, catering mainly for car-borne customers.
Sales densities	Company national average sales (£s) per sq m of net retail floorspace (sales area) used to establish benchmark levels to determine whether centres / stores are under or overtrading
Secondary frontages	Important shopping frontages in the town centre, generally with a greater diversity of ancillary retail uses than the primary frontages. Identified in the Bassetlaw Local Plan.
Supermarkets	Self-service stores selling mainly food, with a trading floorspace less than 2,500 square metres, often with car parking.
Superstores	Self-service stores selling mainly food, or food and non-food goods, usually with more than 2,500 square metres trading floorspace, with supporting car parking.
Undertrading	Surveys indicate centres or individual stores are trading below expected or benchmark levels

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