

# Bassetlaw District

## Retail and Leisure Study

on behalf of Bassetlaw District Council

April 2017



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## 1.0 Introduction

### Instruction

- 1.1 Nexus Planning (Nexus) was commissioned by Bassetlaw District Council ('the Council') in March 2016 to undertake a Retail and Leisure Study for the District of Bassetlaw.
- 1.2 This 2017 Retail and Leisure Study is an update to the two previous studies completed in 2009 and 2012. This Retail and Leisure Study (or Study) will form part of the evidence base upon which the emerging Bassetlaw Plan, the new Local Plan for the District, (up to 2034) will be established.
- 1.3 A fundamental objective of this Study is to deliver an appraisal of the retail/leisure needs and capacity in the period to 2031, and to review the current performance of Worksop, Retford, Harworth & Bircotes and Tuxford centres, as well as other designated 'Local Centres' across the District. The comprehensive appraisal of these elements is of particular importance given recent instabilities in the UK economy. The economic recession, which spanned the period 2008-2013 (approximately) had a significant impact on many town centres and the UK retail and leisure sectors as a whole.
- 1.4 The approach adopted by Nexus has been refined to reflect the latest Government guidance provided in the National Planning Policy Framework (NPPF) (March 2012) and National Planning Practice Guidance (NPPG) (2014).
- 1.5 The aims and objectives for this Study therefore include the following:
  - i. Appraise the economic, retail and leisure trends in shopping patterns at a national and regional level and how this may impact upon plan-making in future;
  - ii. Comprehensively assess the existing vitality and viability of each of Bassetlaw's retail centres (specifically Worksop, Retford, Harworth & Bircotes and Tuxford);
  - iii. Audit and analyse the District's centres to examine the potential for increased capacity in retail convenience and comparison floorspace and identify any deficiencies of provision, based on projected future spending;
  - iv. Comment on any leisure deficiencies of provision identified within Bassetlaw;
  - v. Develop a flexible model of the retail expenditure and floorspace projections across the Study Area that will allow for a number of different possible housing and jobs growth

scenarios to be run in accordance with the emerging Bassetlaw Plan and surrounding local authorities' housing targets;

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

## Structure of Report

- 1.8 We have structured our report as follows:
- **Section 2** summarises key current and future retail and leisure trends, therefore, providing the context for this Study and how it can be used to guide plan-making;
  - **Section 3** provides an abridged explanation of relevant national and local planning policy as it relates to retail and leisure;
  - **Section 4** comprises a synopsis of the vitality and viability of Bassetlaw's centres, and is supplemented by brief audits of the District's lower tier centres at **Appendix C**;

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- **Section 5** details our assessments of the current and future population and expenditure levels within the Study Area;
  - **Section 6** comprises a review of the survey research and considers the key findings with regard to shopping trip patterns throughout the Study Area;
  - **Section 7** provides our analysis in respect to the quantitative and qualitative need for further convenience and comparison goods retail floorspace over the assessment period (to 2031);
  - **Section 8** details the existing leisure provision in Bassetlaw and considers future leisure capacity over the plan period; and
  - **In Section 9** we identify our recommendations in respect of the Council’s future strategy for retail, town centre and leisure development.

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## 2.0 Current and Emerging Retail Trends

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

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



retail development is once again becoming more focused on town centre locations.

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

2.4 Additionally, it is important to recognise the recent results of the public referendum for the UK to leave the European Union in late June 2016 ('Brexit'). The impact on the UK economy, and in particular the retail and leisure markets, is currently unknown and commentary on the topic is changing weekly. As such, it may be appropriate to issue an Addendum to this Study report at the time the effects (positive or negative) are more developed and predicted trends can be supported by observed evidence. For example, it will be important to monitor industry forecast data provided

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

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

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

by experts such as Experian.

## Current Retail Picture

### Household Spending and Labour Trends

- 2.5 In their August 2015 Retail Report, Colliers International documented that, since Quarter 1 2011, household spending has steadily increased each year<sup>5</sup>. Following 2.3% year-on-year growth in Quarter 1 2015, growth in household spending has reached the pre-recession levels of 2006 and 2007. Notably, trends in real wages have been supporting the increase in spending. Real wages reached a 4.5% year-on-year growth rate in March 2015. This is the highest level since March 2007<sup>6</sup>. The Centre for Retail Research published their Retail Forecast for 2016-2017 in January 2016, which supports Colliers findings. In this forecast, they confirm the UK retail sector has enjoyed uninterrupted growth since 2013<sup>7</sup>.
- 2.6 Domestic economic drivers of UK retail performance are linked to two key factors:
- i. Low inflation – drives growth in real wages, strengthens household confidence and disposable income.
  - ii. Low interest rates – lead to low mortgage rates, which in turn results in more money in the pockets of borrowers.
- 2.7 Both of the factors set out above have a significant influence on the public's general confidence, and in turn their tendency to spend their earnings on retail goods. Most notably, reports on consumer confidence indicate that it is currently the strongest it has been for over a decade<sup>8</sup>. Total recorded spending for Quarter 4 2015 was £279.1 billion<sup>9</sup> according to the ONS. This is indicative of considerable increases in spending when considering the low level of spending which occurred in 2009. Notably, in Quarter 2 2009 spending hit a low of £250.8 billion<sup>10</sup>, as reported by the ONS.
- 2.8 Also of note are current trends in the labour market. This information is sourced from the ONS. The median gross earning for full-time employees in the UK has increased and as at April 2016 sat at £528 per week, an increase of 1.9% from £518 per week a year earlier (April 2015)<sup>11</sup>. Figure 2.1 illustrates how earnings have increased since 1997, and further exemplifies the deceleration in

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

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

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

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

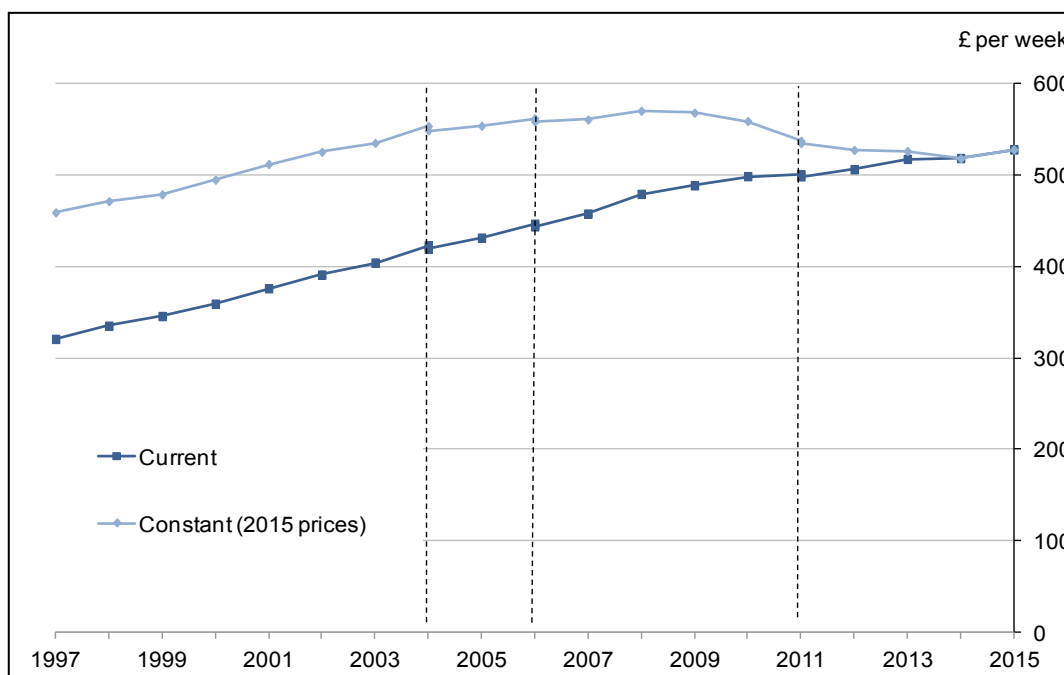
<sup>9</sup> 'Statistical bulletin: Retail Sales' ONS, March 2016

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

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

year-on-year growth that occurred since the start of the recession in 2008.

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



**Source:** ‘Statistical bulletin: Annual Survey of Hours and Earnings: 2015 Provisional Results’, ONS, 18 November 2015

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

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

**UK Retail Property Market**

2.11 In 2011, Colliers CRE reported that economic conditions were resulting in significant structural

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

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

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

- 2.12 In 2014, Colliers acknowledged that recent improvements to the economic outlook were beginning to show positive results for town centres<sup>16</sup>. For example, increased consumer confidence and retailer expansion was resulting in a reduction in vacant retail space. However, Colliers remained cautious at this time. In their 2014 report, they explained that, even though the speed at which a significant amount of vacant space was being taken off the market and the positivity of the current economic indicators suggested a return to normalcy, as during the recession online retailing was flourishing and high street stores were continuing to struggle. As such, they warned retailers to continue with caution when deciding to build upon their existing physical store networks in light of online competition<sup>17</sup>.
- 2.13 In terms of current vacancy rates, the UK average rate of retail shopping pitches as at June 2016 was identified by Experian as 11.2%<sup>18</sup>. The rate of vacancies is described by Colliers as being 'stubbornly high' as it is not typical or reflective of the total economic or retail climate. Colliers explains that in light of recent advances in the performance of the UK economy it should have improved a lot more against its 2012 peak of 16.3%. Perhaps we should expect the vacancy rate to drop to a figure that is more akin to pre-recession time – for example in 2006 the vacancy rate dropped to 7.3%<sup>19</sup>. In terms of actual quantities, reports suggest some 46,000 UK shops lie unoccupied, and around a third of those have been empty for more than three years<sup>20</sup>.
- 2.14 It is vital to distinguish that this high level of vacancies is driven mainly by non-prime units<sup>21</sup>. Colliers identify that the prime unit vacancy rate sits around 7.5% while non-prime is as high as

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

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

<sup>16</sup> 'National Retail Barometer: Summer 2014', Colliers, September 2014

<sup>17</sup> 'National Retail Barometer: Winter 2013', Colliers, 2013

<sup>18</sup> 'Experian Category Report', Experian March 2016

<sup>19</sup> 'Midsummer Retail Report: 2015', Colliers, August 2015

<sup>20</sup> 'Where have all Britain's shoppers gone?', The Guardian, 26 April 2016

<sup>21</sup> Prime units defined as high-quality properties for investment, see Glossary for further details.

17%<sup>22</sup>. As a consequence of the recent economic difficulty and subsequent lack of investment into retail property, we have seen demand drop considerably for 'poorer quality stock'. Such stock is often found in secondary shopping frontages within smaller towns. As a result, this poorer quality stock suffers from a proportionate reduction in value (and often rent)<sup>23</sup>.

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

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

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

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

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

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

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

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

have seen increased investment into town centre retail stores and a drop in prime unit vacancy rates.

## Trends in Comparison Goods Retailing

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

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

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

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

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

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retailing<sup>31</sup>.

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

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

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

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

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

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

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

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

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

types of development harder to gain planning permission. Foremost was the 'town centre first' approach prescribed by the NPPF in 2012 and NPPG in 2014. Application of this policy considerably reduced the number of new out-of-town foodstores obtaining planning permission.

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

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

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

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

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

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



Sainsbury's, Morrisons, Asda)<sup>38</sup>.

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

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

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

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

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

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

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

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

retailers reported £6.2 billion loss of the 2014/2015. However, the Chief Executive stressed that recovery would not be a straightforward process as the food retailing market remained “challenging, deflationary and uncertain”<sup>45</sup>. In order to be successful in the market retailers are forced to cut prices. This means discount food retailers remain the fastest growing supermarkets in UK town centres at present<sup>46</sup>.

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

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

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

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

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

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

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

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

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

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

through the promotion of a 'Love British Food', which in 2011/2012 saw Tesco sales of local produce reach of £1 billion and over 50% of Tesco customers purchasing more locally sourced food than they were five years ago<sup>52</sup>. Other larger chain supermarkets have recognised the desire of shoppers to buy locally. Sainsbury released a British classic range of ready meals, while Morrisons promoted a range called the 'Best of British'.

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

### Trends in Leisure

- 2.42 Leisure is often considered a discretionary activity, and as such, consumer spending on leisure is greatly influenced by the economic climate and in particular average levels of disposable incomes. However, when assessing the average spend of UK households on leisure activities it becomes clear that even in light of an economic downturn consumers in the UK have shown a growing desire to engage in leisure activities.

**Figure 2.2 | ONS Weekly Household Spending Data on Leisure Items**

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

**Sources:**

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

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

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

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

- 2.43 Figure 2.2 illustrates changes in UK average weekly household spending on leisure before the recession (2006), during the recession (2011) and after the recession (2014). ONS have adjusted all the figures to strip out the effects of inflation, so that true like-for-like comparisons can be made.
- 2.44 The most recent ONS data (for the 2014 year) identified that an average household would spend £38.50 on leisure activities, including; £6.90 on 'sports admissions, subscriptions, leisure class fees and equipment hire' and £2.80 on going to 'cinemas, theatres and museums'<sup>53</sup>. This is out a total of £531.30 spent on average per week by UK households. It is interesting to assess the data on average household spending from the ONS for the years both preceding (2006) and during the recession (2011). The ONS average household spending figures for 2011 identify that out of the average weekly spend of £483.60, households spent – £6.70 on 'sports admissions, subscriptions, leisure class fees and equipment hire', £2.40 on going to 'cinemas, theatres and museums'. What is more, ONS data from 2006 confirms that on average households spent £455.90 per week, and of that £5.80 was spent on 'sports admissions, subscriptions, leisure class fees and equipment hire' and £2.00 on the 'cinema, theatre and museums' etc. The significant increases in spending from 2006 to 2014 illustrate the popularity of spending on leisure activities.
- 2.45 Research completed by the Economic and Social Research Council assessing the diversity of uses within 1,100 centres and high streets during 2000 to 2006 (the years preceding the recession) provides a clear indication that during this time, when the economy was strong the leisure service industry was thriving. They found that the total number of leisure service units within UK town centres increased by 23% between 2000 and 2006<sup>54</sup>.
- 2.46 As evident when assessing consumer spending figures (recorded by the ONS) as at 2014 the leisure industry had strengthened since previous years (2006). Mintel calculated that this industry was estimated as worth £80 billion in 2015, approximately 15% higher than the 2010 total expected worth<sup>55</sup>.
- 2.47 A significant challenge that may soon face the industry is anticipated to occur in response to the introduction of the National Living Wage. From 1 April 2016, the UK government introduced a new mandatory National Minimum Wage (NMW) for workers aged 25 and above, initially set at £7.20 - a rise of 50p relative to the previous National Minimum Wage rate. That represents a £910 per annum increase in earnings for a full-time worker on the current National Minimum Wage. A National Minimum Wage rate of £6.70 continues to apply for those aged 21 to 24.
- 2.48 The increased base level wage will improve living standards for low-paid workers but, in the

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

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

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

process, seems certain to push up leisure operators' wage costs, since they largely rely on unskilled workers.

## Out-of-Centre

- 2.49 The Portas Review, among other reports, highlighted that in the last decade (2001 to 2011) the amount of out-of-town retail floorspace has risen by 30% whilst that in-town has fallen by 14%<sup>56</sup>.
- 2.50 However, growth of out-of-centre retailing has been constrained by the 'town centre first' policy regime enforced through the NPPF since its publication in March 2012. As a consequence of the prevailing policy regime, traditionally out-of-centre retailers (for example supermarkets) are being re-focussed back into the centre of UK centres. Most notable, are the number of larger food retailers who now occupy smaller units within the high streets and local centres of the UK<sup>57</sup>, for example Sainsbury's Local, Tesco Extra, and Little Waitrose.
- 2.51 In 2013, Deloitte highlighted that there is a limit to how much an out-of-centre shopping centre can fully meet the daily needs of consumers<sup>58</sup>. Deloitte reported the drive of consumers to out-of-centre locations is primarily motivated by their desire to seek out lower prices, convenience and the wide range of goods available at out-of-centre locations by virtue of their larger store formats<sup>59</sup>. However, changes in consumer habits has driven a return to smaller format shops in more centrally located and accessible locations. As consumer habits become more aligned, the draw of out-of-centre shopping venues is weakened.
- 2.52 One obvious result of new consumer behaviours has led to larger retailers opting to provide 'click and collect' services within their smaller retail units. This service enables consumers to have a much wider variety of goods available to them, but for collection to take place in an easily accessible and convenient location suitable for their busy lifestyles – likely to be a town centre location. Similarly, the Economic and Social Research Council reported that rising numbers of consumers are less convinced by the costs versus benefits balance available at an out-of-centre superstore/retail park and now value convenience at the local/community level<sup>60</sup>.

## Shopping Centre Development and Investment

- 2.53 Since the 2012 Retail Need Assessment was completed, the level of shopping centre development in the UK has seen some progression, following a number of years of minimal development. In

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<sup>56</sup> 'Portas Review – An independent review into the future of our high streets', Mary Portas, 2012

<sup>57</sup> 'British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence', Economic and Social Research Council and the University of Southampton, March 2015

<sup>58</sup> 'The Deloitte Consumer Review – Role of the High Street', Deloitte, 2013

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

<sup>60</sup> 'British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence', Economic and Social Research Council and the University of Southampton, March 2015

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2011, Colliers reported that shopping centre development was at a standstill and little activity was anticipated over the next four years to 2015<sup>61</sup>.

- 2.54 More recent reports suggest that we should not expect an inundation of new shopping centres to open in the UK (i.e. we will not see the peak levels of new development that were reached during the 1980's to 1990's). Colliers research (released in August 2015) has recently reported that the shopping centre market has assumed a dramatic shift, changing from an investment no one was interested in procuring to a "must-have" for investors within a very short time period<sup>62</sup>.
- 2.55 However, some caution is still advised as demand and investment in shopping centre units is focused on prime and regionally dominant assets. In this current climate, it is only those high quality tenants that can deliver the much desired high-quality shopping experience<sup>63</sup>.
- 2.56 Shopping centres considered to be in the secondary market (i.e. not 'A' Grade or prime shopping centre) should be addressed with a lot more caution. Tenants are currently seeking shorter lease terms and secondary shopping centres have been described as being in structural decline<sup>64</sup>.
- 2.57 As alluded to above in paragraph 2.17, the draw of shopping centres includes the experience, and not the retail offer alone. Consumers' willingness to travel to larger out-of-town shopping centres for an overall shopping experience and to use the leisure facilities appears to be increasing. In response to this, the split between retail and leisure units present within UK shopping centres is shifting; with more experiential offers of leisure now being provided. In 2012, the Portas Review recognised this shift highlighting that:

*"...Epic and immersive experiences offered by today's new breed of shopping mall. Modern shopping centres; for example Westfields, bring together cinema premieres, worldclass restaurants, bowling alleys, art galleries and luxury brands – replacing the lightless, soulless experiences of the past"*<sup>65</sup>.

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

*"Shopping centres and other out-of-town formats often have the advantage of single ownership. The landlord is able to create an identity for the centre, choose the retail mix, manage the centre so that it reinforces the brand, co-ordinate marketing and refresh the centre through regular*

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<sup>61</sup> 'Midsummer Retail Report', Colliers CRE, 2011

<sup>62</sup> 'Colliers Midsummer Retail Report', Colliers, August 2015

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

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

<sup>65</sup> 'Portas Review – An independent review into the future of our high streets', Mary Portas, 2012

*reinvestment. Single ownership is rare on our high streets, but that shouldn't stop some of these elements being replicated. Our high streets need to plan their identity and shape their retail offer accordingly. They need leadership, business plans and day-to-day delivery."*

- 2.59 It is this '*managed*' experience delivered by a shopping centre that continues to prove attractive to customers. Therefore, as consumers continue to seek out high quality shopping experiences the growth and success of prime shopping centres is set to continue. In consequence, town centre managers and local authorities will need to continue to monitor the impact the draw of such centres, whether within their District or within adjoining authorities, may have on the health of their centres.
- 2.60 However, as clarified within Experian's October 2015 Retailer Planner Briefing Note, as people work longer hours the idea of completing a weekly shop at an out-of-centre superstore has become less attractive<sup>66</sup>. As we have addressed earlier in this section, the rise of smaller and more regular shopping trips has been apparent in recent years.

## Neighbourhood Shopping

- 2.61 Limited retail research is available on current trends and forecasts addressing the performance of "neighbourhood parades", as defined by the Department for Communities and Local Government<sup>67</sup> (DCLG).
- 2.62 The very term for neighbourhood shopping areas often varies, making it difficult to track and predict trends. Illustrating this point is the fact that what research is available makes reference to a myriad of terms; '*neighbourhood retailing*', '*parades of shops*', '*local shopping centres*', '*local shops*', '*convenience retailing*', and '*secondary retailing*'. Nexus consider the best place to start is the report produced by DCLG entitled 'Parades of Shops - Towards an understanding of performance and prospects', in which they explain that for the purposes of consistency they adopt the terminology of 'neighbourhood parade'<sup>68</sup>. The justification being based on the predominance of a locally focused role. In addition to the fact that, in many cases, the original core functions for 'shopping' has become differentiated.
- 2.63 The DCLG report explains that most neighbourhood parades offer a diverse and complementary occupier mix, providing essential goods and services, which are, in most cases, highly valued by the resident community they serve. Neighbourhood parades tend to be dominated by convenience stores. In these locations, convenience retail stores are typically found alongside local service

<sup>66</sup> 'Retail Planner Briefing Note 13' Experian, October 2015

<sup>67</sup> 'Parades of shops - Towards an understanding of performance & prospects', Department for Communities and Local Government, 2012

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

- outlets including pubs, take-away outlets, personal services (nail and hair salons) and other niche operators specific to that location.
- 2.64 2012 research by Verdict suggests the market share held by neighbourhood parades has been remained relatively stable over the past ten years and this is generally reliant on the fact that they serve a very vital role in the provision of local needs to a local catchment<sup>69</sup>. Verdict released data confirming that in 2003, 17.9% of all UK retail sales took place at the neighbourhood level, which has not changed significantly at 2013, growing slightly to 18.8% of all sales<sup>70</sup>. Accordingly, very little physical change has occurred on these types of parades over those ten years.
- 2.65 In terms of the type of uses typically found in neighbourhood centres, in consequence to the average needs/desires of a shopper coming to such a centre, convenience remains the dominant retail type. Illustrating this point is the fact 70% of expenditure in neighbourhood centres is taken by food based retailers, including convenience stores<sup>71</sup>. Furthermore, 2012 research by Verdict suggested that almost 55.0% of retail expenditure undertaken at a neighbourhood level is in convenience stores<sup>72</sup>.
- 2.66 Neighbourhood retailing as a whole is predicted to grow but it is expected that there will remain considerable pressure on independent shops. Supporting the success of neighbourhood shops is the desire of consumers to do a lot less shopping in terms of volume but on a much higher frequency. In particular, neighbourhood parades that are close to transport hubs and links benefit the most, as workers often shop close to home and on their way back from work for the day<sup>73</sup>.
- 2.67 The DCLG, in 2012, reported that even though some parades remain specifically focused shopping locations, a number of other parades have advanced and now comprise new local services, including health, education, leisure and other community facilities. The plethora and diversity of uses have increased their role as 'community hubs'. This has had the effect of extending their role and increasing their value in local 'place-shaping'<sup>74</sup>. Leisure uses are particularly beneficial for positively contributing to the vitality and vibrancy of a neighbourhood centre during the evening as many operate after retail outlets shut their doors for the day. These add to the draw and diversity of neighbourhood parades, extending their role as a focus for residential communities.

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<sup>69</sup> BIS Research Paper No.188 – 'Policy Implications of Recent Trends in the High-Street/Retail Sector', Department for Innovations and Skills, December 2014

<sup>70</sup> 'British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence', Economic and Social Research Council and the University of Southampton, March 2015

<sup>71</sup> 'Parades of shops - Towards an understanding of performance & prospects', Department for Communities and Local Government, 2012

<sup>72</sup> Research by Verdict on Neighbourhood Retail Markets as detailed in 'Parades of shops - Towards an understanding of performance & prospects', Department for Communities and Local Government, 2012

<sup>73</sup> 'British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence', Economic and Social Research Council and the University of Southampton, March 2015

<sup>74</sup> 'Parades of shops,' Department for Communities and Local Government, 2012



2.68 In summary, the essential role and function of neighbourhood parades has endured over recent years. This is particularly interesting given structural shifts and drastic changes in consumer trends affecting a number of retail sectors. Essentially, neighbourhood parades continue to operate not only as a shopping destination but as a ‘hub’ to which people come for leisure services as well providing public space in which social exchanges and events occur<sup>75</sup>. Finally, the size of these centres has remained stable, suggesting that overall, they have undergone little or modest physical change in response to broader trends, such as the recession<sup>76</sup>.

### **Growth in E-Tailing (or ‘E-Commerce’)**

- 2.69 As has already been established in the preceding sections, the rise of “E-tailing” has significantly altered the way in which the average consumer makes purchases across multiple retail sectors. Between 2008 and 2014, online sales as a proportion of total retail spend (excluding fuel) rose by more than 2.5 times – from under 4.7% in June 2008 to 11.7% in mid-2015 (as reported by the ONS<sup>77</sup>). The most recent data from the ONS on Retail Sales (published in March 2016)<sup>78</sup> identified that the amount spent online accounted for 13.2% of all retail spending (excluding fuel), a further increase from the previous year.
- 2.70 In the current retail environment, reports on “E-tailing” suggest it accounts for one in every five to ten pounds that are spent in the UK<sup>79</sup>. To keep up with the spending patterns of the typical consumer, almost all retailers now have an online presence. Over time, online shops are becoming more and more advanced and easy to use. This supports the growing attraction for consumers to make their purchases online.
- 2.71 It is important to acknowledge that there is a substantial variation between the kinds of purchases that are most likely to be made online. The ONS report that 4.9% of all ‘food’ purchases were made online in February 2017, whereas 14.5% of all ‘textile, clothing, and footwear’ purchases and 10.5% of ‘household good purchases’ were made online<sup>80</sup>. Figure 2.3 illustrates the penetration of online sales by sector based on 2013 data, when Verdict began separately recording and analysing online retail sales. Most notable is the large proportion of music and video, books and electrics that are purchased online.

<sup>75</sup> ‘British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence’, Economic and Social Research Council and the University of Southampton, March 2015

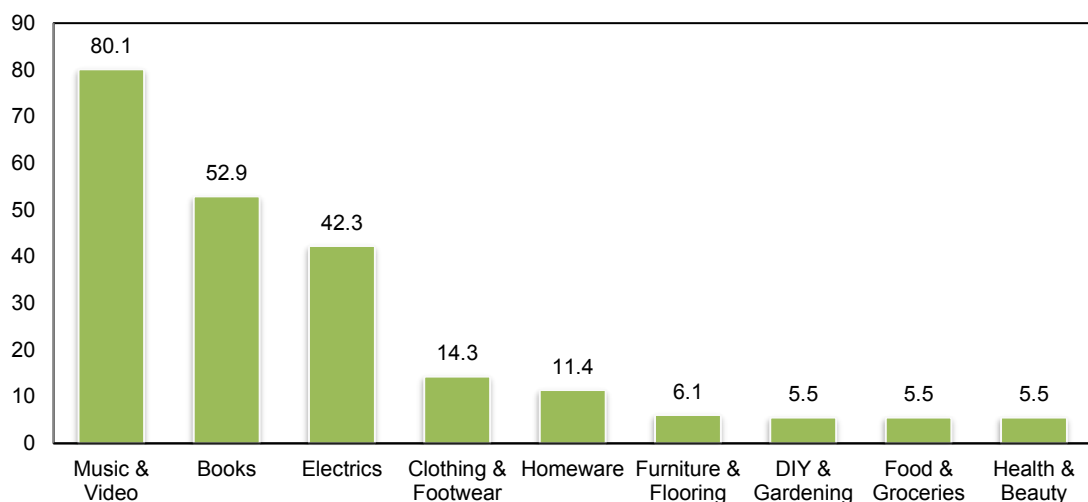
<sup>76</sup> BIS Research Paper No.188 – ‘Policy Implications of Recent Trends in the High-Street/Retail Sector’, Department for Innovations and Skills, December 2014

<sup>77</sup> ‘Retail Planner Briefing Note 13’ Experian, October 2015

<sup>78</sup> ‘Statistical bulletin: Retail Sales’ ONS, March 2016

<sup>79</sup> ‘UK online retail sales to reach £62.7bn in 2020’, Verdict Retail, 17 September 2015

<sup>80</sup> ‘Statistical bulletin: Retail Sales’ ONS, February 2017

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

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

- 2.72 The popularity of making online purchases is predicted to not only continue, but to grow. Experian predict that by 2020 online (non-store) purchases will account for 17.8% of total retail expenditure, rising to 19.9% in 2035<sup>81</sup>. This is a significant increase in contrast to the March 2016 ONS figure of 13.2%. However, it is important to recognise that the increasing internet user base which drove the significant leaps in online sales observed each year from the mid-2000s will no longer be the key contributing factor as 88.5% of the UK population are now internet users (or 57.3 million people)<sup>82</sup>. Nevertheless, growth is expected to be maintained, although through new, more portable technology such as smartphones and tablets.
- 2.73 In addition, a more co-ordinated approach to retail offers is expected with the online and physical world working together – an approach that is coined “omni-channel”. Indicative of the relationship between an online retail presence producing in-store purchasing is research produced by Deloitte in 2015, which estimated that digital technology influenced 33% of in-store retail sales in the UK in 2014, equivalent to £100 billion<sup>83</sup>. In future, Deloitte predict this will continue to grow with 50% of all in-store purchases being influenced digitally at the end of 2015<sup>84</sup>.
- 2.74 The rise in popularity of ‘click and collect’ is another example of online influenced sales resulting in visits to a physical store. Deloitte estimates that approximately one third of all online shoppers make use of ‘click and collect’ services<sup>85</sup>. A variety of retail research providers suggest that the popularity of ‘click and collect’ is set to grow exponentially in the next few years. Interestingly, the ONS highlight that ‘click and collect’ is a complimentary service to the success of the UK high

<sup>81</sup> ‘Experian Retail Planner Briefing Note 13’, Experian, October 2015

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

<sup>83</sup> ‘The Deloitte Consumer Review – Digital Predictions 2015’ Deloitte, 2015

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

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

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street<sup>86</sup>.

- 2.75 As recently as 1 September 2016 Amazon released a new kind of purchasing passage – called Amazon ‘Dash’, which provides customers with a small ‘Dash button’ to have in their home, which when pressed orders refills of a certain product to be delivered to their home (usually the next day). Product suppliers such as ‘Play-Doh’, ‘Finish’ dishwashing liquid, ‘Whiskers’ cat food, and ‘Pedigree’ dog food have all joined the range. The buttons were launched in the United States in 2015 and have seen swift success since their release with many more brands joining over time<sup>87</sup>. Their success in the UK is yet to be confirmed<sup>88</sup>.
- 2.76 In summary, the rise of the online retail world is unquestionable. As the influence of “E-Commerce” continues to accelerate, we can expect retailers to react and start prioritising how they will make sure the relationship between real world retail stores and their online presence become more integrated.

## Conclusion

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

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<sup>86</sup> ‘ONS Statistical Bulletin (2014) Internet Access – Households and Individuals’, ONS, 2014

<sup>87</sup> ‘Amazon Dash Button Continues Rapid Growth—Orders Increase; Brands, Categories and Selection Expand’, Business Wire, 28 June 2016, <http://www.businesswire.com/news/home/20160628005870/en/>

<sup>88</sup> ‘Amazon Dash: does the world really need more little pieces of plastic?’, Senay Boztas, The Guardian online, 2 September 2016

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centres to regain some of the custom they have lost. To make sure the growing spend actually takes place within UK town centres, it is critical that town centres embrace digital solutions whilst also providing well-maintained retail floorspace that provides for a high quality shopping experience.

- 2.81 It is well recognised that town centres must be open to a holistic retail strategy if they are to secure future vitality and viability.
- 2.82 To conclude, as the Council progresses with their new Local Plan it will be vital that they take account of retail and leisure trends. Of note, the Bassetlaw Plan should appropriately address the rise of internet retailing and how planning policies could support a positive relationship between town centres and this new form of making purchases. One such way could be through the promotion of internet collection points in prime locations, as this is likely to draw a significant amount of people to visit a centre. Further commentary on our recommendations for the Bassetlaw Plan is set out in Section 9.0 of this report.

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## 3.0 Planning Policy and Regeneration Context

### Introduction

- 3.1 This Retail and Leisure Study provides evidence that will support and inform the production of the emerging Bassetlaw Plan. As such, it is important to analyse and understand how adopted and emerging national planning documentation may shape the context for local policy-making, in particular those policies that relate to retail and leisure.
- 3.2 The following section of this Study report establishes the planning policy and regeneration context for the Study Area. Relevant documents from the Bassetlaw District Local Development Framework, in addition to associated Neighbourhood Plans, supporting documents, studies, and appraisals have been reviewed and a summary is provided below.

### National Planning Policy Framework

- 3.3 The National Planning Policy Framework (NPPF) was published on 27<sup>th</sup> March 2012, coming into force with immediate effect for plan-making and development management decisions. Subsequent to this, the National Planning Policy Guidance (NPPG) was produced and published on 6<sup>th</sup> March 2014 as an online tool to support the implementation of the NPPF.
- 3.4 The NPPF is unashamedly pro-growth with a “presumption in favour of sustainable development”. It effectively instructs decision makers to make positive decisions and support development unless there are clear adverse environmental, social and/or economic impacts. The NPPF provides the national guidance against which all planning applications should be considered.
- 3.5 The NPPF directly addresses economic development and acknowledges how planning can proactively drive and support economic development and, in turn, deliver homes, business, industrial units, infrastructure and thriving local places that England needs. Further, the NPPF emphasises that every effort should be made to objectively identify and then meet business development needs.
- 3.6 The NPPF stresses the Government’s commitment to securing economic growth in order to create jobs and prosperity. Paragraph 17 asserts the planning system should do everything it can to support sustainable economic growth. Additionally, Paragraph 19 explains significant weight should be placed on the need to support economic growth through the planning system and that planning should operate to encourage development and not act as an impediment to sustainable growth. Paragraph 20 details that local planning authorities should plan proactively to meet the development needs of business and support a “21<sup>st</sup> century economy”. Further to this, Paragraph

21 explains that investment in business should not be over-burdened by the requirements of planning policy.

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

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accessible locations that are well connected to the town centre;

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

### **Ensuring the Vitality of Town Centres Planning Practice Guidance**

- 3.12 National Planning Practice Guidance (referred to as the NPPG) entitled ‘Ensuring the Vitality of Town Centres’ was published in March 2014 and replaced the previous Planning for Town Centres Practice Guidance. The online tool provides a succinct synopsis of how retail and main town centre planning policy should be applied in practice.

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- 3.13 In short, the specific objectives of the NPPG remain similar to those of its predecessor. For example, it directs local planning authorities to plan positively and support town centres. In addition to setting out objectives that aim to generate local employment, promote competition within and between town centres, and create attractive and diverse places for users.
- 3.14 In addition to the enforcement of a 'town centre first' approach in order to meet local needs, the NPPG sanctions this should be delivered through a positive vision or strategy that is communicated through the development plan. In summary, local authorities should use development plan documents, policies and supporting guidance documents to address the following matters:
- a. The appropriate and realistic role, function and hierarchy of town centres in the area for the duration of the plan period. This should involve an audit of the vitality and viability of existing town centres and their ability to accommodate new development;
  - b. Encapsulate a clear vision for the future of each town centre and the most appropriate mix of uses;
  - c. Ability for the town centre to accommodate the scale of assessed need through new development;
  - d. Timeframe for the delivery of new retail floorspace;
  - e. Any other complementary approaches which are necessary or appropriate to enhance the town centre to deliver the vision for its future; and
  - f. How the car parking provision can be enhanced in order to encourage town centre vitality.
- 3.15 Of specific relevance to this Retail and Leisure Study, Paragraph 005 categorises a series of key indicators to be used when assessing the health of a centre over time. It is these indicators that we have based our health checks of the vitality and viability of Bassetlaw centres on, as set out in detail in Section 5 of this Report.
- 3.16 Paragraph 005 also explains that it is often the case that successful town centre regeneration initiatives involve a range of improvements such as renewed public realm, parking, and accessibility and other partnership mechanisms, rather than being purely led by retail schemes or focused on substantial new development.

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

- 3.17 The Portas Review was published in December 2011 and since that time has been referenced as a



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key guiding document for town centre planning policy and regeneration efforts. The Review was undertaken by Mary Portas, as an independent adviser and retail expert, and assessed, on behalf of central Government, the state of Britain's high streets and town centres.

- 3.18 The review provided a critical assessment of the factors contributing to a third of high streets degenerating or failing. In addition, the Report analysed the reasons why, over the previous decade, out-of-town retail floorspace had increased by 30% while in town floorspace had actually shrunk by 14%. As part of the Review, Portas made 28 recommendations, including actions that government, businesses and other organisations should take in order to bring back life into their high streets and town centres. Portas put out a challenge to re-imagine them as social hubs, not only just for shopping but also for learning, socialising and fun.
- 3.19 In March 2012, the Government issued a formal written response to the Portas Review. In their response, the Government (Rt. Hon Grant Shapps MP, Minister for Housing and Local Government) acknowledged that in retort to the challenges being faced by the UK high street; including shoppers going to out-of-centre retail developments, in addition to online retailing, the high street must provide something new and different for its visitors. As part of this response, the Government acknowledged a number of recommendations, including:
- i. Introduction of Town Teams (defined by Portas to be visionary, strategic and strong operational management teams for high streets) – Town Teams should not restrict their imagination;
  - ii. Funding for pilot areas (known as Portas Pilots) which are judged to have the best concepts for town centre and high street improvements;
  - iii. A £10 million High Street Innovation fund allocated to councils in areas blighted by empty voids;
  - iv. Support for a new National Market Day to be held on 23 June; and
  - v. £500,000 investment into the development of new Business Improvement Districts.
- 3.20 It is interesting to look back on this response now, given a number of these recognised initiatives are no longer being actively pursued by the Government.
- 3.21 In summary, the Government's response sought to encourage local planning authorities to adopt inspirational thinking in order to ascertain concepts for town centre enhancement and improvement. The overriding goal local authorities were tasked with is to encourage their residents back into the town centre, in both the daytime and night-time hours. However, given on-going

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challenges and competing priorities for both the Government and local authorities a number of the schemes are not currently considered feasible.

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

- 3.22 Over the past few years, the Government has supported the nation's town centres by adopting flexible policies that allow the diversification of town centre units.
- 3.23 In May 2013 changes were made to the Town and Country Planning (General Permitted Development) Order 1995 in response to the Portas Review's (see above) recommendation to make it easier to convert surplus space in order to provide for the effective re-use of town centre units. The May 2013 amendments provided for a period of three years during which the change of use of B1 offices to C3 residential uses could take place without the need for formal planning permission. Under this order, applicants are simply required to apply for a prior approval notice from the relevant local planning authority.
- 3.24 The 2013 Order also provides for the temporary change of use (for up to two years) of uses falling within Use Classes A1, A2, A3, A4, A5, B1, D1 and D2 to uses falling within Classes A1, A2, A3 and B1. Prior approval for this type of use would be given when it relates to no more than 150 sq m of floorspace and the temporary provision has not formerly been relied upon.
- 3.25 In April 2014, permitted development rights were further extended to provide for certain additional changes of use without the need for formal planning permission. The changes introduced two new classifications of permitted development for commercial premises, as follows:
- a) The first provides for the change of use of premises and land from Use Class A1 to use as a 'deposit taker' (effectively comprising banks, building societies, credit unions and friendly societies).
  - b) The second provides for the change of use from Use Classes A1 and A2 to C3 residential.
- 3.26 Again, there are certain restrictions as to where and when the rights can be exercised. Most notably, the change of use must relate to no more than 150 sq m of floorspace.
- 3.27 Further extensions to the permitted development rights came into force two years later on 4 April 2016. The key changes introduced by this 2016 Order include:
- a) Removal of the 31 May 2016 deadline altogether (being the end of the previously identified three-year period), thereby making the permitted rights permanent; and
  - b) Allowing laundrettes to change to residential uses.

3.28 The intended consequence of such measures is to secure the redevelopment and reuse of premises and diminish long-term vacancies. To this end, the rights are expected to support town centres to be comprised of well-utilised units

## The Bassetlaw Local Development Framework

### Bassetlaw Core Strategy and Development Management Policies DPD

3.29 Bassetlaw District Council adopted the Core Strategy and Development Management Policies DPD (herein referred to as the Core Strategy) on the 22<sup>nd</sup> of December 2011.

3.30 The Core Strategy is the fundamental Local Development Framework document that prescribes the overarching framework for all local development documents. The Core Strategy includes a number of Development Management Policies, which are more detailed development management policies, on key issues that will need to be taken account of when assessing proposed new development.

3.31 The content of the Core Strategy identifies the settlements to which new development will be directed and the amount of new housing and employment land that will be provided in these areas up to 2028.

3.32 Given the subject matter of this Study only those policies which are relevant to retail and leisure have been the focus of this assessment. Below the relevant policies are identified and their relevance explained.

### Settlement Hierarchy

**Figure 3.1 | Bassetlaw Settlement Hierarchy from the adopted Core Strategy**

Settlement Classification	Settlement
<b>Sub-Regional Centre</b>	Worksop
<b>Core Service Centre</b>	Retford
<b>Main Regeneration Settlement</b>	Harworth & Bircotes
<b>Local Services Centre</b>	Carlton-in-Lindrick/Langold, Tuxford, Misterton
<b>Rural Services Centres</b>	Beckingham, Blyth, Clarborough, Hayton, Cuckney, Dunham, East Markham, Elkesley, Everton, Gamston, Gringley-on-the-Hill, Mattersey, Misson, Nether Langwith, North Leverton, North and South, Wheatley, Rampton, Ranskill, Sturton-le-Steeple, Sutton-cum-Lound, Walkeringham
<b>All Other Settlements</b>	

Source: Bassetlaw Core Strategy, Pages 19-20

3.33 In respect to the role and function of the District's local centres, Core Strategy Policy CS1 'Settlement Hierarchy' defines the settlement hierarchy in the District and sets the framework for the scale and distribution of development in each of these centres. Figure 3.1 illustrates the adopted settlement hierarchy.

3.34 The Core Strategy includes several settlement specific policies, which support the settlement hierarchy by providing further detail to ensure the vision and objectives for each settlement are achieved during the plan period (to 2028).

3.35 Below we summarise each of the settlement specific policies and what they aim to achieve.

#### **Policy CS2: Worksop**

3.36 Policy CS2 conveys that the Council will expect that all new development in Worksop will contribute to the town's role as the District's Sub-Regional Centre. Furthermore, Policy CS2 explains that new development should enhance both the built and natural environment, while also protecting and improving the centre as a retail and leisure destination.

3.37 Policy CS2 also deals with the nearby shopping areas, including Celtic Point and Prospect Precinct, which are both classed as Large Local Centres and Retford Road, which is classed as a Small Local Centre. Policy CS2 explains that proposals within these centres that will lead to the loss of a shop or service or that might prejudice the success of the centres, or be detrimental to the local environment, will only be supported where the applicant has clearly demonstrated that this proposal will not harm the vitality and viability of the centres.

#### **Policy CS3: Retford**

3.38 Policy CS3 acknowledges the role and function of Retford as the second largest settlement in Bassetlaw. This policy states the new development in Retford should be of a scale necessary to sustain the town's role as a Core Service Centre. The Council's focus for Retford is to maintain an appropriate range of services, facilities and retail provisions, while also increasing employment opportunities provided to the local community.

3.39 Additionally, Policy CS3 recognises the historic character of Retford as a market town, emphasising that particular regard will be given to the protection and enhancement of Retford's character. All development should take full account of the town's Conservation Area status.

3.40 Policy CS3 also addresses Welbeck Road, a nearby Small Local Centre that comprises a number of key services and facilities. Policy CS3 highlights that any new development, which results in the loss of a retail unit in Welbeck Road that could threaten the success of the centre will not be given

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the support of the Council.

#### **Policy CS4: Harworth & Bircotes**

- 3.41 The settlement hierarchy set out in Policy CS1 identifies Harworth & Bircotes as the Main Regeneration Settlement for the District and Policy CS4 provides further details of how this role will be fulfilled. For retail hierarchy purposes, Harworth & Bircotes is classed as a Large Local Centre.
- 3.42 Policy CS4 explains that significant new development in Harworth & Bircotes is expected to contribute to a 'step-change' in Harworth & Bircotes. Additionally, new development in the centre should deliver a greater range of local employment opportunities, with facilities that can attract inward investment and support smaller businesses to grow.
- 3.43 Policy CS4 directs leisure facilities and appropriate scales of comparison and convenience goods retail development towards Harworth & Bircotes. This in line with the recommendations made in the 2012 Retail Needs Assessment.

#### **Policy CS5: Carlton-in-Lindrick and Langold**

- 3.44 The preamble to Policy CS5 explains that Carlton-in-Lindrick and Langold are functionally linked settlements within the former mining area to the north of Worksop.
- 3.45 Policy CS5 conveys the Council's ambitions for these two settlements and highlights that they will prioritise the re-development of brownfield sites. New development should be of a high quality of design, making strong connections with the existing settlement and surrounding communities.
- 3.46 For retail hierarchy purposes, Carlton-in-Lindrick is classed as a Small Local Centre and Langold as a Large Local Centre.
- 3.47 The Council seeks to focus new services, leisure facilities and appropriate scales of comparison and convenience goods retail development within, and focused on, the Carlton-in-Lindrick and Langold centres.
- 3.48 The policy identifies the following two regeneration opportunities and provides support for their completion:
- The redevelopment of the former Firbeck Colliery site and other brownfield sites that serve to significantly increase the range and quality of housing in these settlements,
  - Improvements to increase the attraction of Langold Country Park both for local residents and as a visitor and tourist draw in its own right.

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**Policy CS6: Tuxford**

- 3.49 The introductory text for Policy CS6 acknowledges that Tuxford is well placed, and has the right mix of services, facilities and employment provision, to expand its role as a key Local Service Centre and become a sustainable town providing local employment opportunities and services and facilities to a wider rural area.
- 3.50 Policy CS6 provides clarity on how the Council hopes to achieve the expansion of Tuxford's role, stating that new development should strengthen Tuxford's role as a Local Service Centre for the rural communities of southeast Bassetlaw. Of note, the policy explains that support will be provided to proposals that enhance the employment, leisure and retail offer in the village centre, bring empty buildings back into use and improve the public realm, while respecting and enhancing its historic assets.

**Policy CS7: Misterton**

- 3.51 The introductory text for Policy CS7 makes clear that unlike the other Local Service Centres (Carlton-in-Lindrick and Tuxford) in the District; Misterton has seen significant residential growth of late and is expected to see more.
- 3.52 Policy CS7 elucidates that new development in Misterton must support its role as a Local Service Centre in order to provide essential services and facilities to the rural communities of northeast Bassetlaw. Any new development will be expected to deliver community benefits or to provide enhancements to existing facilities.
- 3.53 Additionally, this policy also provides support for initiatives to improve the village centre, including enhancements to community facilities and regeneration of existing derelict buildings.

**Policy CS8: Rural Service Centres**

- 3.54 Policy CS8's preamble explains that settlements designated as Bassetlaw's Rural Service Centres are spread throughout the District. Although they do not meet all of the day-to-day needs of their communities, these centres provide a level of service provision that is above that provided by the other rural settlements.
- 3.55 Further to this, the policy itself states that any future development within a Rural Service Centre will be of a scale appropriate to the current size and role of the relevant settlement and should sustain local employment, community services and facilities.

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## Neighbourhood Plans

- 3.56 The Localism Act 2011 provided new powers for parish and town councils to prepare land use planning documents. Of the centres that the Study focuses upon, the town councils for Harworth & Bircotes and Tuxford have seized this opportunity and have prepared Neighbourhood Plans for their local areas.

### **Harworth & Bircotes Neighbourhood Plan**

- 3.57 The Harworth & Bircotes Neighbourhood Plan prepared by the Harworth & Bircotes Town Council was made in October 2015. The plan acts as an important reference point and material consideration in any development planning decisions, as it represents the community's aspirations.

- 3.58 The vision for Harworth & Bircotes is set out in the Neighbourhood Plan as:

*"In 13 years' time Harworth & Bircotes will be a thriving community, a place where people are proud to live. It will be a safe and happy place, an area that values its people and its environment. It will have a variety of homes, jobs, shops, schools, sustainable transport and recreational facilities; something for everyone. Harworth & Bircotes will be a place people want to move to".*

- 3.59 What is more, the Neighbourhood Plan also contains several objectives, two of which relate specific to the vitality and viability of the town centre. These objectives are:

- *To sustain and regenerate the Town Centre of Harworth & Bircotes, strengthening its role at the heart of the community,*
- *To encourage restaurants and cafes to locate in the area providing amenities suitable for all the family.*

### **Tuxford Neighbourhood Plan**

- 3.60 In June 2016, the Tuxford Town Council published the submission version of their Neighbourhood Plan, which passed its referendum and was made in November 2015.

- 3.61 The Tuxford Neighbourhood Plan provides the following vision for Tuxford:

*"In 20 years' time Tuxford will be a vibrant cohesive community. There will be things to do and places to go for young and old alike. It will value its proximity to the open countryside and people will be able to walk and cycle safely to school, the shops and for their leisure and recreation in, around and out of the town.*

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*New development will have been sensitively designed to integrate well with the older parts of the town and the benefits from this growth of the town can be seen in a revitalised shopping area and improved community facilities”.*

- 3.62 The following objective from the Neighbourhood Plan relates to the growth of Tuxford as a thriving town centre; *“Development should create an environment that makes it attractive for micro, small and medium sized businesses and shops to locate and flourish in the town and should particularly encourage proposals that create a more vibrant evening economy”.*
- 3.63 Of note, the Neighbourhood Plan recognises the recent efforts of the Council to ensure the Conversation Area status of the centre is no longer ‘at risk’. A specific policy dedicated to conservation issues is included within the Neighbourhood Plan.

### Emerging Local Plan - The Bassetlaw Plan

- 3.64 Section 15 of the Planning and Compulsory Purchase Act 2004 (as amended by the Localism Act 2011) requires every Local Planning Authority in England and Wales to prepare, maintain and publish a Local Development Scheme (LDS). A key requirement of the act is to ensure the LDS is kept up to date.
- 3.65 On 8<sup>th</sup> September 2015, Bassetlaw District Council resolved to produce a new single Local Plan that will apply to the whole of the District. At the time this Retail and Leisure Study was prepared the Council had commenced consultation on the Initial Draft Bassetlaw Plan. This consultation ended on 9<sup>th</sup> December 2016. Formal adoption of the Bassetlaw Plan is scheduled for 2019.
- 3.66 As already indicated above, this Retail and Leisure Study will form part of the Council’s new evidence base.

### **Evidence Base**

- 3.67 The Council’s evidence base (used to inform the preparation of emerging Local Plan policies) includes a range of studies and supplementary documents. The studies and supplementary documents cover a range of topics including the economy, employment, housing, and the physical/built environment.
- 3.68 As already referenced above, this Retail and Leisure Study is an update on the 2012 Retail Need Assessment completed by England and Lyle and 2009 Retail Study by Martin Tonks.
- 3.69 We have looked to the 2012 Assessment in order to establish an understanding of the predictions and recommendations that were made at this time.



- 3.70 The 2012 Assessment contained a review of the relevant parts of the local policy framework, an analysis of the 2009 household telephone survey, qualitative health checks, commitments, and economic capacity forecasts, and subsequently set out scope for new retail development in the District through capacity analysis for bulky goods, as well as comparison and convenience goods.
- 3.71 Key findings from the 2012 Assessment are set out below and provide an indication of the District's retail performance as at 2012, as well as the forecasted retail growth in 2012.

#### Commitments

- 3.72 At the time the 2012 Assessment was written, planning permission had been granted for a Tesco Superstore at Carlton Road in Worksop to replace the existing Tesco store on Gateford Road. The study acknowledged the size of the new Tesco would be much larger and as such would have a significant impact upon the retail function of the town centre. Whilst there is an extant planning permission for the Tesco development at this site, we are aware that the landowner is currently pursuing alternative uses for the site.
- 3.73 Additionally, the 2012 Assessment noted that planning permission had been granted for two new foodstores, an Asda at Vesuvius Works and the Morrisons at Kilton Road, which has now been trading from Worksop for several years.
- 3.74 There were no commitments for convenience goods in Retford. However, at that time three new comparison retailers were expected to come forward in the town.

#### Retail Needs Assessment

- 3.75 As part of their Retail Needs Assessment England and Lyle produced expenditure forecasts and these are set out in Figure 3.2.

**Figure 3.2 | Bassetlaw Expenditure Forecasts produced by England and Lyle in 2012**

Expenditure Forecasts (2010 prices)	2010 £m	2016 £m	2021 £m	2028 £m
<b>Convenience Goods</b>	310.0	315.3	331.2	351.9
<b>Comparison Goods</b>	403.9	452.6	540.6	685.7

*Source: England and Lyle Retail and Leisure Study (2012) page 14*

- 3.76 In their report (and as shown in Figure 3.2) England and Lyle explain that there was only a small forecast growth in convenience goods expenditure in the short term to 2016 (1.7%). The forecast growth from 2010 is 6.8% to 2021 and 13.5% to 2028. Furthermore, in comparison goods the forecast growth in expenditure is significantly greater with a growth of 12.0% from 2010 to 2016. The long term growth in comparison goods from 2010 is 33.8% to 2021 and 68.8% to 2028.

- 3.77 Considering each of the main town centres in Bassetlaw and expenditure growth, England and Lyle forecast expenditure growth to be slightly higher in the Worksop catchment than in the Retford catchment, in both convenience and comparison goods. Their predictions for each of these centres are set out in Figure 3.3.

**Figure 3.3 | Worksop and Retford Expenditure Forecasts produced by England and Lyle in 2012**

Expenditure Forecasts (2010 prices)	2010 £m	2016 £m	2021 £m	2028 £m
<b>Convenience Goods</b>				
<b>Worksop</b>	184.0	187.8	187.8	210.8
<b>Retford</b>	126.0	127.6	133.4	141.1
<b>Comparison Goods</b>				
<b>Worksop</b>	240.6	270.4	323.9	412.2
<b>Retford</b>	163.3	182.1	216.6	273.5

Source: England and Lyle Retail and Leisure Study (2012) page 15

#### Capacity Analysis

- 3.78 The capacity analysis completed by England and Lyle shows that for Worksop there was:

- No capacity for additional convenience goods floorspace in the period to 2028.
- No capacity for additional comparison goods floorspace in the period to 2028.
- Bulky goods floorspace capacity of 6,500 sq m (gross) in 2016; 7,800 sq m (gross) in 2021; and 10,200 sq m (gross) in 2028.

- 3.79 Whereas in Retford there was:

- Convenience goods floorspace capacity of 2,900 sq m (gross) in 2016; 3,200 sq m (gross) in 2021; and 3,600 sq m (gross) in 2028. This would represent a new store of approximately the same size as the existing Asda supermarket in Retford.
- No capacity for additional comparison goods or bulky goods floorspace in the period to 2028.

#### **North Derbyshire and Bassetlaw SHMA, November 2013 (GL Hearn)**

- 3.80 Bassetlaw District Council, Bolsover District Council, Chesterfield Borough Council and North East Derbyshire District Council jointly commissioned GL Hearn in 2013 to produce a joint Strategic Housing Market Assessment, which considers future housing need over the period to 2031. In their report GL Hearn explain that on the basis of their assessment there is a need for 1,065 homes per

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annum in the housing area to 2031 in order to support population growth including increasing employee figures.

- 3.81 Of note, GL Hearn recognise that a quarter of homes in the assessed area contain older persons.
- 3.82 This study is of interest when considering population and growth projections for the town centres of Bassetlaw.

## Conclusion

- 3.83 The NPPF recognises and stresses the importance of promoting the vitality and viability of town centres through a ‘town centre first’ approach to development and defined retail hierarchy. Town centres play an essential contributing role in the nation’s economy as well as acting as the heart of local communities – where both social and commercial exchanges take place.
- 3.84 As a direct result of the NPPF coming into force, all planning applications for main town centre uses must provide a full assessment of the impact of the proposal on the vitality and viability of protected centres (for applications greater than 2,500 sq m, or a locally set threshold). It is on the basis of this impact assessment that local planning authorities consider the overall impact of the planned development on their existing retail provision as well as pipeline retail developments.
- 3.85 The adopted Core Strategy (and supporting Development Management Policies) identifies and sets out a hierarchy of Bassetlaw’s centres, defines the boundaries of centres, and also includes policies that seek to promote the competitive performance in each of the centres. Worksop is the foremost centre in the hierarchy followed by Retford, Harworth & Bircotes, Tuxford/ Carlton-in-Lindrick/ Langold/ Misterton, and then the other smaller rural service centres.
- 3.86 The Council’s current Core Strategy was adopted in 2011 and in order to ensure they have an up to date plan the Bassetlaw District Council have opted to develop and adopt a new Local Plan, to be called the Bassetlaw Plan, by 2019.
- 3.87 As part of the production of the Bassetlaw Plan the Council are gathering a suite of new technical studies and reports to form the evidence base upon which the Plan will be based. This Retail and Leisure Study will form part of the evidence base and influence those policies that relate to retail and leisure and most importantly those policies that influence and support the vitality and vibrancy of Bassetlaw’s centres and settlements.

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## 4.0 Assessment of Key Retail Centres

- 4.1 This section of the Nexus Retail and Leisure Study details our assessment of the vitality and viability of the centres within Bassetlaw District in order to obtain a clear picture of the health of these centres.
- 4.2 The analysis focuses on the four higher level centres of Worksop, Retford, Harworth & Bircotes and Tuxford, and addresses them in order of size in the subsequent sections. Each of these centres fulfils a vital role in Bassetlaw by serving the needs of the immediate local community and often residents from the wider area. Additionally, these centres also function as focal points of activity, by virtue of their range of services that are accessible to the population, comprising; retail, employment, leisure and education facilities.
- 4.3 Accompanying these more in-depth evaluations, at **Appendix C**, we set out our assessment of the remaining Local and Small Local Centres as identified under the settlement hierarchy within the Council's 2011 Core Strategy. These centres include:
- a. Carlton-in-Lindrick and Langold;
  - b. Misterton;
  - c. Celtic Point within the Worksop development boundary;
  - d. Prospect Precinct within the Worksop development boundary;
  - e. Retford Road within the Worksop development boundary; and
  - f. Welbeck Road within the Retford development boundary.
- 4.4 Experian Goad Plans have determined the extents of the two largest town centres (Worksop and Retford). Whereas the boundaries of the smaller centres have been taken from the Council's adopted Core Strategy<sup>89</sup>.
- 4.5 Section 4.0 concludes with an appraisal of future capacity and pipeline schemes within competing centres. The quantity of future capacity and pipeline schemes will consolidate the retail offer of the competing centres and enhance their retail offer, augmenting their market share.
- 4.6 To do this, Nexus worked in collaboration with Bassetlaw District Council officers to contact neighbouring local authorities, in order to identify prominent pipeline schemes within the neighbouring competing centres.

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<sup>89</sup> Due to the size of these centres there are no Experian GOAD Plans available.

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## Methodology

- 4.7 The National Planning Policy Framework (NPPF) of March 2012 states at Paragraph 23 that local planning authorities should:
- i. Set out policies for the management and growth of town centres over a defined plan period;
  - ii. Recognise town centres as the heart of their communities; and
  - iii. Pursue policies to support their viability and vitality.
- 4.8 Paragraph 23 also guides local planning authorities to promote competitive town centres that provide customer choice with a diverse retail offer, which is reflective of the individuality of each town centre.
- 4.9 While the NPPF does not provide a precise list of criteria to be used to assess the health of a centre, the Government's 'Ensuring the Vitality of Town Centres' National Planning Practice Guidance (NPPG) of March 2014 offers a helpful set of indicators. The NPPG explains these indicators should be monitored on a regular basis in order to judge the health of a centre and its performance over time.
- 4.10 Below is a list, and accompanying brief descriptions, of the indicators that have been used by Nexus to complete their assessment of the health of the Bassetlaw centres:
- **Diversity of Uses** - Data on the diversity of uses in each of the Bassetlaw centres was collated during the Retail Surveys completed by Nexus in June 2016. The collected data includes the number, type and quantity of floorspace provided in these locations.
  - **Proportion of Vacant Street Level Property** - Vacant properties were also identified during the June 2016 Nexus Surveys. The volume of vacant floorspace within a centre can provide an indication of how well the centre is performing. However, it is important to acknowledge that a degree of vacancy is inevitable and indeed desirable. Some 'churn' is expected in the market as units alter and change, as new businesses come in, and others leave. In this context, vacant units can be found in even the strongest of town centres. Equally, a low vacancy rate does not necessarily mean a centre is performing well; as the quality and performance of the occupied units may be relatively poor.
  - **Commercial Yields on Non-Domestic Property** - Whilst this can be an indicator of centre performance over time, data on commercial yields on the centres is not available publically at this time.

- **Customers' Views and Behaviour** - Information on customers' views is based on the results of the comprehensive NEMS Household Survey (completed in May 2016). These results provide an indication of how a centre is both used and viewed by local residents.
- **Retailer Representation and Intentions to Change Representation** - Information on the current strength of centres and retailer representation have been derived from Javelin Venuescore UK Shopping Venue Rankings, Experian GOAD Category Reports and other published sources.
- **Commercial Rents** - Zone A rental data can provide information on historic trends, however, data on commercial rent is not available publically at this time.
- **Pedestrian Flows** - General footfall and pedestrian flows were observed by Nexus during site visits to the Bassetlaw centres in mid-2016. The centres were visited on different days of the week and at different times of the day. Therefore, Nexus were able to obtain a comprehensive understanding of pedestrian flows through observation at these varying times.
- **Accessibility** - Consideration of access to and around each centre was informed by the Nexus site visits. This was in addition to stakeholder engagement, and a desktop review of data pertaining to access to public transport and parking facilities.

The accessibility of a centre is determined by the ease and convenience of access by a variety of transport means; including pedestrians, cyclists and disabled people.

- **Perceptions of Safety and Occurrence of Crime** - General perceptions of safety were gathered by Nexus during the site visits and supplemented by a review of existing data, such as that which kept by the Nottinghamshire Police.
- **State of Town Centre Environmental Quality** - Consideration of the quality of the buildings and public realm in each of the centres was informed by Nexus's site visits to each of the centres.

4.11 As part of this study Nexus visited each of the following centres in Bassetlaw with a view to assess their vitality and viability:

- Worksop;
- Retford;
- Harworth & Bircotes;
- Tuxford;
- Langold;

- Carlton-in-Lindrick;
- Misterton;
- Celtic Point;
- Prospect Precinct;
- Retford Road; and
- Welbeck Road

- 4.12 Given the size, nature and function of some of the smaller centres in Bassetlaw not all of the above indicators are applicable. We have only analysed the health of these smaller centres against those measures considered applicable.
- 4.13 In the following sections, we provide our assessment conclusions for the three largest settlements of Worksop, Retford, and Harworth & Bircotes, and given the Council's aspirations for Tuxford, we provide a more in-depth assessment of its current role and function as a retail service centre.
- 4.14 As already explained above, our appraisal of each of the smaller centres' roles and function can be found in **Appendix C**.

### **Stakeholder Engagement**

- 4.15 Nexus undertook stakeholder engagement with local representatives to understand the local context, including issues and concerns affecting local residents and businesses. This involved discussions with the Chairs of the Worksop and Retford Business Forums, as well as representatives from local Parish Councils.
- 4.16 The following topics were covered during these meetings; the vitality and viability of the centre, vacancies, mix of retail, parking, street environment, crime and security and town centre events.
- 4.17 The assessment begins with an analysis of the role of Bassetlaw's centres in the sub-regional shopping hierarchy.

### **Sub-Regional Hierarchy**

- 4.18 The plan included as Figure 5.2 in Section 5 (and in a larger format at **Appendix A**) illustrates the location of the Study Area relative to the main settlements in the sub-region.
- 4.19 Figure 4.1 illustrates the position of the sub-region's principal centres based on the Javelin Venuescore UK Shopping Venue Rankings 2014/15. Details from two previous years' indices are also displayed. The index details from 2011/2012 were selected as they represent the time during which the previous 2012 England and Lyle Retail Study was completed. The previous year's scores from 2013/14 were also selected as they provide a clear indication of how any recent

improvements tied with the improving UK economy may have affected the centres rankings.

- 4.20 Javelin Venuescore's index ranks 2,711 retail venues within the UK (including town centres, stand-alone malls, retail warehouse parks and factory outlet centres) based on the strength of their current retail provision. Towns and major shopping centres are graded using a scoring system taking account of the presence of multiple retailers in each location – including anchor stores, fashion operators and non-fashion multiples. It is important to acknowledge that the Venuescore index does not include an assessment of independent operators, or other town centre health indicators, identified in the NPPG i.e. these factors do not influence the score.

**Figure 4.1a | Comparison of Venuescores for Bassetlaw and Competing Regional Centres**

Centre	Classification	2014-15 Score	2014-15 Rank	2013-14 Rank	2011-12 Rank	Market Position Classification	Market Position Index (Average 100) <sup>90</sup>
Nottingham	Major City	506	7	7	7	Upper Middle	112
Sheffield	Major City	350	22	25	35	Middle	96
Derby	Major Regional	322	27	27	21	Middle	100
Sheffield Meadowhall	Major Regional	293	38	31	41	Upper Middle	118
Lincoln	Major Regional	270	44	77	39	Middle	101
Doncaster	Major Regional	264	45	48	44	Middle	93
Mansfield	Regional	173	121	134	187	Lower Middle	90
Chesterfield	Regional	148	160	154	112	Middle	92
Newark	Regional	143	170	182	177	Middle	96
Scunthorpe	Sub-Regional	122	205	194	187	Lower	79
<b>Worksop</b>	<b>Sub-Regional</b>	<b>108</b>	<b>235</b>	<b>246</b>	<b>248</b>	<b>Lower Middle</b>	<b>89</b>
Rotherham	Sub-Regional	104	250	292	270	Lower	78
Gainsborough	Sub-Regional	77	356	353	382	Middle	91
<b>Retford</b>	<b>Major District</b>	<b>74</b>	<b>380</b>	<b>374</b>	<b>373</b>	<b>Lower Middle</b>	<b>85</b>
Alfreton, Derbyshire Designer Outlet	Local	13	468	433	527	Lower	80
Dinnington	Minor District	21	1,406	1,322	2,029	Lower	70

Source: Javelin Venuescore, 2011/12, 2013/14, and 2014/15 (centres in Bassetlaw shown in **bold**)

<sup>90</sup> The Market Position Index provides an Indexed measure of the degree to which the venue's offer has a high-end or discount focus High=Bias towards High-end retailers; Low=Bias towards Discount-oriented retailers. (Source: Javelin Venuescore)



**Figure 4.1b | Comparison of Venuescores for Bassetlaw and Comparable Regional Rankings**

Centre	Classification	2014-15 Score	2014-15 Rank	2013-14 Rank	2011-12 Rank	Market Position Classification	Market Position Index (Average 100) <sup>90</sup>
Chesterfield	Regional	148	160	154	112	Middle	92
Newark	Regional	143	170	182	177	Middle	96
Loughborough	Sub-Regional	133	188	192	174	Lower Middle	90
Kettering	Sub-Regional	122	205	200	172	Middle	90
Grantham	Sub-Regional	118	211	229	194	Middle	90
<b>Worksop</b>	<b>Sub-Regional</b>	<b>108</b>	<b>235</b>	<b>246</b>	<b>248</b>	<b>Lower Middle</b>	<b>89</b>
Boston	Sub-Regional	100	261	250	241	Lower Middle	89
Market Harborough	Sub-Regional	97	275	258	331	Middle	103
Fosse Shopping Park, Leicester	Sub-Regional	96	279	250	352	Middle	105
Melton Mowbray	Sub-Regional	92	293	317	317	Middle	95
Corby	Sub-Regional	87	318	365	323	Lower Middle	87
Spalding	Sub-Regional	83	333	326	422	Lower Middle	89
Buxton	Sub-Regional	82	335	335	343	Middle	100
Skegness	Sub-Regional	82	335	320	338	Lower Middle	84
Gainsborough	Sub-Regional	77	356	353	382	Middle	91
Hinckley	Sub-Regional	77	356	343	260	Middle	92
<b>Retford</b>	<b>Major District</b>	<b>74</b>	<b>380</b>	<b>374</b>	<b>373</b>	<b>Lower Middle</b>	<b>85</b>
Beeston	Major District	72	394	419	365	Lower Middle	87
Stamford	Major District	72	394	441	410	Upper Middle	112
Wellingborough	Major District	72	394	374	382	Lower Middle	86
Ilkeston	Major District	67	433	405	442	Lower Middle	88
Louth	Major District	65	444	450	516	Middle	92

Source: Javelin Venuescore, 2011/12, 2013/14, and 2014/15 (centres in Bassetlaw shown in **bold**)

4.21 Worksop is ranked above Retford by Javelin, who in 2014/2015 awarded Worksop a ranking of 235<sup>th</sup> and Retford 380<sup>th</sup>. Since the 2011/2012 index Retford has dropped 7 places from 373<sup>rd</sup>, while Worksop has moved up 13 places from 248<sup>th</sup> to 235<sup>th</sup> during the same period. None of the other centres in the District are included within index, which is limited to the top 2,711 centres in the UK.

4.22 The centres in Bassetlaw remain relatively low in the rankings compared to traditionally competing

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regional and sub-regional centres. Whilst Worksop and Retford occupy a higher position than the Derbyshire Designer Outlet Centre in Alfreton and Dinnington in Rotherham, they are ranked below the larger centres of Nottingham City Centre, Sheffield, Derby, Meadowhall, Lincoln, Doncaster, Mansfield, Chesterfield and Newark, which can be considerable draws to residents of Bassetlaw.

- 4.23 It is also worth noting that Worksop is ranked higher than the large neighbouring centres of Rotherham and Gainsborough, though this is likely a quirk of the way in which Javelin calculates the Venuescore rankings on the basis of national multiple retailers. Worksop has a greater proportion of national multiples than either Rotherham or Gainsborough (which, in turn, would have a higher proportion of independent retailers, cafes and other town centre occupiers), though Worksop may not necessarily be considered a 'larger' or 'higher order' centre. This is also evident when considering the centres in the region with similar Venuescore rankings to Worksop (ranging from Chesterfield to Corby) and Retford (which has a similar ranking to centres such as Skegness, Gainsborough and Stamford).
- 4.24 Shoppers are responsive to the strength and attractiveness of surrounding regional and sub-regional centres. The shopping patterns in the Study Area are therefore influenced to some degree by the greater strength, diversity and attractiveness of the retail offer at these higher order centres.

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## Worksop

### Introduction

- 4.25 Worksop is the largest settlement in Bassetlaw and performs an important role as a retail and service destination for residents from the local area, as well as residents from nearby smaller centres. The population of Worksop is estimated to be approximately 45,000 according to the 2011 Census results.
- 4.26 Worksop is considered to be the principal urban centre of Bassetlaw. It provides the majority of retail and employment for Bassetlaw, as well as leisure facilities and opportunities for education. As such, it is identified as a 'Large Town Centre' (Sub-Regional Centre) and sits at the top of the settlement hierarchy that is included in the Council's adopted Core Strategy.
- 4.27 It is located towards the centre of the defined Study Area, and is approximately 10 miles to the west of Retford, 20 miles to the south-west of Gainsborough and 20 miles to the southeast of Sheffield. Worksop is situated in Zone 1 of the Study Area. This is illustrated on the Study Area Map at Figure 5.2 and included as **Appendix A**.
- 4.28 The core town centre of Worksop consists of a number of key streets; Bridge Street/Bridge Place, Park Street, Gateford Road, and Carlton Road. The majority of the town's retail offer is located along Bridge Street. Worksop's outdoor markets take place along the pedestrianised part of Bridge Street every Wednesday, Friday and Saturday. The Council provides stalls and canopies and it attracts a significant draw each day it is hosted.
- 4.29 Worksop also consists of two other Large Local Centres – Celtic Point and Prospect Precinct, in addition to one Small Local Centre – Retford Road. Brief assessments of these centres are included within **Appendix C**, while the following sub-sections focus on the Worksop Large Town Centre.

### Diversity of Uses

- 4.30 The Nexus Retail Survey completed in June 2016 identified a total of 374 units in the town centre, comprising a total gross floorspace of 70,940 sq m.
- 4.31 The Experian Goad Plan has guided how we have defined the town centre for the purposes of this Survey. A Goad plan illustrating the location and use of each unit in the Worksop Town Centre (as defined by Experian Goad) is included as **Appendix B**.

- 4.32 Nexus has also considered the several large format food-stores located ‘on the edge’ and ‘out-of-centre’ of Worksop, including Morrisons, Aldi, Tesco, and Sainsbury. However, given the location of these stores they are not included within the Worksop Town Centre boundary as defined by Experian Goad.
- 4.33 We have reviewed the diversity of retail and leisure uses accommodated in the Worksop Town Centre (by number, type and quantity of floorspace provided) and summarise our findings in Figure 4.2.

**Figure 4.2 | Worksop Town Centre Composition (as at June 2016)**

	Units (no.)	Units (%)	Units UK Avg. (%)	Floorspace (sq m)	Floorspace (%)	Floorspace UK Avg. (%)
<b>Convenience</b>	33	8.8%	8.6%	5,850	8.2%	15.2%
<b>Comparison</b>	133	35.6%	32.0%	34,000	47.9%	35.9%
<b>Retail Service</b>	57	15.2%	13.9%	5,390	7.6%	6.7%
<b>Leisure Services</b>	65	17.4%	23.3%	12,760	18.0%	24.4%
<b>Financial and Business Services</b>	31	8.3%	10.6%	5,320	7.5%	8.0%
<b>Vacant</b>	50	13.4%	11.2%	6,250	8.8%	9.0%
<b>Other</b>	5	1.3%	0.1%	1,370	1.9%	0.1%
<b>TOTAL</b>	<b>374</b>			<b>70,940</b>		

*Source: Nexus Retail Survey June 2016*

- 4.34 Figure 4.1b identifies that Worksop is broadly comparable to the town centres of Grantham (South Kesteven) and Boston (Lincolnshire) in terms of the Javelin Venuescore rankings, which generally correlate closely with the actual market sizes of the centres (in terms of consumer spending)<sup>91</sup>. Notably, whilst Worksop has risen in the rankings since 2011, the centres of Grantham and Boston both fallen over the same period, indicating that the proportion of national multiple retailers and consumer spending in Worksop is rising, against the trend of similarly sized centres in the region.
- 4.35 The most recent Retail Studies covering Grantham<sup>92</sup> and Boston<sup>93</sup> identifies that Worksop’s vacancy rate (13.4%) was significantly lower than that of Grantham (17.0%), yet slightly higher than Boston (10.7%). More generally, Grantham was shown to have a similar proportion of comparison retailer, with a lower proportion of convenience and service units. Boston, on the other hand, showed a high proportion of convenience and leisure facilities, whilst a lower proportion of comparison and retail services.

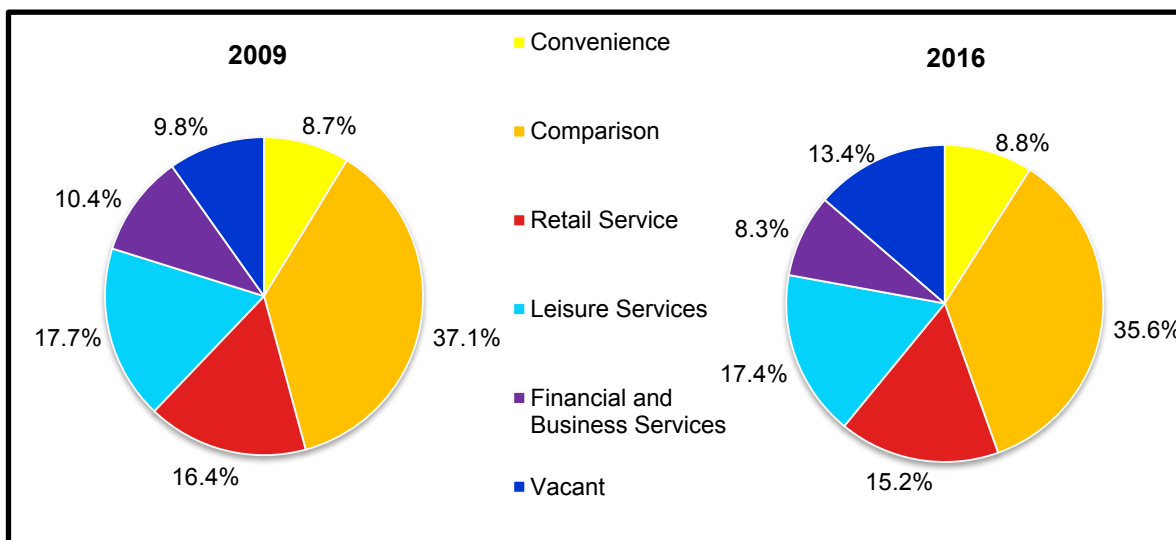
<sup>91</sup> ‘Venuescore 2014-15’, Javelin Group, 2014

<sup>92</sup> South Kesteven Retail Study, 2015

<sup>93</sup> ‘South East Lincolnshire Town Centre and Retail Capacity Study’, 2013

4.36 As part of our assessment, we have also considered the diversity of uses at the time the previous 2009 Study was completed. Figure 4.3 provides a comparison of the representation of the different uses (based on number of units) in Worksop Town Centre in 2009 and 2016.

**Figure 4.3 | Worksop Town Centre Composition (as at June 2016)<sup>94</sup>**



Source: Nexus Retail Survey June 2016 and Martin Tonks 2009 Study

**Convenience Goods Units**

4.37 There are a total of 33 units retailing convenience goods, representing 8.8% of the total town centre units. This level of representation is generally aligned with national UK averages, as the most recent data from Experian Goad suggests that on average 8.6% of town centre units in the UK are convenience.

4.38 The convenience units are accommodated over 5,850 sq m of floorspace, making up 8.2% of total town centre floorspace. Notably, this level of floorspace provision is well below the UK average of 15.2% of town centre floorspace being dedicated to convenience. This suggests that there are a large number of proportionately smaller convenience units in Worksop Town Centre.

4.39 The largest retail unit within the town centre is Asda on Memorial Avenue (Victoria Retail Park) which extends to approximately 1,170 sq m of floorspace. In 2011 this unit was converted from a Netto.

<sup>94</sup> For the purposes of completing this assessment we have not included other/miscellaneous as the categorisation of these uses may differ, and therefore, may not provide an accurate comparison.

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- 4.40 The most common convenience units are greengrocers (5), electronic cigarette retailers<sup>95</sup> (5) convenience stores (4), off licences (4) and butchers (4). Additionally, there are 2 bakeries and 2 health foodstores in the town centre.
- 4.41 The 2012 Retail Study confirmed that Worksop is well served by convenience shopping facilities and referred to the figures report in the 2009 Study, which identified that Experian Goad recorded 32 convenience units representing 8.7% of total units in the town centre. In 2016 this judgment remains accurate, as correspondingly 33 convenience units (8.8% of total units) were identified as being located within the town centre. The 2009 Study indicated that the centre was missing an anchor foodstore. The Asda on Memorial Avenue (Victoria Retail Park) within the Goad defined boundary can be considered as correcting this gap.
- 4.42 The convenience units within the town centre boundary are supplemented by 3 large convenience stores which sit outside of the Goad defined boundary. These include; the Tesco on Gateford Road to the north-west (6,432 sq m gross floorspace), the Morrisons to the east on Kilton Road (5,500 sq m gross floorspace), and the Sainsbury's on High Ground Road to the west (approximately 3,920 sq m floorspace).
- 4.43 In summary, Worksop is well served by convenience units, and the underrepresentation of town centre convenience floorspace is supported by a number of large out-of-centre foodstores, which are each set over large floorplates.

### Comparison Goods Units

- 4.44 Comparison retail stores occupy the greatest number of town centre units (133), accounting for 35.6% of all units. This proportion is higher than national average figure of 32.0%.
- 4.45 The quantity of comparison floorspace accounts for almost half, 47.9% of total floorspace in Worksop. The percentage of floorspace in Worksop dedicated to comparison goods is significantly higher than the UK average of 35.9%.
- 4.46 The level of provision has remained mostly unchanged since the 2009 Retail Study, which confirmed there were 130 comparison units, occupying 37.1% of total town centre units and representing 46.0% of total floorspace.
- 4.47 Notably, a significant majority of Worksop's comparison units are located within The Priory Centre.
- 4.48 Several major comparison retailers are located in the town centre, including Argos, Boots, Dorothy

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<sup>95</sup> Electronic cigarette retailers that sell electronic cigarette (or e-cig) parts, fluids and flavours are categorised by Experian Goad as 'tobacconists', and as such are considered to be convenience retailers.

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Perkins, New Look, Superdrug, Boots and Phones 4 U. Additionally, there are 4 large format comparison retail units with a presence in the town centre, including B&M Bargains (1,240 sq m), Wilkinson (1,570 sq m), Poundstretcher (1,580 sq m), and the largest store, Matalan which occupies a 3,490 sq m unit. It is these large stores which contribute significantly to the high floorspace percentage.

- 4.49 The 2012 Study identified that Worksop is provided with satisfactory levels of comparison shopping facilities including those within the town centre, retail parks and non-food floorspace in superstores. In addition, the market and smaller specialist shops distributed throughout town provide additional opportunities for comparison shopping.
- 4.50 Interestingly, the 2009 household survey suggested that more clothes shops were desired by residents. In 2016 a total of 21 clothing/shoe shops were identified, including national multiples such as; New Look, Burton, Dorothy Perkins, and Peacocks. This represents 5.6% of total town centre units, where the national average representation of clothing retailers is only slightly higher at 7.9%. Pandora jewellers recently opened a new store in the Priory Centre, replacing The Jewel Box.
- 4.51 Worksop is host to 14 charity shops, which make up 3.7% of the units in the town centre. Whilst this is a somewhat high proportion (the national average is just 2.7%), there mixed views on whether or not this reflects positively on the health of a centre. A high proportion of charity shops can be seen to detract from the appearance of high streets, since shoppers can perceive charity shops as representative of a lower quality (more discount oriented) town centre offer, occupying units at the expense of other town centre investment. Whilst charity shops do benefit from lower business rates and cheaper stock than non-charity retailers do, they are becoming increasingly more professional in their appearance and approach to sales. These lower overheads allow such stores to occupy vacant units that may otherwise have remained unviable, whilst providing discounted goods and helping to maintain town centre footfall.
- 4.52 The level of comparison representation in Worksop, including some multiple large format comparison retailers, is aligned with Worksop's position at the top of the District's retail hierarchy and its function as the District's main retail destination.

### Retail Services

- 4.53 There are a total of 57 retail service units located in the town centre accommodated over 5,390 sq m of floorspace. When comparing this level of provision against national averages, Worksop's provision of retail service units at 15.2% is above the UK town centre average of 13.9%.

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- 4.54 The findings of Nexus's Retail Survey suggest that the number of retail services units in Worksop has remained generally the same since 2009, as the 2009 Study also identified 60 retail service units. However, a number of the occupiers are likely to have changed.
- 4.55 The most common retail services offered in the town centre are hairdressers/barbers and beauty salons. At present there are 23 hairdressers and/or barbers in the town centre, 8 beauty salons, and 3 tattooists. As such, health and beauty services represent 9.0% of total town centre units. This level of representation is above UK figures, as Experian Goad report that 8.5% of retail service units in UK town centres are dedicated to health and beauty services.
- 4.56 Retail service floorspace accounts for 7.6% of total town centre floorspace. This figure is just higher than the national average of 6.7%.
- 4.57 It is useful to draw on the findings of the NEMS Household Survey, which identified that for 11.2% of respondents the choice of services (hairdressers, banks etc.) was the foremost attractor for them to visit Worksop.

### Leisure Services

- 4.58 The percentage of leisure services units in Worksop sits below the national average of 23.3%, with 17.4% of units (65 units) in the town centre being occupied by leisure service providers.
- 4.59 At the time the 2009 Study was completed there were 65 leisure service units identified, as such the level of provision in Worksop has remained unchanged since this time.
- 4.60 The leading leisure service offer in Worksop is provided by cafes and coffee shops, occupying a total of 17 units. Additionally, there are 14 take-away outlets and 11 public houses. There are only a small number of eat-in style restaurants, which account for a total of 8 outlets.
- 4.61 The NEMS Household Survey responses specify that 4.4% of respondents identified the choice of leisure facilities (restaurants, pubs etc.) as the principal reason they would visit Worksop. This is much lower than the response rate received for Retford, as 10.3% of respondents identified the leisure facilities in Retford as one of the main reasons they would visit the centre. As such, the response for Worksop is reflective of the underrepresentation of such facilities in the town.
- 4.62 The opening of the Savoy Cinema has helped to improve the leisure offer in the town, and as will be explained under the section entitled 'Stakeholder Engagement', the cinema is acknowledged for bringing visitors to the eastern part of the town.



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## Financial and Business Services

- 4.63 The proportion of town centre units occupied by financial and business services, 8.3% (31 units), is below the national average figure of 10.6%. The findings of Nexus's 2016 Study suggest that since 2009 the provision of such services in the town has slightly reduced, as that Study noted a total of 38 units.
- 4.64 The current proportion of financial and business floorspace is also slightly below than the national average; 7.5% in Worksop compared to the national average of only 8.0%.
- 4.65 Estate agents occupy the highest majority of units, totalling 11 units. Following this, banks/buildings societies are represented in a total of 9 units.
- 4.66 As already mentioned above, the NEMS Household Survey suggests that service units such as banks (and hairdressers) are the main reason for 11.2% of respondents visiting Worksop.

### Other / Miscellaneous Retail Units

- 4.67 During the Nexus Survey there were a total of 5 units within the town centre identified as 'other'. These include; 2 mobility information centres, a tourist information centre, and a citizen's advice bureau, as well as the postal sorting office.

## **Vacancies**

- 4.68 The Retail Survey completed by Nexus in June 2016 identified approximately 6,250sq m of vacant floorspace across 50 units within the Worksop Town Centre. This brings the vacancy rate to 13.4% of total units.
- 4.69 As such, Worksop's is underperforming in this regard, with the number of vacant units being above the UK average figure – 13.4% compared to 11.2%. However, the amount of vacant floorspace is actually just below the UK average figure – 8.8% compared to 9.0%.
- 4.70 The majority of the vacant units are located in the northern and southern parts of Bridge Street or Bridge Place; away from the pedestrianised area recognised as the town centre's 'prime pitch'.
- 4.71 The prevailing vacancy rate is higher than it was in 2009. In the 2009 Study a total of 36 units were noted as vacant, representing a 9.8% vacancy rate.

## **Customers' Views and Behaviour**

- 4.72 As explained earlier in this section, we have looked at the findings of the NEMS Household Survey

with the aim of forming an understanding of how local people perceive Worksop. To do this we have paid particular regard to those questions of relevance to the health and retail operation of Worksop. In Figure 4.4 we summarise the principal findings of our focused review.

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

Question	Respondents from entire Study Area		Respondents from Zone 1 (Location of Worksop)	
<b>Visits Worksop Most Often</b>	52.8%		87.2%	
<b>Frequency of Visits to Worksop</b>	Daily	3.7%	Daily	5.0%
	Two times a week	11.4%	Two times a week	18.8%
	Once a week	37.6%	Once a week	51.3%
	Once a fortnight	14.9%	Once a fortnight	13.5%
<b>Typical Mode of Transport to Worksop*</b>	Car	88.1%	Car	83.4%
	Bus	4.0%	Bus	1.8%
	Walk	6.6%	Walk	13.8%
<b>Main Reason for Visiting Worksop*</b>	Choice and range of shops	31.2%	Close to home	45.3%
	Close to home	26.9%	Choice and range of shops	22.4%
	Choice of services	11.2%	Choice of services	14.4%
	Choice of leisure services	4.4%	Choice of leisure services	3.8%
	Close to work	3.2%	Close to work	3.8%
	Strength of supermarket	2.1%	Environmental quality of centre	2.6%
	Environmental quality of centre	1.8%	Strength of supermarket	1.6%

Source: NEMS Household Survey, May 2016

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

- 4.73 Figure 5.2 Survey Area Zones in Section 5.0 (and the larger format version included as **Appendix A**) of this report for the plan, which illustrates the boundaries of each of the Zones.
- 4.74 The results of the NEMS Survey, unsurprisingly, identified that Worksop is the most commonly visited centre in Bassetlaw, with 52.8% of all respondents stating that this was the centre they visited the most. In comparison, 36.0% stated that they visited Retford the most often.
- 4.75 Furthermore, of respondents who reside in Zone 1 (being the Zone in which Worksop is located) a significant proportion (87.2%) named Worksop as the Bassetlaw centre that they visit the most often, with 11.9% visiting Retford the most and the remaining 0.9% visiting Harworth & Bircotes. When asked how often they visit, 75.1% of respondents said they visited once a week or more, compared residents of Zone 5 (being the Zone in which Retford is located), 92.8% of whom said they visited Retford at least once a week or more.

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- 4.76 The overriding reason for visiting Worksop was found to be the choice and range of shops – being the number one reason given by 31.2% of all respondents. This result suggests that the retail offer in Worksop is more or less perceived as adequate for the District's foremost settlement. The second most common reason given was the closeness to home (26.9%), followed by the choice of services (hairdressers, banks etc.) (11.2%).
- 4.77 Of those respondents who reside in Zone 1 (the Zone in which Worksop is located); the closeness of the town centre to their home was the most commonly given reason (45.3%).
- 4.78 A comparatively small number of respondents visit Worksop daily (3.7%). Whereas 9.0% of respondents said they visited Retford daily. This is reflective of the fact Worksop is a larger urban centre, attracting visitors who are wishing to visit a retail destination that provides more of a retail experience rather than fulfilling their daily needs.

### **Stakeholder Engagement**

- 4.79 During engagement with stakeholders it became evident that a significant portion of the business community would like to see improvements to the town centre. Most notably, reducing the level of anti-social behaviour during evening hours was highlighted as a desired outcome, with stakeholders highlighting a perception of shoplifting, and the consumption of alcohol in public spaces. This impacts upon the success of the town's evening economy. Developments and enhancements to the street environment were indicated as one way the town centre could be improved, and in turn anti-social behaviour may be discouraged.
- 4.80 An aspiration for new and improved family-oriented restaurants was also emphasised. Whilst there are some restaurants fulfilling this role already, the provision is considered too low for a town of this size.
- 4.81 The success of the Savoy Cinema was highlighted and considered one of the main reasons the eastern part of town is functioning well and attracting visitors.
- 4.82 The existing level of car parking is considered sufficient. The business community and the Council are currently in discussions with regards to modifying the parking pricing structure for the town. In terms of public transport, a wish to improve the bus routes and provide better connections into and around the town centre was identified. The results of the NEMS Household Survey indicate the popularity of driving in to the centre, as 88.1% of respondents identified that they drove the last time they went into Worksop Town Centre. As such this indicates a high demand for parking spaces in the centre. Moreover, a very small percentage said they caught the bus; only 4.0%.

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- 4.83 The success of the outdoor market along Bridge Place is considered to be contributing to the success of retail units along this prime pitch. However, an aspiration to start the markets at the top of Bridge Street was expressed.

### **Retailer Representation**

- 4.84 We have already assessed the Venuescore UK Shopping Venue Rankings to determine the retail hierarchy ranking of Worksop and other nearby centres, using a weighted scoring system that takes account of the presence of multiple retailers. The Venuescore ranking identifies Worksop as being a 'Major District' centre in the region with a high street retail offer bettered by both Doncaster and Sheffield regional centres. Venuescore classified the centre as having a 'lower-middle' market position, suggesting that the centre provides more of a discounter and downmarket retail offering.
- 4.85 Worksop benefits from 14 retail units of the top 31 Experian Goad defined major retailers (Argos, WHSmith, Marks and Spencer's Simply Food, Boots Chemist, Wilko, Tesco, Burton, Dorothy Perkins, New Look, Carphone Warehouse, Clintons, Superdrug, O2, Vodaphone). Whilst this Study serves as a snapshot of the centre at the time of our survey, we note that Argos has since vacated the town centre store, relocating to Sainsbury's at Highgrounds.

### **Pedestrian Flows**

- 4.86 During the site visits to Worksop in mid-2016, Nexus observed pedestrian activity and considered the levels of footfall across different parts of the centre. The greatest levels of pedestrian traffic were evident along the pedestrianised sections of Bridge Street and in and around The Priory Centre. Further to this, the newly refurbished and bus terminus building as well as the Savoy Cinema appeared to attract a significant amount of pedestrians and shoppers to the eastern part of the town centre.
- 4.87 At the time the June 2016 site visit was completed, the market stalls were erected and active along Bridge Place. The market stalls had a significant number of visitors at the time. Many people were observed sitting and standing around, indicating that they were spending time in the area and not just passing through.
- 4.88 Within The Priory Centre itself, Nexus also observed a significant number of visitors to the units within this shopping centre.
- 4.89 The southern end of the town centre (where Bridge Place becomes Park Street) has a significantly lower volume of pedestrian activity. The consequences of this were noted by Nexus during their site visits, as the number of vacant units in this part of the town centre is comparatively high.

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## Accessibility

- 4.90 The town benefits from decent access to public transport, providing transport both around the centre itself and to nearby centres across the District and wider region.
- 4.91 Worksop Railway Station is located to the north of the town centre on Carlton Road. Northern and East Midlands Trains serve the Station and provide hourly connections to Sheffield, Nottingham, Gainsborough and Lincoln.
- 4.92 In addition, a recently opened bus terminus is located in the town centre; on the corner of Newcastle Street/Watson Road. This location is close to the main shopping area in the town (approximately 170 metres east from Bridge Street) and the library. Bus services leaving this terminus provide connections in and around the town centre and to nearby centres, including Retford, Harworth, Dinnington and Doncaster. As already mentioned, improvements to bus routes serving the town centre are desired by stakeholders.
- 4.93 A variety of car parking spaces are available at a number of locations throughout the town centre. The majority of the car parking spaces are charged at £1 per hour. There is one free car parking plot on Priorswell Road to the east of the town centre. There are 12 Council managed car parks in Worksop. The largest being the Central Avenue providing 213 spaces, plus 18 disabled spaces. Stakeholder engagement suggested that the level of car parking at present is considered sufficient. However, amendments to the pricing structure are currently being explored. What is more, the results of the NEMS Household Survey indicate a desire to reduce the pricing of parking – being the second most requested measure that would encourage survey respondents to visit Worksop more often.
- 4.94 A limited provision of on-street parking is also available within the town centre. Some spaces can be found on Watson Road and Carlton Road.
- 4.95 Additionally, Worksop Town Centre is situated in close proximity to the A57 with connections to the A1, M1 and A60. The ease of accessing Worksop Town Centre from this major road allows for goods to be transported in and out of the area without difficulty. Evidence of this, is the decision of both Wilkinson and B&Q to have distribution centres in Worksop.
- 4.96 By virtue of its accessibility, Worksop and its surrounds is gradually becoming a popular place to live as commuters can easily access key employment opportunities provided in Sheffield, Lincoln and Nottingham.
- 4.97 The NEMS Household Survey identified that 88.1% of respondents across the survey area travel to

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Worksop Town Centre by private car (as driver or passenger), 6.6% walk and only 4.0% travel by bus, minibus or coach. Interestingly, 83.4% of respondents who reside in Zone 1 (being the Zone in which Worksop is located) stated they travel by private car (as driver or passenger). This suggests that even when people live nearby it is still the norm to travel by private car to the centre.

- 4.98 Reflective of residents' predisposition to drive into Worksop centre by car are the results of the Household Survey, in which only a very small number of resident's identified measures related to public transport as ways to improve Worksop. Only 0.8% identified increased public transport and no one identified cheaper public transport. This signifies that given visitors generally do not rely on public transport; they do not see a reason for it to change.

### **Perception of Safety**

- 4.99 Natural surveillance from pedestrian activity is high along Bridge Place during the day time. A small number of public houses, as well as restaurant/take-away outlets help the town centre to maintain some degree of activity during evening hours. However, anti-social behaviour in the town centre was highlighted as an issue impacting upon the perception of safety. Council and community led initiatives are being pursued in the hope of improving security in the town centre.
- 4.100 In addition, CCTV cameras are operational within the town centre. The surveillance provided by the CCTV cameras, indicated by street signage, help to create an impression of a safe place.
- 4.101 The results of the NEMS Household Survey also provide an indication of how safe resident's feel in Worksop. Of note, when asked if there are any measures which would encourage survey respondents to visit Worksop more often, only 0.9% identified 'better security'. While this could suggest that most people think Worksop is safe, it could also suggest that people generally do not visit the town at night, when anti-social behaviours are prevalent (refer to Figure 4.3).

### **Environmental Quality**

- 4.102 The environmental quality of Worksop's townscape is best described as mixed in quality. The need to enhance and improve the condition of the streetscape in town is emphasised within the Council's planning policy documents (including the adopted Core Strategy). This ambition was also identified during stakeholder engagement.
- 4.103 The results of the NEMS Household Survey provide an indication of how residents view the environmental quality of Worksop. A total of 2.6% identified that improvements to the environment of Worksop would encourage them to visit more.
- 4.104 The following photos of Worksop Town Centre were taken during Nexus's site visits.



Looking north up the pedestrianised section of Bridge Place with active market stalls



Active market stalls on Bridge Place selling clothing



The Palais Bingo Hall on Newcastle Avenue is a popular leisure venue



The Asda and Farmfoods on Memorial Avenue, the Asda was previously a Netto

## Summary

- 4.105 In terms of the diversity of retail uses accommodated within Worksop, the town centre is well provided in terms convenience units, and boasts a significant provision of comparison units. Of note, the number of units dedicated to convenience and comparison sales is higher than national averages. In contrast, the quantity of convenience floorspace is well below the national averages, as 8.8% of Worksop’s Town Centre floorspace is dedicated to convenience goods, whilst the national average is almost double at 15.2%.
- 4.106 The provision of retail service units is also above national averages; 15.2% compared to 13.9% UK wide. Notably, health and beauty providers in Worksop are the most common retail service and the level of representation is aligned with UK trends.

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- 4.107 The leisure and financial & business service sectors in Worksop are both slightly underrepresented when comparing the level of provision to UK averages. There is a recognised shortfall in terms of good quality and family friendly restaurants and bars in Worksop, and as such the centre fails to generate a vibrant night time economy. This sentiment resonated during stakeholder engagement. The opening of the Savoy Cinema is recognised as improving the attraction of the town centre for leisure related outings.
- 4.108 When assessing vacancy rates, Worksop is currently underperforming, with a vacancy rate (13.4%) which is higher than the national average across all UK centres of 11.2%. The vacancy rate has increased since the last study was completed in 2009, however, in floorspace terms the amount of vacant floorspace is actually just below the UK average figure.



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## Retford

### Introduction

- 4.109 Retford Town Centre is located in the south-eastern portion of the Study Area, and lies within Zone 5 as indicated on the Study Area Map at Figure 5.2. It is located approximately 10 miles to the east of Worksop, 12 miles to the south-west of Gainsborough and 20 miles to the north-east of Mansfield. Additionally, it is approximately 30 miles north of the Nottingham City Centre.
- 4.110 Retford is the second largest settlement in Bassetlaw after Worksop. It has an estimated population of 22,013 (as indicated by the 2011 Census).
- 4.111 Retford is a historic market town and the character and quality of architecture of the centre provide a pleasant built environment.
- 4.112 The primary focus of Retford Town Centre is the Market Square and the interconnecting streets that radiate off it. Both the Market Square and the pedestrianised part of Carolgate attract a large percentage of centre's visitors, and the footfall observed here is reflective of this.
- 4.113 The town centre boundary is centred around Carolgate north to west and as such it is linear in form. The boundary incorporates a number of adjoining roads; including Bridgegate, Grove Street, Exchange Street and West Street. However, the density of shops reduces as the streets move further away from Carolgate.
- 4.114 There are 2 significant foodstores located outside of the town centre boundary; Asda to the south of the centre and Morrisons to the north.

### Diversity of Uses

- 4.115 The Nexus Retail Survey (completed in June 2016) identified a total of 280 units located in the town centre, making up a total gross floorspace of 62,410 sq m.
- 4.116 Our findings are summarised in Figure 4.5.

**Figure 4.5 | Retford Town Centre Composition (June 2016)**

	Units (no.)	Units (%)	Units UK Avg. (%)	Floorspace (sq m)	Floorspace (%)	Floorspace UK Avg. (%)
<b>Convenience</b>	24	8.6%	8.6%	13,840	22.2%	15.2%
<b>Comparison</b>	101	36.2%	32.0%	23,420	37.6%	35.9%
<b>Retail Service</b>	38	13.6%	13.9%	3,790	6.1%	6.7%
<b>Leisure Services</b>	55	19.7%	23.3%	11,270	18.1%	24.4%
<b>Financial and Business Services</b>	38	13.6%	10.6%	6,700	10.7%	8.0%
<b>Vacant</b>	19	6.8%	11.2%	2,660	4.3%	9.0%
<b>Other</b>	4	1.4%	0.1%	690	1.1%	0.1%
<b>TOTAL</b>	<b>280</b>			<b>62,410</b>		

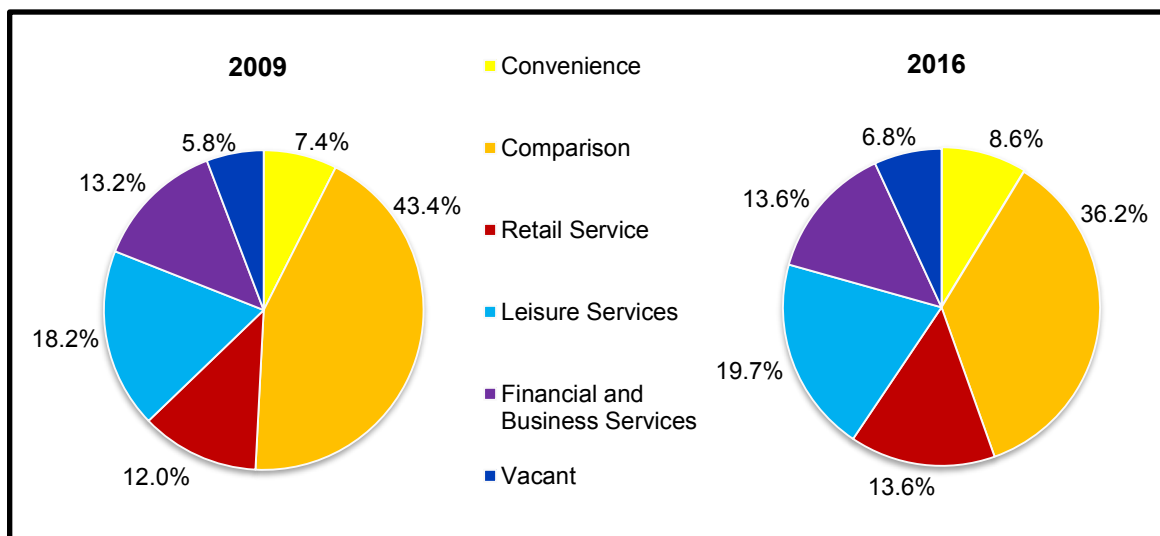
*Source: Nexus Retail Survey, June 2016*

- 4.117 The centres of Hinckley (Leicestershire) and Beeston (Nottinghamshire) are considered to be broadly comparable to Retford in terms of size, proportion of national multiple retailers and consumer spending, as identified by Javelin Venuescore, Figure 4.1b. Each of the centres have fallen in the Venuescore rankings since 2011, signifying the difficulty in town centres of this scale in attracting investment and national multiple retailers over a period in which many retailers have reduce stock and revaluated their portfolios. Notably, however, Retford has fallen just 7 places since 2011 (far less than each of Hinckley and Beeston, which fell 96 and 29 places respectively), suggesting that Retford remains a relatively stable destination for national multiple retailers.
- 4.118 Hinckley<sup>96</sup> and Beeston<sup>97</sup> both show a higher vacancy rate than Retford, which is low for a centre of its size. Hinckley has a higher proportion of comparison goods retailers, yet a lower proportion of service facilities, whilst Beeston showed a higher proportion of convenience retailer and financial services, with a lower proportion of comparison goods retailer.
- 4.119 As part of our assessment we have also considered the diversity of uses in Retford at the time the previous 2009 Study was completed. The pie charts in Figure 4.6 provide a comparison of the representation of the different uses (based on number of units) in Retford Town Centre in 2009 and 2016.

<sup>96</sup> 'Hinckley & Bosworth Borough Retail Capacity Study', 2007

<sup>97</sup> 'Greater Nottinghamshire Retail Study', 2015

**Figure 4.6 | Retford Town Centre Composition 2016 versus 2009<sup>98</sup>**



*Source: Nexus Retail Survey June 2016 and Martin Tonks 2009 Study*

4.120 A plan illustrating the location and use of each unit in the town centre (as defined by Experian Goad) is provided at **Appendix B**.

Convenience Goods Units

4.121 At the time the Nexus Survey was completed a total of 24 convenience units were identified. The 24 units’ account for 8.6% of the total town centre units. This level of provision is consistent with the UK national average of 8.6%.

4.122 Interestingly, the percentage amount of floorspace dedicated to the sale of convenience goods sits well above the national average – 22.2% of total floorspace in Retford is convenience floorspace compared to a national average figure of 15.2%. Significantly contributing to this floorspace figure are 2 large format foodstores – the Morrisons, which is spread out over a 5,930 sq m floor plate, and the Asda, which occupies a 3,140 sq m unit. These foodstores sit outside the town centre boundary as it is defined in the Council’s Core Strategy. As such, this floorspace figure is considerably skewed by the foodstores.

4.123 The majority of the smaller convenience goods units have frontages on the main retail street - Carolgate.

4.124 The most common convenience units are confectioners, occupying 4 town centre units. Following this, there are 3 bakeries and 3 supermarkets; including the Asda and Morrisons mentioned above

<sup>98</sup> For the purposes of completing this assessment we have not included other/miscellaneous as the categorisation of these uses may differ, and therefore, may not provide an accurate comparison.

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and the 1,400 sq m Aldi on Carolgate.

- 4.125 The 2012 Retail Study confirmed that at that time the centre was well served by convenience stores, and our Survey supports a similar inference.

### Comparison Goods Units

- 4.126 Comparison retailers occupy 101 units in Retford, making up 36.2% of the total number of town centre retail units. This percentage is in excess of the national average of 32.0%.
- 4.127 In terms of dedicated comparison floorspace, Retford encompasses 23,420 sq m, or 37.6% of total town centre floorspace. This percentage figure is again above the national average figure of 35.9% of total town centre floorspace.
- 4.128 Clothing shops dominate the town centre, occupying a total of 18 units. Notably, 8 of these units sell ladies wear. Following this, charity shops and furniture retailers are prevalent. There are a total of 11 charity shops and 10 furniture shops.
- 4.129 In terms of floorspace, 3 large household goods outlets; Home Bargains, B&M Bargains, and Family Bargains, provide a significant amount of comparison floorspace, each occupying units that are over 1,000 sq m in size.
- 4.130 The 2009 Study identified 105 comparison units in the centre, and based on this the 2012 Retail Study concluded that the provision of comparison retail in Retford was reasonable; noting that the retail warehouse offer was limited. Since that time the quantity of comparison floorspace in the town has only marginally decreased, and we would conclude that Retford's current provision of comparison is adequate.
- 4.131 The 2009 Study also suggested that fashion shops were underrepresented and customers desired more multiple retailers such as Next. The current national multiples in the town include; Dorothy Perkins, New Look, and Burton.

### Retail Services

- 4.132 The 2016 Nexus Survey identified a total of 38 retail service units in the town centre, representing a total of 13.6% of town centre units. The level of retail service is sits just below the national average of 13.9%.
- 4.133 The most common retail service offered in the town centre is hairdressing and barber services. Such services are offered from 15 of the total 38 retail services units (or 36.6% of the total retail

service units). Additionally, there are a total of 5 beauty salons. Therefore, just like Worksop health and beauty providers are a dominant service provided in the town centre; representing 7.1% of total town centre units. This is aligned with national trends, as Experian Goad identify that on average 8.5% of UK town centre units are occupied by health and beauty services.

- 4.134 The amount of retail service floorspace in the town centre is just below the national average; as 6.1% of Retford's town centre floorspace is dedicated to retail services (4,390 sq m) and the national average figure is 6.7%.
- 4.135 The number of retail service units in the centre has increased since 2009, when 29 units were identified. The growing popularity of health and beauty services is the likely cause of this increase.

### Leisure Services

- 4.136 When assessing the Nexus Survey results against national averages, Retford has a slight under provision of leisure service units with 19.7% (a total of 55) of the town's total units offering leisure services compared to the national average of 23.3%.
- 4.137 Similarly, in terms of floorspace the quantity is lower than the average UK figure; 18.1% of Retford's Town Centre floorspace is dedicated to leisure service while 24.2% is the national average.
- 4.138 The town is well provided in terms of cafes and public houses. There are presently a total of 12 cafes/coffee shops and 9 public houses. The new Opera Tea Rooms on Jubilee Courtyard has supplemented the existing provision.
- 4.139 Of note, are the 2 theatres; the Majestic Theatre and the Retford Little Theatre. Both theatres are recognised as key community assets in the town, showcasing a variety of shows and hosting various community events.
- 4.140 The NEMS Household Survey results indicate that the choice of leisure services is the third most common reason for visiting Retford (10.3%), after the choice and range of shops (37.7%) and closeness to home (24.4%). The draw of Retford's leisure provision, as indicated by the Household Survey results, is much higher than Worksop, as only 4.4% of people identified leisure uses as the main draw to Worksop.

### Financial and Business Services

- 4.141 The financial and business service sector in Retford has a marginally higher percentage of units in comparison to the national average; 13.6% in Retford compared to the national average of 10.6%.

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- 4.142 Most notably, there are a significant number of estate agents and banks/building societies in Retford. At the time the Nexus Survey was completed a total of 10 banks/building societies and 8 estate agents were identified.
- 4.143 4.9% of respondents to the Household Survey identified that the choice of services, such as banks and hairdressers, was their primary reason for visiting Retford.
- 4.144 As would be expected, most of the financial and business service units, apart from banks, do not occupy units on the prime pitch (Carolgate), and are instead located on the secondary frontages such as West Street and Grove Street.
- 4.145 The type of financial and business services in Retford differs from Worksop. For example, Retford has a higher number of accountants, with a total of 4, whereas Worksop only has 1. However, both towns are provided with a similar number of banks/building societies – Retford has 10 and Worksop 9.

#### Other / Miscellaneous Retail Units

- 4.146 There is only a small number, 3 in total, of 'other' or miscellaneous retail units identified in Retford Town Centre.
- 4.147 These units include; the Retford Hub on Churchgate, the food bank on Exchange Street and the taxi hire unit on Beardsalls Row.

#### **Vacancies**

- 4.148 The Retail Survey completed by Nexus in June 2016 identified 19 vacant units within Retford Town Centre, totalling 2,660 sq m of vacant floorspace. The 19 units' account for 6.8% of total units, and the 2,660 of floorspace accounts for 4.3% of total floorspace in the town.
- 4.149 When considering vacancy rates these are lower, in terms of both percentage of units and floorspace, than national averages. The UK vacancy rate in terms of vacant units is presently 11.2% and vacant floorspace figure is 9.0%.
- 4.150 At the time the 2009 Study was completed the vacancy rate was at a similar level – 5.8%. Retford's level of vacancy is considered reasonable given the size of the town, and as explained earlier some 'churn' is expected in all town centres. As such, the vacancy rate in Retford suggests that it is performing well in this regard.

## Customers' Views and Behaviour

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

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

Question	Respondents from the Study Area		Respondents from Zone 5 (Location of Retford)	
<b>Visits Retford Most Often</b>		36.0%		94.0%
<b>Frequency of Visits to Retford*</b>	Daily	9.0%	Daily	17.3%
	Two times a week	27.0%	Two times a week	42.8%
	Once a week	27.5%	Once a week	32.7%
	Once a fortnight	8.6%	Once a fortnight	4.9%
<b>Typical Mode of Transport to Retford*</b>	Car	82.2%	Car	70.8%
	Bus	4.5%	Bus	3.8%
	Walk	9.9%	Walk	19.7%
<b>Main Reason for Visiting Retford*</b>	Choice and range of shops	37.7%	Close to home	41.3%
	Close to home	24.4%	Choice and range of shops	31.7%
	Choice of leisure services	10.3%	Choice of leisure services	12.4%
	Choice of services	4.9%	Choice of services	2.9%
	Environmental quality of centre	3.7%	Close to work	2.8%
	Close to work	2.9%	Strength of supermarket	2.4%
	Strength of supermarket	2.9%	Environmental quality of centre	1.9%

Source: NEMS Household Survey, May 2016

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

- 4.152 A total of 36.0% of all respondents from the Study Area confirmed they visited Retford the most often; this is compared to 52.8% stating they visit Worksop most often and 9.3% identifying Harworth & Bircotes as their most frequented centre.
- 4.153 A very high percentage (94.0%) of respondents who reside in Zone 5 (the centre containing Retford) visit Retford most often. A comparatively smaller percentage of Zone 5 respondents specified they visited the other Bassetlaw centres often; with only 2.2% visiting Worksop, 3.1% stating Tuxford and 0.8% identifying Harworth & Bircotes.
- 4.154 In terms of the frequency of visits to Retford Town Centre; a high number of those who reside in

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Zone 5 frequent Retford visit daily (17.3% of respondents from Zone 5). A further 75.5% stated they visit Retford at least once per week.

- 4.155 The two foremost reason respondent's visit Retford is because they are attracted to the choice and range of shops (37.7%) or because of its proximity to their home (24.4%).

### **Stakeholder Engagement**

- 4.156 In terms of the overall health of Retford, the health of the markets and retail performance was highlighted as positive, and generally 'above average' when considered against comparable centres in the UK.
- 4.157 The quality of the both the street environment and built form was described as 'good'. Shop owners as well as the Council are recognised for putting effort into maintaining and enhancing the town centre environment.
- 4.158 In terms of what could be improved, the need for additional uses that support and provide for the night time economy was stressed. In particular, new restaurants and bars were desired.
- 4.159 In addition, stakeholders questioned the method of charging for parking in the town centre in terms of convenience and handiness and how it effects the attraction of the town to visitors. The majority of visitors travel to the centre by car; 82.2% of Household Survey respondents, a figure which is indicative of the high level of demand for parking by visitors to the centre.

### **Retailer Representation**

- 4.160 The Javelin Venuescore ranking identifies Retford as being a 'Major District' centre in the region with a high street retail offer bettered by Worksop, Chesterfield and Mansfield.
- 4.161 Retford comprises 11 of the top 31 Experian Goad defined major retailers (Argos, Boots the Chemist, WHSmith, Wilkinsons, Burton, Dorothy Perkins, New Look, Clarks Shoes, Clintons, Superdrug and Vodafone). This is slightly less than the number of defined major retailers present within Worksop; which explains why Worksop sits above Retford in the Javelin Venuescore index, which ranks town centres based on factors such as this – Worksop is ranked 235<sup>th</sup> and Retford is ranked 380<sup>th</sup>.

### **Pedestrian Flows**

- 4.162 During the visits to Retford completed in mid-2016, the level of pedestrian activity was observed. The greatest levels of pedestrian traffic were evident along the pedestrianised part of Carolgate



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and into the Market Square. It is in this part of the town that the densest retail offer is located, including the regular outdoor markets.

- 4.163 The southern stretch of Carolgate was seen to benefit from stable pedestrian traffic throughout the day and into the evening in consequence to its food, drink and service offer.
- 4.164 The location of the 2 large foodstores just outside of the Council's town centre boundary (Asda to the south-west and Morrisons to the north), means that the volume of visitors attracted to these stores often does not often led to direct footfall in the central part of the town.
- 4.165 The minimal number of restaurants that are open during the evening means that during this time only minimal pedestrian traffic is likely. Those restaurants that are present within the town are generally focused on Grove Street in the northern portion of the centre. The evening leisure offer here is complemented by 2 public houses; the Turks Head and the Dominie Cross.

### **Accessibility**

- 4.166 There are 6 Council run car parks in Retford, the largest being Churchgate Central with 152 car parking spaces and an additional 11 disabled spaces. All of the Council run car parks become free of charge after 6pm in the evening.
- 4.167 There are limited numbers of on-street parking available close to the Market Square and Carolgate. Most visitors to the centre park in one of the Council run car parks, which are all located relatively close to the core of the town centre.
- 4.168 Retford Railway Station is located to the south of the town centre. Walking from the Market Square the Railway Station can be reached in less than 15 minutes at distance of 0.7 miles. The Railway Station is served by trains operated by Northern, First Hull Trains and Virgin East Coast. A journey from Retford to Doncaster via train takes approximately 15 minutes, while a journey to Sheffield City Centre takes up to 40 minutes.
- 4.169 The NEMS Household Survey identified that 82.2% of respondents across the Study Area travel to Retford by car (as a driver or passenger), 9.9% walk and a further 4.5% travel by bus, minibus or coach. Interestingly, the percentage of people who walk into Retford Town Centre is comparatively higher than those who identified that they walk into Worksop Town Centre; as the response rate to this same question for Worksop suggests that only 6.6% walk (refer to Figure 4.4).

### **Perception of Safety**

- 4.170 The area around Market Square and Carolgate provides a consistently tight form of urban

development with a significant number of retail units all built right up to the footpath frontage. Additionally, the level of vacant units present in this part of the town centre is relatively low, which compliments the tight form of development. The regular markets provide a significant level of activity as many visitors are attracted to the markets which take place on a regular basis.

- 4.171 The volume of visitors coming to this part of the town everyday provides natural surveillance throughout daylight hours. In consequence to this, the core of the town centre represents an environment where people feel safe. During the night-time, there are a few leisure uses which attract people in the evening hours. However, these are not focused around the core of the town (the Market Square), and therefore, the level of natural surveillance during the night-time hours significantly decreases in this location.
- 4.172 As explained earlier in our assessment, there is a focus of restaurants and public houses attracting visitors during the evening on Grove Street. As such, it could be said that the perception of safety in this part of the town is assisted by the amount of night time activity taking place here.
- 4.173 Beyond the Market Square and as the town extends further away from Carolgate the density of retail development is much lower and the pedestrian environment is much less open and defined. As a result, these areas can often attract a higher level of anti-social behaviour, and result in a perception that they are much less safe.
- 4.174 As with Worksop, the Council operates several Public Space CCTV cameras throughout the town centre. The CCTV cameras are operated under a strict Code of Practice.

### **Environmental Quality**

- 4.175 Retford Town Centre offers a high quality urban environment, assisted greatly by the number of historical buildings present here.
- 4.176 The quality of streetscape in Retford is orderly and generally free from visible litter. Retford contains usable street furniture which positively contributes to the quality of the street environment, of note are the benches on Carolgate.
- 4.177 The Market Square and the buildings which surround it represent a high quality environment that is reflective of its historic role as a market town. The pedestrianisation of Carolgate and the Market Square with well-kept paving further augments the quality of the core town centre environment.
- 4.178 To encourage the on-going preservation and maintenance of the historic town centre the Council have produced a Conservation Area Appraisal for Retford. The Appraisal was produced in 2012 and explains that the centre is characterised by its Georgian period architecture.

4.179 Responses collected by Nexus during stakeholder engagement indicate that the built environment of Retford is considered to be one of its positive attributes and assists to support its strength and ability to draw in visitors as a shopping destination.

4.180 The following photos of Retford Town Centre were taken during Nexus’s site visits.



Noticeboard that is maintained by the Retford Civic Society



Market stalls erected in Market Place



Gates to King George VI Coronation Park, which is located west of the town centre



The large Morrisons to the north of the town centre



Looking down the pedestrianised part of Bridge Place



A new café, The Opera Tea Rooms in Jubilee Courtyard

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## Summary

- 4.181 Retford is well provided in terms of the variety of different uses. Notably, Retford's provision of convenience and comparison units sits above national averages. The only use that is slightly underrepresented when assessed against national figures are leisure services – 19.6% of Retford total units, whereas the UK average is 23.3% of total units. The desire for additional restaurants and bars was highlighted during stakeholder engagement.
- 4.182 The current vacancy rate in Retford is below the national average of 11.2% - currently sitting at 6.8%. Assessed against this measure, the town centre can be considered to be performing well.
- 4.183 Retford is the second most frequented settlement in the District after Worksop. Notably 94.0% of residents in Zone 5 (the Zone in which Retford is located) visit Retford the most often and of those that do 17.3% visit daily. This is representative of its attraction for local residents to satisfy their day-to-day shopping and leisure needs.

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## The network of district, and local centres and parades

- 4.184 In addition to completing health checks for Bassetlaw's two main centres Nexus has also appraised the large and small local centres in the District. At a national level, the NPPF points out the importance of strong neighbourhood centres for the overall performance of an area or district.
- 4.185 Harworth & Bircotes and Langold and are recognised in the adopted planning documents as 'Large Local Centres'. Whereas Tuxford, Carlton-in-Lindrick, and Misterton are recognised as 'Small Local Centres' and provide smaller concentrations of retail and leisure activity which are of local value.
- 4.186 On the basis of the Council's aspirations to improve and expand Harworth & Bircotes and Tuxford these two centres have been assessed against all of the town centre health check criteria. Our findings are summarised below in the following sub-sections. Briefer health checks have been completed on the remaining centres of Langold, Carlton-in-Lindrick, Misteron, Celtic Point, Prospect Precinct, Retford Road and Welbeck Road; and our analysis is included at **Appendix C**.

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## Harworth & Bircotes

### Introduction

- 4.187 Harworth & Bircotes is identified in the Core Strategy (2009) as the Main Regeneration Settlement for Bassetlaw. This planning policy document describes the town as a regeneration opportunity town and a focus for development that will drive a 'step-change'. In terms of its place in the District's settlement hierarchy Harworth & Bircotes is identified as a 'Large Local Centre'.
- 4.188 Harworth & Bircotes is located within Zone 2 in the north-western portion of the defined Study Area. The settlement is located approximately 10 miles north-east of Worksop, and 10 miles north-west of Retford. The centre is the third largest in the District with a population of approximately 8,000 (as identified by the 2011 Census).
- 4.189 The centre is currently undergoing significant redevelopment as part of the regeneration scheme occurring on the site of the former Harworth Colliery. This regeneration scheme has already supplied a number of new homes, as well as a large new Asda on Scrooby Road. The recently adopted Harworth & Bircotes Neighbourhood Plan allocates the site for the delivery of the 996 new homes that have previously been granted outline planning permission, as well a minimum of an additional 500 dwellings as Phase 1 of the proposed Harworth Colliery masterplan (to potentially rise to 750 new dwellings at Phase 2). The redevelopment of this brownfield site is the largest single site of this kind in the District. In addition to the Neighbourhood Plan proposals, planning permission was granted in 2016 for the Harworth South Business Park, comprising over 200,000 sq m of office and commercial floorspace to the south of Harworth & Bircotes.
- 4.190 Harworth & Bircotes Local Centre can be described as a linear in nature, as most of the retail frontages are situated on Scrooby Road which runs east to west, with the exception of some retail units on Grosvenor Road, an adjoining road running north to south. There are two anchor stores within the centre; the Asda situated on the western side of Scrooby Road and the Aldi located to the south of Scrooby Road, opposite the traditional high street. The opening of the Asda in 2012, and Aldi in 2015 dramatically changed the retail provision in the centre and the draw to local residents.
- 4.191 The relatively new town hall and medical centre on Scrooby Road are considered to represent an opportunity to re-establish Harworth & Bircotes as a vibrant hub of services and facilities attracting a significant number of local residents.
- 4.192 Harworth & Bircotes was not assessed in detail in the previous Bassetlaw Retail Studies, and therefore, we do not draw on these reports for comparisons.

## Diversity of Uses

- 4.193 The Nexus Retail Survey identified that there was a total of 59 retail units in Harworth & Bircotes. The results of this assessment are set out in Figure 4.8.
- 4.194 Details on the quantity of floorspace for each of the units are not available as the centre has not been surveyed by Experian Goad, and as such this has not formed part of our assessment of the diversity of uses.

**Figure 4.8 / Harworth & Bircotes Town Centre Composition (June 2016)**

	Units (no.)	Units (%)	Units UK Avg. (%)
<b>Convenience</b>	8	13.6%	8.6%
<b>Comparison</b>	11	18.6%	32.0%
<b>Retail Service</b>	17	28.8%	13.9%
<b>Leisure Services</b>	15	25.4%	23.4%
<b>Financial and Business Services</b>	3	5.1%	10.6%
<b>Vacant</b>	4	6.8%	11.2%
<b>Other</b>	1	1.7%	0.1%
<b>TOTAL</b>	<b>59</b>		

*Source: Nexus Retail Survey, June 2016*

## Convenience Goods Units

- 4.195 Convenience uses occupy an above average number of the centres retail units. The 8 convenience units represent a total of 13.6% of the centres units. This is a considerably high level of representation when considered against the UK average for convenience units is only 8.6%.
- 4.196 The most common convenience use is convenience stores and frozen food retailers both occupying 2 units in the centre. As already mentioned there are currently 2 supermarkets, the Asda and the Aldi on the south side of Scrooby Road. The draw of these foodstores is evident when reviewing the Household Survey results and comparing them to the other Bassetlaw centres. 18.5% of respondents identified the strength of Harworth & Bircotes supermarket as their main reasons for visiting the centre. This compares to only 2.5% for Retford and 2.1% for Worksop.

## Comparison Goods Units

- 4.197 At present, comparison units account for 18.6% of all of Harworth & Bircotes units. This level of representation is well below the national average of 32.0%. That said this composition is expected given the size and location of the centre. The type of comparison units' present is varied, with 2 of

the 11 units utilised by florists and a further 2 units occupied by chemists.

### Retail Services

- 4.198 Retail service units are the most dominate retail type present in Harworth & Bircotes. 17 of the 58 centre units are occupied by retail service providers. The 17 units represent 28.8% of the total units in the centre.
- 4.199 As with the larger centres in Bassetlaw (Worksop and Retford), health and beauty providers are the most common service on offer. In total there are 10 units offering health and beauty services in Harworth & Bircotes, the most common being hairdressing, being provided at 4 outlets.

### Leisure Services

- 4.200 The most common type of leisure services provided in Harworth & Bircotes is take-away outlets, accounting for 8 of the 14 leisure service units. Following this, there are 2 betting offices and 1 public house, in addition to 1 Indian restaurant.
- 4.201 The underrepresentation of eat-in style restaurants and abundance of take-away outlets present in the centre was highlighted to Nexus during stakeholder engagement. Leisure services in the centre represent 25.4% of the total units.
- 4.202 The popularity of the take-away units, and other leisure offers, in the town is evident when assessing the Household Survey results. 7.6% of respondents identified these uses as being the main draw to the town for them. This percentage is a lot higher than the draw for retail service (hairdressers, banks etc.) units, as only 2.4% identified these uses as their main reason for visiting the centre.

### Financial and Business Services

- 4.203 The financial and business service sector has a lower percentage of units in comparison to the national average – with only 5.1% of the centre’s units occupied by such providers. The 3 units provide essential services such as building supplies and services (2 units) as well as 1 unit supplying insurance services. The presence of building supply and services stores correlates with the centres’ role as the District’s main regeneration centre, as it is undergoing significant redevelopment.
- 4.204 There is a notable lack of banks and other financial and business services that would traditionally be present in a town such as Harworth & Bircotes, as a result of the fact that the centre is continuing to grow and residents currently travel to larger neighbouring towns for such services. This is not unusual for a centre of Harworth & Bircotes size; however, we would expect these facilities to develop over time as the local resident population’s requirements increase.



## Other / Miscellaneous Retail Units

4.205 No miscellaneous retail units were identified in Harworth & Bircotes during the June 2016 Retail Survey.

## **Vacancies**

- 4.206 At the time Nexus completed their Retail Survey in June 2016, Harworth & Bircotes had a vacancy rate of 6.8%, comprising 3 units in total. This level of vacancy is below the national average of 11.2%.
- 4.207 The Harworth & Bircotes Neighbourhood Plan, published in 2014, identified that at that time there were a total of 4 vacant units in the centre. As such, the Nexus Retail Survey identified a slight decrease in vacancy by 1 unit.

## **Customers' Views and Behaviour**

4.208 We summarise the principal findings of the NEMS Household Survey in respect to those questions of relevance to the health of Harworth & Bircotes in Figure 4.9.

**Figure 4.9 | NEMS Household Response Summary for Harworth & Bircotes**

<i>Question</i>	<i>Respondents from the Study Area</i>		<i>Respondents from Zone 2 (Location of Harworth Bircotes)</i>	
<b>Visits Harworth &amp; Bircotes Most Often</b>	9.3%		66.8%	
<b>Frequency of Visits to Harworth Bircotes*</b>	Daily	20.3%	Daily	42.1%
	Two times a week	13.8%	Two times a week	19.3%
	Once a week	36.8%	Once a week	22.9%
	Once a fortnight	8.2%	Once a fortnight	6.5%
<b>Typical Mode of Transport *</b>	Car	84.5%	Car	68.9%
	Bus	1.8%	Bus	2.8%
	Walk	11.0%	Walk	22.8%
<b>Main Reason for Visiting Harworth Bircotes*</b>	Choice and range of shops	37.8%	Close to home	51.2%
	Close to home	27.3%	Choice and range of shops	30.0%
	Strength of supermarket	8.5%	Strength of supermarket	5.2%
	Choice of leisure services	7.6%	Choice of services	3.8%
	Choice of services	2.4%	Close to work	3.6%
	Close to work	1.8%	Choice of leisure services	3.1%

*Source: NEMS Household Survey, May 2016*

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

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- 4.209 The NEMS Household Survey identifies that out of the town centres in Bassetlaw, Harworth & Bircotes is the third most frequented centre by the respondents within the Study Area, with only 9.3% stating they visit Harworth & Bircotes the most often. This response is not surprising given it is one of the smallest town centres in the District, and in particular it is considerably smaller than both Worksop and Retford, which attract a much larger visitor base.
- 4.210 In terms of how often these respondents visit Harworth & Bircotes, the results illustrate that the majority of people visit between one or two times a week – over 50% of respondents.
- 4.211 A smaller number visit daily – just over 20%. However, this is a comparatively high number of daily visits (when compared to the both Worksop and Retford), and can be attributed to centres function in providing for the local needs of the community who live in close proximity.
- 4.212 The majority of visitors drive in to the centre, including those who live within Zone 2 (being the Zone in which the centre is situated).
- 4.213 The range of shops (37.8%), as well as proximity to home (27.3%), is the main reasons people visit Harworth & Bircotes.

### **Stakeholder Engagement**

- 4.214 What became evident during stakeholder engagement is that the residents of the centre are welcoming of the significant development occurring in the centre and there is little or no objection to new development.
- 4.215 In addition, issues with the current form of the built environment were noted. The maintenance and design of shopfronts is considered to be one area in particular that, if addressed, could improve the quality of the centre.
- 4.216 Given the set-up of the existing centre there is no current central focal point for community members to meet and interact. However, the Town Hall acts as a community centre; providing space for a number of community events throughout the year.
- 4.217 These comments are reflected in the Neighbourhood Plan for Harworth & Bircotes.

### **Retailer Representation**

- 4.218 Harworth & Bircotes only currently accommodate one of the top 31 Experian Goad defined major retailers, Boots.
- 4.219 The town centre also features large Asda and Aldi foodstore, which are both competitive national

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retail operators that are expanding nationwide.

- 4.220 The lack of national retailer presence in the town is representative of its smaller size (being a lot smaller than both Worksop and Retford). Harworth & Bircotes is recognised in local planning policy as a 'Large Local Centre', and therefore, its primary function is to serve the local needs of residents. As such, the scale of retail and leisure development is consistent with its position in the hierarchy.
- 4.221 Due to its size Harworth & Bircotes is not ranked on the Venuescore UK Shopping Venue Rankings.

### **Pedestrian Flows**

- 4.222 Pedestrian flows around the Asda were identified as being the highest for the town centre. The other area of town where the highest pedestrian activities were observed was the eastern part of Scrooby Road; where a focus of cafes and other food outlets is situated. It appeared to Nexus that these outlets were one of the primary draws into the town centre.
- 4.223 Much lower levels of pedestrian activity were seen in the western part of the settlement, likely due to the type of retail activity that is present there – 1 public house, vehicle workshop, in addition to number of vacant units.

### **Accessibility**

- 4.224 In terms of opportunities for public transport to and from Harworth & Bircotes the only option is by bus. The town is a fair distance away from any railway stations. The centre is served by the No. 21, No. 25, No. 27, No. 29, the No. 127 and the No. 205. These bus routes provide connections around the centre itself and to other nearby centres and areas. A bus connection between Harworth & Bircotes and Worksop would take approximately 30 minutes in duration on the No. 25. Similarly a journey by bus from Harworth & Bircotes to Retford on the No. 29 would take just five minutes longer, totally a 35 minute journey on average. The Harworth & Bircotes Neighbourhood Plan provides support for the development of a transport hub, or bus depot, noting the infrequency of services and that car ownership in Harworth & Bircotes is lower than the national and district averages.
- 4.225 When considering the availability of car parking spaces for shoppers there is a perception that there is an under provision of parking, resulting in a number of cars parking on the pedestrian sections of Scrooby Road (as highlighted within the Harworth & Bircotes Neighbourhood Plan), although this could be more indicative of residents preference to park closer to the shopping facilities. There is also a significant amount of parking available to the rear of the Harworth & Bircotes Town Hall, which could benefit from clearer, more prominent signage. Nonetheless, we would expect the requirement for additional parking spaces to increase as the town centre's local resident population grows.

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- 4.226 The high demand for car parking spaces in the centre is reflective of the most popular mode of transport used by visitors to the centre. The NEMS Household Survey identified that 84.5% of respondents across the Study Area who visit Harworth & Bircotes the most often travel by car. Following this, only 11.0% walk and an even smaller proportion, only 1.8%, travel by bus, minibus or coach (refer to Figure 4.9).
- 4.227 Additionally, a high percentage of those respondents who reside in Zone 2, meaning they live very close to the Harworth & Bircotes Local Centre, still drive to the town centre (59.3%). A very minimal percentage; 5.2%, travel by bus, minibus or coach.
- 4.228 A total of 22.8% of Zone 2 respondents stated they typically walk into the town centre. Again, this is representative of the town centre's role and function as an easily accessible local centre offering basic goods and services to the local community.

### **Perception of Safety**

- 4.229 By virtue of its open built form, wide main street, and linear form, the perception of safety in Harworth & Bircotes is generally high. Scrooby Road, being the prime pitch and main retail frontage for the centre, is provided with a high volume of natural surveillance from active and open frontages along the majority of the road. Towards the eastern end of the town the volume of activity reduces and the main land uses are residential. As such this part of the centre does not benefit from as much natural surveillance and as a result of the level of perceived safety is reduced.
- 4.230 In terms of night-time activity, there are a limited number of town centre uses which attract visitors to the town centre after 5pm. The Blacksmiths Arms is the only destination in the centre for regular evening social activity. This is the only public house in Harworth & Bircotes. The Paradise Restaurant on Scrooby Road is another use, which attracts some visitors to the centre in the evening hours.

### **Environmental Quality**

- 4.231 The Harworth & Bircotes Neighbourhood Plan assesses the quality of the civic space provided along Scrooby Road. The outcome of the assessment suggests that the quality of the streetscape is average.
- 4.232 Further to this, the Neighbourhood Plan puts forward recommendations for how Scrooby Road could be improved. The suggestions include; addressing the substantial problems related to cars parking on the pedestrian sections of Scrooby Road, and the provision of new street furniture, which can also provide places to sit as well as improving the aesthetics of the street.

4.233 Interestingly, only 2.6% of respondents to the NEMS Household Survey identified ‘better environment’ as the overriding improvement that could be made in the centre to encourage them to visit more often.

4.234 The following photos of Harworth & Bircotes were taken during Nexus’s site visits.



Looking east along Scrooby Road



The Fire Station in the middle of Scrooby Road



A hairdressers and bunting for the Tour de Yorkshire on Scrooby Road



Hair and beauty salon and acupuncture clinic along Scrooby Road

## Summary

4.235 The significant residential and employment development currently under construction at the Colliery site and to the south of the centre will significantly alter the Harworth & Bircotes centre over the coming years. The new residents and employees (at the new Business Park) in the area will increase the level of demand for services and facilities in the centre.

4.236 The retail offer in Harworth & Bircotes is dominated by take-away outlets and health and beauty

providers. This type of provision is comparable to other similar centres of its size in the UK. In order to meet growing and changing demands; as a result of the significant regeneration, it is anticipated that the composition of the town centre will be change quite dramatically in the coming years.

- 4.237 The relatively low vacancy rate suggests that the centre is on the whole performing adequately for a centre of its size and composition.

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## Tuxford

### Introduction

- 4.238 Tuxford is classified as a 'Small Local Centre' in the Council's 2011 Core Strategy. The estimated population of Tuxford sits at approximately 2,500 (as recorded by the 2011 Census).
- 4.239 Tuxford is located within Zone 6 in the south-eastern part of the defined Study Area. The settlement is located approximately 11 miles south-east of Worksop and 8 miles south of Retford.
- 4.240 Tuxford is a former market town and well supplied with heritage buildings. In the Council's 2011 Core Strategy the condition of Tuxford's Conservation Area is identified as being at risk. Since that time a Council led program has seen the quality of the Conservation Area, including shopfronts, individual buildings as well as the centre's public realm improve. The benefit of the schemes are recognised in the emerging Neighbourhood Plan, which explains that a significant regeneration program totalling £225,000 since 2009 has meant that the Conservation Area status of Tuxford is no longer at risk.
- 4.241 By virtue of its size, Tuxford serves the local community with key services and facilities including a Doctor's Surgery and a Post Office. There is 1 Supermarket in the town; the Co-Operative Food on Newcastle Street.
- 4.242 The centre is focused along Eldon Street, with retail units also stretching south-west along Newcastle Street and south-east along Newark Road.
- 4.243 Tuxford was not assessed within the previous Bassetlaw Retail Studies, and therefore, we do not draw on these reports to make comparisons.

### Diversity of Uses

- 4.244 We have reviewed the diversity of uses accommodated in the Tuxford local centre (by number and type) and summarise our findings below. As already indicated earlier for Harworth & Bircotes, details on the quantity of floorspace for each of the units is not available, and as such this has not formed part of our assessment of the diversity of uses.
- 4.245 The Nexus Retail Survey identified that there was a total of 29 retail units in the town centre. The results of this assessment are set out in Figure 4.10.

**Figure 4.10 / Tuxford Town Centre Composition (June 2016)**

Type of Use	Units (no.)	Units (%)	Units UK Avg. (%)
<b>Convenience</b>	6	20.7%	8.6%
<b>Comparison</b>	7	24.1%	32.0%
<b>Retail Service</b>	6	20.7%	13.9%
<b>Leisure Services</b>	6	20.7%	23.4%
<b>Financial and Business Services</b>	1	3.4%	10.6%
<b>Vacant</b>	2	6.9%	11.2%
<b>Other</b>	1	3.4%	0.1%
<b>TOTAL</b>	<b>29</b>		

*Source: Nexus Retail Survey, June 2016*

### Convenience Goods Units

4.246 A total of 6 units selling convenience goods were identified during the Retail Survey. The 6 units account of 20.7% of the total units in the centre. This percentage figure is well above the national average of 8.6%, but considered fitting given the size and composition of Tuxford.

### Comparison Goods Units

- 4.247 At present, comparison units account for 24.1% of all retail units in Tuxford. This level of representation is below the national average of 32.1%, but considered comparable to other centres in the UK, which are similar in size to Tuxford.
- 4.248 Of note almost half of the comparison units are art dealers. This is considered to be distinctive and reflective of the distinguishing offer available in Tuxford, which sets it apart from the other centres in Bassetlaw.
- 4.249 The draw of the unique offer of the shops in Tuxford is evident when assessing the results of the NEMS Household Survey. 49.3% of respondents noted that the choice and range of shops in Tuxford was their main reason for coming to the centre. This is comparatively higher than the response rate given for the other centres, as 37.8% gave this as the reason for visiting Harworth & Bircotes, 37.7% for Retford and 31.2% for Worksop.

### Retail Services

- 4.250 As with convenience units there are also 6 retail service providers in Tuxford. The most common service provided is hairdressing. Hairdressers occupy 3 of the 6 units.
- 4.251 The high proportion of Hairdressers is similar to the other centres in Bassetlaw.



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### Leisure Services

4.252 There are 6 leisure service units in Tuxford. The dominant services are food and beverage outlets, including; 2 take-away outlets, 1 restaurant, and 1 public house.

### Financial and Business Services

4.253 There is only 1 ground floor unit in this category in Tuxford – KSR Accountants.

4.254 This level of provision is not considered to be unusual for a centre of this size.

### Other / Miscellaneous Retail Units

4.255 The information and advice centre ‘Mine of Information’ at 2 Market Place is the only ‘miscellaneous’ unit identified in Tuxford.

### Summary

4.256 The retail offer in Tuxford is varied and diverse for its small size. Notably, the type of uses located in the centre is spread evenly with 6 units in each of these 3 categories; convenience, retail service and leisure service uses, which are complemented by 7 comparison units.

### **Vacancies**

4.257 At the time Nexus completed their Retail Survey in June 2016 2 vacant units were identified.

4.258 As explained under the section entitled ‘Stakeholder Engagement’, Tuxford generally has a very low vacancy rate and quick turnover when a unit does become vacant. As such the 2 identified units are considered to represent ‘churn’, which can signify a successful town centre.

### **Customers’ Views and Behaviour**

4.259 We summarise the principal findings of the NEMS Household Survey in respect to those questions of relevance to the health of Tuxford in Figure 4.11.

**Figure 4.11 | NEMS Household Response Summary for Tuxford**

Question	Total Percentage Response		Respondents from Zone 6 (Location of Tuxford)	
<b>Visits Tuxford Most Often</b>		1.9%		13.2%
<b>Frequency of Visits to Tuxford*</b>	Daily	6.1%	Daily	11.2%
	Two times a week	18.3%	Two times a week	33.3%
	Once a week	34.0%	Once a week	18.4%
	Once a fortnight	14.9%	Once a fortnight	7.2%
<b>Typical Mode of Transport *</b>	Car	93.4%	Car	88.9%
	Bus	5.4%	Bus	5.8%
	Walk	6.1%	Walk	11.2%
<b>Main Reason for Visiting Tuxford*</b>	Choice and range of shops	49.3%	Close to home	44.4%
	Close to home	32.3%	Choice and range of shops	26.0%
	Choice of services	12.3%	Choice of leisure services	22.3%
	Choice of leisure services	2.1%	Strength of supermarket	0.0%
	Strength of supermarket	0.0%	Choice of services	0.0%
	Close to work	0.0%	Close to work	0.0%

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

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

- 4.260 The NEMS Household Survey identifies that out of the main town centres in Bassetlaw (Worksop, Retford, Harworth & Bircotes, Tuxford), Tuxford is the least frequented by the respondents, with only 1.9% stating they visit Tuxford the most often. This is unsurprising given it is one of the District's Small Local Centres, and within close proximity to the nearby much larger Retford Town Centre (a 20 minute drive).
- 4.261 Additionally, 13.2% of those respondents within Zone 6 (being the Zone that Tuxford is located within) identified that they visit Tuxford most often. Again, given its size and proximity to Retford this is not surprising.
- 4.262 In terms of how often these respondents visit the Tuxford, the results illustrate that the majority of people visit between one or two times a week – almost 60% of respondents.
- 4.263 The attraction of the shops in Tuxford is evident from the Household Survey results. As almost 50% (49.3%) of respondents stated that this is the main draw to Tuxford for them. This percentage result is higher than the other responses received for the other centres in Bassetlaw, where the response rate was generally more around 30-40%.

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## Stakeholder Engagement

- 4.264 Findings from stakeholder engagement completed by Nexus identified that Tuxford is considered to be performing the best it has for almost ten years. Of note, the overall health of the centre has picked up in the past five years.
- 4.265 Notably, the shop frontages and building facades are all considered to be visually pleasing and complemented by a pleasant street environment. These factors help to create a positive village feel.
- 4.266 The Conservation Area status of Tuxford and the architecturally interesting and aesthetically pleasing buildings are noted as adding to its charm. Recent efforts of the Council to support the enhancement of the Conservation Area were highlighted.
- 4.267 Issues with parking were identified. Of note, the availability and cost of parking to support the centre could be improved.
- 4.268 The inferences above are reflected in the Tuxford Neighbourhood Plan. Notably, to inform the production of this plan a 'Tuxford Place Analysis' was commissioned which provides an analysis of how the buildings in the centre relate to the land form, their layout, landscaping and use of materials. Such an analysis can be used to ensure that the environmental quality of the centre is recognised, maintained and enhanced.

## Retailer Representation

- 4.269 As with Harworth & Bircotes, Tuxford does not currently accommodate any of the top 31 Experian Goad defined major retailers. Co-Operative Food is the only national operator with a presence in Tuxford.
- 4.270 The lack of top national retailer presence in the town is representative of its small size and position in the District's settlement hierarchy. Tuxford is a small market town whose primary function is to provide essential services for local residents.
- 4.271 Due to its small size, Tuxford is not ranked on the Venuescore UK Shopping Venue Rankings.

## Pedestrian Flows

- 4.272 During the Nexus visits it became evident that there was no one part of the town that attracted the most footfall. However, relatively higher levels of pedestrian activity could be seen in and around the Co-Operative foodstore on Newcastle Street, which is adjoined by the Tuxford Pharmacy. The draw of this store is reflected in this level of footfall.

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## Accessibility

- 4.273 In terms of opportunities for public transport to and from Tuxford, taking a bus is the only option available. The following bus routes served Tuxford; No. 22, No. 33, No. 37, No. 37A, No. 37B, No. 39, No. 39B, and the Sherwood Arrow. These bus routes provide connections around the centre itself and to other nearby centres and areas. A bus from Tuxford to Retford would take approximately 20 minutes and a number of buses serve this route and provide this connection.
- 4.274 Driving from Tuxford it takes approximately one minute to connect with the A1. This helps to improve connections between Tuxford and nearby centres.
- 4.275 As already noted, the need to improve the availability of car parking within the centre was noted during stakeholder engagement. The high demand for car parking spaces in the centre is reflective of the fact the private car is the most popular mode of transport used by visitors to the centre. The NEMS Household Survey identified that 93.4% of respondents across the Study Area visit Tuxford by car.

## Perception of Safety

- 4.276 As a result of its small size, wide roads, open streetscape, low level of vacancy, and well-kept shop frontages, Tuxford has a high level of perceived safety. Of note, it is the quality and openness of the shopfronts that make a significant positive contribution to this, as does the quality of the open green space within the town centre.
- 4.277 While only a small number uses within the centre attract much of an evening economy, those that they do are well-lit and can be accessed along wide open streets.

## Environmental Quality

- 4.278 The quality and preservation of the streetscape as well as individual buildings in Tuxford really sets it apart and provides a well-respected and valued centre.
- 4.279 As already indicated above the Council recognised and developed a strategy to improve the environmental quality of the Tuxford Conservation Area, through Council led improvements to public realm as well as promoting the enhancement of privately owned buildings.
- 4.280 The following photos of Tuxford were taken during Nexus' site visits.



Fish and Chip Shop and one vacant unit in Tuxford



The wide streets of Tuxford centre



The Sun Inn Public House at the junction Newcastle Street and Newark Road



Hair Flair and KSR Accountants – the only financial service operator in Tuxford with a ground floor unit



Iron fencing forms part of the pleasant public realm in Tuxford

## Summary

- 4.281 Tuxford is a small retail centre that provides a unique village shopping experience. The comparatively high provision of Art Dealers and architecturally interesting buildings contribute to its pleasant and aesthetically pleasing streetscape.
- 4.282 Vacancy rates in the centre generally remain low as retailers are keen to be part of the centre's growing success.

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## Pipeline Developments

- 4.283 In accordance with the duty to cooperate, as prescribed in Paragraph 178 of the NPPF, Nexus has worked in collaboration with Officers from Bassetlaw District Council to contact neighbouring local planning authorities in order to identify future capacity and pipeline schemes within competing centres. The pipeline schemes of interest are those of a nature and scale which could have the effect of consolidating their retail offer and enhancing their market share. In this instance, we consider this to be developments comprising of at least 1,000 sq m of retail or leisure floorspace.
- 4.284 A number of forthcoming retail and leisure developments have been highlighted in the following local authority jurisdictions.

### **Mansfield District Council**

- 4.285 Mansfield Town Centre is identified by Javelin Venuescores as a 'Regional Centre'. Mansfield District has an up-to-date Retail Update Report for 2014/2015. The Mansfield Retail and Leisure Study 2014 report indicated a likely need for additional capacity of 25,200 sq m for comparison goods and approximately 2,300 sq m for convenience goods by 2031.
- 4.286 Additionally, the contact person at Mansfield District Council provided a useful list of recent planning permissions and recent issues. Of particular significance is the mixed use town centre development at Belvedere Street/Quaker Way in Mansfield. This site extends to 0.48 hectares (a significant size for a town centre location).
- 4.287 In addition, two new Aldi stores are planned for in Mansfield. A recent (2015) permission granted to a new Aldi store at Sherwood Oaks Business Park, on the outskirts of Mansfield town centre. Additionally, another Aldi store was permitted in 2014 and construction has begun at a location on the A60, Leeming Street South, between Mansfield and Mansfield Woodhouse.

### **Newark and Sherwood District Council**

- 4.288 Correspondence with representatives at Newark and Sherwood District Council identified that with regards to pending retail applications there are only two considered to be of significance.
- 4.289 The Council is currently considering proposals to deliver a 2,884 sq m (net) of out-of-centre convenience superstore in Newark. The Council is in the process of receiving advice on the acceptability of the proposal in retail planning terms.
- 4.290 An application was recently allowed at appeal, to vary a condition of an existing planning permission at Northgate. The proposed amendment would relax the restriction to bulky goods placed to allow for

the sale of 'non-food' retail. The proposal does not however result in any increase in retail floorspace.

- 4.291 The Council are embarking on a Review of the Local Plan. An Issues Paper was published for Consultation in October 2015. A new Town Centre and Retail Study as part of the plan review is soon to be commissioned.

#### **Bolsover District Council**

- 4.292 Bolsover District Council is currently in the process of commissioning a new combined Retail and Leisure Study in collaboration with North East Derbyshire and Chesterfield Borough Councils. This will assess the capacity for future retail development. Additionally, Bolsover consulted on a new draft Local Plan in late 2016.
- 4.293 At present, there are no significant retail or leisure developments with planning permission or under construction. Notwithstanding this, a number of applications for change of use to retail or leisure uses have been permitted since 2011, suggesting there is some level of demand for new retail and leisure uses.

#### **West Lindsey District Council**

- 4.294 Contact with West Lindsey District Council confirmed that there have been no planning approvals for retail/leisure developments proposing over 1,000 sq m of floorspace in recent years.
- 4.295 However, there have been a small number of approvals for such developments for less than 1,000 sq m. Of note is the 2015 approval of an application to erect a shopping centre at Corringham Road, Gainsborough, providing a total of 873 sq m of retail floorspace.
- 4.296 In regards to pipeline developments, a planning application for a new 958 sq m Lidl on Beaumont Street, Gainsborough, was approved in April 2016 and is currently under construction.

#### **Doncaster Metropolitan Borough Council**

- 4.297 Information provided by Doncaster Metropolitan Borough Council identified several forthcoming developments that will provide over 1,000 sq m of retail of leisure floorspace in the Borough. Notably, this includes three new Lidl's, and 1 new Aldi, which are all expected to open shortly in the District.
- 4.298 A new Muse Cinema is expected to open in 2017 in Waterdale, Doncaster; this will complement the existing Vue Cinema complex in Doncaster City Centre.

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- 4.299 What is more, the majority of new retail and leisure developments are located in 'out of town' or 'edge of centre' locations.

### **Metropolitan Borough of Rotherham**

- 4.300 With regards to retail and leisure commitments in the Metropolitan Borough of Rotherham, Nexus were made aware of seven developments with planning permission that are proposing over 1,000 sq m of retail or leisure floorspace. The most notable is the 9,289 sq m of retail to be developed at Parkage on Rotherham Road, which received planning permission in 2010.
- 4.301 As with Doncaster two of the commitments relate to new large format Aldi stores, one in Maltby the other in Bramley. Also of note, since 2008 four other Aldi stores have opened in the Borough. This is reflective of growing success and expansion of discount food retailers in the UK (as explained in Section 3.0 on retail trends).
- 4.302 In terms of new leisure developments, a themed leisure facility and resort in the Rother Valley is still identified as a local commitment, following the renewal of the 2005 outline planning permission in 2010. This development is to include hotels, and an extreme sports facility.

### **North Lincolnshire Council**

- 4.303 Finally, the North Lincolnshire Council provided details of the transformational North Lincolnshire Shopping Park project which opened in 2014.
- 4.304 The Shopping Park project boasts 10,497 sq m of floorspace including a Marks and Spencer's, Boots, as well as multiple restaurants. The expansive Shopping Park supports the wider redevelopment projects occurring at Lincolnshire Lakes, including significant volumes of new housing. Lincolnshire Lakes involves the delivery of 6,000 new homes and supporting community and transport infrastructure as well as opportunities for leisure and business development.
- 4.305 Additionally, the Council are currently considering a number of planning applications for new retail floorspace, including further applications as part of the Lincolnshire Lakes redevelopment effort. Of note, in May 2016 the Council published a Lincolnshire Lakes Area Action Plan (May 2016). This document seeks to directly support the delivery of the project, recognised as one of the Council's major transformational projects.

## **Conclusion**

- 4.306 Nexus conducted health checks in each of the recognised town centres, identifying the vacancy rates and retail/service composition, in addition to analysis of stakeholder views, retailer



representation, customer views, pedestrian flows, accessibility, perception of safety and environmental quality.

- 4.307 Audits were also completed for Bassetlaw's smaller local centres. The results of which are set out in **Appendix C**.
- 4.308 The findings indicate that the majority of the centres are fulfilling their designated roles and functions as anticipated for their position the District's settlement hierarchy (as defined in the Council's Core Strategy).
- 4.309 All of the District's centres show different strengths and weaknesses. The list below provides a brief summary of each of the main centres:
- 4.310 **Worksop** is the largest settlement in Bassetlaw and boasts a well-spread mix of uses over 374 units expanding over 70,940 sq m of floorspace. Convenience units represent 8.8% of total units, a figure that is aligned with the national average. However, when assessing the floorspace figures for these units, Worksop is underprovided with convenience floorspace – 8.2% compared to the UK average of 15.2%. The level of comparison provision in Worksop is above the UK average (34.8% of units) with a percentage of clothing/shoe stores that is just below national averages. The limited leisure provision, in particular, family friendly restaurants, means that Worksop does not attract much activity during the evening. Our stakeholder engagement suggested that an increased provision is wanted. Improvements to the price of parking and street environment are also desired. Worksop is the most frequented Bassetlaw centre, with 52.8% of Household Survey respondents indicating it is the centre they visit most often. The current vacancy rate in Worksop is above national figures at 13.54% of total units, suggesting that Worksop Town Centre is currently not performing well against this measure. However, the amount of vacant floorspace (8.8%) sits just below the UK average (9.0%).
- 4.311 **Retford** sits just below Worksop in the Council's settlement hierarchy. The centre is well provided for in terms of a variety of difference retail and leisure uses, with its representation of both convenience and comparison units comparable to UK averages. In terms of leisure provision, Retford boasts two theatres (Majestic Theatre and the Retford Little Theatre), and a museum, which are recognised key community assets. The popularity of the leisure services in Retford is reflected in the results of the NEMS Household Survey, as 10.3% of respondents noted that the choice of leisure facilities was the main attractor to visit the town. Notably, this level of response is higher than what was received for the other Bassetlaw centres. The vacancy rate in Retford is below national averages in terms of both number of units and quantity of floorspace. This suggests the centre is performing well in terms of attracting new and retaining existing retail operators.

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- 4.312 **Harworth & Bircotes** is identified as the Main Regeneration Settlement for Bassetlaw. The recent Asda and Aldi developments in the centre have dramatically altered the provision of convenience retail in the town. The remaining retail offer in Harworth & Bircotes is dominated by take-away outlets and health and beauty providers. Harworth & Bircotes role in providing for the day-to-day needs of the local residents is reflected in the results of the NEMS Household Survey; as 66.8% of Zone 2 residents (the Zone containing Harworth & Bircotes) visit the centre most often. This compares to Study Area average of 9.3% of total respondents. A desire to improve the streetscape of the centre was highlighted to Nexus during stakeholder engagement. It is considered that as a result of the major redevelopment occurring on the Colliery Site that major changes to the quality of the public realm and shop frontages will come forward as new retailers and leisure providers are attracted to the growth. This goal for the centre is highlighted within the recently adopted Neighbourhood Plan.
- 4.313 The retail offer in **Tuxford** is unique, as are the architecturally interesting buildings and streetscape. Recent improvements to the Conservation Area status of the town are obvious when visiting the centre. The success of the recent Council-led schemes responsible for these improvements is recognised within the emerging Neighbourhood Plan. The popular art dealerships and museum mean that the town not only provides for day-to-day shopping needs but also acts as a retail/leisure destination. The popularity of the town is evident when assessing the vacancy rate; currently at 6.8%. During stakeholder engagement the quick up take of vacant units was highlighted as new retailers show enthusiasm to be part of this unique centre's success.

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## 5.0 Population and Expenditure

### Introduction

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

### Study Area

- 5.2 A key task of this Study is to review previous findings relating to shopping patterns within the local area, most notably the household surveys undertaken by NEMS Market Research in November 2008 to inform the previous Martin Tonks (MT) Bassetlaw Retail Study produced in 2009 and the England & Lyle (EL) Bassetlaw Retail Need Assessment produced in 2012, identifying any significant variations in shopping patterns over the past eight years that may have resulted from recent retail investments in the vicinity of the Study Area or wider changes in nationwide shopping habits.
- 5.3 The Study Area adopted for the previous studies comprised of 7 zones which broadly covered the Bassetlaw District boundary, as well as surrounding areas within Mansfield, Doncaster, Rotherham and Bolsover where shoppers may be attracted to Bassetlaw's retail and leisure offer.
- 5.4 Nexus has broadly adopted the same study area as the previous studies in order to enable before and after comparisons and to allow us to robustly identify any emerging trends in shopping patterns across the Study Area.
- 5.5 Following consultation with the Council, 3 additional zones (Zones 8 - 10) have been added to the Study Area in order to ensure that any trips from residents located in the hinterlands surrounding Bassetlaw, on the fringes of Mansfield, Maltby, Bramley, Rossington and Doncaster who will be drawn to Bassetlaw for their main retail needs are suitably captured.
- 5.6 A small region to the south east of Tuxford was not included in the previous study, likely due to the size of the relevant postal sector that covers this area, which extends to border of Newark to the south and would not exhibit the same shopping patterns as residents of Tuxford. Following discussions with the Council, it was decided not to include this rural and mostly uninhabited area to retain consistency with the previous study.
- 5.7 Figure 5.1 shows the geographical extent of the Study Area (**Appendix A**), whilst Figure 5.2 shows the definitions of the survey zones by postal sector.

Figure 5.1 | Survey Area Zones

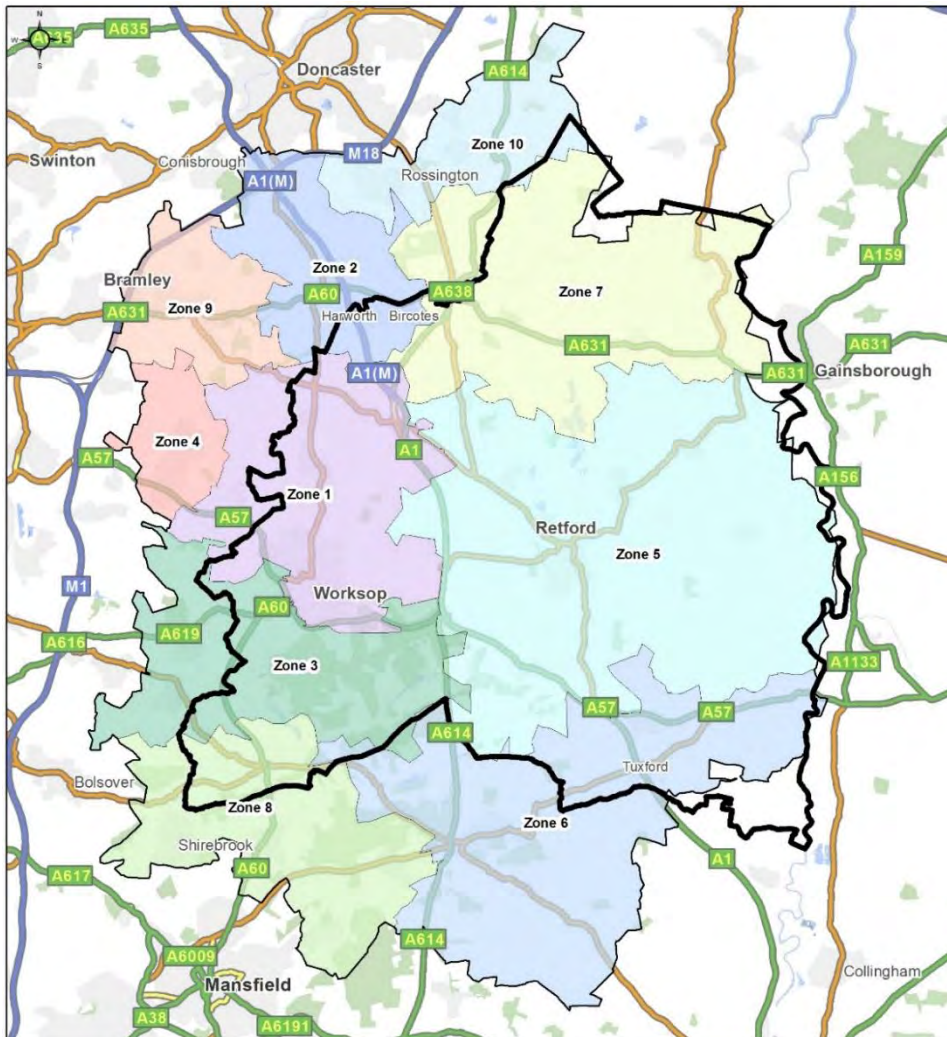


Figure 5.2 | Definitions of Survey Area Zones

Survey Zone	Postcode Sectors
<b>Zone 1   Worksop</b>	S80 (1 & 2), S81 (0, 7, 8 & 9)
<b>Zone 2   Harworth / Bircotes</b>	DN11 (8 & 9)
<b>Zone 3   Whitwell / Creswell</b>	S80 (3 & 4)
<b>Zone 4   Anston / Dinnington</b>	S25 (1, 2, 3, 4 & 5)
<b>Zone 5   Retford</b>	DN22 (0, 6, 7, 8 & 9)
<b>Zone 6   Markham / Ollerton</b>	NG22 (0 & 9)
<b>Zone 7   Bawtry / Gringley</b>	DN10 (4 - 6)
<b>Zone 8   Mansfield fringe</b>	NG20 (0, 8 & 9), NG21 9
<b>Zone 9   Maltby / Bramley fringe</b>	S66 (7 & 8)
<b>Zone 10   Rossington / Doncaster fringe</b>	DN9 3 & DN11 0

## Study Area Population

- 5.8 Nexus has utilised in-house data sourced from the Experian Micromarketer G3 system to calculate the baseline population data (2015 estimates) in the absence of up to date Local Authority housing figures.
- 5.9 Experian's population dataset utilises the 2011 Census release, and projects forwards using growth rates derived from ONS population projections and current age and gender estimates. These are accepted as the industry standard basis for long term retail planning.
- 5.10 We have taken a base date of 2016 (the year of the Study), calculating population and retail expenditure forward to 2021, 2026 and 2031 in accordance with the emerging Bassetlaw Plan and NPPF guidance.
- 5.11 At 2016, the defined Study Area is estimated to contain a resident population of approximately 253,340, rising by 5.3% to 266,770 at 2031 (equating to 13,430 additional residents).

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

Zone	2016	2021	2026	2031
<b>Zone 1   Worksop</b>	54,126	55,317	56,422	57,317
<b>Zone 2   Harworth / Bircotes</b>	15,017	15,231	15,469	15,629
<b>Zone 3   Whitwell / Creswell</b>	15,380	15,731	16,053	16,305
<b>Zone 4   Anston / Dinnington</b>	21,635	22,089	22,501	22,790
<b>Zone 5   Retford</b>	37,043	37,746	38,366	38,833
<b>Zone 6   Markham / Ollerton</b>	19,065	19,463	19,946	20,287
<b>Zone 7   Bawtry / Gringley</b>	12,583	12,842	13,036	13,197
<b>Zone 8   Mansfield fringe</b>	37,491	38,320	39,094	39,752
<b>Zone 9   Maltby / Bramley fringe</b>	19,560	19,934	20,197	20,385
<b>Zone 10   Rossington / Doncaster fringe</b>	20,678	20,968	21,223	21,473
<b>Total</b>	<b>252,578</b>	<b>257,641</b>	<b>262,307</b>	<b>265,968</b>

Source: Appendix E, Table A1

- 5.12 The resident population (and by extension, the resident expenditure available to facilities within Bassetlaw) is not distributed evenly across the Zones of the defined Study Area, which is to be expected of any sample of a population. This is because residential housing is typically focussed towards urban areas within the zones and across the Study Area. By way of an example, 21.4%, 14.8% and 14.7% of the residents across the Study Area reside in Zone 1 (Worksop), Zone 8 (Mansfield Fringe) and Zone 5 (Retford) respectively, whilst the zone with the lowest proportion of residents was 7 (Bawtry / Gringley) with 5.0%.

## Retail Expenditure

- 5.13 Retail expenditure data (in the form of convenience and comparison goods expenditure per capita) has been sourced from the in-house Experian Micromarketer G3 system.
- 5.14 The data takes account of the socio-economic characteristics of the local population to provide local consumer expenditure calculations. Experian is a robust source of population and expenditure data that is widely used for calculating retail capacity across the industry.
- 5.15 Expenditure data from Experian is provided at a base year of 2015 in 2015 prices (as is every subsequent monetary value) and has been projected forward using per capita growth forecasts derived from the latest Experian Planner Briefing Note 14 (November 2016).

**Figure 5.4 | Retail Expenditure Forecasts**

Year	Convenience growth rates	Comparison growth rates
2014	-1.7%	7.2%
2015	-1.1%	4.6%
2016	0.0%	3.3%
2017	-0.2%	1.4%
2018	-0.9%	1.0%
2019	0.0%	3.0%
2020	0.0%	3.0%
2021	0.0%	3.0%
2022	0.0%	3.0%
2023	0.0%	3.0%
2024	0.1%	3.2%
2025	0.1%	3.2%
2026	0.1%	3.2%
2027	0.1%	3.2%
2028	0.1%	3.2%
2029	0.1%	3.2%
2030	0.1%	3.2%
2031	0.1%	3.2%
2032	0.1%	3.2%

Source: Table 1a, Experian Retail Planner Briefing Note 14, November 2016

- 5.16 As identified in Figure 5.4, Experian forecasts suggest that convenience goods expenditure has fallen in 2014 and (to a lesser extent) 2015, as a result of a trend towards more price conscious shopping patterns and the growth of high street discounters such as Lidl and Aldi, as discussed in further detail in Section 2. No change, followed by marginal growth is now anticipated in the convenience goods sector with a consistent 0.1% growth per annum forecast over the period 2024-2035.

- 5.17 Comparison expenditure is shown to have risen by 7.2% and 4.6% in 2014 and 2015 respectively, before levelling off between 2019 and 2023. Experian forecasts a steady growth of 3.2% per annum over the period 2024-2032 as comparison retailers incorporate newer technologies, innovations and formats (including 'click and collect') in order to respond to the increasing competition from internet shopping.
- 5.18 Experian note that long term forecasts should be treated with caution and subject to regular reviews, given the wide range of factors that can impact on the broader national economy.

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

- 5.19 Special forms of trading (SFT) are defined by Experian as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales. This includes online sales by supermarkets, department stores and catalogue companies, which are discussed in detail in 'Growth in E-Tailing (or E-Commerce)' in Section 2.
- 5.20 Experian Retail Planner Briefing Note 14 (November 2016) provides estimated forecasts of internet and other SFT, which allows for us to 'strip out' any expenditure that survey respondents suggest is made by SFT and instead utilise Experian's forecasts. This ensures that the proportion of SFT accounted for in our modelling increases in line with Experian forecasts as opposed to remaining constant at current levels.
- 5.21 Many stores offer online sales, but source goods from regular stores' stock. This is often the case for foodstores, where employees will carry out online orders from stores' shelves each morning before they open to the general public. These orders are then delivered by dedicated vans at each store and as such the online expenditure is attributed to tangible stores.
- 5.22 Experian provides forecast figures, cited at Figure 5.5, which forecasts the proportion of online sales derived from the shelves of physical stores, so as to ensure that this expenditure is counted as 'available' spend within the Study Area.

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

Year	Convenience SFT growth rates	Comparison SFT growth rates
2016	3.0%	13.2%
2021	3.9%	15.6%
2026	4.6%	16.1%
2031	5.0%	16.3%

Source: Experian Retail Planner Briefing Note 14, November 2016

## Convenience Goods Expenditure

- 5.23 Projecting forward available expenditure per capita and population growth for each survey zone in 2016, 2021, 2026 and 2031, we are able to estimate the total available convenience and comparison goods expenditure.

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

2016	2021	2026	2031	Growth 2016-2031
£506.3 m	£506.0 m	£513.0 m	£520.0 m	<b>£13.7 m</b>

Source: Table 2a, Appendix E

- 5.24 As identified in Figure 5.6, in 2016 it is estimated that the resident population of the Study Area spent £506.3m on convenience goods, which is expected to increase by £13.7m (2.7%) to £520.0m by 2031.
- 5.25 For the purpose of the Study this total available convenience expenditure is split across two sub-categories, with a Study Area average of 79.6% of spending attributed to main food shopping trips and 20.4% attributed to 'top-up' shopping trips (as derived from the NEMS Household Survey on a zone by zone basis).

## Comparison Goods Expenditure

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

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

2016	2021	2026	2031	Growth 2016-2031
£654.0 m	£726.0 m	£856.7 m	£1,013.2 m	<b>£359.2 m</b>

Source: Table 8, Appendix E

**Figure 5.7a | Non-Bulky Comparison Goods Expenditure across the Study Area**

2016	2021	2026	2031	Growth 2016-2031
£451.3 m	£500.9 m	£591.1 m	£699.0 m	<b>£247.7 m</b>

Source: Table 8, Appendix E

Figures may not total due to rounding



**Figure 5.7b | Bulky Comparison Goods Expenditure across the Study Area**

2016	2021	2026	2031	Growth 2016-2031
£202.8 m	£225.1 m	£265.7 m	£314.2 m	<b>£111.4 m</b>

Source: Table 8, Appendix E

Figures may not total due to rounding

- 5.27 Applying the increases in population and comparison goods expenditure per capita, Figure 5.7 above estimates that the resident population of the Study Area generated £654.0m of comparison goods expenditure in 2016, rising to £1,013.2m in 2031 (an increase of £359.2m or 55%). Of this, bulky goods are shown to make up 69% of comparison goods spending, whilst non-bulky goods make up the remaining 31%.

### Summary

- 5.28 The Study Area has a resident population of 252,578 at 2016, rising to 265,968 by 2031. It is estimated that, at 2016, the population generates £506.3m (convenience goods) and £654.0m (comparison goods) of retail expenditure, which is expected to increase to £520.0m and £1,013.2m (respectively) at 2031.
- 5.29 The base data in this section is then utilised, in conjunction with our analysis of the market shares of retailers across the Study Area in Section 6 below, to inform our subsequent analysis of retail expenditure capacity in Section 7.

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## 6.0 Original Market Research

### Introduction

- 6.1 In carrying out this Study, we have gathered empirical evidence through undertaking a household telephone survey of 1,000 respondents in May 2016 in order to provide up-to-date information on local shopping patterns across the Survey Area, including the trade draws of particular town centres, leisure destinations and outdoor markets.
- 6.2 Nexus has partnered with specialist consultancy NEMS Market Research Ltd in order to identify shopping patterns, preferences and trends through a comprehensive household telephone survey of residents across the Study Area. This data provides the underlying structure of our quantitative retail capacity modelling, which is used to calculate the capacity for new retail floorspace across the Study Area over the plan period.
- 6.3 It is acknowledged that there are potential limitations with such datasets, which are restricted by the number of surveys that can be carried out across the Study Area, as well as the length of the household questionnaire itself. The results of the survey were then weighted according to the population profile in each zone, as set out in Section 1.4 at **Appendix D**. As such, the results are understood to provide a broad, representative indication of the market shares of retail and leisure destinations across the Study Area.

### Household Telephone Survey

- 6.4 The previous MT and EL studies utilised a household telephone survey undertaken by NEMS Market Research (November 2008) across a Study Area of 7 zones.
- 6.5 As discussed in Section 5, we have broadly adopted the previous Study Area (with the addition of 3 further zones to ensure that expenditure from residents on the fringes of nearby centres are fully and robustly accounted for) in order to allow for comparisons and better assess the changes in local trends in shopper preferences between 2008 and 2016.
- 6.6 The shopping patterns that result from the household survey provide the basis of the calculations of the retail expenditure at each retail destination by extrapolating the total available expenditure provided by Experian MMG3 (as discussed in Section 5, above). The household survey also provides details of linked trips between various destinations, the use of other town centre facilities, the most popular means of travel to each centre and the frequency of visits.
- 6.7 As noted above, a limitation of the household survey is that the results may underestimate trade to smaller centres and retail facilities. In order to counter this, we ask respondents for the destination

that they last made a purchase so as to record more infrequent purchases including drive-by and impulse shopping that are more likely to be at smaller centres and stand-alone stores.

- 6.8 The full tabulations of the results of the household telephone survey are provided at **Appendix D**.

### Convenience Shopping Patterns

- 6.9 The MT Retail Study 2009 identified that (based on November 2008 household survey data), 60.2% of the total convenience goods expenditure generated within the Study Area at the time (Zones 1-7) was spent entirely at facilities located in the centres of either Worksop, Retford, Harworth & Bircotes or Tuxford. Our updated household telephone survey indicates that this has risen to 66.6%, as of May 2016.
- 6.10 Utilising the revised, 2016 Study Area including the additional Zones 8-10, so as to more robustly incorporate inflow from residents located outside of Bassetlaw, we calculate that the District has a market share of 49.1% of the total convenience goods expenditure generated within the new, wider Study Area.
- 6.11 Focussing on each town centre individually, at Figure 6.1 below we extract the convenience goods market shares from the 2009 Study for facilities within the District's assessed centres (being Worksop, Retford, Harworth & Bircotes and Tuxford), as well as the updated convenience goods market shares across both the original Study Area (Zones 1-7) and the wider Study Area (Zones 1-10) in order to allow for changes in the market shares over the past 8 years.

**Figure 6.1 | Convenience Goods - Study Area Market Share (%)**

Destination	2008 Zones 1-7	2016	
		Zones 1-7	Zones 1-10
<b>Worksop</b>	33.4%	34.6%	25.2%
<b>Retford</b>	24.9%	24.1%	16.9%
<b>Harworth &amp; Bircotes</b>	1.8%	7.2%	6.4%
<b>Tuxford</b>	- <sup>1</sup>	0.8%	0.5%
<i>Others in Bassetlaw</i>	-	-	0.1%
<b>Bassetlaw District</b>	-	-	<b>49.1%</b>

Source: Appendix E and MT, Retail Study 2009 (Table J)

<sup>1</sup> Market shares to retailers in Tuxford were not identified in the 2009 Study

Figures may not total due to rounding

- 6.12 Worksop and Retford have maintained a relatively constant market share of convenience shopping trips in the eight years since the previous household survey. Since 2008, Worksop's market share of convenience goods spend from residents of Zones 1-7 has marginally increased, whilst Retford's market share has marginally decreased.

- 6.13 The majority of convenience expenditure in the two centres is spent at the key anchor stores of Morrisons (which accounts for 6.1% of expenditure from residents of Zones 1-10), Aldi (5.3%) and Tesco (4.2%) in Worksop, and Morrisons (5.8%) and Aldi (4.6%) in Retford.
- 6.14 Harworth & Bircotes' convenience goods market share has more than tripled since the 2008 survey from 1.8% to 7.8% of residents in Zones 1-7. The majority of trips within Harworth & Bircotes are made to Asda and Aldi, with market shares of 3.5% and 2.7% of residents of Zones 1-10 respectively. This increase can largely be accounted for by the development of the Asda and Aldi foodstores, which opened in October 2012 and January 2015 respectively.
- 6.15 Tuxford attracted 0.5% of the convenience spending from the wider Study Area in 2016, however, the 2008 household survey did not identify any significant convenience trade to Tuxford.

**Figure 6.2 | Convenience Goods – Town Centre Market Share (%)**

Destination	Market Share of Total Convenience Spend from the Study Area (2016)		
	Town Centre	Edge-of-Centre	Out-of-Centre
<b>Worksop</b>	3.3%	0.6%	21.4%
<b>Retford</b>	2.7%	13.9%	0.5%
<b>Harworth &amp; Bircotes</b>	0.1%	6.2%	0.0%
<b>Tuxford</b>	0.6%	0.0%	0.0%

Source: Appendix E and MT, Retail Study 2009 (Table J)

- 6.16 Notably, whilst Worksop Town Centre features both the Iceland and Marks & Spencer foodstores, the majority of Worksop's convenience goods draw is to foodstores in out-of-centre locations, including the Sainsbury's at Highgrounds Road located outside of Worksop in Zone 3, which has the highest market share for top-up convenience spending outside of Bassetlaw's town centres.
- 6.17 The majority of convenience goods trips in Retford are made to destinations on the edge of the town centre, with the Morrisons, Aldi and Asda foodstores attracting a significant proportion of main food shopping trips from across the Study Area.
- 6.18 Both the Asda and Aldi foodstores, which make up the majority of Harworth & Bircotes' convenience offer, are located on edge-of-centre sites, whilst the convenience offer in Tuxford is made up of the Co-op on Newcastle Street and independent traders located within the Local Centre Boundary.
- 6.19 Figure 6.3 identifies the shifting patterns of market shares in each of the key zones over the period 2008-2016. It is important to note that these market shares incorporate all edge and out-of-centre provision in addition to town centre facilities. This data is useful in identifying changing trends across the Study Area but, as population and retail expenditure varies considerably from zone to zone, Figure 6.3 on its own does not provide the complete picture when assessing the overall draw of the centres.

**Figure 6.3 | Convenience Goods - Shopping Patterns by Zone (%)**

Zones	Worksop		Retford		Harworth & Bircotes		Tuxford		Others		Total	
	2008	2016	2008	2016	2008	2016	2008	2016	2008	2016	2008	2016
1	83.3	90.8	5.8	3.6	0.4	0.9	0.0	0.0	10.5	4.7	100.0	100.0
2	4.2	0.0	7.6	3.0	17.6	59.7	0.0	0.0	70.6	37.3	100.0	100.0
3	51.0	51.0	0.8	0.0	0.0	0.0	0.0	0.0	48.2	49.0	100.0	100.0
4	18.2	19.3	0.0	0.0	0.0	0.0	0.0	0.0	81.8	80.7	100.0	100.0
5	2.0	2.4	85.0	88.5	0.2	2.7	0.0	0.0	12.9	6.4	100.0	100.0
6	1.9	1.6	21.9	24.6	0.0	0.0	0.0	6.7	76.2	67.0	100.0	100.0
7	0.0	0.5	26.8	10.1	1.3	15.2	0.0	0.0	71.9	74.3	100.0	100.0
8	-	5.9	-	0.0	-	0.0	-	0.0	-	94.1	-	100.0
9	-	1.0	-	0.0	-	0.0	-	0.0	-	99.0	-	100.0
10	-	0.5	-	0.0	-	17.1	-	0.0	-	82.4	-	100.0
Adjusted Total <sup>1</sup>	33.4	34.6	24.9	24.1	1.8	7.2	0.0	0.8	39.8	33.4	100.0	100.0
Study Area Total	-	25.2	-	16.9	-	6.4	-	0.5	-	51.0	-	100.0

Source: Appendix E and MT, Retail Study 2009 (Table J)

<sup>1</sup> Adjusted market share figures excluding Zones 8, 9 & 10 to allow for comparison with 2008 data

- 6.20 Nevertheless, it is clear that the Worksop area accounts for a significant proportion of spend across Zones 1 (Worksop) and 3 (Whitwell / Creswell) as well as a notable share of Zone 4 (Anston / Dinnington). Convenience goods expenditure in Worksop from residents of Zone 1 has increased by 6.5% since the last survey in 2008, whilst the proportion of residents drawn from Zone 2 (Harworth & Bircotes) has fallen from 4.2% to 0.0% in the last eight years following the development of the more local Asda and Aldi foodstores.
- 6.21 Convenience trade to Retford is primarily drawn from its own Zone 5 (Retford), as well as Zones 6 (Markham / Ollerton) and 7 (Bawtry / Gringley) to the south and north respectively. There has also been a drop in the proportion of spending attracted from Zones 1 and 2 as convenience facilities in each of Worksop and Harworth & Bircotes have increased their draw from across the Study Area.
- 6.22 Residents of Zone 2 predominantly visit Harworth & Bircotes for their convenience goods shopping, and the proportion of convenience goods expenditure spent in Harworth & Bircotes has more than tripled since the previous survey in 2008 as the convenience goods offer in the centre has increased following the development of the Asda and Aldi foodstores.
- 6.23 Tuxford drew a market share of 6.7% of all convenience goods spending from residents of its own zone (6) in 2016, whilst the market share of retailers in Tuxford were not identified in the 2009 Study.

### Comparison Shopping Patterns

- 6.24 Figures 6.4 and 6.5 identify the market share of comparison goods spending broken down by town centre and per zone, comparing the results of the 2008 and 2016 household surveys. In 2008, it was

found that the four main centres in Bassetlaw claimed 40.6% of comparison goods expenditure across Zones 1-7 of the Study Area, decreasing to 39.9% in 2016.

**Figure 6.4 | Comparison Goods - Study Area Market Share (%)**

Destination	2008	2016	
	Zones 1-7	Zones 1-7	Zones 1-10
<b>Worksop</b>	27.8%	25.3%	18.9%
<b>Retford</b>	12.8%	14.1%	10.3%
<b>Harworth &amp; Bircotes</b>	- <sup>1</sup>	0.5%	0.5%
<b>Tuxford</b>	- <sup>1</sup>	0.0%	0.0%
<i>Others in Bassetlaw</i>	-	-	0.0%
<b>Bassetlaw District</b>	-	-	<b>29.7</b>

Source: Appendix E and MT, Retail Study 2009 (Table L)

<sup>1</sup> Market shares to retailers in Harworth & Bircotes and Tuxford were not identified in the 2009 Study

Figures may not total due to rounding

- 6.25 Broken down by town centre, Figure 6.4 identifies that the comparison expenditure market shares of Worksop and Harworth & Bircotes fell from their 2008 market shares. Worksop Town Centre has fallen from 27.8% of comparison goods spending from residents of zones 1-7 in 2008 to an equivalent of 25.3% in 2016. This equates to 18.9% of comparison expenditure across zones 1-10 of the wider Study Area in 2016. Retford's market share of comparison goods spending in the Study Area (zones 1-7) grew over the past eight years from 12.8% in 2008, to 14.1% in 2016.

**Figure 6.5 | Comparison Goods - Shopping Patterns by Zone (%)**

Zones	Worksop		Retford		Harworth & Bircotes		Tuxford		Others		Total	
	2008	2016	2008	2016	2008	2016	2008	2016	2008	2016	2008	2016
<b>1</b>	<b>54.5</b>	<b>50.2</b>	2.0	2.4	0.0	0.0	0.0	0.0	43.4	47.4	100.0	100.0
<b>2</b>	10.0	9.5	2.8	3.4	<b>0.0</b>	<b>4.0</b>	0.0	0.0	87.1	83.1	100.0	100.0
<b>3</b>	50.7	37.1	0.7	1.2	0.0	0.0	0.0	0.0	48.6	61.7	100.0	100.0
<b>4</b>	25.9	30.5	0.5	0.0	0.0	0.0	0.0	0.0	73.6	69.5	100.0	100.0
<b>5</b>	8.8	9.2	<b>44.0</b>	<b>46.3</b>	0.0	0.1	0.0	0.0	47.2	44.4	100.0	100.0
<b>6</b>	7.8	6.3	17.8	15.2	0.0	0.0	<b>0.0</b>	<b>0.2</b>	74.5	78.4	100.0	100.0
<b>7</b>	2.2	2.0	8.2	9.6	0.0	1.9	0.0	0.0	89.6	86.6	100.0	100.0
<b>8</b>	-	5.1	-	1.0	-	0.0	-	0.0	-	93.9	-	100.0
<b>9</b>	-	0.2	-	0.1	-	0.0	-	0.0	-	99.8	-	100.0
<b>10</b>	-	0.1	-	0.4	-	2.2	-	0.0	-	97.2	-	100.0
Adjusted Total <sup>1</sup>	<b>27.8</b>	<b>25.3</b>	<b>12.8</b>	<b>14.1</b>	<b>0.0</b>	<b>0.5</b>	<b>0.0</b>	<b>0.0</b>	<b>59.4</b>	<b>60.1</b>	<b>100.0</b>	<b>100.0</b>
Study Area Total	-	<b>18.9</b>	-	<b>10.3</b>	-	<b>0.5</b>	-	<b>0.0</b>	-	<b>70.3</b>	-	<b>100.0</b>

Source: Appendix E and MT, Retail Study 2009 (Table L)

<sup>1</sup> Adjusted market share figures excluding Zones 8, 9 & 10 to allow for comparison with 2008 data

- 6.26 As identified in Figure 6.5, each of Worksop and Retford captured the greatest proportion of comparison expenditure market share across their own Zones 1 (Worksop) and 5 (Retford).

Worksop also claimed a significant share of comparison goods expenditure from residents of Zones 3 (Whitwell / Creswell) and 4 (Anston / Dinnington), whilst Retford attracted a notable proportion of comparison goods spending from Zone 6 (Markham / Ollerton).

- 6.27 Worksop has seen a slight fall in market share of comparison expenditure across a number of zones, likely due to lack of comparison retail investment in the town centre over the period, with spend from Zone 3 (Whitwell / Creswell) in particular having fallen from 51% to 37% over the last 8 years as residents have turned to other comparison goods retailers outside of Bassetlaw's primary centres.
- 6.28 Retford is shown to have experienced a slight increase in the market share of residents' comparison goods spending since 2008, spread relatively evenly across several zones.
- 6.29 The 2009 Study did not identify market shares to retailers in Harworth & Bircotes or Tuxford whilst, in 2016, the majority of comparison goods spending in each of Harworth & Bircotes and Tuxford was from their own Zones.
- 6.30 The majority of local residents in Harworth & Bircotes (Zone 2) and Tuxford (Zone 6) travel to further afield to facilities outside of the District for their comparison goods needs.

## Market Share Analysis

Figure 6.6 | All Retail - Market Share by Destination (%)

Destination	Market Share by Category (%)												Total Market Share (all retail)
	Convenience Spending			Comparison Spending									
	Main Food	Top-up	Total	Clothing	Books etc.	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total	
<b>Worksop</b>	25.4	24.3	<b>25.2</b>	10.9	15.7	15.5	15.7	18.0	30.6	34.4	26.8	<b>18.9</b>	21.6
<b>Retford</b>	18.1	12.1	<b>16.9</b>	6.8	18.1	11.4	11.9	17.1	7.6	6.6	13.2	<b>10.3</b>	13.2
<b>Harworth &amp; Bircotes</b>	6.4	6.2	<b>6.4</b>	0.5	2.7	0.2	0.2	3.4	0.2	0.3	0.1	<b>0.5</b>	3.1
<b>Tuxford</b>	0.0	2.7	<b>0.5</b>	0.0	0.1	0.0	0.0	0.3	0.0	0.0	0.0	<b>0.0</b>	0.2
<b>Others in Bassetlaw</b>	0.0	0.5	<b>0.1</b>	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	<b>0.0</b>	0.1
<b>Bassetlaw Sub-Total</b>	49.9	45.7	49.1	18.2	36.6	27.2	27.8	38.8	38.4	41.4	40.1	29.7	38.2
<b>Others in Study Area</b>	17.3	23.3	<b>18.5</b>	2.0	6.7	1.8	5.0	20.8	4.7	9.4	10.8	<b>5.2</b>	11.0
<b>Outside the Study Area</b>	32.8	31.0	<b>32.5</b>	79.8	56.7	71.0	67.2	40.4	56.9	49.2	49.1	<b>65.1</b>	50.8
<b>Total</b>	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: Appendix E

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### Convenience Goods

- 6.31 Convenience spending is categorised by Experian as low-cost, everyday food, beverages and perishable items that consumers are unlikely to be willing to travel far to buy. Convenience shopping trips are divided into two sub-categories, main food shopping and top-up shopping, which is more likely to be sourced locally to resident's homes or place of work.
- 6.32 Across the Study Area, Figure 6.6 illustrates that Bassetlaw caters for 49.9% of main food trips and 45.7% of top-up trips of residents across the wider Study Area (Zones 1-10).
- 6.33 The majority of convenience goods expenditure is spent in Worksop and Retford (25.2% and 16.9% respectively), while Harworth & Bircotes receives 6.4% and Tuxford just 0.5%.
- 6.34 Each of Worksop, Retford and Harworth & Bircotes are identified as having a lower top-up market share than for main food shopping, suggesting that they serve as the primary convenience destinations for their local resident populations.
- 6.35 Tuxford, however, caters for a greater proportion of top-up spending than on main food, reflecting the smaller convenience offer in the centre and that local residents are willing to travel further afield to benefit from a wider convenience goods offer.

### Comparison Goods

- 6.36 Experian provides expenditure estimates divided into eight sub-categories of comparison goods, which can be grouped as bulky goods: 'DIY', 'Electrical' and 'Furniture', and non-bulky goods: 'Books, CDs and DVDs', 'Chemist Goods', 'Clothing & Footwear', 'Small Household Goods' and 'Toys and Recreational Goods'.
- 6.37 As identified in Figure 6.6 above, Worksop captures a greater comparison goods market share than Retford, Harworth & Bircotes and Tuxford for all Experian comparison goods market shares with the exception of media goods (such as books and CDs), where Retford draws a slightly greater proportion of spending across the Study Area. Retford is also identified as catering for a wide mix of household goods, recreation, chemist and furniture comparison goods shopping due in part to a strong presence of national multiples in the town centre.
- 6.38 Worksop is shown to bring in a significant market share of over 25% of all DIY, electrical and furniture goods expenditure across the Study Area, primarily due to the B&Q at Sandy Lane Retail Park, which caters to over 25% of DIY spending across the Study Area alone.
- 6.39 Harworth & Bircotes serves a more specialist comparison goods market, with notable market shares of books and media (2.7%) and chemist goods (3.4%). Tuxford provides a very limited comparison



goods offer, only showing market shares of books and media and chemist goods expenditure greater than 0.1% of the Study Area.

## Markets

6.40 The household survey asked respondents questions around the use of the District's outdoor markets.

6.41 21% of all respondents who visited a market in Bassetlaw, visited the Retford outdoor market most frequently. Slightly fewer residents (18%) visited the Worksop market most frequently, whilst 61% of respondents across the Study Area did not visit either market.

**Figure 6.7 | Markets - Market Share by Destination (%)**

Destination	Which market do you visit the most? (%)	What is the main reason for visiting the centre? (%)
Worksop market	18.8	3.1
Retford market	20.6	2.9
<i>Don't visit any of these markets</i>	<i>60.69</i>	-
<b>Total</b>	<b>100.0</b>	-

Source: Appendix D

6.42 Of those who visited the markets in Bassetlaw, 27% of respondents did not undertake any linked shopping during their trips, while 38% carried out linked non-food shopping and 29% of trips were linked with food shopping. A total of 17% of market trips were linked to visits to cafes and restaurants within the local centre of either Worksop or Retford.

6.43 When asked the main reason for visiting Worksop or Retford Town Centres, just 3% of residents identified the quality of the local market as the primary reason.

## E-Tailing

6.44 Across the Study Area, a total of 67% of residents make use of special forms of trading (or SFT), with a notably higher proportion of SFT identified in Zone 5 (Retford) with 77% and Zone 7 (Bawtry / Gringley) with 75%.

6.45 Of the respondents that utilise SFT, the majority purchased clothes (49%), books (34%) and CDs, DVDs and other media (32%). The vast majority of residents who made purchases online received their goods through home delivery (89%), with a small proportion collecting the goods in-store (6%) and even fewer receiving goods through a dedicated click and collect hub (2%).

6.46 However, Zone 10 (Rossington / Doncaster fringe) showed a particularly notable proportion of

residents' making use of dedicated click and collect hubs (11%), suggesting that the lack of take-up across the Study Area may be more associated with the relative availability of the hubs, as such facilities are more widely erected across more densely populated urban settlements, such as Doncaster.

## Leakage

- 6.47 Notably, in terms of leakage, Bassetlaw District is bordered to the northwest and southwest by Doncaster and Mansfield respectively, as well as Sheffield and Rotherham to the west, although it is noted that the survey identifies that Sheffield has significantly less of a convenience goods retail draw on residents of Bassetlaw District.
- 6.48 50.9% of convenience goods expenditure made by residents of the wider Study Area (Zones 1-10) is 'lost' from Bassetlaw itself, while 70.3% of all comparison goods expenditure from residents of the Study Area is spent outside the District. This is referred to as 'Study Area Leakage'.
- 6.49 It is worth noting that the previous MT Retail Study (2009) adopted an alternative definition of 'leakage' as resident spending to facilities outside of the Study Area (Zones 1-7), as opposed to facilities outside of Bassetlaw District. It was identified that, in 2008, a total of 15.5% of convenience goods spending and 50.1% of comparison goods spending from residents within the Study Area was made to facilities outside of the Study Area, which is shown to have grown to 18.7% (convenience) and 56.2% (comparison), as of 2016.

**Figure 6.8 | Study Area (Zones 1-10) Leakage by Destination at 2016 (%)**

Destination	Study Area Leakage by Category (%)												Total Leakage (all retail)
	Convenience Spending			Comparison Spending									
	Main Food	Top-up	Total	Clothing	Books etc.	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total	
<b>Doncaster</b>	10.5	9.7	<b>10.4</b>	24.2	15.5	19.7	21.3	12.5	14.0	19.7	12.9	<b>19.1</b>	<b>15.3</b>
<b>Mansfield</b>	13.3	9.0	<b>12.5</b>	8.9	11.0	8.9	10.1	8.5	13.6	2.6	9.6	<b>9.5</b>	<b>10.8</b>
<b>Rotherham</b>	9.6	11.1	<b>9.9</b>	6.1	4.5	7.4	3.9	11.9	5.9	5.0	10.2	<b>6.6</b>	<b>8.0</b>
<b>Sheffield Meadowhall</b>	0.1	0.0	<b>0.1</b>	24.7	11.3	9.2	17.1	3.9	4.7	0.0	2.1	<b>12.4</b>	<b>7.0</b>
<b>Sheffield</b>	0.6	1.6	<b>0.8</b>	3.5	2.7	4.2	8.4	1.1	7.0	3.1	4.0	<b>4.7</b>	<b>3.0</b>
<b>Others outside Bassetlaw</b>	16.0	22.8	<b>17.3</b>	14.2	18.3	23.4	11.5	23.3	16.3	28.1	21.1	<b>18.1</b>	<b>17.8</b>
<b>Total Leakage from Bassetlaw</b>	<b>50.1</b>	<b>54.3</b>	<b>50.9</b>	<b>81.8</b>	<b>63.4</b>	<b>72.8</b>	<b>72.2</b>	<b>61.2</b>	<b>61.6</b>	<b>58.6</b>	<b>59.9</b>	<b>70.3</b>	<b>61.8</b>

Source: Appendix E

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- 6.50 Convenience goods leakage was focussed towards Mansfield and Doncaster, each attracting 12.5% and 10.4% of convenience goods spending from residents across the Study Area.
- 6.51 Notably, both centres attracted a higher proportion of main food spending than top-up goods spending, suggesting that residents are regularly making the journey to these centres for their convenience goods shopping (as opposed to carrying out this shopping alongside other activities such as work commutes). Interestingly, a higher proportion of convenience goods expenditure to facilities in Sheffield and Rotherham was made through top-up shopping, indicating that this spending was more likely to be associated with other activities.
- 6.52 Combined, Doncaster, Sheffield and Sheffield Meadowhall account for over 50% of Study Area expenditure on clothing goods, and over 30% of all spending on media (such as books and CDs), household goods and recreation goods. Mansfield itself draws a higher proportion of media, recreation and electrical goods spending from the Study Area, whilst Rotherham would appear to have a more niche offering to residents of the Study Area with a notable draw of chemist's goods and furniture.
- 6.53 Over 80% of spending on clothing and footwear by residents across the Study Area is spent at retail destinations outside of the Study Area. Likewise, there is seen to be a high degree of leakage of both household goods (72.8%) and toys and recreational goods (also 72.2%) that are purchased outside of the Study Area.

## Summary

- 6.54 Looking at just Zones 1-7 (the previous Study Area, as defined in the 2008 Study), the proportion of convenience goods expenditure spent in either Worksop, Retford, Harworth & Bircotes, Tuxford, or other facilities within the Study Area has fallen from 84.5% in 2008 to 81.4% in 2016, while the market share of comparison goods expenditure has fallen from a high of 49.9% in 2008 to 43.5% in 2016.
- 6.55 Leakage of convenience goods spending from Zones 1-7 to the centres of Doncaster and Rotherham has actually decreased since 2008, from 6.8% to 5.3% and from 1.5% to 0.3%, respectively. This would indicate that, since 2008, convenience spending has increased to other neighbouring destinations such as Mansfield, which was not specified in the 2008 Study. In terms of comparison trade, leakage from Zones 1-7 has increased to both Sheffield Meadowhall (from 9.2% in 2008 to 13.8% in 2016) and Doncaster (from 13.3% to 15.8%).
- 6.56 The most recent household survey identified that, in 2016, Worksop accounted for 25.2% of convenience goods spending across the wider Study Area (Zones 1-10). Notably, 21.5% of the convenience spending is directed to foodstores located in out-of-centre locations, such as Morrisons

at Kilton Road, Aldi and Tesco at Gateford Road and Sainsbury's at Highgrounds Road, whilst just 3.3% is to stores located within the boundary of the town centre. Similarly, Retford draws a total of 16.9% of convenience goods spending, with just 2.7% located within the town centre. 13.9% of convenience spending is to the Morrisons at Idle Valley Road, Asda at Wharf Road and Aldi at Carolgate, which are located edge-of-centre in retail terms and make up the majority of Retford's convenience retail provision. Harworth & Bircotes' convenience offer has grown significantly through the provision of the Asda and Aldi along Scrooby Road (both edge-of-centre) and provides for a total of 6.4% of convenience goods spending across the wider Study Area, whilst Tuxford caters to just 0.5% of convenience goods spending, the majority of which is provided for by the Co-op at Newcastle Street.

- 6.57 Turning to comparison goods, spending in Worksop fell from the 2008 market share while Retford marginally grew. In 2016 Worksop made up 18.9% comparison goods trips, Retford 10.3%, Harworth & Bircotes 0.5% and Tuxford just 0.02%.
- 6.58 As the largest centre in the District, Worksop retains at least 15% of all comparison goods categories (with the notable exception of clothing and footwear), with a particularly high proportion of Electrical, DIY and Furniture goods, whilst Retford provides for a notable proportion of books, CDs and other media goods, as well as chemist goods.
- 6.59 In terms of leakage, 50.9% of convenience goods trips from across the wider Study Area are made to facilities outside of the District (with Mansfield and Doncaster accounting for 12.5% and 10.4%, respectively). A total of 70.3% comparison goods expenditure from residents across the wider Study Area is spent outside of Bassetlaw District, with Doncaster and Sheffield Meadowhall the most popular destinations, accounting for 19.1% and 12.4% of spending respectively.

## 7.0 Retail Capacity

### Introduction

- 7.1 One of the key aims of this Study is to provide recommendations on the capacity for new retail floorspace over the plan period to 2031. The use of long term projections should be treated with caution and reviewed regularly in order to test the accuracy of the forecasts against emerging datasets. External national and international factors can influence the wider performance of the economy, which can have trickle down effects on local shopping patterns. One such example has been the trend toward convenience discounters (such as Lidl and Aldi) in response to the period of economic downturn between 2008 and 2013.
- 7.2 We would also note that any identified retail capacity across the Study Area does not necessarily equate to justification for new retail floorspace in and of itself (especially in out-of-centre locations), and any such development would be required to be assessed in line with national policy in terms of impacts on the vitality and viability of town centres, the potential to prejudice emerging town centre developments, and the 'town centre first' sequential approach to site selection.
- 7.3 Detailed quantitative retail capacity tables are enclosed at **Appendix E**.

### Methodology

- 7.4 Retail capacity modelling follows a consistent, robust methodology which incorporates a number of datasets and informed assumptions:

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

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

floorspace, whilst a surplus of expenditure would suggest capacity for additional retail floorspace.

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

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

- 7.9 For robustness, when assessing the capacity for new convenience retail floorspace we adopt a constant market share in line with findings of the latest household survey (i.e. that stores across Bassetlaw District will continue to draw 49.1% of all convenience goods spending across the Study Area) on the basis of the comparable strength of offer of the surrounding centres.
- 7.10 In addition to allowing for growth in retail expenditure over the plan period (as considered in Section 5), we utilise data provided within the Experian Retail Planner Briefing Note in order to take account of forecast growth in efficiencies in retailers' trading (for example, through the adoption of new technologies and more efficient use of available floorspace). Floorspace efficiencies are estimated to have a greater impact on comparison retailers than convenience retailers over the plan period as the rise of food discounting continues to subdue projected efficiencies in turnover of existing convenience retail floorspace.
- 7.11 We go on to make a number of statistical assumptions through the quantitative capacity exercise in order to account for a number of variables:
- Utilising a 'goods based' approach, we strip out expenditure for non-food comparison goods such as clothing, household goods, CDs, DVDs and other media that are now commonly sold at major foodstores. These assumptions are made in line with floorspace figures sourced from Verdict UK or, where data is not available, Nexus' professional judgement based on site visits.
  - We also make assumptions as to the gross to net sales floorspace of each store, again utilising online planning records where available, Verdict UK Food & Grocery Retailers 2014 or Nexus' professional judgement.
  - Finally, we consider whether foodstores are likely to attract any additional 'inflow' from outside of the Study Area. Based on the localised nature of convenience food shopping and the extent of the Study Area it is unlikely that convenience destinations within Bassetlaw draw a significant amount of trade from outside of the Study Area. We do not assume any

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significant inflow of trade from residents beyond the wider Study Area (Zones 1-10), which has been expanded from the Study Area utilised for the 2009 Retail Study.

- 7.12 We then go on to calculate the anticipated turnover of all major convenience goods operators on the basis of the published company sales data, referred to as ‘benchmark’ turnover. ‘Benchmark’ turnover is calculated from national average ‘sales densities’ (turnover per square metre) from sources such as Verdict UK Food & Grocery Company Briefing Reports and Mintel Retail Rankings. By comparing the turnover estimates derived from the findings of the household survey (total available expenditure distributed on the basis of each destinations market share) to the benchmark turnovers, we are able to establish where stores are trading above (overtrading) or below (undertrading) company averages. For stores located outside of designated town centres, surplus expenditure over and above benchmark turnover is considered to be available as this suggests that existing convenience goods providers in the Study Area are stretched and overproviding to meet the existing need.
- 7.13 As smaller convenience retailers and local traders may not publish annual turnover figures and there is not a standardised dataset available, local town centre stores are assumed to be trading in line with the findings of the household survey (at 2016), or ‘at equilibrium’. We provide a detailed assessment of this benchmark exercise measuring the performance of convenience retailers at Table 5, **Appendix E**.
- 7.14 Discount convenience retailers have traditionally served a different market and customer base to traditional supermarkets, such as the ‘big 4’. However, since the recession, there has been a growing trend towards shopping at discount retailers, or combining trips to both formats which has reduced traditional retailer’s turnover, whilst increasing spending at discounters. This blending of the two markets has been reflecting in the gradual decrease in the sales density (and profit margins) of the big 4 retailers over recent years, and the increase the sales densities of discounters such as Aldi.
- 7.15 On the basis of the household survey, we identify that convenience retailers within Bassetlaw turnover an estimated £248.5m, marginally more than the benchmark turnover of £247.6m at 2016. This overtrade equates to a surplus of £0.8m of expenditure across the Study Area, or 0.3% above company averages. Notably, there is a marked difference in the trading performance of different centres, often as a result of either oversupply, undersupply of convenience retailers, or the dominance of one or two particular stores.
- 7.16 Convenience retailers serving residents of Worksop and the surrounding hinterlands (being within Zones 1 & 3) are found to be undertrading by a combined £-22.0m. In particular, the Sainsbury’s at Highgrounds Road and Tesco at Gateford Road in Worksop are identified as undertrading by £-14.8m and £-9.9m, respectively, whilst the Aldi at Gateford Road in Worksop is seen to be

overtrading by £14.9m. Notably, convenience retailers within the town centre were shown to be undertrading by £-7.9m.

- 7.17 Retford convenience retailers were seen to be overtrading by £12.8m, almost entirely due to the performance of the Aldi at Carolgate, which showed a surplus of £12.7m above company averages.
- 7.18 Harworth & Bircotes showed a total overtrade of £8.5m of convenience goods turnover above company averages, with the Aldi and Asda on Scrooby Road overtrading by £4.7m and £3.9m respectively.

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

Year	Turnover (£m) <sup>1</sup>	Available Expenditure (£m) <sup>2</sup>	Inflow (£m)	Surplus Expenditure (£m)
2016	247.6	248.5	0.0	0.8
2021	245.2	248.3	0.0	3.2
2026	244.9	251.8	0.0	6.8
2031	246.1	255.2	0.0	9.1
<b>Study Area Market Share (%)</b>		<b>49.1</b>		

<sup>1</sup> Allows for turnover efficiency as set out in Table 4a Experian Retail Planner 14 (November 2016)

<sup>2</sup> Assumes constant market share claimed by Bassetlaw District facilities at 49.1% from Study Area (allows for no inflow uplift)

Source: Table 6a, Appendix E

- 7.19 Tying the methodology together, Figure 7.1 above identifies a marginal surplus of £0.8m expenditure in 2016, rising to £3.2m in 2021 taking account of increases in population and expenditure. A surplus of £6.8m available expenditure is estimated by 2026, growing to £9.1m at 2031.
- 7.20 This surplus in resident spending is contrary to the turnover forecasts for convenience goods retailers across the District over the same time period, which are forecast to fall to 2026, with a slight uplift at 2031. This is due to continued pressures to cut costs and further reduce pricing (in response to the rising market share of discount operators), in spite of an allowance for increases in floorspace efficiency and extensions in floorspace.
- 7.21 We go on to consider committed, emerging and extant permissions for new convenience retail floorspace across the District that could come forward over the next few years. These equate to a net convenience floorspace of 7,742 sq m and an estimated turnover of £103.7m.
- 7.22 Taking account of committed turnover, we identify a residual turnover of £-102.8m at 2016, rising to £-94.0m at 2031. Using average sales densities to cater for minimum (a large supermarket operator) and maximum (a combination of discount foodstores and larger supermarket operators) scenarios, we calculate that there is no capacity for new convenience retail floorspace, should all of the committed developments come forward as identified in **Appendix E** (Table 6d).



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

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min <sup>1</sup>	Max <sup>2</sup>
<b>2016</b>	0.8	103.7	-102.8	-8,000	-10,200
<b>2021</b>	3.2	102.6	-99.4	-7,900	-9,900
<b>2026</b>	6.8	102.5	-95.7	-7,600	-9,600
<b>2031</b>	9.1	103.0	-94.0	-7,400	-9,400

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

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

Source: Table 6d, Appendix E

- 7.23 As shown in Figure 7.3 below, we then go on to consider the 'likely scenario' and the committed retail floorspace that is likely to come forward over the next few years. Our assumptions are based on discussions with planning officers, company statements and from media reports.
- 7.24 In producing a 'likely scenario', we disregard the Tesco foodstore at Carlton Road in Worksop (which is implemented, but is currently for sale and is unlikely to proceed in as approved) and the proposed retail development of Vesuvius Works at Sandy Lane in Worksop, both of which have been announced as shelved by their respective developers, thereby significantly reducing the convenience turnover of the committed floorspace in 2016 from £103.7m to £14.2m.
- 7.25 Across Bassetlaw District as a whole, taking account of the turnover of commitments that are likely to come forward over the plan period, we identify a total negative residual turnover of £-14.1m at 2016, falling to £-5.8m at 2031.

**Figure 7.3 | Likely Convenience Goods Floorspace Capacity in Bassetlaw District**

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min <sup>1</sup>	Max <sup>2</sup>
<b>2016</b>	0.8	14.9	-14.1	-1,100	-1,400
<b>2021</b>	3.2	14.8	-11.6	-900	-1,200
<b>2026</b>	6.8	14.8	-7.9	-600	-800
<b>2031</b>	9.1	14.8	-5.8	-500	-600

<sup>1</sup> Average sales density assumed to be £12,932 per sq m (rounded) based on the average sales density of the leading four supermarkets as identified by Verdict 2015

<sup>2</sup> 50% of residual expenditure assumed to be consumed by leading four supermarkets (£12,932/sq m) and 50% assumed to be consumed by discount operators (£7,530 per sq m) as identified by Verdict 2015 and Mintel 2015. This equates to £10,231/sq m.

Source: Table 6f, Appendix E

- 7.26 On the basis of minimum and maximum average sales densities, we calculate that there would not

be any capacity for new convenience goods floorspace between 2016 and 2031. This is primarily due to capacity for new convenience goods floorspace over the plan period being taken up by previously approved commitments, most notably the recently approved retail and leisure complex at the former Icon Polymer site in Retford.

### Capacity for Future Comparison Goods Floorspace

- 7.27 The methodology for calculating capacity for comparison goods floorspace differs from that used to model capacity for convenience goods floorspace. The principal reason for this is that there are no robust, industry standard benchmark sales densities for calculating the turnover of smaller independent retailers that typically make up the majority of the comparison provision of town centres (although it is noted that Mintel Retail Rankings do provide published sales densities for national multiple comparison retailers). Moreover, the trading levels of comparison retailers can fluctuate significantly depending on a number of localised variables, most notably the location of the retailer relative to similar providers (as customers are likely to link multiple comparison goods trips and retailers in close proximity to each other provide a greater draw).
- 7.28 As such, we adopt the approach that comparison goods retailers across the Study Area are trading 'at equilibrium' at 2016 (which adopts the survey derived turnover) and examine capacity by measuring the growth in available expenditure to 2031.

**Figure 7.4 | Comparison Goods Surplus in Bassetlaw District**

Year	Turnover (£m) <sup>1</sup>	Available Expenditure (£m) <sup>2</sup>	Inflow (£m)	Surplus Expenditure (£m)
2016	194.5	194.5	0.0	0.0
2021	214.3	215.9	0.0	1.6
2026	236.4	254.8	0.0	18.4
2031	261.0	301.3	0.0	40.3
<b>Study Area Market Share (%)</b>		<b>29.7</b>		

<sup>1</sup> Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 14 (November 2016)

<sup>2</sup> Assumes constant market share claimed by Bassetlaw District facilities at 29.6% from Study Area

Source: Table 26a, Appendix E

- 7.29 Based on the survey findings, we estimate that (at 2016) comparison goods retailers within Bassetlaw District turnover £194.5m, or 29.7% of available comparison goods expenditure in the Study Area. We adopt a constant market share, assuming that the performance of comparison retailers within Bassetlaw continues to be commensurate with its current market share. This equates to a total turnover of £261.0m by 2031.
- 7.30 Taking account of population and expenditure growth and forecast floorspace efficiencies, we identify a surplus expenditure of £1.6m at 2021, rising to £18.4m by 2026, and £40.3m at 2031.

- 7.31 As with convenience capacity modelling, we have taken account of committed comparison retail goods floorspace across the District, which equates to a total of 9,932 sq m, or £81.5m of committed comparison goods turnover.

**Figure 7.5 | Comparison Goods Floorspace Capacity in Bassetlaw District**

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min <sup>1</sup>	Max <sup>2</sup>
2016	0.0	81.5	-81.5	-14,800	-23,300
2021	1.6	89.8	-88.2	-14,600	-22,900
2026	18.4	99.0	-80.7	-12,100	-19,000
2031	40.3	109.3	-69.0	-9,400	-14,700

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

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

Source: Table 26d, Appendix E

- 7.32 Figure 7.5 identifies a residual expenditure deficit of £-88.2m at 2021, falling to £-80.7m at 2026, and £-69.0m at 2031. We go on to utilise average sales densities for high street retailers (the upper end of what could be achieved) to provide assumed minimum floorspace estimates and average sales densities for bulky goods retailers (the lower end of what could be achieved) to provide assumed maximum comparison goods floorspace capacity estimates. This available residual spend equates to a negative comparison goods floorspace capacity across the plan period.
- 7.33 We also look at the 'likely scenario' following an assessment of the likelihood of committed developments coming forward over the study period, again 'stripping out' potential turnover of schemes that developers have announced will not be coming forward, namely the Tesco foodstore at Carlton Road (2,320 sq m net, which equates to a turnover of £30.9m) and the Vesuvius Works development at Sandy Lane in Worksop (1,502 sq m, with a turnover of £20.9m). This has the effect of reducing the committed turnover by 63.5% to £29.7m.
- 7.34 Considering only the turnover of the comparison goods retails commitments likely to come forward over the study period provides a residual expenditure deficit of £-29.7m at 2016, rising to £-31.2m at 2021 and falling to £-17.7 by 2026. By 2031 we estimate a marginal residual expenditure surplus of £0.4m.
- 7.35 This available expenditure would provide a negative comparison goods floorspace capacity to 2026. By 2031, the surplus of residual expenditure would allow for just 100 sq m of new comparison goods floorspace.

**Figure 7.6 | Likely Comparison Goods Floorspace Capacity in Bassetlaw District**

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min <sup>1</sup>	Max <sup>2</sup>
2016	0.0	29.7	-29.7	-5,400	-8,500
2021	1.6	32.7	-31.2	-5,100	-8,100
2026	18.4	36.1	-17.7	-2,700	-4,200
2031	40.3	39.9	0.4	100	100

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

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

Source: Table 26f, Appendix E

- 7.36 We go on to assess the capacity for net additional comparison goods floorspace for both non-bulky (defined as 'Clothing & Footwear', 'CDs, DVDs and Books', 'Small Household Goods', 'Toys, Games, Bicycles and Recreational Goods' and 'Health and Beauty/Chemist Goods') and bulky (defined as 'Furniture', 'DIY' and 'Electrical') goods, taking account of projected increases in population and expenditure as well as the existing market share shopping patterns.
- 7.37 Whilst we do not find any significant residual expenditure for new comparison goods floorspace in the District over the plan period, we calculate a surplus non-bulky goods expenditure of £23.6m from residents of the Study Area by 2031. Taking into account £22.4m of non-bulky goods commitments, we identify a residual expenditure of £1.2m by 2031, which equates to just 200 sq m of capacity for new non-bulky comparison goods floorspace.
- 7.38 In terms of bulky goods, we identify a surplus expenditure of £16.7m of spending on bulky goods by 2031, which, in view of £17.4m of committed development, would equate to a residual expenditure of £-0.7m. This would provide a negative capacity for new bulky comparison goods development in Bassetlaw over the plan period.

**Figure 7.7 | Likely Non-Bulky Comparison Goods Floorspace Capacity in Bassetlaw District**

Year	Surplus Expenditure (£m)	Commitments (£m) <sup>3</sup>	Residual Expenditure (£m) <sup>2</sup>	Floorspace Capacity (sq m net) <sup>1</sup>
2016	0.0	16.7	-16.7	-3,000
2021	0.9	18.4	-17.5	-2,900
2026	10.8	20.3	-9.5	-1,400
2031	23.6	22.4	1.2	200

<sup>1</sup> Average sales density assumed to be £5,500 per sq.m for non-bulky goods retailers

<sup>2</sup> Residual calculated by subtracting turnover of commitments (sourced from Table 26k) from surplus expenditure (sourced from Table 26g)

<sup>3</sup> Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 14 (November 2016)

<sup>4</sup> Figures may not total due to rounding

Source: Table 26l, Appendix E

**Figure 7.8 | Likely Bulky Comparison Goods Floorspace Capacity in Bassetlaw District**

Year	Surplus Expenditure (£m)	Commitments (£m) <sup>3</sup>	Residual Expenditure (£m) <sup>2</sup>	Floorspace Capacity (sq m net) <sup>1</sup>
2016	0.0	13.0	-13.0	-3,700
2021	0.7	14.3	-13.7	-3,500
2026	7.6	15.8	-8.2	-1,900
2031	16.7	17.4	-0.7	-200

<sup>1</sup> Average sales density assumed to be £3,500 per sq.m for bulky goods retailers

<sup>2</sup> Residual calculated by subtracting turnover of commitments (sourced from Table 26q) from surplus expenditure (sourced from Table 26m)

<sup>3</sup> Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 14 (November 2016)

<sup>4</sup> Figures may not total due to rounding

Source: Table 26r, Appendix E

## Summary

- 7.39 Under a scenario where only the retail floorspace commitments that are likely to come forward are considered, we identify that there would not be any capacity for additional convenience floorspace by 2031. We calculate capacity for the delivery of just 100 sq m of net additional comparison floorspace across Bassetlaw by the end of the plan period.
- 7.40 Of this comparison goods floorspace capacity, on the basis of current market share patterns, we calculate capacity for 200 sq m of non-bulky goods comparison floorspace by 2031, and negative capacity for new bulky comparison goods development in Bassetlaw over the plan period.

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## 8.0 Leisure

### Introduction

- 8.1 The UK leisure market has undergone drastic structural changes over the past few years. The economic downturn of 2008 to 2013 significantly changed consumers spending behaviours. Even though overall spending was down, the popularity of going to the cinema or theatre has steadily increased, as has eating out at restaurants, cafés, or purchasing take-away meals. Additionally, as the health and fitness world flourishes, the number of fitness centre memberships has steadily increased. ONS reported that in 2006 average weekly spend on 'sports admissions, subscriptions, leisure class fees and equipment hire' was £5.80 and in 2014 it had increased to £6.90; a 19.0% increase 8 years. Further commentary on recent and emerging leisure trends is included in Section 2.0 of this report.
- 8.2 This section of the Retail and Leisure Study provides our analysis of the market share for leisure activities in the District and whether people use other centres because of any inherent weaknesses within the District's centres. Following this, we also analyse the existing retail and leisure stock in the District and compare this with competing destinations and, where possible, national average benchmarks.

### Methodology

- 8.3 The results of the NEMS Household Survey offer an indication of locations/facilities where residents of the Study Area satisfy their leisure needs. As such, the survey enables us to analyse patterns of travel and potential deficiencies (those that are qualitative in nature) in Bassetlaw's leisure provision.
- 8.4 The modelling of future commercial leisure needs cannot be based upon the same quantitative model used to estimate retail need (as we have done in Section 7.0 by estimating future expected expenditure). As an alternative, Nexus considers that a more fitting methodology is to appraise Bassetlaw's existing provision against recognised sector 'standards' or 'benchmarks'. The completion of this 'benchmarking exercise' allows us to establish deficits and where some gaps in the provision of existing facilities may be.
- 8.5 There is a limited collection of uses within the leisure market for which reliable data can be obtained. These include; gyms and leisure centres, cinemas, and ten pin bowling. The general reason such information is made available for these types of uses is on the basis that they require proportionally larger properties, and by virtue of their size land parcels/sites may need to be identified through the local development plan process and land/sites allocated to these uses accordingly.

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- 8.6 Public houses, restaurants, clubs, are typically accommodated in smaller units. By the very nature of their size the market can generally deliver units of this size unaided by intervention by the local development plan process through allocations. Moreover, in light of the fact some uses benefit from permitted development rights (of which some became permanent in early April 2016) with regards to change of use, means that the supply of these uses is not specifically managed or controlled by the planning process (i.e. they do not necessitate planning permission).

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

- 8.7 The NEMS Household Survey (completed in May 2016) included 18 questions which asked respondents to describe their leisure activities and habits. It is the responses to these questions (Questions 36 to 55), which are pertinent to our understanding of leisure trends and needs in Bassetlaw. The breakdown of the answers to these questions is set out in full within **Appendix D**.
- 8.8 It is important to acknowledge that residents of neighbouring districts, including; Mansfield, West Lindsey, Doncaster, Rotherham, Newark and Sherwood, and North Lincolnshire, may visit Bassetlaw to satisfy some of their leisure requirements, and residents of Bassetlaw may similarly visit the adjoining districts for the same reason. In response to this, the Study Area (from which respondents were engaged) encompasses areas further than Bassetlaw, mainly to the east. The Zones which are beyond the District boundary are Zones 4, 9, 8 and 10.
- 8.9 In the following sections we summarise and interpret the responses given to questions 36 to 55, paying particular attention to the responses as they relate to distance travelled to leisure facilities, as well as general levels of satisfaction with Bassetlaw's provision of leisure.

### **Participation in Leisure Activities**

- 8.10 In the first instance it is important to have an understanding of the participation rates and general popularity of leisure activities across the Study Area. Question 36 of the Household Survey NEMS asked respondents to identify all of the leisure activities they participated in (respondents were allowed to identify as many options as they wished).
- 8.11 Figure 8.1 scrutinises participation rates across all ten zones.
- 8.12 As evident in Figure 8.1, the most popular leisure activity among survey respondents is to go to a restaurant, with more than half, 62.7%, indicating they visit restaurants. Following that the second most popular leisure activity is a trip to the pubs/bars; with 45.2% of respondents identifying they partake in such trips.
- 8.13 Sitting closely behind this, 42.0% visit the cinema, and 30.9% frequent theatres / concert halls.

8.14 In contrast, trips to nightclubs were only identified by 3.3% of respondents, and partaking in bingo only attracts 5.7% of Study Area respondents.

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

	Total	Zone 1 (Worksop)	Zone 2 (Harworth / Bircotes)	Zone 3 (Whitwell/ Creswell)	Zone 4 (Anston/ Dinnington)	Zone 5 (Retford)	Zone 6 (Markham / Ollerton)	Zone 7 (Bawtry / Gringley)	Zone 8 (Mansfield fringe)	Zone 9 (Maltby / Bramley fringe)	Zone 10 (Rossington / Doncaster fringe)
<b>Restaurant</b>	62.7	60.3	71.6	65.4	62.2	68.6	64.5	69.4	52.7	59.7	65.4
<b>Pub / bars</b>	45.2	46.4	42.2	43.3	38.4	56.5	58.3	44.3	35.2	48.6	35.8
<b>Cinema</b>	42.0	53.9	45.4	60.5	36.6	40.0	48.2	47.6	30.4	30.5	25.6
<b>Theatre / concert hall</b>	30.9	35.4	44.3	29.9	23.4	36.1	25.2	26.5	27.0	31.5	22.6
<b>Running / cycling / outdoor activities</b>	24.0	24.9	31.2	29.5	14.0	38.6	18.0	37.2	16.1	6.7	24.0
<b>Museum / art galleries</b>	20.9	21.8	31.4	20.7	13.7	38.2	23.0	18.0	13.0	8.4	13.1
<b>Ten pin bowling</b>	17.3	9.8	32.5	9.6	16.8	24.9	14.5	20.3	20.9	12.1	18.1
<b>Health &amp; fitness</b>	16.8	20.4	24.6	13.0	11.5	22.4	14.1	28.0	10.7	5.8	17.2
<b>(None mentioned)</b>	16.4	16.0	15.5	15.2	18.5	12.0	15.5	14.9	25.1	12.1	14.8
<b>Leisure centre activities</b>	15.2	14.0	14.8	28.6	12.5	18.3	14.6	12.7	7.9	22.8	13.4
<b>Social club</b>	7.9	6.2	8.5	9.9	9.7	3.8	11.4	0.6	8.1	16.5	9.0
<b>Bingo</b>	5.7	4.2	6.7	4.7	3.6	3.7	4.9	2.4	5.3	12.5	12.3
<b>Nightclub</b>	3.3	0.8	1.9	7.5	0.9	0.0	0.7	7.9	4.6	8.9	7.7

Source: Question 36 of NEMS Household Survey, Appendix D



## Indoor Sports and Health and Fitness

- 8.15 32.0% of Study Area residents participate in indoor leisure and/or health and fitness centre activities. Our assessment of where respondents undertake these activities is set out in Figure 8.2.
- 8.16 As evident when assessing the results, of those who participate, only 10.9% of Study Area residents carry out those activities within Bassetlaw. Within the District, Worksop is the most popular destination, attracting 10.1% of all participants.
- 8.17 It is noteworthy that private health and fitness centres dominate the market share in the District. This is likely to be because of the limited amount of community sports and health facilities. The Maltby Leisure Centre is the most popular community facility attracting 9.2% of trips.

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

Zone	Worksop (Zone 1)	Retford (Zone 5)	District Total (Zones 1 & 5)	Maltby / Bramley fringe (Zone 9)	Elsewhere outside District	Total
<b>Study Area Average</b>	<b>10.1</b>	<b>0.7</b>	<b>10.9</b>	<b>10.3</b>	<b>78.9</b>	<b>100.0</b>
1	41.4	0.0	41.4	0.0	58.6	100.0
2	0.0	0.0	0.0	4.4	95.6	100.0
3	0.0	0.0	0.0	0.0	100.0	100.0
4	21.7	0.0	21.7	26.4	51.9	100.0
5	0.0	3.9	3.9	0.0	96.1	100.0
6	0.0	3.0	3.0	0.0	97.0	100.0
7	0.0	0.0	0.0	0.0	100.0	100.0
8	0.0	0.0	0.0	0.0	100.0	100.0
9	0.0	0.0	0.0	81.3	18.7	100.0
10	0.0	0.0	0.0	0.0	100.0	100.0

Source: Question 37 of NEMS Household Survey, Appendix D

## Cinemas

- 8.18 As indicated in Figure 8.1, 42.0% of Study Area residents undertake trips to the cinema.
- 8.19 There is currently one large cinema in the District. This is the relatively new Savoy Cinema in Worksop Town Centre. As shown in Figure 8.3, the six screen Savoy attracts a high percentage of the Study Area residents, with 50.7% of respondents confirming their last cinema trip was to the Savoy. Additionally, the Savoy attracts 85.7% of Worksop residents (Zone 1).
- 8.20 It is those residents of Zone 2 (Harworth & Bircotes) and Zone 7 (Markham/Ollerton) that look predominantly outside the District when undertaking their cinema visits. The main attracting facility for Zone 2 and Zone 7 residents is the Vue in Doncaster Leisure Park; as 81.9% of Zone 2 and 68.8% of Zone 7 identified that it was this facility which they last visited. This result is somewhat unsurprising given the short distance and travel time between these zones and Doncaster.
- 8.21 Figure 8.3 demonstrates the market share of the Savoy in Worksop and nearby competing centres.

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

Zone	Savoy, Worksop (%)	Cineworld, Valley Centertainment, Sheffield (%)	Odeon, Mansfield Lesiure Park, Mansfield (%)	Vue, Doncaster Leisure Park, Doncaster (%)	Vue, Meadowhall Centre, Sheffield (%)	Elsewhere outside District (%)	Total (%)
<b>Study Area Average</b>	<b>50.7</b>	<b>7.5</b>	<b>10.4</b>	<b>16.8</b>	<b>8.6</b>	<b>5.9</b>	<b>100.0</b>
1	85.7	3.7	0.0	2.2	6.9	1.4	100.0
2	14.5	0.0	0.0	81.9	0.0	3.6	100.0
3	82.2	1.0	0.0	0.0	12.3	4.5	100.0
4	67.3	21.6	0.0	0.0	6.3	4.8	100.0
5	54.6	24.5	0.0	17.7	0.0	3.2	100.0
6	46.6	0.0	46.8	0.0	0.0	6.6	100.0
7	5.1	3.0	0.0	68.8	11.4	11.8	100.0
8	11.1	0.0	61.7	0.0	0.0	27.2	100.0
9	0.0	21.0	0.0	4.4	74.6	0.0	100.0
10	0.0	0.0	0.0	90.3	9.7	0.0	100.0

Source: Question 39 of NEMS Household Survey, Appendix D

## Restaurants

- 8.22 62.7% of Study Area residents make restaurant trips, making it the most popular leisure activity.
- 8.23 As Figure 8.4 demonstrates, 28.4% of those trips are made to restaurants in Worksop or Retford. Worksop is the most popular destination (attracting 15.4% of all trips), followed closely by Retford (attracting 13.0% of all trips).
- 8.24 Assessing the results on a local level, it is obvious that Retford and Worksop are popular destinations for their own residents. Worksop attracts 47.3% of its own residents, whilst 64.0% of Zone 5 residents (the Zone that Retford is in) visit Retford to eat out at restaurants.
- 8.25 Of the 58.9% of trips which are made to locations outside of the Study Area, the most popular destinations are restaurants in Doncaster (13.6% of trips), Sheffield (9.8%) and Mansfield (7.4%).

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

Zone	Zone 1 - Worksop Town Centre (%)	Zone 5 - Retford Town Centre (%)	Others in Study Area (%)	Doncaster Town Centre (%)	Mansfield Town Centre (%)	Sheffield City Centre (%)	Elsewhere outside of District (%)	Total (%)
<b>Study Area Average</b>	<b>15.4</b>	<b>13.0</b>	<b>12.6</b>	<b>13.6</b>	<b>7.4</b>	<b>9.8</b>	<b>28.1</b>	<b>100.0</b>
1	47.3	5.9	2.6	2.6	2.6	19.0	19.9	100.0
2	17.4	2.9	26.0	29.3	0.0	0.0	24.4	100.0
3	34.3	1.7	5.4	0.0	1.9	21.8	34.8	100.0
4	15.1	0.0	47.2	0.0	0.0	20.6	17.2	100.0
5	1.7	64.0	1.1	5.3	1.1	3.9	23.0	100.0
6	4.5	3.4	35.2	0.0	17.9	2.0	36.9	100.0
7	0.9	6.3	19.6	35.4	0.0	13.5	24.3	100.0
8	3.4	1.7	0.0	0.0	43.7	2.6	48.6	100.0
9	2.3	0.0	19.9	21.6	0.0	11.1	45.2	100.0
10	0.0	0.0	5.0	73.9	0.0	1.6	19.5	100.0

Source: Question 41 of NEMS Household Survey, Appendix D

## Bars and Pubs

- 8.26 A total of 45.2% of Study Area residents identified that they regularly visit pubs and bars. As would be expected, the majority of such trips are to bars and pubs within close proximity to residents' homes. A significant proportion of respondents in each Zone choose to visit the bar/pub their local town or village. When analysing the results for the larger towns in the District, Worksop is the most popular for bar and pub trips (attracting 18.5% of all trips), followed by Retford (10.9%).
- 8.27 53.1% of respondents identified destinations outside of the District (and Study Area). In terms of popular destinations for restaurants outside of the District, the most prominent leakages are to Doncaster Town Centre (8.2%), Mansfield Town Centre (5.0%) and Sheffield City Centre (5.8%).
- 8.28 In Figure 8.5 we summarise the NEMS Household Survey findings with regards to bars and pubs.

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

Zone	Zone 1 - Worksop Town Centre (%)	Zone 5 - Retford Town Centre (%)	Others in Study Area (%)	Doncaster Town Centre (%)	Mansfield Town Centre (%)	Sheffield City Centre (%)	Elsewhere outside District (%)	Total (%)
<b>Study Area Average</b>	<b>18.49</b>	<b>10.92</b>	<b>17.46</b>	<b>8.19</b>	<b>4.98</b>	<b>5.82</b>	<b>34.14</b>	<b>100.00</b>
1	69.1	1.9	0.0	0.0	3.0	16.5	9.4	100.0
2	1.2	4.5	36.3	39.7	0.0	0.0	18.3	100.0
3	21.5	0.0	0.0	0.0	0.0	21.9	56.6	100.0
4	8.0	0.0	37.2	3.9	0.0	14.8	36.1	100.0
5	2.1	48.4	2.4	0.0	0.0	0.0	47.1	100.0
6	0.9	3.9	45.7	0.0	7.4	0.0	42.1	100.0
7	3.2	21.6	19.5	20.2	0.0	0.0	35.6	100.0
8	15.6	0.0	0.0	0.0	33.4	0.0	51.0	100.0
9	2.6	0.0	70.0	1.3	0.0	2.9	23.3	100.0
10	0.0	0.0	3.0	55.3	0.0	0.0	41.7	100.0

Source: Question 43 of NEMS Household Survey, Appendix D

## Ten Pin Bowling

- 8.29 17.3% of Study Area residents identified that they play ten pin bowling. For those that do, the most popular bowling facility is the Tenpin Doncaster, The Leisure Park, in Doncaster (43.3%), followed by the Hollywood Bowl at Sheffield Centertainment; attracting 26.3% of residents. The third most popular facility is the Mansfield Superbowl (19.4%).
- 8.30 There are no ten pin bowling facilities within the District.
- 8.31 Figure 8.6 illustrates the spread of market share for ten pin bowling facilities in the area.

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

Zone	Chesterfield Bowl, Storforth Lane, Chesterfield (%)	Hollywood Bowl, Valley Centertainment, Sheffield Leisure Park (%)	Mansfield Superbowl, Stockwell Gate, Mansfield (%)	Rotherham Superbowl, Wortley Road, Rotherham (%)	Tenpin Doncaster, The Leisure Park, Doncaster (%)	Elsewhere outside District (%)	Total (%)
<b>Study Area Average</b>	<b>4.8</b>	<b>26.3</b>	<b>19.4</b>	<b>4.5</b>	<b>43.3</b>	<b>1.8</b>	<b>100.00</b>
1	0.0	36.2	0.0	0.0	63.8	0.0	100.0
2	0.0	2.0	0.0	0.0	98.0	0.0	100.0
3	6.3	50.6	19.0	0.0	24.0	0.0	100.0
4	0.0	51.0	0.0	49.0	0.0	0.0	100.0
5	2.6	40.3	0.0	0.0	57.1	0.0	100.0
6	0.0	0.0	73.5	0.0	0.0	26.5	100.0
7	0.0	41.4	0.0	0.0	58.6	0.0	100.0
8	21.8	0.0	74.3	3.9	0.0	0.0	100.0
9	0.0	100.0	0.0	0.0	0.0	0.0	100.0
10	0.0	0.0	0.0	0.0	100.0	0.0	100.0

Source: Question 45 of NEMS Household Survey, Appendix D

## Theatres, Galleries and Museums

8.32 There are three destinations located within the District which according to the NEMS Household Survey attract theatre, gallery and museum trips. These are:

- The Retford Majestic Theatre, Coronation Street, Retford – attracting 6.7% of trips
- Acorn Community Theatre, Queen Street, Worksop – attracting 1.9% of trips
- Bassetlaw Museum, Amcott House, Grove St, Retford – attracting 1.6% of trips

8.33 Of the 90.9% of trips which are carried out outside the District, major trip attractors include destinations in central London (17.9% of trips), The Lyceum in Sheffield (11.7%) and Theatre Royale in Nottingham (7.4%).

8.34 These findings are illustrated at Figure 8.7.

**Figure 8.7 | Study Area Market Share for ‘Theatres, Galleries and Museums’ by Zone (%)**

Zone	Acorn Community Theatre, Worksop (%)	The Retford Majestic Theatre, Retford (%)	Bassetlaw Museum, Retford (%)	Central London (%)	Crucible Theatre, Sheffield (%)	Doncaster Museum and Art Gallery, Doncaster (%)	The Lyceum, Sheffield (%)	Theatre Royal, Nottingham (%)	Elsewhere outside Study Area (%)	Total (%)
<b>Study Area Average</b>	<b>1.9</b>	<b>6.7</b>	<b>1.6</b>	<b>17.9</b>	<b>3.6</b>	<b>6.1</b>	<b>11.7</b>	<b>7.4</b>	<b>43.1</b>	<b>100.0</b>
1	8.7	2.3	2.3	8.6	2.9	0.0	17.5	2.9	54.8	100.0
2	0.0	5.9	0.0	9.9	8.2	38.5	9.5	0.0	28.1	100.0
3	3.0	0.0	0.0	11.9	4.4	0.0	33.2	1.9	45.8	100.0
4	0.0	4.7	0.0	19.6	23.5	0.0	36.5	0.0	15.8	100.0
5	0.0	18.4	2.9	28.5	0.0	6.5	1.3	11.8	30.6	100.0
6	0.0	10.6	0.0	16.6	0.0	0.0	0.0	35.1	37.7	100.0
7	0.0	20.1	13.2	6.5	2.2	8.3	5.5	2.2	42.1	100.0
8	0.0	0.0	0.0	28.6	0.0	0.0	2.5	13.0	55.9	100.0
9	0.0	0.0	0.0	18.5	2.0	0.0	15.0	0.0	64.4	100.0
10	0.0	0.0	0.0	12.3	2.0	19.4	9.8	4.0	52.5	100.0

Source: Question 49 of NEMS Household Survey, Appendix D

## Bingo

- 8.35 While only a small percentage of the Study Area participate in bingo (5.7%) those that do often frequent facilities available locally.
- 8.36 Question 47 of the NEMS Household Survey queried respondents on which centre/facility they last visited to play bingo. We have assessed the responses and display our findings in Figure 8.8.
- 8.37 As would be expected, it is those facilities which are close to people's home which they frequent. For example, 66.7% of respondents from Zone 1 (the Zone in which Worksop is located) frequent Worksop Town Centre to play bingo. Similarly, 54.5% of Zone 5 respondents (the Zone where Retford is located) frequent bingo facilities in Retford. What is more, 51.1% of Zone 2 residents are most likely to go to facilities to Harworth (which is in Zone 2) to play bingo.

**Figure 8.8 | Study Area Market Share for 'Bingo' by Zone (%)**

Zone	Palais Bingo Worksop or Worksop (%)	Retford (%)	Harwoth-Bircotes (%)	Hodthorpe (%)	Gala Bingo, Rotherham (%)	Gala Bingo, Doncaster (%)	Elsewhere in Study Area (%)	Elsewhere outside Study Area (%)	Total (%)
<b>Study Area Average</b>	<b>11.3</b>	<b>4.7</b>	<b>3.8</b>	<b>2.1</b>	<b>16.2</b>	<b>17.6</b>	<b>20.7</b>	<b>23.6</b>	<b>100.0</b>
1	66.7	0.0	0.0	0.0	0.0	0.0	0.0	33.3	100.0
2	0.0	0.0	51.1	0.0	9.4	9.4	7.5	22.6	100.0
3	0.0	0.0	0.0	44.2	0.0	0.0	44.2	11.7	100.0
4	0.0	0.0	0.0	0.0	0.0	0.0	75.1	24.9	100.0
5	0.0	54.5	0.0	0.0	0.0	22.8	0.0	22.8	100.0
6	0.0	0.0	0.0	0.0	0.0	0.0	45.7	54.3	100.0
7	0.0	0.0	0.0	0.0	0.0	29.5	23.5	47.1	100.0
8	0.0	0.0	0.0	0.0	0.0	0.0	61.6	38.4	100.0
9	0.0	0.0	0.0	0.0	89.5	0.0	5.3	5.3	100.0
10	0.0	0.0	0.0	0.0	0.0	76.1	11.9	11.9	100.0

Source: Question 47 of NEMS Household Survey, Appendix D

## Running, Cycling & Outdoor Activities

- 8.38 24.0% of Study Area residents participate in outdoor exercise activities. The vast majority of these trips are carried out close to home. This is evident when assessing the NEMS Household Survey results to question 51 summarised at Figure 8.9.
- 8.39 Within the District the two most popular destinations are Retford (21.7% of Study area residents) and Worksop (19.7% of Study area residents).

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

Zone	Zone 1 - Worksop Town Centre (%)	Zone 2 - Tickhill Town Centre (%)	Zone 4- Dinnington Town Centre (%)	Zone 5 - Retford Town Centre (%)	Elsewhere in Study Area (%)	Doncaster Town Centre (%)	Elsewhere outside Study Area (%)	Total (%)
<b>Study Area Average</b>	<b>19.7</b>	<b>0.9</b>	<b>1.1</b>	<b>21.7</b>	<b>5.7</b>	<b>14.7</b>	<b>36.3</b>	<b>100.0</b>
1	85.9	0.0	0.0	0.0	0.0	0.0	14.1	100.0
2	0.0	9.2	0.0	8.1	0.0	47.9	34.7	100.0
3	17.0	0.0	0.0	0.0	2.1	0.0	80.9	100.0
4	30.4	0.0	22.4	0.0	0.0	0.0	47.2	100.0
5	4.7	0.0	0.0	79.4	0.0	6.1	9.8	100.0
6	0.0	0.0	0.0	4.7	70.0	0.0	25.3	100.0
7	0.0	0.0	0.0	2.4	16.0	55.4	26.1	100.0
8	0.0	0.0	0.0	0.0	0.0	0.0	100.0	100.0
9	0.0	0.0	0.0	0.0	23.0	14.4	62.6	100.0
10	0.0	0.0	0.0	0.0	0.0	50.0	50.0	100.0

Source: Question 51 of NEMS Household Survey, Appendix D

## Additional Leisure Facilities

- 8.40 Question 54 of the NEMS survey found that the significant majority of respondents in Bassetlaw (58.9%) did not identify any leisure facilities that they wished to see more of. Of the 58.9%, 48.0% of respondents stated that there were not any they wished to identify, and the remaining 10.9% stated that they 'did not know' what additional facilities could be provided.
- 8.41 Of the leisure facilities identified, a bowling alley (8.8%), more children's facilities (8.0%) and more sports facilities (8.0%) were the most popular response provided by Bassetlaw residents. Following this, 6.4% identified a cinema, 6.1% a swimming pool and 3.8% outdoor play areas.
- 8.42 When looking at levels of satisfaction with the provision on a zone-by-zone basis there appears to be a few recognisable geographic gaps. For example, it is notable that 16.5% of Worksop residents (Zone 1) identified a bowling alley, whereas only 8.4% of Retford residents (Zone 5) responded with



the same request. When looking at the ten pin facilities used by Zone 1 and Zone 5 residents it appears Zone 1 (Worksop) residents may be satisfied with the facilities available close by in Doncaster - Tenpin Doncaster, The Leisure Park; as 57.1% of Zone 5 respondents to question 45 which asked people to identify which ten pin bowling facility they last visited identified this facility.

- 8.43 Additionally, 15.2% of Retford residents (Zone 5) identified a new cinema, and only 0.8% of Worksop residents (Zone 1) provided the same response. An outcome which suggests Worksop residents are satisfied with the current cinema provision made available at the Savoy.
- 8.44 What is more, 5.5% of Worksop (Zone 1) respondents requested more restaurants, while only 0.6% of Retford (Zone 5) identified restaurants. This would suggest that those residents of Zone 5 are generally satisfied with the level of provision in Retford.
- 8.45 The NEMS Household Survey Results to question 45 are summarised in Figure 8.10.

**Figure 8.10 | Leisure Facilities Which Bassetlaw Respondents Wish to See More of (%)**

Activity	Zone 1 - Worksop	Zone 2 - Harworth /Bircotes	Zone 3 - Whitwell /Creswell	Zone 5 - Retford	Zone 6 - Markham /Ollerton	Zone 7 – Bawtry /Gringley	District Average
<b>Bowling Alley</b>	16.5	0.0	9.3	8.4	0.0	0.0	<b>8.8</b>
<b>More Children's Facilities</b>	8.3	11.0	6.6	2.5	21.0	1.4	<b>8.0</b>
<b>More Sports Facilities</b>	6.7	0.0	1.8	3.9	9.3	11.0	<b>8.0</b>
<b>Cinema</b>	0.8	1.9	0.9	15.2	15.2	3.5	<b>6.4</b>
<b>Swimming Pool</b>	2.0	4.7	8.5	9.4	5.3	13.7	<b>6.1</b>
<b>Outdoor Play Areas</b>	3.1	0.0	2.3	1.8	16.2	0.6	<b>3.8</b>
<b>Restaurants</b>	5.5	1.9	2.0	0.6	2.5	0.7	<b>2.8</b>
<b>None</b>	39.8	53.1	48.4	50.1	39.2	56.8	<b>45.8</b>
<b>Do Not Know</b>	10.9	9.3	15.4	11.7	13.4	6.3	<b>11.3</b>

Source: Question 54 of NEMS Household Survey, Appendix D

## Capacity for Additional Leisure Facilities

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

which we can base our assessment.

- 8.47 As explained earlier the findings of the NEMS Household Survey permit an assessment of the market share secured by facilities within the District and the wider Study Area for a variety of leisure sectors. In order to supplement this qualitative assessment of the attractiveness of the Study Area's facilities, Nexus have also drawn on national data.
- 8.48 As such, we have completed a 'benchmarking' exercise by referencing the estimated increases in the Study Area population. The results of the 'benchmarking' exercise have been used to inform our conclusions with regards to the prospective future need for additional commercial leisure facilities in Bassetlaw.

### Estimated Study Area Population

- 8.49 Within Section 5 of this Retail and Leisure Study we set out our assessment of how the Study Area's population will grow at regular year intervals from 2016 to 2031 (i.e. at 2016, 2021, 2026, 2032 and 2031). We have calculated the population within each postal code sector using Experian Micromarketer G3 data and projected forwards using Nottinghamshire County Council population forecasts.

**Figure 8.11 | Study Area Population by Survey Zone (2016 to 2031)**

Zone	Population			
	2016	2021	2026	2031
1	54,126	55,317	56,422	57,317
2	15,017	15,231	15,469	15,629
3	15,380	15,731	16,053	16,305
4	21,635	22,089	22,501	22,790
5	37,043	37,746	38,366	38,833
6	19,065	19,463	19,946	20,287
7	12,583	12,842	13,036	13,197
8	37,491	38,320	39,094	39,752
9	19,560	19,934	20,197	20,385
10	20,678	20,968	21,223	21,473
<b>Total Study Area Population</b>	<b>252,578</b>	<b>257,641</b>	<b>262,307</b>	<b>265,968</b>
<b>Total Bassetlaw District Population (Zones 1-3 and 5-7)</b>	<b>153,214</b>	<b>156,330</b>	<b>159,292</b>	<b>161,568</b>

Source: Table 1, Appendix E

- 8.50 The outcomes of our estimation exercise suggest that by 2016 the Zones within the Study Area will

have a resident population of approximately 252,578 people and by 2031 this population will grow to 265,340. The estimated 2031 population represents an increase of 12,762 additional residents.

8.51 As part of our assessment we have considered that Bassetlaw broadly comprises Zones 1 to 3, and 5 to 7. Zone 4, 8, 9 and 10 mainly sit outside the District boundary. Therefore, we have also tallied the estimations for the population of the Bassetlaw District, which is currently estimated at 153,214, increasing to 161,568 in 2031.

8.52 Figure 8.11 sets out in full our population forecast for the reporting periods to 2031.

### Health and Fitness

8.53 A February 2015 report from Savills<sup>99</sup> identified that the level of health and fitness clubs in the UK is higher than it has ever been before, with more clubs and more members. In terms of membership rates across the whole of the UK, Savills estimate that 13.2% of the UK's population are registered members of private health and fitness clubs. In 2014 the membership rate was 12.6%. As at February 2015 Savills estimates that there were 6,112 fitness facilities in the UK.

8.54 Similarly, the Leisure Database Company's most up to date research (of June 2015)<sup>100</sup> suggests that there were in the region of 6,312 health and fitness clubs operating across the UK at 2015. We have taken an average of these two estimations, which gives a figure of 6,212.

8.55 At the time these estimations were produced the UK population was projected at 64.6 million<sup>101</sup>, and therefore, we calculate there to be on average one club for every 10,399 persons. Our calculations are summarised in Figure 8.12.

8.56 When estimating the potential requirement for additional health and fitness facilities in Bassetlaw, we have considered only the capacity within the District itself, rather than the wider Study Area (broadly Zones 4, 8, 9 and 10). The reason for this is because the average person is likely to seek out and attend such facilities that are close to home (i.e. typical customer behaviour). Moreover, such trips are likely to be completed by a single person on a regular basis - i.e. several times per week. The type and frequency of trips varies greatly to cinema or ten pin bowling activities. Visits to these kinds of leisure facilities are more often than not completed on a much less frequent basis and undertaken by groups of people and/or families. In consequence to the purpose of visit and frequency participants in cinema or ten pin bowling activities are more willing to travel further distances.

8.57 Accordingly, the six zones which broadly comprise the Bassetlaw District have an identified

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

<sup>100</sup> State of the UK. Fitness Industry 2015, Leisure Database Company, June 2015

<sup>101</sup> As identified by the Office for National Statistics' 2014-Based National Population Projections 25 June 2015 data release

estimated population of 153,214 at 2016, increasing to 161,568 at 2031. Based on the assumed benchmark identified above, we calculate that the District could support around 15 health and fitness clubs at 2016, increasing to around 16 clubs at 2031.

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

Year	Total Bassetlaw District Population (Zones 1-3 and 5-7)	Typical Population Required to	Potential No. of Clubs Supported
2016	153,214	10,399	15
2021	156,330	10,399	15
2026	159,292	10,399	15
2031	161,568	10,399	16

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

- 8.58 Taking account of the fact the assessment considers more mainstream facilities with larger memberships; it would appear that the current provision of 6<sup>102</sup> within the District is insufficient for meeting likely demand (estimated at 15 clubs).
- 8.59 Notwithstanding this, our appraisal has made it evident that there is only a single national multiple private gyms in the District (being the Bannatyne Health Club, Worksop). It should therefore be recognised that there may be an underlying qualitative need for additional facilities of this nature and scale. Of note, recent trends, as identified by both Mintel and Savills, in health and fitness indicate a rise in the popularity of budget private gyms<sup>103104</sup>.
- 8.60 We have identified there to be capacity for additional facilities in the period to 2031. This conclusion is based upon current rates of participation in the Study Area (16.8% of respondents to Question 36 of the survey) as well as the request made by 8.0% of respondents for more sports facilities. In light of this capacity we foresee that market forces will be capable of bringing forward these new uses in areas of demand through the development management process (review and approval of planning applications).
- 8.61 To summarise, there is no specific need for identified site allocations to provide for these facilities.

## Cinema

- 8.62 In the year 2015, data kept by the British Film Institute<sup>105</sup> specified a total of approximately 171.9 million cinema admissions in the UK in 2015 – the third highest annual admission count for the past decade<sup>106</sup>. In order to estimate the average number of admissions per year we have taken the

<sup>102</sup> The figure of 6 is based on those that were identified as part of the NEMS Household Survey

<sup>103</sup> 'Health and Fitness Clubs – UK.', Mintel, July 2015

<sup>104</sup> 'The UK.'s health and fitness sector', Savills online, 27 February 2016

<sup>105</sup> 'Statistical Yearbook', British Film Institute, 2014

<sup>106</sup> 'The Box Office 2015 - BFI Research and Statistics', British Film Institute, April 2016

approximate UK population in 2015 of 64.6 million<sup>107</sup>, and generated a figure which suggests there were 2.7 admissions per person in 2015.

- 8.63 The UK Cinema Association specifies that in 2015 there were a total of 4,115 cinema screens throughout the UK<sup>108</sup>.
- 8.64 Taking into account the estimations provided by both the British Film Institute and the UK Cinema Association suggests that on average each cinema screen demands 41,774 admissions per year.
- 8.65 Through the application of our benchmarking exercise we have produced an estimate that from the District's 2016 population (153,214) there would be on average 413,678 cinema admissions in the year 2016, and that by 2031 this would increase; with the population increase of 22,556, to around 436,234. Following this, we have taken the assumed number of visits per screen and produced a finding that around 10 screens could be supported over the period to 2031. Figure 8.13 below conveys our findings.
- 8.66 This exercise suggests that the existing provision of 6 full-time screens (at the Savoy in Worksop) within the District does not meet demand coming from the District population. However, given the popularity of the Savoy coupled with the presence of nearby cinemas, in Doncaster, Sheffield and Chesterfield, that are all relatively accessible for Bassetlaw residents, the existing provision is sufficient to meet demand. Notably, even though 15.3% of Retford (Zone 5) respondents requested a new cinema (compared to only 0.8% of Worksop (Zone 1) respondents), those people who live in Retford can easily make use of the nearby cinemas in the neighbouring centres.
- 8.67 Against this background, we would not recommend the allocation of land for a cinema on this basis.

**Figure 8.13 | Cinema Screen Requirement in the District**

Year	Bassetlaw Population (Zones 1-3 and 5-7)	Number of Cinema Visits Per Person	Attendance	Number of Admissions Required to Support Screen	Screens Supported by the District
<b>2016</b>	153,214	2.7	413,678	41,774	10
<b>2021</b>	156,330	2.7	422,091	41,774	10
<b>2026</b>	159,292	2.7	430,088	41,774	10
<b>2031</b>	161,568	2.7	436,234	41,774	10

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

<sup>107</sup> As identified by the Office for National Statistics' 2014-Based National Population Projections 25 June 2015 data release

<sup>108</sup> 'UK. cinema industry infrastructure', UK. Cinema Association, Retrieved online in April 2016

## Ten Pin Bowling

- 8.68 Mintel are a global and award-winning provider of Market Research, who provides information on trends and insight in the leisure sector. In terms of data on ten pin bowling trends in the UK they are one of the only providers. As such we have looked to Mintel research to provide a general indication of the average number of ten pin bowling lanes per resident in the UK.
- 8.69 In 2011 Mintel identified a total of 5,773 bowling lanes throughout the UK<sup>109</sup>. Taking into account the UK population at the time this data was produced (63.3 million) and assessing this against the 2011 provision of ten pin bowling lanes; results in a figure of one bowling lane per every 10,965 persons. The analysis completed by Nexus is included in Figure 8.14.
- 8.70 Figure 8.14 below indicates that, based on the assumed benchmark, we calculate that around 15 lanes could be supported in the District in the period up to 2031.
- 8.71 What is more, the results of the NEMS Household Survey suggest that one of the most sought after leisure facilities in the District are ten pin bowling allies. As illustrated at Figure 8.10, 8.8% of Bassetlaw residents who responded to the survey identified bowling allies as their most desired new facility. Ten pin bowling alleys were the most requested leisure facility overall. Additionally, when looking at the request for ten pin bowling allies on a Zone-by-Zone basis it appears that those residents of Worksop (Zone 1) are less satisfied with the current provision, as 16.5% requested a ten pin bowling facilities, whereas only 8.4% of Retford (Zone 5) residents had the same request.
- 8.72 Notwithstanding this, it is generally accepted that ten pin bowling patronage in the main is reducing. Therefore, it seems likely that the existing level of provision provided in the wider local area is enough to cater for demands to the end of the Plan period.

**Figure 8.14 | Ten Pin Bowling Requirement in the District**

Year	Bassetlaw Population (Zones 1-3 and 5-7)	Typical Population Required	Potential Number of Lanes
2016	153,214	10,965	14
2021	156,330	10,965	14
2026	159,292	10,965	15
2031	161,568	10,965	15

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

<sup>109</sup> 'Tenpin Bowling – UK.', Mintel, November 2011

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## Restaurants

- 8.73 While we are not able to provide concise findings on predicted demand for restaurants over the plan period – i.e. we do not have credible ‘benchmark’, our Study has produced some interesting findings.
- 8.74 The restaurant facilities in Worksop attract a much lower percentage of local residents’ patronage, when assessed against those in Retford. Worksop attracts 47.3% of its own residents (Zone 1), whilst 64.0% of Zone 5 residents (the Zone that Retford is in) visit Retford to go to the restaurants.
- 8.75 Furthermore, the attraction of leisure facilities (such as restaurants) in Worksop is lower than for Retford, as only 3.8% (of Zone 1 residents – the Zone in which Worksop is situated) identify Worksop’s leisure facilities as their main reason for visiting the centre. This is comparatively lower than the figures provided for Retford; as 12.4% of (of Zone 5 residents – the Zone in which Retford is situated) identified leisure facilities as the main draw.
- 8.76 Additionally, the desire to see more and better quality restaurants in Worksop was identified during stakeholder engagement, a finding which is supported by the 2009 Retail Study.
- 8.77 As such, while land allocations are not appropriate, it may be possible to encourage new restaurant operators to the centres through the development management process.

## Conclusion

- 8.78 As part of this Retail and Leisure Study, Nexus has measured Bassetlaw’s existing leisure provision against ‘benchmarks’ in order to ascertain whether there are any gaps in the market where demand is not being met by existing provision.
- 8.79 In terms of existing market shares, the District provides well for its population in terms of cinemas (the popular Savoy), bars/pubs, bingo, and running, cycling and outdoor activities. For the majority of other leisure activities, the population base look to surrounding centres, such as Mansfield, Doncaster, Sheffield and Chesterfield.
- 8.80 Moreover, there is no identified latent capacity for any of the activities that we have been readily able to forecast into the future; health and fitness clubs, cinema screens or ten-pin bowling lanes.
- 8.81 Turning to consider the requests for new facilities in the District (Question 54 of the NEMS Household) there were no substantial numbers in any one category, with 45.8% of respondents who are Bassetlaw residents unable to identify any particular need. In our experience, this is a high proportion, and suggests that the District provides well for its residents. Of note, more ten pin bowling lanes (8.8%), as well as children’s facilities and additional sports facilities (both requested by

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8.0% of respondents) were the most popular requests.

- 8.82 In light of our findings, we do not think that it is necessary for the Council to plan for any significant new major leisure facilities over the Plan period (to 2031) by way of specific site allocations. Nonetheless, the Council are likely to welcome proposals to expand the range and quality of leisure provision in the District (in particular new restaurants), subject to adherence and support of the policies of the emerging Local Plan.



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## 9.0 Recommendations and Future Retail Strategy

### Introduction & Policy Basis

- 9.1 This Retail and Leisure Study has been commissioned in order to form part of the evidence base to support the emerging Bassetlaw Plan (up to 2034) in accordance with national policy requirements.
- 9.2 Specifically, Paragraph 23 of the NPPF indicates that local planning authorities should:
- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
  - Define a network and hierarchy of centres that is resilient to anticipated future economic changes;
  - Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
  - Promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
  - Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
  - Allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;
  - Allocate appropriate edge-of-centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge-of-centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre; and
  - Set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres.
- 9.3 In addition, Paragraph 26 of the NPPF indicates that local planning authorities may set their own local threshold for retail, leisure and office developments outside of town centres for which an impact

assessment would be required.

- 9.4 The Council has therefore appointed Nexus to undertake a health check of the vitality and viability of Bassetlaw's centres, and to provide a robust quantitative base for their retail and leisure capacity projections to 2030. In conjunction with this Study, we have conducted and analysed a household telephone survey that enables us to understand existing market share patterns, and the performance of existing centres and stores.

## Qualitative Retail Capacity Assessment

### Trends

- 9.5 Prior to conducting our quantitative assessment, we firstly analysed in Section 2 the retail and leisure trends, which have prevailed in towns and centres across the UK over recent years.

### Vitality and Viability

- 9.6 We then set out our findings in Section 4 of Bassetlaw's key centres (being Worksop, Retford, Harworth & Bircotes and Tuxford) through a health check assessment of vitality and viability, as well as how the larger centres of Worksop and Retford have performed since the previous Study in 2009.
- 9.7 **Worksop** is the largest centre in Bassetlaw, both in terms of number of units (374) and available floorspace (70,940 sq m), with an average unit size of 190 sq m. The centre is well provided for in terms of the number of convenience (8.8%) and comparison units (35.6%). The proportion of these uses has not changed significantly since 2009 (8.7% and 37.1%, respectively) and are higher than the national averages (8.6% and 32.0%, respectively). However, in floorspace terms, the centre has almost half the national average (15.2%) of convenience goods floorspace (8.2%), and a significantly greater proportion of comparison retail floorspace (47.9%) than the national average (35.9%).
- 9.8 Notably, the centre is surrounded by three out-of-centre foodstores that serve residents of Worksop: Tesco at Gateford Road to the north west (6,432 sq m), Morrisons at Kilton Road (5,500 sq m), and Sainsbury's at High Ground Road to the west (circa 3,920 sq m).
- 9.9 The number of retail service facilities in Worksop is slightly above national averages, whilst the proportion of leisure and financial and business services in the centre are slightly below the national averages. Notably, there is a significantly lower provision of restaurants, pubs and other leisure facilities in Worksop than in Retford, and such facilities serve less of a draw to Worksop than the retail offer, despite the attraction of the Savoy Cinema development to the south of the centre.
- 9.10 Worksop's vacancy rate has increased above the national average since the previous 2009 Study in

terms of units but, notably, remains below the national average in terms of vacant floorspace. Our site visits identified a lower footfall and a notable concentration of vacant units towards the south of the centre, where fewer facilities attracted residents up the sloping Bridge Street. This is in contrast to the higher levels of footfall surrounding the Bridge Street access to The Priory Centre, and along Newcastle Street from the Asda and bus terminal to the east of the centre.

- 9.11 Worksop is also ranked above Retford by Javelin Venuescore, since it has a greater proportion of national multiples than Retford and as such, is classified as a sub-regional centre. Whilst Worksop has risen in the rankings since 2011, similarly ranked centres in the region (Grantham and Boston) have actually fallen over the same period. This would suggest that Worksop is performing well in attracting investment from national retailers to the town centre, against the trend of similarly sized regional centres.
- 9.12 The NEMS household survey revealed that residents visited Worksop less regularly than Retford, which is reflective of the fact Worksop – as a larger urban centre than Retford – attracts visitors who are wishing to visit a retail destination that provides more of a retail experience rather than fulfilling their daily needs. Further engagement with stakeholder identified anti-social behaviour as a concern (particularly during evening hours), as well as a lack of leisure service facilities (restaurants, bars, pubs etc.) in the centre to better support the evening economy. Whilst the recent Savoy Cinema development was recognised as a success, there are further aspirations for family oriented restaurants to complement the offer.
- 9.13 **Retford** is the second largest centre in the District, with 280 units, making up 62,410 sq m of retail floorspace (equating to an average unit size of 224 sq m). The number of convenience (8.6%) and comparison goods (36.2%) units in the centre are broadly consistent with national averages (8.6% and 32.0%, respectively). The proportion of convenience units has increased since the previous Study (7.4%), whilst the number of comparison goods units has fallen quite significantly since 2009 (43.4%). In terms of actual retail floorspace, the proportion of convenience floorspace (22.2%) is greater than the national average (15.2%), whilst the proportion of comparison floorspace (36.6%) is consistent with the national average (35.9%).
- 9.14 Retford is anchored by three foodstores (in edge-of-centre locations), with a large Morrisons at Idle Valley Road to the north (6,800 sq m), Asda at Wharf Road (3,716 sq m) and Aldi at Carolgate (1,567 sq m) to the south.
- 9.15 In terms of town centre services, Retford is broadly in line with national averages for the proportion of retail services and has a higher proportion of financial and business services. Whilst the centre features a lower proportion of leisure services than the national average, the provision of restaurants, cafes, public houses and tea rooms is a larger draw to residents visiting Retford (10.3% of residents

identified the choice of leisure services as the primary reason for visiting the centre) than Worksop (just 4.4% identified leisure as the reason for visiting).

- 9.16 Retford is performing well, with a vacancy rate in both units and floorspace well below the national averages, which has remained relatively consistent since 2009. Whilst there were not many individual vacant units, there were clusters of vacancies to the east of the centre along Grove Street. This corresponded with our observations of a lower footfall along these streets and a higher level of pedestrian traffic along Carolgate to the Market Square.
- 9.17 With a lower number of national multiple retailers, Retford is ranked below Worksop by Javelin Venuescore and is classified as a Major District centre. Whilst Retford has fallen in the rankings since 2011, it has fallen at a lower rate than the similarly ranked centres of Hinckley and Beeston, which would suggest that the centre remains a relatively stable destination for national multiple retailers despite the difficulties facing town centres of this scale in attracting investment.
- 9.18 As could be expected, a higher proportion of residents of the Study Area identified Worksop as the centre that they visited most often, followed by Retford, Harworth & Bircotes and Tuxford. However, amongst residents in zones the immediately adjoining the centres, Retford was visited more regularly than Worksop, which reflects its position fulfilling resident's day-to-day retail needs and as a café/tearoom destination, whilst Worksop serves as more of a retail destination.
- 9.19 Local stakeholders consider the centre healthy, highlighting the quality of the street environment, retail performance and the markets in Retford. However, it was noted that car parking in the centre could be managed more conveniently and that additional leisure services such as restaurants and bars would benefit the centre's evening economy.
- 9.20 **Harworth & Bircotes** is currently undergoing significant regeneration, with plans to develop up to 1,750 new dwellings around the centre over the plan period, in addition to over 200,000 sq m of office and commercial floorspace in the recently approved Harworth South Business Park. This development will complement the existing linear high street, as well as the recent Asda (2,044 sq m) and Aldi (1,537 sq m) foodstore developments on Scrooby Road in 2012 and 2015, which substantially altered the make-up and retail offer of the centre. At the time of our surveys, Harworth & Bircotes comprised of 13.6% convenience units, above the national average of 8.6%. Comparison units, on the other hand, only made up 18.6% of the centre, significantly below the national average of 32.0%.
- 9.21 Retail service facilities are the most dominant units in Harworth & Bircotes, with over double the national average. The proportion of leisure services (including take-away units) is broadly in line with the national average, and the number of financial and business services is over half the national

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average. However, this is to be expected in a growing centre and we would anticipate an increase in the number of financial and business services as the resident local population grows over the plan period.

- 9.22 Harworth & Bircotes' vacancy rate is significantly lower than the national average, having slightly decreased since the survey undertaken for the Harworth & Bircotes Neighbourhood Plan, published in 2014.
- 9.23 The majority of residents that visit Harworth & Bircotes more frequently than they visit any other centre, visit between once and twice a week (over 50%), with a smaller share visiting daily (over 20%). However, this is a greater proportion of daily visits than either Worksop or Retford, which would suggest that the centre provides for the day-to-day needs of the local residents (through the large Asda and Aldi supermarkets), while residents are travelling further afield to centres such as Worksop, Doncaster and Sheffield Meadowhall for additional goods and services that are not currently offered in Harworth & Bircotes.
- 9.24 Footfall was seen to be higher towards the Asda on Scrooby Road, with a high proportion of pedestrian flows observed along the cafes, take-aways and service facilities to the east of the centre. There would appear to be scope to better link the disparate runs of units across the linear centre. Stakeholders are welcoming of the benefits of new development and have highlighted aspirations for a more unified approach to the built environment (and in particular the design and maintenance of shopfronts) in order to improve the quality of the centre.
- 9.25 However, we would note that the health check provides a snapshot of the centre as it currently operates and – given the proposed influx of local residents – the shopping patterns, demands of the local residents and the composition of the centre are expected to evolve over time.
- 9.26 **Tuxford** currently serves as a local centre, designated as a Conservation Area with a concentration of heritage assets giving the centre a unique character. Tuxford is the smallest of Bassetlaw's four key centres, with just 29 units providing day-to-day goods and services to the local resident population, anchored by the Co-op foodstore on Newcastle Street.
- 9.27 The centre is well provided for in terms of convenience goods retailers (20.7%), which is significantly higher than the national average (8.6%), whilst the number of comparison goods retailers (24.1%) is lower than the national average (32.0%).
- 9.28 Tuxford features the same proportion of retail services as leisure services, and just a single financial and business services unit, which is significantly below the national average. There are no banks or building societies in the centre and, as such, residents are required to travel further afield to larger centres for some day-to-day services. Nonetheless, the composition of Tuxford is varied and

relatively evenly spread for a centre of its size, with residents identifying the choice and range of shops as the primary reason for visiting the centre.

- 9.29 A relatively small proportion of just two vacant units were identified during our survey of the centre, significantly lower than the national average and suggesting a healthy centre that is performing well. Local stakeholders recognised recent Council efforts to support and enhance the Conservation Area, noting that the character of the streetscape and shop frontages contribute to the draw of the centre. However, the availability and cost of parking in the centre were identified as areas for improvement and investment.

### Market Share

- 9.30 Having established the Study Area and considered the underpinning matters of population, expenditure and special forms of trading in Section 5, we then moved on in Section 6 to analyse the market shares arising out of the Household Telephone Survey of 1,000 households in the District.

### **Convenience Goods Market Shares - Study Area**

Destination	Convenience Spending (%)			Total Market Share (%) (all retail)
	Main Food	Top-up	Total	
<b>Worksop</b>	25.4	24.3	<b>25.2</b>	21.6
<b>Retford</b>	18.1	12.1	<b>16.9</b>	13.2
<b>Harworth &amp; Bircotes</b>	6.4	6.2	<b>6.4</b>	3.1
<b>Tuxford</b>	0.0	2.7	<b>0.5</b>	0.2
<b>Others in Bassetlaw</b>	0.0	0.5	<b>0.1</b>	0.1
<b>Bassetlaw Sub-Total</b>	<b>49.9</b>	<b>45.7</b>	<b>49.1</b>	<b>38.2</b>
<b>Others in Study Area</b>	17.3	23.3	<b>18.5</b>	11.0
<b>Outside the Study Area</b>	32.8	31.0	<b>32.5</b>	50.8
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

Source: Appendix E

- 9.31 Worksop and Retford have maintained a relatively constant share of convenience retail trips since 2008, with the majority of convenience spending directed towards the key anchor stores of Morrisons, Aldi and Tesco in Worksop and Morrisons and Aldi in Retford.
- 9.32 As we identified in Section 7, convenience retailers in Worksop were seen to be trading below national company averages (with the notable exceptions of the Aldi at Gateford Road and Morrisons at Kilton Road), suggesting a relative oversupply of convenience retailers in the centre. Nonetheless, Worksop continues to serve as the most popular destination for convenience spending in the District. On the other hand, convenience retailers in Retford were observed to be trading above company averages, though this was heavily influenced by the strong performance of the Aldi at Carolgate.
- 9.33 Convenience goods spending in Harworth & Bircotes has effectively tripled since 2008, due to development of the Asda and Aldi (both of which were seen to be overtrading above company

averages), whilst Tuxford did not account for a significant proportion of convenience spending and was seen to serve predominantly as a destination for local day-to-day top-up shopping.

### Comparison Goods Market Shares - Study Area

Destination	Comparison Spending (%)									Total Market Share (%) (all retail)
	Clothing	Books etc.	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total	
<b>Worksop</b>	10.9	15.7	15.5	15.7	18.0	30.6	34.4	26.8	<b>18.9</b>	21.6
<b>Retford</b>	6.8	18.1	11.4	11.9	17.1	7.6	6.6	13.2	<b>10.3</b>	13.2
<b>Harworth &amp; Bircotes</b>	0.5	2.7	0.2	0.2	3.4	0.2	0.3	0.1	<b>0.5</b>	3.1
<b>Tuxford</b>	0.0	0.1	0.0	0.0	0.3	0.0	0.0	0.0	<b>0.0</b>	0.2
<b>Others in Bassetlaw</b>	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	<b>0.0</b>	0.1
<b>Bassetlaw Sub-Total</b>	<b>18.2</b>	<b>36.6</b>	<b>27.2</b>	<b>27.8</b>	<b>38.8</b>	<b>38.4</b>	<b>41.4</b>	<b>40.1</b>	<b>29.7</b>	38.2
<b>Others in Study Area</b>	2.0	6.7	1.8	5.0	20.8	4.7	9.4	10.8	<b>5.2</b>	11.0
<b>Outside the Study Area</b>	79.8	56.7	71.0	67.2	40.4	56.9	49.2	49.1	<b>65.1</b>	50.8
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	100.0

Source: Appendix E

- 9.34 Worksop is seen as the most popular destination for almost all categories of comparison goods, drawing a significantly higher proportion of spending on DIY, electrical and furniture goods than other centres in the District, primarily due to the specialised bulk goods offer of the out-of-centre retail parks.
- 9.35 Retford provides a wide mix of comparison goods to residents across the Study Area, attracting a healthy proportion of trade due in part to a strong presence of national multiples in the centre.
- 9.36 Harworth & Bircotes and Tuxford did not draw a significant proportion of comparison goods spending across the centre, which is to be expected given the relative lack of comparison goods retailers present.

### Leakage Market Shares - Previous Study Area (Zones 1-7)

Destination	2008		2016	
	Convenience Spending	Comparison Spending	Convenience Spending	Comparison Spending
<b>Retained within the Study Area</b>	84.5%	49.9%	81.4%	43.5%
<b>Leakage outside the Study Area</b>	15.5%	50.1%	18.6%	56.5%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

Source: Appendix E

**Leakage Market Shares - Wider Study Area (Zones 1-10)**

Destination	Study Area Leakage by Category (%)												Total Leakage (all retail)
	Convenience Spending			Comparison Spending									
	Main Food	Top-up	Total	Clothing	Books etc.	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total	
<b>Doncaster</b>	10.5	9.7	<b>10.4</b>	24.2	15.5	19.7	21.3	12.5	14.0	19.7	12.9	<b>19.1</b>	<b>15.3</b>
<b>Mansfield</b>	13.3	9.0	<b>12.5</b>	8.9	11.0	8.9	10.1	8.5	13.6	2.6	9.6	<b>9.5</b>	<b>10.8</b>
<b>Rotherham</b>	9.6	11.1	<b>9.9</b>	6.1	4.5	7.4	3.9	11.9	5.9	5.0	10.2	<b>6.6</b>	<b>8.0</b>
<b>Sheffield Meadowhall</b>	0.1	0.0	<b>0.1</b>	24.7	11.3	9.2	17.1	3.9	4.7	0.0	2.1	<b>12.4</b>	<b>7.0</b>
<b>Sheffield</b>	0.6	1.6	<b>0.8</b>	3.5	2.7	4.2	8.4	1.1	7.0	3.1	4.0	<b>4.7</b>	<b>3.0</b>
<b>Others outside Bassetlaw</b>	16.0	22.8	<b>17.3</b>	14.2	18.3	23.4	11.5	23.3	16.3	28.1	21.1	<b>18.1</b>	<b>17.8</b>
<b>Total Leakage from Bassetlaw</b>	<b>50.1</b>	<b>54.3</b>	<b>50.9</b>	<b>81.8</b>	<b>63.4</b>	<b>72.8</b>	<b>72.2</b>	<b>61.2</b>	<b>61.6</b>	<b>58.6</b>	<b>59.9</b>	<b>70.3</b>	<b>61.8</b>

Source: Appendix E

- 9.37 In total, the District attracts 49.1% of convenience spending and 29.7% of comparison goods spending from the wider Study Area (Zones 1-10). Of this, the majority of convenience goods spending leakage was to Mansfield, Doncaster and Rotherham. In terms of comparison goods leakage, Doncaster, Sheffield Meadowhall and Mansfield were identified as the major draws out of the District.
- 9.38 In order to compare the current performance of the District against the previous Retail Study, we have also considered trade from just Zones 1-7 (the previous Study Area, as defined in the 2008 Study), which calculates that leakage of both convenience and comparison goods spending has marginally increased over the past 8 years.
- 9.39 However, leakage of convenience goods trade to Doncaster and Rotherham has fallen since the 2008 Study. It is assumed that leakage of convenience spending has increased to other neighbouring destinations such as Mansfield (which was not specified in the earlier, 2008 Study).
- 9.40 In terms of comparison trade, leakage to both Sheffield Meadowhall and Doncaster has increased since 2008, both of which were seen to attract a significant amount of clothing, footwear and recreation trade in particular.



## Quantitative Retail Capacity Assessment

- 9.41 In Section 7, we built on the work carried out in Sections 5 and 6 to set out our forecast capacity for new retail development over the Plan period. Notably, this work takes full account of the considerable number of extant commitments already in the system. We reviewed the emerging, extant, and permitted applications for new retail developments with Council officers in order to establish a 'likely' scenario, disregarding proposals that the developers have announced will not be going ahead.
- 9.42 The negative performance of a number of foodstores in Worksop more or less cancelled out the positive performance of a number of major foodstores across the rest of the District, which led to a marginal surplus expenditure of £0.8m at 2016, increasing to £9.1m by 2031 as a result of expected levels of growth. This surplus is more than consumed by the forecast turnover of existing convenience goods commitments (£14.9m at 2016). We therefore conclude that there is no capacity for additional convenience goods floorspace over the period to 2031.

### Likely Convenience Goods Floorspace Capacity in Bassetlaw District

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min <sup>1</sup>	Max <sup>2</sup>
2016	0.8	14.9	-14.1	-1,100	-1,400
2021	3.2	14.8	-11.6	-900	-1,200
2026	6.8	14.8	-7.9	-600	-800
2031	9.1	14.8	-5.8	-500	-600

Source: Appendix E

- 9.43 Turning to consider comparison goods, we look at the capacity for both bulky and non-bulky goods retailers, and on the basis of £13.0m of committed bulky goods turnover at 2016, we do not find any capacity for new bulky goods floorspace over the plan period. In terms of non-bulky goods, notwithstanding commitments totalling £16.7m at the current time, there is marginal capacity for new floorspace towards the end of the Plan period. Our assessment shows that there could be capacity for just 200 sq m net.
- 9.44 Our full methodology is set out at Section 7, and in **Appendix E**.

### Likely Bulky Comparison Goods Floorspace Capacity in Bassetlaw District

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)
2016	0.0	13.0	-13.0	-3,700
2021	0.7	14.3	-13.7	-3,500
2026	7.6	15.8	-8.2	-1,900
2031	16.7	17.4	-0.7	-200

Source: Appendix E

### Likely Non-Bulky Comparison Goods Floorspace Capacity in Bassetlaw District

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)
<b>2016</b>	0.0	16.7	-16.7	-3,000
<b>2021</b>	0.9	18.4	-17.5	-2,900
<b>2026</b>	10.8	20.3	-9.5	-1,400
<b>2031</b>	23.6	22.4	1.2	200

Source: Appendix E

- 9.45 It is also important to point out that the lack of any significant demonstrable quantitative capacity should not necessarily prevent the Council from allowing new applications for retail development in existing designated centres, where such developments would bolster the draw of such centres and encourage growth.
- 9.46 This is particularly relevant to the Main Regeneration Settlement of Harworth & Bircotes, where the population is planned to grow significantly over the plan period. The centre is currently lacking in comparison retail provision. In order for the centre to provide for the emerging resident population, and to ensure that the centre does not develop into a commuter town, we would recommend that the Council take a flexible approach to appropriate town centre development within Harworth & Bircotes.
- 9.47 Equally, Tuxford is a strategically located centre designated to expand its role as a key Local Service Centre and become a sustainable town over the plan period. In qualitative terms, the Council could still be supportive of appropriate retail applications within Tuxford, where new convenience stores and independent comparison retailers could suitably compliment the centre's current mix of town centre uses.
- 9.48 We would stress that, in accordance with national planning policy and guidance, applications for retail developments above the locally set threshold and outside of the designated Town Centre boundaries would need to be considered in accordance with the sequential approach and standard impact assessment methodology

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## Leisure

- 9.49 In terms of leisure facilities, Section 8 does not identify District wide capacity for any of the activities that we are readily able to forecast into the future (health and fitness clubs, cinema screens or ten-pin bowling lanes).
- 9.50 On the basis of the proportion of trips made by residents, we consider that the District provides well for its population in terms of cinemas (the popular Savoy Cinema in Worksop) bars/pubs, bingo, and running, cycling and outdoor activities. For the majority of other leisure activities, the population base look to surrounding centres, such as Mansfield, Doncaster, Sheffield and Chesterfield.
- 9.51 Additionally, whilst a high proportion of respondents were content with the provision of leisure facilities across the District, there was indication of public demand for new bowling lanes, children's play facilities and additional sports facilities.
- 9.52 Nonetheless, it is important to recognise that this capacity is subject to market forces dictating demand in order to meet any identified gaps in leisure provision across the District. The Council are likely to welcome proposals to expand the range and quality of leisure provision (in particular restaurants and other town centre leisure facilities), subject to adherence and support of the policies of the emerging Bassetlaw Plan.

## Local Retail Impact Thresholds

- 9.53 In accordance with national planning policy, retail, office and leisure developments greater than 2,500 sq m proposed in edge-of-centre and out-of-centre locations will be subject to the assessment of the impact criteria set out by Paragraph 26 of the NPPF.
- 9.54 Where appropriate, Local Authorities are entitled to identify local thresholds in accordance with the following considerations identified within the NPPG ('Ensuring the vitality of town centres', Paragraph 16):
- scale of proposals relative to town centres;
  - the existing viability and vitality of town centres;
  - cumulative effects of recent developments;
  - whether local town centres are vulnerable;
  - likely effects of development on any town centre strategy; and

- impact on any other planned investment.

9.55 The Bassetlaw Core Strategy & Development Management Policies DPD (2011) currently identifies local thresholds for new edge-of-centre and out-of-centre retail proposals in Worksop, Retford, Large Local Centres and Small Local Centres across the District:

Centre	Convenience (sq m)	Non-Bulky Comparison (sq m)	Bulky Comparison (sq m)
<b>Worksop</b>	929	460	929
<b>Retford</b>	750	400	929
<b>Large Local Centre<sup>1</sup></b>	400	100	100
<b>Small Local Centre<sup>2</sup></b>	100	100	100

Source: *Bassetlaw Core Strategy & Development Management Policies DPD (Policies CS2 to CS7)*

<sup>1</sup> Celtic Point (Worksop); Prospect Precinct (Worksop); Harworth & Bircotes; Langold

<sup>2</sup> Retford Road (Worksop); Welbeck Road (Retford); Carlton-in-Lindrick; Tuxford; Misterton

- 9.56 This policy position was informed by the Martin Tonks Report on the Proposed Hierarchy of Retail Centres in Bassetlaw (2010), on the basis of the former Planning Policy Statement 4: Planning for Sustainable Economic Growth (PPS4), which has since been withdrawn and replaced by the NPPF and NPPG.
- 9.57 In our assessment of this position, we have regard to the average size of units where recent floorspace figures are available, which identifies relatively little variation with the average occupied town centre unit measuring 190 sq m in Worksop and 224 sq m in Retford (sourced from Experian Goad).
- 9.58 It is also relevant to note the existing trading patterns of the centres, in order to establish their vulnerability to the development of additional edge-of-centre and out-of-centre retail stores. Whilst the household survey identifies that 49% of convenience spend was made to stores in the District, just 7% of this trade was to stores located within the town centre boundaries. Notably, a number of convenience retailers serving Worksop are located outside of the town centre boundaries, with Morrisons, Aldi and Tesco each individually drawing as much trade as all convenience stores in Worksop Town Centre combined. In Retford, the Morrisons, Aldi and Asda perform particularly strongly from edge-of-centre locations and in Harworth & Bircotes, both the Asda and Aldi foodstores are located outside of the town centre boundary. Tuxford on the other hand, is served by a small Co-operative Food store located within the town centre boundary.
- 9.59 This pattern is less pronounced in terms of comparison goods spending where 30% of spending was retained within the District, of which, 24% was spent at town centre retailers. Notable comparison destinations located outside of town centres in the District were the Victoria Retail Park and Sandy Lane Retail Park, on the outskirts of Worksop.

- 9.60 We have also considered the on-going plans to consolidate units in the Priory Shopping Centre in Worksop to provide units of larger footprints in order to better attract national multiple retailers and fill runs of vacant units. This trend reflects our understanding that the current retail market favours larger and more flexible units that might not otherwise be available in constrained town centres, leading retailers to pursue edge and out-of-centre units that would directly compete with the town centre offer, thereby jeopardising the vitality and viability of the centres.
- 9.61 The previous local impact thresholds recommended in the Martin Tonks Report (2010) were informed by the retail capacity exercise at the time – which had identified capacity for new convenience and comparison retail development – and ‘known’ or committed proposals for retail developments. These known developments included a Tesco foodstore at Carlton Road and Vesuvius foodstore proposal at Sandy Lane, both of which have since confirmed that they are not going ahead.
- 9.62 Over the plan period, we do not identify any capacity for new convenience floorspace, and negligible comparison capacity. As such, we would suggest that the centres are potentially vulnerable to both categories of retailers in edge-of-centre and out-of-centre locations. Developments of both ‘big box’ retail destinations and smaller, town centre parade style units can directly compete with the town centre offer, jeopardising the vitality and viability of the centres and that the threshold should reflect the smaller floorplates of the existing retail facilities across the centres.
- 9.63 We would recommend a consolidation of the local impact thresholds, as the centres are equally vulnerable to convenience, non-bulky and bulky comparison given the lack of capacity for any new retail development and the consistently strong performance of edge-of-centre and out-of-centre facilities across the District. Additionally, given the intention to direct new retail services to the growing centres of Harworth & Bircotes and Tuxford, we would recommend increasing the local thresholds in these centres, where there is a qualitative need for new facilities to support the emerging local resident populations.
- 9.64 As such, we recommend a locally set threshold of **929 sq m (net) for proposals within the catchments of Worksop and Retford**, a threshold of **600 sq m (net) for proposals within the catchments of Harworth & Bircotes and Tuxford** and a threshold of **100 sq m (net) for proposals across the rest of the District**.
- 9.65 In addition, we would recommend encouraging the amalgamation of units (where there is little, or marginal, loss of net retail floorspace) in order to encourage investment in the District’s centres.
- 9.66 We would stress that whilst the locally set threshold would require the submission of an impact assessment for all edge-of-centre and out-of-centre developments exceeding the recommended

local thresholds, national guidance dictates that the impact test should be undertaken in a proportionate and locally appropriate way, commensurate to the scale of development proposed. The level of detail would typically be agreed with Council officers during the pre-application process in order to avoid overly onerous requirements that may otherwise restrict and delay development opportunities from coming forward.

## Town Centre Boundaries

- 9.67 The Bassetlaw Proposals Map was adopted in 2011, to be read alongside the Core Strategy & Development Management Policies DPD. The Proposals Map identifies the designated town centre boundaries, primary shopping areas, primary frontages and secondary frontages. We include at **Appendix F** our proposed recommendations for retail boundaries in each of Worksop, Retford, Harworth & Bircotes and Tuxford
- 9.68 Worksop is a large, linear centre based around the high street along Bridge Street, the Priory Shopping Centre towards the middle and the anchor Asda and Marks and Spencer food stores to the east and west of Bridge Street. Given its size and the tendency towards specialisation as retailers cluster together to provide a mutually beneficial retail environment, the centre can be broadly divided into zones.
- 9.69 To the north of the centre, between the station and the Chesterfield Canal the units are typically bulky goods retailers and retail services such as health and beauty salons, and leisure services such as take-away units and public houses. The central zone of Worksop comprises of the Priory Shopping Centre and the traditional high street, which is made up of non-bulky high street retailers and financial and business services. Towards the south, the centre has a number of runs of vacant units, and complimentary town centre uses such as the Savoy Cinema and the District Council's offices.
- 9.70 We agree with the current extent of the town centre boundary and primary and secondary retail frontages. We would recommend contracting the boundary of the primary shopping area to the south of the centre to allow for greater flexibility in the use of these units and to address the number of vacant units and provide a more focussed draw to visitors to Worksop. The few existing café spaces and restaurants to the south of Worksop compliment the Savoy Cinema, and the area would benefit from an increased focus in developing an active evening economy to draw visitors to Worksop.
- 9.71 We would also recommend that the Council encourage better connections between Worksop and the train station to the north of the centre. The centre would not benefit from expanding further north to encompass the station – which would negatively affect pedestrian flows to units towards the extremities of the centre – and visitors are unlikely to cover the length of such a large centre,

carrying out linked trips, unless they are travelling to a specific draw. With that in mind, we would recommend encouraging complementary and ancillary town centre uses between centre and station, in addition to works to improve accessibility and signage. Such uses could include bulky goods and retail services, as well as residential development, which could provide a local footfall, reduce the number of vacant units and increase the vitality and viability of the centre.

- 9.72 Retford is a linear town centre, extending south from a market square, anchored by a large Morrisons to the north and Asda and Aldi foodstores to south. The centre is well provided for in terms of the variety of different uses and has very few vacant units, which are necessary to allow for 'churn', the introduction of local independent retailers and investment from national multiples.
- 9.73 It would be beneficial for the Council to focus on leisure services and facilities such as cafes and restaurants that would support an evening economy in Retford, cultivating the centre as a café/tearoom destination, building on links to Kings Park. Such uses would be suitable towards the north of the centre, along the roads leading off Market Place that are currently predominantly made up of leisure services, financial and business services and bulky goods comparison retailers. As such, we would consider that the current town centre designations for Retford are appropriate.
- 9.74 Harworth and Bircotes are currently designated separately as local centre boundaries, with defined primary and secondary retail frontages along the north of Scrooby Road where the majority of retailers are currently located, anchored between the Aldi foodstore to the west and Asda to the east. A comprehensive residential-led development is proposed in phases to the south of Scrooby Road.
- 9.75 We would recommend that the Council extend the town centre boundary to the south of Scrooby Road to include the Asda and Aldi developments, as well as the current town square proposal, as prepared by Nottinghamshire County Council and supported through the Harworth & Bircotes Neighbourhood Plan. We would also recommend that the Council extend the current Harworth Local Centre boundary eastwards from the Blacksmith Arms Public House, along Main Street, to incorporate the Harworth Post Office.
- 9.76 The current primary and secondary frontages are considered suitable, and we would suggest that the primary shopping area be defined to match the town centre boundary, incorporating the area between Hill Top Court and Shrewsbury Road to the north of Scrooby Road, as well as the Aldi, Asda and the town square proposal site to the south.
- 9.77 Tuxford is a former market town with a significant number of heritage assets located at the corner of Eldon Street, Newcastle Street, Newark Road and Lincoln Road, situated within the Tuxford Conservation Area and to the west of the A1 road.
- 9.78 The Tuxford Neighbourhood Plan recognises the need for development within Tuxford, and is

supportive of cafes and restaurants that would provide community facilities within the centre. Given the constrained nature of the heritage designation of the centre, we would suggest that these community facilities be located to the edge of the centre in order to encourage retail within the town centre boundaries.

- 9.79 We would not recommend any changes to the town centre boundary of Tuxford, although we note that this may become necessary in the future should the centre attract significant new investment, or organically grow beyond the confines of the current boundary in such a way that would materially alter the current shopping patterns.



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## Glossary of Terms

<b>Bulky goods:</b>	Goods of a large physical nature (for example DIY, furniture, carpets) that sometimes require large areas for storage or display <i>Source: Planning Portal</i>
<b>Capacity:</b>	Forecast resident spending within the catchment area, with which to support existing and additional retail floorspace <i>Source: Planning Portal</i>
<b>Comparison Goods:</b>	Retail items not bought on a frequent basis, for example televisions and white goods (fridges, dishwashers etc.) <i>Source: Planning Portal</i>
<b>Convenience Goods:</b>	Everyday essential items, such as food <i>Source: Planning Portal</i>
<b>Edge-of-Centre:</b>	For retail purposes, a location that is well connected and up to 300 metres of the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge of centre, account should be taken of local circumstances <i>Source: NPPF</i>
<b>Expenditure per Capita:</b>	The amount of money spent on retail goods per person in each Zone across the Study Area
<b>Expenditure:</b>	Average annual expenditure levels for various forms of goods, multiplied by the population within the defined Study Area.
<b>Experian Goad:</b>	Experian Goad is a retail property intelligence system that helps retail developers, property investors, planning professionals, and commercial agents to identify profitable locations for retail property development and investment projects. It offers comprehensive retail location plans and easy to use reports covering over 3,000 shopping areas in the UK and Ireland.
<b>Experian (MMG3):</b>	A population, expenditure and socio-demographic dataset that utilises the

2011 Census release, projected forward by using growth rates derived from Office for National Statistics projections and current age and gender estimates.

**Floorplate:** Defined as the physical rentable area on one whole floor; sometimes called the footprint.

**Goald Plans:** A plan showing a bird's eye view of a retail centre including the exact location of all retail outlets and vacant premises, fascia name, retail category, and floor space. Key location factors such as pedestrian zones, road crossings, bus stops and car parks are also featured, allowing you to instantly assess the site quality of existing or prospective store locations  
*Source: Experian*

**Independent Retailers:** Retailers with less than 10 outlets/ stores  
*Source: Experian*

**Main Town Centre Uses:** Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities)  
*Source: NPPF*

**Market Share:** The proportion of residents that visit a particular retail destination, derived from household survey results

**National Multiple:** Defined as retailers with ten or more stores/ outlets  
*Source: Experian*

**Prime Unit:** 'Prime' is a widely used term within real estate investment circles to describe building and location quality. There are no universally agreed definition, however, and no consistency in the distinctions applied to prime or non-prime property.  
*Source: Colliers*

**Primary shopping area:** Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage)

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*Source: NPPF*

**Primary/ secondary frontages:** Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses

*Source: NPPF*

**Retail Floorspace:** Total floor area of the property that is associated with all retail uses in square metres. May be expressed as a net figure (the sales area) or in gross (including storage, preparation and staff areas)

*Source: Planning Portal*

**Retail Impact:** The potential effects of proposed retail development upon existing shops

*Source: Planning Portal*

**Sequential Approach:** A planning principle that seeks to identify, allocate or develop certain types or locations of land before others. For example, brownfield housing sites before greenfield sites, or town centre retail sites before out-of-centre sites

*Source: Planning Portal*

**Sales Density:** Turnover, per square metre. Various retail planning sources such as Verdict UK Food & Grocery Company Briefing Reports and Mintel Retail Rankings provide average (or benchmark) sales densities for national multiple convenience retailers

**Special Forms of Trading:** Special forms of trading (SFT) are defined as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies

*Source: Experian*

**Study Area:** The geographical area where the household survey is carried out, based on postal sectors that make up the 10 zones that broadly cover Bassetlaw District, as well as hinterlands within Doncaster, Rotherham, Derbyshire and Lincolnshire where shoppers may be attracted to Bassetlaw's retail and leisure offer

**Trade draw:** The proportion of trade that a development is likely to receive from customers within and outside its catchment area. It is likely that trade draw will relate to a certain geographic area (i.e. the distance people are likely to travel) and for a particular market segment (e.g. convenience retail). The

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best way of assessing trade draw where new development is proposed is to look at existing proxies of that type of development in other areas

*Source: NPPG*

**Turnover:**

Sales per unit area of retail floorspace

*Source: Planning Portal*

**Town Centre:**

Area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres

*Source: NPPF*