

# TOWN CENTRE & RETAIL STUDY 2016

Prepared on behalf of:  
Newark and Sherwood District Council

**Carter Jonas**

## QA

# Newark and Sherwood District Council: Town Centre and Retail Study 2016

The signatories below verify that this document has been prepared in accordance with our Quality Manual requirements. These procedures do not affect the content and views expressed by the originator. The document must be treated as a draft unless it has been approved and signed by a Partner.

Date:

December 2016

Originators:

Approved:



---

Carter Jonas

Dr Steven Norris

Partner



**CONTENTS**

1 INTRODUCTION..... 10

2 PLANNING POLICY CONTEXT & EVIDENCE BASE..... 13

    National Planning Policy Framework (NPPF) ..... 13

    National Planning Practice Guidance (PPG) ..... 15

    Local Planning Policy Context ..... 16

    Plan Review ..... 22

    Other Relevant Documents..... 22

    Summary..... 27

3 NATIONAL RETAIL TRENDS & TOWN CENTRE FUTURES ..... 28

    Retail Trends..... 28

    Special Forms of Trading and Internet Shopping ..... 29

    Floorspace ‘Productivity’ Growth ..... 31

    Impact of Out-of-Centre Retailing ..... 32

    Changing Retailer Requirements..... 33

    Vacancy Levels ..... 34

    Trends in Retail-led Investment and Development..... 35

    Independents and Markets ..... 38

    Summary..... 39

4 STUDY AREA AND HOUSEHOLD SURVEY SHOPPING PATTERNS ..... 42

    Study Area and Zones ..... 42

    Household Survey..... 42

    Convenience Goods - Market Share Analysis ..... 43

    Comparison Goods- Market Share Analysis..... 47

    Summary..... 51

5 NEWARK ON TRENT TOWN CENTRE – HEALTH CHECK..... 53

    Retail Context..... 53

    Retail Composition and Diversity ..... 56

    The Market ..... 58

    Vacancy Levels ..... 59

    Retailer Requirements ..... 59

	Prime Zone A Rents.....	60
	Accessibility and Parking .....	60
	Pedestrian Flows, Dwell Times and Frequency of Visit.....	61
	Customer Views and Perceptions.....	62
	Environmental Quality .....	65
	Out of Centre.....	66
	New Investment and Development Opportunities .....	66
	Summary.....	66
6	SOUTHWELL DISTRICT CENTRE – HEALTH CHECK .....	68
	Retail Composition and Diversity .....	69
	The Market.....	71
	Vacancy Levels .....	72
	Retailer Requirements .....	72
	Accessibility.....	72
	Pedestrian Flows, Dwells Times and Frequency of Visit .....	73
	Customer Views and Perceptions.....	73
	Environmental Quality .....	76
	Summary.....	77
7	OLLERTON DISTRICT CENTRE – HEALTH CHECK .....	78
	Vacancy Levels .....	81
	Accessibility.....	82
	Pedestrian Flows, Dwell Times and Frequency of Visit.....	82
	Customer Views and Perceptions.....	83
	Environmental Quality .....	85
	Summary.....	86
8	EDWINSTOWE DISTRICT CENTRE – HEALTH CHECK .....	88
	Retail Composition and Diversity .....	89
	Vacancy Levels .....	91
	New Investment and Development.....	91
	Accessibility.....	91
	Pedestrian Flows, Dwell Times and Frequency of Visit.....	92

Customer Views and Perceptions.....	92
Environmental Quality.....	95
Summary.....	95
9 RAINWORTH DISTRICT CENTRE – HEALTH CHECK.....	97
Retail Composition and Diversity.....	97
Vacancy Levels.....	99
Accessibility.....	99
Pedestrian Flows, Dwell Times and Frequency of Visit.....	100
Customer Views and Perceptions.....	100
Environmental Quality.....	103
Summary.....	103
10 LOCAL CENTRES – HEALTH CHECK.....	105
Balderton.....	106
Bilsthorpe.....	106
Blidworth.....	107
Boughton.....	108
Clipstone.....	108
Collingham.....	109
Farnsfield.....	109
Lowdham.....	110
Sutton on Trent.....	110
11 QUANTITATIVE RETAIL NEED ASSESSMENT.....	111
THE CREATE MODEL: KEY ASSUMPTIONS & FORECASTS.....	111
POPULATION AND EXPENDITURE FORECASTS.....	112
Population Projections.....	112
Expenditure Per Capita and Special Forms of Trading (SFT).....	113
Total Available Expenditure.....	114
MARKET SHARE ANALYSIS.....	114
‘INFLOW’ (TRADE DRAW FROM OUTSIDE STUDY AREA).....	115
RETAIL FLOORSPACE COMMITMENTS & ALLOCATIONS.....	116
NEWARK & SHERWOOD DISTRICT: CAPACITY FORECASTS.....	119

Convenience Goods Capacity .....	120
Comparison Goods Capacity .....	122
SUMMARY .....	125
12 COMMERCIAL LEISURE NEEDS - 'GAP' ASSESSMENT.....	128
Leisure Expenditure Growth .....	128
Cinema Provision and Need .....	129
Food & Beverage Provision and Need .....	131
Health & Fitness Need .....	135
Bingo & Gambling .....	138
Family Entertainment Facilities .....	139
Cultural Activities.....	140
Hotel Provision .....	141
Newark Showground and Antique Fairs .....	142
Summary.....	142
13 EXECUTIVE SUMMARY: KEY FINDINGS & RECOMMENDATIONS.....	145
DISTRICT-WIDE RETAIL AND LEISURE NEEDS.....	145
MEETING NEEDS IN THE DISTRICT'S MAIN CENTRES .....	148
Newark Town Centre .....	148
Southwell Town Centre .....	151
Ollerton Town Centre .....	153
Edwinstowe Town Centre .....	155
Rainworth Town Centre .....	156
Local Centres .....	157
LOCAL IMPACT THRESHOLD: RECOMMENDATIONS.....	158
14 GLOSSARY .....	160
APPENDIX 1: STUDY AREA PLAN .....	<b>Error! Bookmark not defined.</b>
APPENDIX 2: HOUSEHOLD SURVEY METHODOLOGY .....	<b>Error! Bookmark not defined.</b>
APPENDIX 3: HOUSEHOLD SURVEY RESULTS (WEIGHTED) .....	<b>Error! Bookmark not defined.</b>
APPENDIX 4: IN-CENTRE SURVEY RESULTS .....	<b>Error! Bookmark not defined.</b>
APPENDIX 5: CONVENIENCE GOODS - MARKET SHARES (incl SFT).....	<b>Error! Bookmark not defined.</b>
APPENDIX 6: COMPARISON GOODS - MARKET SHARES (incl SFT).....	<b>Error! Bookmark not defined.</b>

APPENDIX 7: HEALTH CHECK METHODOLOGY – EXPLANATORY NOTE ..... **Error! Bookmark not defined.**

APPENDIX 8: POPULATION PROJECTIONS..... **Error! Bookmark not defined.**

APPENDIX 9: AVAILABLE CONVENIENCE AND COMPARISON GOODS EXPENDITURE.. **Error! Bookmark not defined.**

APPENDIX 10: CONVENIENCE GOODS MARKET SHARE ANALYSIS (EXCL SFT)..... **Error! Bookmark not defined.**

APPENDIX 11: COMPARISON GOODS MARKET SHARE ANALYSIS – (EXCL SFT) ..... **Error! Bookmark not defined.**

APPENDIX 12: CONVENIENCE GOODS CAPACITY FORECASTS ..... **Error! Bookmark not defined.**

APPENDIX 13: COMPARISON GOODS CAPACITY ASSESSMENT: SCENARIO 1 **Error! Bookmark not defined.**

APPENDIX 14: COMPARISON GOODS CAPACITY ASSESSMENT: SCENARIO 2 **Error! Bookmark not defined.**

APPENDIX 15: COMPARISON GOODS CAPACITY ASSESSMENT: SCENARIO 3 **Error! Bookmark not defined.**

APPENDIX 16: COMPARISON GOODS CAPACITY ASSESSMENT: SCENARIO 4 **Error! Bookmark not defined.**

## 1 INTRODUCTION

- 1.1 Carter Jonas (CJ) was commissioned by Newark and Sherwood District Council ('the Council') to update the retail and town centre evidence base<sup>1</sup> to help inform both plan-making and decision-taking across the District. The findings of the assessment will be used to inform the review of the Council's Development Plan Documents (DPD).
- 1.2 By way of background the District of Newark and Sherwood is the largest in Nottinghamshire and is situated in the northern part of the East Midlands Region. Adjoining the District to the west are the Nottingham and Mansfield conurbations; Lincoln lies to the north-east and Grantham to the south-east. The rural nature of the District means that it has a dispersed settlement pattern, which ranges from market towns and large villages, to smaller villages and hamlets. The main towns of Newark-on-Trent, Southwell and Ollerton and Boughton act as a focus for their own communities and those in the wider area, whilst the larger villages function in a similar role for their immediate rural catchments. However services are limited outside of these centres and some higher level and specialist facilities are only found in larger urban areas adjoining the District. Public transport services are also limited outside of the main centres and routes, and as a result accessibility to employment and services is more difficult in rural areas.
- 1.3 Newark-on-Trent is significant as a centre of commerce and trade with strong links to the surrounding countryside, as well as excellent cross-country communication links by road and rail. It has a rich and strong historical heritage centred on the Castle (partially destroyed in the English Civil War), many buildings of special architectural or historic interest and an extensive Conservation Area with a traditional Market Place at its heart. Newark Urban Area (NUA) comprises the main built up areas of Newark, Balderton and Fernwood and is the focus for much of the growth within the District. This focus has been reflected in the allocation of three major strategic urban extensions incorporating, to different extents, residential, employment, retail and community uses. The majority of the District's employment is focused in Newark and the Western areas, although a significant proportion of the District's workforce travel outside of the District for work. The District is also popular with visitors and tourists, with the main attractions including Sherwood Forest, Newark, the Minster Town of Southwell and Center Parcs Holiday Village close to Edwinstowe. It is estimated that some 47,000 visitors made a trip to the area in 2007<sup>2</sup>.
- 1.4 This study has been prepared in the context of current and emerging national and development plan policy guidance, as well as other key material considerations; principally the **National Planning Policy Framework** (NPPF) published in March 2012. Where relevant the study also draws on advice set out in the **National Planning Practice Guidance** (PPG), published in March 2014, which still places significant weight on the development of positive plan-led visions and strategies to help ensure the vitality of town centres.

---

<sup>1</sup> Including the Retail and Town Centre Study 2010 and Retail Capacity and Proposals Advice 2012

<sup>2</sup> STEAM Survey 2007

- 1.5 The assessment of the need (or ‘capacity’) for new retail (convenience and comparison goods) floorspace has been carried out at the strategic District-wide level to help inform the likely scale, type, location and phasing of new retail development over the short (0-5 years), medium (6-10 years) and long term (11-15 years).
- 1.6 The Study Area defined for the purpose of this retail assessment principally covers Newark and Sherwood District, but also incorporates parts of neighbouring local planning authority areas. This Study Area has been further sub-divided into eleven study zones that broadly reflect the local catchments of the District’s main centres (see Appendix 1). The defined Study Area and zones provide the framework for the new telephone interview survey of some 1,100 households conducted by NEMS Market Research (NEMS) in April and May 2016. This survey provides the most up-to-date and robust evidence on shopping patterns, leisure preferences and expenditure flows within the Study Area. In turn, this has informed the high level health check assessments for the District’s main town centre of Newark, as well as the quantitative (‘capacity’) and qualitative need assessments for new retail (convenience and comparison goods) floorspace. The survey approach adopted by NEMS is explained in some detail in Appendix 2, along with the questionnaire. The full (weighted) survey results are set out in Appendix 3.
- 1.7 In addition, a visitor survey was carried out across the district with 200 interviews in the main town centre of Newark and 50 across each of the four district centres. The survey was conducted by NEMs and focused on identifying shopping patterns and perceptions of each town centre from a town user’s perspective and where improvements could be directed to enhance retail and commercial leisure provision. The in-centre survey results are set out in Appendix 4.
- 1.8 For ease of reference this report is structured as follows (please note that the Sections highlighted in green are ‘work in progress’ and have not been submitted with this working draft report):
- **Section 2** reviews the national, regional (where relevant) and local planning policy context material to retail planning and town centres.
  - **Section 3** highlights some of the key trends that are driving the dynamic changes in the retail sector at the national and local level, and how this has shaped (and is likely to shape) the UK’s urban and retail landscape.
  - **Section 4** sets out the results of the market share analysis for convenience and comparison goods retailing across the Study Area and eleven zones as based on the results of the household telephone interview survey. The market share tabulations for convenience and comparison goods are set out in Appendix 5 and Appendix 6 respectively.
  - **Sections 5-9** provide more detailed health checks for Newark Town Centre and the four District Centres. **Section 10** provides a high level overview of the health of the District’s smaller Local Centres. These assessments draw on recent research and the latest town centre audits for the centres, supplemented by site visits and audits of town centre uses and vacancies. The assessment also takes account of consultation with key stakeholders.

- **Section 11** describes the key inputs and outputs of the retail (economic) capacity assessment for comparison and convenience goods retailing for the District and its main centre based on our in-house CREATE (excel spreadsheet) model. The full economic tabulations are set out in **Appendices 8-16**.
- **Section 12** sets out the findings of the high level commercial leisure 'gap' and need assessment for the main leisure uses, including food and beverage, cinema and gym provision. It also provides an overview of the needs for other town centre uses.
- Finally, **Section 13** draws together the key findings of the qualitative and quantitative need assessments for retail and commercial leisure. It reviews and provides robust advice on the definition and extent of primary and secondary frontages for each of the main centres and their Primary Shopping Areas based on the research and evidence. Advice is also provided on the need for a '*local impact threshold*' and the potential for the District's main centres to accommodate any identified needs in full over the Plan period based on the current and future availability of potential development opportunity sites in and on the edge of centres, and their suitability for new retail and mixed use floorspace.

1.9 It is also important to state at the outset that, in our experience, capacity forecasts beyond a five year time period should be interpreted with caution as they are subject to increasing margins of error. We therefore advise the Council that although this updated study provides the robust evidence base required to help inform plan-making, site allocations and the determination of planning applications at the local level, the forecasts should be constantly monitored, and updated to take into account any significant new retail development and changes in the retail expenditure and population growth forecasts over time, as well as any potential impacts arising from other key trends in the retail (such as, for example, the growth in internet shopping) and commercial leisure sectors.

## 2 PLANNING POLICY CONTEXT & EVIDENCE BASE

2.1 This section provides a high level overview of the relevant national and local development plan planning policy pertaining to retail and town centre uses, along with other material considerations.

### National Planning Policy Framework (NPPF)

2.2 The NPPF was published in March 2012 and sets out the planning policies for England and how these are expected to be applied. It reinforces the importance of up-to-date plans and strengthens local decision making. The NPPF must be taken into account in the preparation of Local Plans<sup>3</sup> and Neighbourhood Plans<sup>4</sup>. At the heart of the NPPF is a presumption in favour of sustainable development<sup>5</sup>, which is seen as *“a golden thread running through both plan-making and decision-taking”* (paragraph 14). The NPPF (paragraph 14) sets out the Government’s view of what sustainable development means in practice for both plan-making and decision-taking at the local level.

2.3 For plan-making the Framework states that local planning authorities should positively seek opportunities to meet the development needs of their area. Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless any adverse impacts of doing so would significantly and demonstrably outweigh the benefits. The Framework (paragraph 15) states that policies in Local Plans should follow the approach of the presumption in favour of sustainable development so that *“...it is clear that development which is sustainable can be approved without delay”*.

2.4 The NPPF (paragraph 17) also sets out twelve core planning principles that underpin both plan-making and decision-taking. Amongst other objectives these principles confirm that planning should be genuinely plan-led; proactively drive and support sustainable economic development to deliver thriving local places; promote mixed use developments; focus significant development in locations which are or can be made sustainable; and deliver sufficient community and cultural facilities and services to meet local needs.

2.5 The Framework (paragraph 150) emphasises that Local Plans are *“...the key to delivering sustainable development that reflects the vision and aspirations of local communities”*. They should be “aspirational but realistic” and should set out the opportunities for development and clear policies on *“...what will or will not be permitted and where”* (paragraph 154). Only those policies that provide a clear indication of how a decision maker should react to a development proposal should be included in the plan. Any additional DPDs should only be used where clearly justified (paragraph 153).

2.6 The NPPF (paragraph 156) requires strategic priorities for the area covered by the Local Plan to deliver the homes and jobs needed in the area; the provision of retail, leisure and other commercial development; and the provision of health, security, community and cultural infrastructure and other local facilities; etc. Crucially the

---

<sup>3</sup> Defined by NPPF (Annex 2) as the plan for the future development of the local area, drawn up by the local planning authority in consultation with the community. In law this is described as the development plan documents adopted under the Planning and Compulsory Purchase Act 2004. Current Core Strategies or other planning policies, which under the regulations would be considered to be development plan documents, form part of the Local Plan. The term includes old policies which have been saved under the 2004 Act.

<sup>4</sup> A plan prepared by a Parish Council or Neighbourhood Forum for a particular neighbourhood area (made under the Planning and Compulsory Purchase Act 2004).

<sup>5</sup> Sustainable development is defined as meeting the needs of the present without compromising the ability of future generations to meet their own needs.

NPPF (paragraph 157) indicates that Local Plans should, amongst other key requirements plan positively for the development and infrastructure required in the area; be drawn up over an appropriate time scale (preferably 15 years; indicate broad locations for strategic development on a key diagram and land-use designations on a Proposals Map; allocate sites to promote development and flexible use of land, bringing forward new land where necessary, and provide detail on form, scale, access and quantum of development where appropriate; and identify land where development would be inappropriate, for instance because of its environmental or historic significance.

2.7 In terms of the evidence-based approach to planning, the Framework states LPAs should ensure that the Local Plan is based on "...adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area" (paragraph 158). Furthermore the assessment of, and strategies for housing, employment and other uses should be integrated, and take full account of relevant market and economic signals. LPAs should use this evidence base to assess the needs for land or floorspace for economic development, including for retail and leisure development; examine the role and function of town centres and the relationship between them; assess the capacity of existing centres to accommodate new town centre development; and identify locations of deprivation which may benefit from planned remedial action. The NPPF is clear that pursuing sustainable development requires "...careful attention to viability and costs in plan-making and decision-taking" (paragraph 173).

2.8 The Framework (paragraphs 18-149) sets out thirteen key 'principles' for delivering sustainable development, including building a strong, competitive economy; ensuring the vitality of town centres; promoting sustainable transport; delivering a wide choice of high quality homes; requiring good design; promoting healthy communities; protecting Green Belt land; and conserving and enhancing the natural and historic environment. In terms of '**ensuring the vitality of town centres**' the NPPF (paragraph 23) states that planning policies should be positive and promote competitive town centre<sup>6</sup> environments, as well as setting out policies for the management and growth of centres over the plan period. When drawing up Local Plans, LPAs should amongst other considerations:

- 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<sup>7</sup>, based on a clear definition of primary and secondary frontages<sup>8</sup> in designated centres, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;

---

<sup>6</sup> The NPPF (Annex 2) states that 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.

<sup>7</sup> Primary shopping area is defined by the NPPF (Annex 2) as the 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).

<sup>8</sup> The NPPF (Annex 2) states that '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.

- allocate a range of suitable sites to meet the scale and type of retail and leisure development needed in town centres;
- ensure that the needs for retail and leisure are “*met in full*” and “*not compromised by limited site availability*”. Assessments should therefore be undertaken 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;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- 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
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

2.9 When assessing and determining applications for main town centre uses<sup>9</sup> that are not in an existing centre and not in accordance with an up-to-date Local Plan, the Framework requires that LPAs should:

- Apply a **sequential test**<sup>10</sup>, which requires applications for main town centre uses to be located in town centres first, then in edge-of-centre locations and only consider out-of-centre locations if suitable sequentially more preferable sites are not available. When considering edge and out of centre proposals, “*...preference should be given to accessible sites that are well connected to the town centre*” (paragraph 24). Applicants and LPAs should demonstrate flexibility on issues such as format and scale.
- Require an **impact assessment** if the development is over a proportionate, locally set floorspace threshold (if there is no locally set threshold, the default threshold is 2,500 sqm). The NPPF (paragraph 26) states that this should include assessment of 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 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. For major schemes where the full impact will not be realised in five years, “*...the impact should also be assessed up to ten years from the time the application is made*”.

2.10 The NPPF (paragraph 27) states that “...where an application fails to satisfy the sequential test or is likely to have significant adverse impact on one or more of the above factors, it should be refused”.

## National Planning Practice Guidance (PPG)

2.11 This study also draws on advice set out in the *National Planning Practice Guidance* (PPG), published in March 2014. The PPG has streamlined and replaced the advice previously set out in *PPS4 Practice Guidance on Need, Impact and the Sequential Approach*.

---

<sup>9</sup> NPPF (Annex 2) defines ‘main town centre uses’ as 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).

<sup>10</sup> This sequential approach should not be applied to applications for small scale rural offices or other small scale rural development.

- 2.12 The revised PPG still places significant weight on the development of positive plan-led visions and strategies for town centres, and has retained the key sequential and 'impact tests'. Of relevance to this study the PPG (para 003) states that the assessment of the potential for centres to accommodate new development and different types of development should cover a "*three-five year period*" but should "*also take the lifetime of the Local Plan into account and be regularly reviewed*".

## Local Planning Policy Context

- 2.13 The relevant parts of the development plan include the **Core Strategy** (adopted in 2011) and the **Allocations & Development Management** (A&DM) (adopted in 2013) Development Plan Documents (DPDs). The key policies and provisions of these DPDs are briefly reviewed below as this will help to inform the preparation of this retail and town centre study update.
- 2.14 The Council is also currently undertaking a review of its DPDs to ensure that the allocations and policies contained within the Core Strategy and A&DM documents continue to be appropriate, up-to-date and effective<sup>11</sup>. The first stage of this review was the **Issues Paper** which was subject to a period of consultation in Autumn 2015. Following this, the second stage which sets out the Council's '*preferred approach to strategy*' was placed on public deposit at the end of July 2016. This second stage of consultation will be followed by additional consultation on detailed policies for sites and settlements later in 2016. It is as part of this stage that the proposed approach to retail and other main town centre uses will be set out, supported by the recommendations of this study.

## Newark and Sherwood Core Strategy (2011)

- 2.15 The Core Strategy was adopted in March 2011 and sets out the Council's strategic vision and proposals for guiding the future development of Newark and Sherwood up to 2026, along with the key issues to be addressed over the plan period. It addresses key strategic matters including how to support the retail development of the District's town, district and local centres, particularly Newark Town Centre.
- 2.16 Due to the size of the District, the array of influences acting upon it and the diverse and dispersed nature of its settlements the Core Strategy identifies a great variety of issues facing its communities. In order to establish a policy approach appropriate to meeting these differing needs the Core Strategy sub-divides the District into the following five distinct and internally cohesive areas based upon the presence of common characteristics:
- **Newark Area:** This is split into three sub-areas to reflect the diverse nature of this part of the district - '*Newark and Rural South Sub-Area*' (NRSSA), '*Rural North Sub-Area*' (RNSA) and '*Collingham Sub-Area*' (CSA). The NRSSA contains the District's largest settlement, Newark-on-Trent. The Newark Urban Area (NUA) is defined as the main built up areas of Newark, Balderton and Fernwood and was designated as a Sub-Regional Centre within the former Regional Plan, and so as a result is the focus for much of the growth within the District.

---

<sup>11</sup> The Inspector who examined the A&DM DPD concluded that because the plan had been prepared during the recession that an early review should be conducted to test if the market had recovered enough to continue to deliver the various elements of the plan.

- **Southwell Area:** This covers the southern central part of the district and is focused around Southwell, which is a town of outstanding architectural and historic interest, with the Minster at its heart. Southwell The all-weather Southwell Racecourse is also a popular attraction.
- **Nottingham Fringe Area:** This area is focused around the Nottingham-Derby Greenbelt which is intended to protect the open character of land around the Nottingham conurbation and City of Derby. This designation extends into the south-western part of the Newark and Sherwood District. Within this area, Lowdham is the district's main settlement.
- **Sherwood Area:** This area covers a large part of the north-west of the district. The district centres of Ollerton & Boughton and Edwinstowe are situated here. Outside of the district, Mansfield and Worksop are within close proximity to the area. Much of Sherwood Forest is also in this area and there are proposals for a new visitor centre and Regional Park status .This is not yet completed, although the planning application for the Centre was submitted to the Council in September 2016.. The Sherwood Energy Village (SEV) established in 1994 has helped to tackle unemployment in the area.
- **Mansfield Fringe Area:** This area includes the district centre of Rainworth and the local centres of Blidworth and Clipstone. All have close links to Mansfield. Since the 1970s the area has seen major industrial change and large scale job losses. , The Sherwood Growth Zone, which covers the area around the Mansfield Ashfield Regeneration Route – including Rainworth - is intended to be a major future regeneration catalyst.

2.17 Some of the key issues and challenges facing the District and its main centres, as highlighted by the Core Strategy, include meeting the District's housing requirements over the plan period; delivering the strategic urban extensions and planned growth for the Newark Urban Area; integrating this with the provision of new supporting infrastructure; maintaining local services and facilities and ensuring that local people have good accessibility to them; providing a diverse local economy and additional employment opportunities; maintaining and enhancing the District's attractive and distinctive environment in urban and rural areas whilst accommodating change; and promoting the development of tourism without compromising the District's capacity to maintain and enhance its continuing tourism offer and potential.

2.18 **Spatial Policy 1** of the Core Strategy identifies three complementary settlement roles which will be central to the delivery of the District's Spatial Strategy. These are:

### Core Strategy – Spatial Policy 1: Settlement Hierarchy

DESIGNATION:	ROLE & FUNCTION	LOCATION:
<b>Sub-Regional Centre:</b>	Major centre in the Sub-Region and the main focus for housing and employment growth in the District and for new services and facilities.	Newark Urban Area (NUA) which comprises Newark-upon-Trent, Balderton and Fernwood.
<b>Service Centres:</b>	Characterised by a range of local facilities and act as a focus for service provision for a large local population and rural hinterland.	Southwell, Ollerton and Boughton, Clipstone and Rainworth
<b>Principal Villages:</b>	Have a good range of day-to-day facilities (e.g. primary school, food shop, health facilities, employment, etc.), and complement the role of Service Centres. Act as secondary focus for service provision in each area.	Collingham, Sutton-on-Trent, Farnsfield, Lowdham, Bilsthorpe, Edwinstowe and Blidworth

Source: Core Strategy (page 21)

Notes: The Urban Boundaries of the main settlements are defined on the Proposals Map prepared as part of the A&DM DPD.

- 2.19 **Spatial Policy 2** sets out the spatial distribution of new housing and employment growth within the District between 2006 and 2026. For housing, the Core Strategy identified 14,162 new dwellings by 2026, of which 70% are to be allocated to the Newark Urban Area, 20% to the Service Centres and 10% to the Principal Villages. The employment land requirement for the District identified by the Core Strategy is in the range of 210-220 hectares by 2026, of which the majority is identified for the Newark area. The focus of new housing and employment in Newark will support its role as a Sub-Regional Centre, deliver employment growth ambitions, and benefit local regeneration goals.
- 2.20 To achieve the level of growth identified for the Newark Urban Area, **Spatial Policy 5** of the Core Strategy identifies three Strategic Sites<sup>12</sup>:
- **Land South of Newark (Policy NAP 2A)** - The site lies to the south of existing residential areas of Hawtonville. This area, as shown on the Proposals Map, is identified as a strategic site for housing (in the region of 3,100 dwellings, 2,200 of which to be constructed in the plan period to 2026); employment land uses (B2 and B8 uses: 38 hectares in the plan period); and two local centres. The two local centres are the 'Eastern Centre' (which has an allocation for a 1,800 sqm gross / 1,200 sqm net foodstore), and the 'Western Centre' (which has an allocation for a much smaller store of 100 sqm gross). Subsequent to this, the Council (at the January 2015 Planning Committee) allowed for a larger supermarket of 1,800 sqm net as part of the 'Eastern Centre'. The distribution of proposed uses is indicatively illustrated on Figure 5 (page 76) of the Core Strategy.
  - **Land East of Newark (Policy NAP 2B)** - The site lies to the south of existing residential developments off Beacon Hill Road, within 10 minutes' walk of the town centre. This area, as shown on the Proposals Map, is identified as a strategic site for housing (circa 1,600 dwellings) and a local centre, comprising retail, service, employment and community uses; and associated green, transport and other infrastructure. The distribution of proposed uses is indicatively illustrated on Figure 6 (page 81) of the Core Strategy.
  - **Land around Fernwood (Policy NAP 2C)** - The site is centred on an existing development on the former Balderton Hospital site. This area, as shown on the Proposals Map, is identified as a strategic site for housing (in the region of 3,200 dwellings, 2,200 of which to be constructed in the plan period to 2026); a high quality, landscaped B1 Business Park for individual regional and national HQ and high tech businesses (15 hectares); a local centre, comprising retail, service, employment and community uses; and associated green, transport and other infrastructure. The distribution of proposed uses is indicatively illustrated on Figure 7 (page ) of the Core Strategy. The first phase will consolidate the existing development, and later phases will extend it to the south.
- 2.21 In terms of specific retail and town centre policies, **Core Policy 8** identifies the following retail hierarchy:

---

<sup>12</sup> The extent of the 3 Strategic Sites, is shown on the Proposals Map and is identified at Figures 5-7. The infrastructure required to support the strategic sites is set out in the Infrastructure Delivery Plan.

## Core Strategy – Core Policy 8: Retail Hierarchy

DESIGNATION:	ROLE & FUNCTION	LOCATION:
<b>Sub-Regional Centre / Town Centre:</b>	Principal focus of new and enhanced retail and other town centre activity.	Newark Town Centre
<b>District Centres:</b>	Primarily used for convenience shopping, with some comparison shopping and also providing a range of other services	Southwell, Edwinstowe, Ollerton and Rainworth
<b>Local Centres</b>	Concerned with the sale of food and other convenience goods to the local community.	Balderton, Collingham, Bilsthorpe, Farnsfield, Blidworth, Lowdham, Boughton and Sutton-on-Trent

Source: Core Strategy (page 51)

2.22 In order to inform the preparation of the Core Strategy the Council commissioned the Newark and Sherwood Retail and Town Centres Study<sup>13</sup> (2010 NSRTCS). In terms of retail capacity the study first assessed the 'Baseline' capacity for the District (see table below). It then assessed a second scenario for Newark Urban Area (NUA) arising from its, now former, 'Growth Point' status and the additional expenditure capacity generated by circa 10,913 new homes<sup>14</sup>.

### 2010 Retail Capacity Forecasts to 2026 (sqm net) – Baseline and Growth Point Forecasts

	2009-2014	2009-2019	2009-2024	2009-2026
<b>BASELINE SCENARIO – DISTRICT AREA</b>				
<b>Convenience Goods</b>	-400	1,336	2,485	2,686
<b>Comparison Goods</b>	-5,064	430	7,379	10,338
<b>TOTAL</b>	-5,464	1,766	9,864	13,024
<b>GROWTH POINT SCENARIO – NEWARK URBAN AREA ONLY</b>				
<b>Convenience Goods</b>	966	3,415	5,465	5,661
<b>Comparison Goods</b>	-1,467	6,218	15,818	19,067
<b>TOTAL</b>	-501	9,633	21,283	24,728

Source: GVA Capacity Assessment (Appendices 5, 6 and 7)

Notes: Assumes a major foodstore operator trading at £10,000 psm. Also assumes much higher pre-recession annual growth in expenditure.

2.23 After allowing for the Potterdyke scheme in Newark and other planned commitments at the time within and immediately adjacent to the District, the 2010 RTCS identified limited capacity for additional convenience goods floorspace up to 2014, with an increase in capacity to 5,661 sqm net within the NUA and 6,707 sqm net across the District by 2026. The assessment of leisure expenditure also indicated that there is potential to support additional leisure facilities over the plan period.

2.24 **Core Policy 8** states that proposals for the provision of retail and other town centre uses in the centres should be consistent in scale with their size and function. The boundaries and frontages for these centres, along with detailed policies concerning development in these areas are set out in the *Allocations & Development Management DPD*. CP8 also identifies the need for new local centres of an appropriate scale to meet local need in the new settlements planned for the land to the South and East of Newark, and around Fernwood, without harm to the vitality and viability of existing centres. CP8 also states that retail development in out-of-

<sup>13</sup> Prepared by GVA Grimley and published in March 2010.

<sup>14</sup> Equivalent to a population increase of 25,754 people based on an average household size of 2.36 persons

centre locations will be strictly controlled by utilising the policies within PPS4 (now superseded by the NPPF) and proposals will need to demonstrate their suitability through a sequential site approach and provide a robust assessment of impact on nearby centres.

- 2.25 The important role of Newark is further reinforced by **Newark Area Policy 1** (NAP 1) which seeks to promote Newark Urban Area and the Town Centre as the main focus for residential, commercial, leisure and tourism activity within the District. It identifies the need to improve the retail provision in and on the edge of the centre to reduce travel to other centres outside the District, and to attract national and independent retailers, cafés and restaurants that are willing to occupy historic properties.

### ***Allocations and Development Management Document (2013)***

- 2.26 The Allocations and Development Management Development Plan Document (A&DM DPD) was adopted in July 2013 and is one of the Local Development Documents (LDDs) included within the Newark and Sherwood Local Development Framework (LDF). Its main purpose is to allocate sufficient land for housing, employment and retail, to meet the needs of Newark and Sherwood to 2026 and beyond. The document also sets out amendments to urban boundaries and village envelopes, retail boundaries as well as sites requiring continued protection from development (open space and green infrastructure designations). It also includes a suite of Development Management policies to provide greater direction, help deliver specific allocations and assist in the day-to-day assessment of planning applications.
- 2.27 To help inform A&DM DPD the Council commissioned the *Retail Capacity and Retail Proposals* (RCRP) study in May 2012 to a review and update retail requirements. This found that the comparison floorspace capacity for the District was approximately 15% lower than originally estimated for the Core Strategy, although the other elements of the Core Strategy remained valid. The updated capacity forecasts are summarised in the table below.

#### **2010 Retail Capacity Forecasts to 2026 (sqm net)**

	<b>Newark Urban Area</b>	<b>Rest of District</b>	<b>District-Wide</b>	<b>TOTAL</b>
<b>Convenience Goods</b>	5,661	6,707		12,368
<b>Comparison Goods</b>			15,690	15,690
<b>TOTAL</b>				28,059

Source: A&DM DPD, Table 2 (page 13)

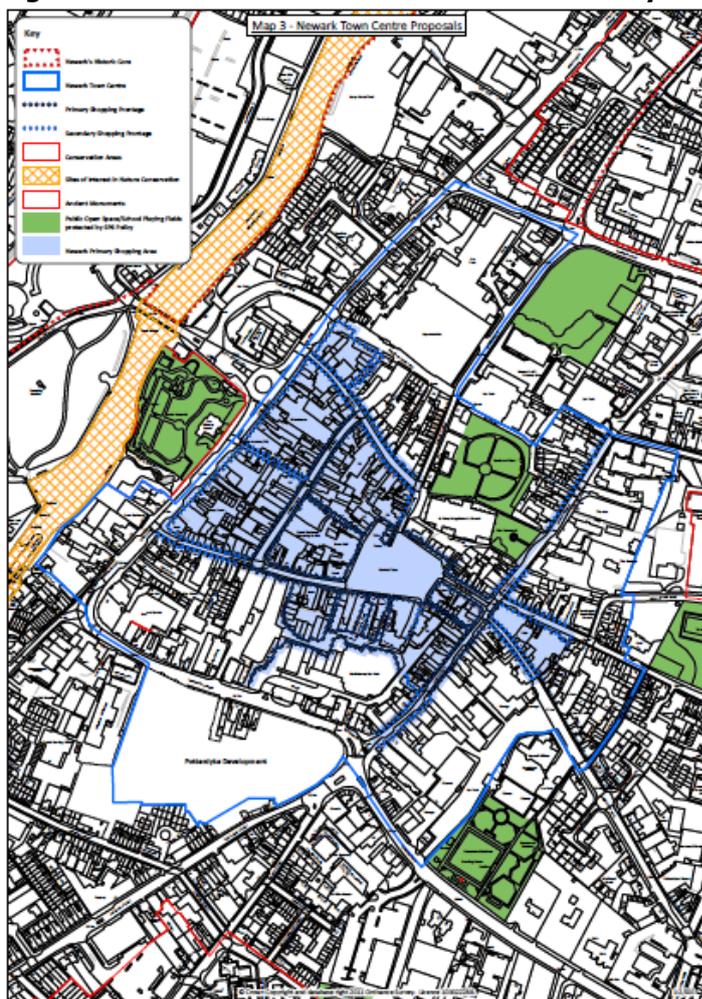
- 2.28 The A&DM DPD states that after taking into account existing completions and commitments, sufficient land has been identified to meet the above requirements. The Core Strategy identified that the majority of the growth forecast for the Newark Urban Area over the plan period would be accommodated by the three Strategic Sites. The residual requirement of 1,544 dwellings and 25-32 hectares of employment land is planned for in the A&DM through Policies NUA/Ho/1-10, NUA/MU/1-4 and NUA/E/1-4. Of the identified sites:

- **Policy NUA/MU/3** allocates land at the current NSK factory on Northern Road for mixed use development to accommodate at least 150 dwellings, employment provision and comparison retail provision of around 4,000 sqm net.

- **Policy NUA/MU/4** also identifies land at Bowbridge Road for approximately 115 dwellings and a new leisure centre for Newark.

2.29 In line with the Core Strategy (CP 8), **Policy NUA/TC/1** of the A&DM identifies Newark Town Centre as the focus for new and improved shopping, leisure and tourism facilities within the Newark Urban Area. A town centre boundary is defined which illustrates the extent of the *Primary Shopping Area* (PSA), as well as Primary Shopping Frontages (PSF) and Secondary Shopping Frontages (SSF) have been defined on the Policies Map. This is reproduced below for ease of reference.

**Figure 2.1 Newark Town Centre & PSA Boundary**



Source: 2013 Allocations and Development Management DPD

2.30 The plan shows the Town Centre boundary (solid blue line); the PSA (blue shaded area); PSF (blue circles); and SSF (blue diamonds). The defined PSA is bounded by, but excludes the Potterdyke (Asda) scheme to the south and Morrisons to the north. These stores are defined in retail planning terms as being 'edge of centre', although both stores are clearly well related to the PSA. The other main shopping locations and stores in Newark – namely Northgate Retail Park, Aldi and Waitrose - are defined as being 'out-of-centre' in policy terms.

2.31 The A&DM DPD states that development of retail and other town centre uses within Newark Town Centre will be considered against the general policy requirements in the Core Strategy and the Development Management

Policies in Chapter 7<sup>15</sup>, with particular reference to **DM Policy 11** (*Retail and Town Centre Uses*) which promotes the town centres 'first' policy approach:

- **Newark Town Centre** – Proposals for non-retail uses at street level within the PSF will not be supported unless they can demonstrate a positive contribution to the town's vitality and viability. The Council supports a greater diversity of town centre uses within the SSF, providing that there is no overall dominant use other than retail (A1). Within the lower part of Stodman Street and along Castle Gate, the Council will not resist a dominance of restaurant and café A3) uses.
- **District and Local Centres** - New and enhanced retail development and other town centre uses that are consistent with the size and function of the District Centres, and maintain and enhance their role will be supported. Within existing and proposed new Local Centres, as defined on the Policies Map, new and enhanced convenience retail will be supported that serves the community and is consistent with its size and function.
- **Out-of-Centre** - Retail development in all out-of-centre locations will be strictly controlled. Retail proposals creating more than 2,500 sqm outside of existing centres will require justification through a sequential and impact test. Assessments should take account of current and future expenditure capacity and the appropriateness of their scale. For proposals that may impact on Newark Town Centre, it is also necessary to take account of impact on the function of the town centre as a market town and the viability of the market; the effect of development on independent retailers having regard to their role within the town centre; and the impact of development on the town centre in catering for tourism.

## Plan Review

- 2.32 The Newark and Sherwood Plan *Review Issues Paper* (Autumn 2016) sets out that the review will consider the extent of the existing centre boundaries and frontage designations and retail/main town centre use policies. The assessment of the continued deliverability of current retail and main town centre use allocations will form part of the review process. Following the *Issues Paper* the Council has now prepared its '*preferred approach to strategy*' which outlines its preferred approach to new housing and employment development targets, based on the latest evidence, a refined spatial strategy (i.e. where future development should be located), new affordable housing policies and a range of other minor changes to current planning policy. This will be followed later in 2016 with the preferred approach to settlements and sites- which will, informed by this study, also address retail and main town centre uses.

## Other Relevant Documents

- 2.33 The following provides a brief commentary on some the evidence-based documents that are most relevant to the preparation of this update of the retail and town centre evidence base.

---

<sup>15</sup> The Development Management Policies have been designed to complement the Spatial, Core and Area Policies of the Core Strategy to provide a suite of policies with which to assess all development proposals on both allocated and unallocated sites. The principle of development will be established by reference to the policies of the Core Strategy and detailed proposals will be assessed by reference to the relevant Development Management Policies. All policies are mutually inclusive and development proposals will need to satisfy all those that are relevant. Where there is a need for reference to other policy or guidance, this is made clear within the justification.

## ***Newark and Sherwood Retail and Town Centres Study (March 2010)***

- 2.34 The 2010 Retail and Town Centres Study (RTCS) prepared by GVA Grimley for the Council assessed the need for new retail floorspace and leisure uses up to 2026 and provided health checks for the Town Centre and smaller District and Local Centres.
- 2.35 This study informed the preparation of the Core Strategy and, as described above, forecast capacity for 5,661 sqm net of new convenience goods floorspace and 18,459 sqm net of comparison goods floorspace by 2026 within Newark's Urban Area (NUA). This higher forecast capacity was based on the additional population and expenditure arising from its Growth Point Status and the provision of approximately 11,000 homes over the plan period (approximately 70% of the growth would be provided in the NUA<sup>16</sup>). In response to these higher capacity forecasts the study supported the principle of a sustainable District / Local Centre at one or more of the Council's proposed strategic housing land allocations.
- 2.36 In terms of other leisure and town centre uses, the study encouraged the proliferation of quality restaurants along the western flank of the town centre and identified opportunities to intensify eating / drinking and associated leisure uses at Dobson's Quay subject to relevant planning controls, exploiting its riverside location and enhancing linkages with the town centre. Additional eating/drinking areas were also identified encouraged in the Market Place and around the cinema. The study also concluded that the town would benefit from a 'quality' or 'boutique' hotel operator to support the tourism industry.
- 2.37 However there were relatively few suitable, available and viable sites at the time within the town centre that could accommodate additional retail and leisure floorspace. The development of the Asda and other new town centre uses as part of the Potterdyke planning permission was seen as key to improving the town's overall retail offer over the short term, although the scheme was located outside the PSA it is adjacent to it and contains the town's Bus Station. The key challenge for Newark going forward was how to incorporate additional floorspace within or adjoining the PSA, to help increase footfall and dwell time and maintain the town's market share within the network of sub-regional centres. To achieve this, the study recommended that the Council explore fully infill development / redevelopment opportunities to provide new units to attract new retailers / leisure operators. It also identified an opportunity for change around the Carter Gate area, which was under-performing at the time; although this appeared to be more suited to a mixed-use residential led scheme, rather than prime retail.
- 2.38 In conclusion, the study advised that Newark town centre's position within the Regional hierarchy should be consolidated. However, it should not be seeking to compete with larger competing centres such as Nottingham and Lincoln, but should seek to enhance its retail and leisure offer, creating a 'different' retail experience.

## ***Retail Capacity and Retail Proposals (May 2012)***

- 2.39 This updated study<sup>17</sup> was commissioned by the Council following the adoption of the Core Strategy to help inform the preparation of the *A&DM DPD*. The study focused on the issues of retail capacity and proposals for retail development. It specifically advised on the suitability of the following two sites to accommodate major

---

<sup>16</sup> Equivalent to Zone 1 of GVA's defined study area comprising postcode sectors NG23 5, NG24 1, NG24 2, NG24 3 and NG24 4  
<sup>17</sup> Prepared by Alyn Nichols and Associates

new retail floorspace and whether both sites could come forward within the Plan period without harming the vitality and viability of the town centre:

- **Land at Northern Road, Newark** (the NSK site) - located approximately 1km to the east of the Town Centre for mixed use development, including new retailing. As described above, this site was subsequently allocated in the A&DM DPD under **Policy NUA/MU/3** for a scheme to include comparison retail provision of around 4,000 sqm net.
- **Land at North Gate, Newark** – an application by *Newark Property Developments Limited* (NPDL) on part of the former Warwick and Richardsons Brewery site to effectively extend Northgate Retail Park to provide some seven larger format (“bulky goods”) retail units with a total (Class A1) retail floorspace of 6,754 sqm gross (including mezzanine space) and 222 car parking spaces (ref. 11/01067/OUTM). The site is located some 400 metres from the nearest point of the Town Centre’s defined PSA and is therefore defined as ‘out of centre’ in retail planning terms.

2.40 The study concluded that although the 2010 NSRTCS overstated capacity by approximately 15% (resulting in the revised 15,690 sqm comparison floor space target) due to the impact of the economic recession and the growth in internet shopping, there would nevertheless be significant capacity over the Plan period up to 2026 to support both the North Gate scheme and the retail floorspace proposed for the NSK site. However, because this capacity would arise in the latter part of the Plan period, they advised that “*any site allocation should either include provision for phasing or require consideration of the impact of the proposals on the town centre*” (paragraph 32). The study also advised that the Council was in a position to determine the planning application in advance of the A&DM DPD being adopted. In the absence of capacity for new comparison goods floorspace in the short term, the study concluded that “controls” (conditions) would be necessary to ensure that development would not harm the vitality and viability of the town centre.

2.41 The NPDL outline application was subsequently refused by the Council, but allowed at (Section 78) appeal<sup>18</sup> in February 2013. The Inspector concluded that the scheme would assist the objectives of Core Strategy Policies CS8 and NAP1. The permitted scheme allows for a discount food retailer, bulky goods retail and a Majestic Wines unit. The applicant submitted a revised application in 2013 (13/00997/OUTM) for the same quantum of retail floorspace (i.e. 6,754 sqm gross) but with amendments to the scheme’s layout and configuration. For example, the application was for a modest increase in the floorspace of the A1 convenience foodstore (unit A) from 1,375 sqm gross, as permitted at appeal, to 1,520 sqm gross. This was not considered significant by the Council as to fundamentally undermine the appeal decision, and planning permission was granted on 4<sup>th</sup> December 2013 subject to conditions.

2.42 Following this there was an application (15/01858/OUTM) to vary condition 25 of planning permission 13/00997/OUTM to allow the use of Unit B as A1 (non-food) for the relocation of the Next store from the Northgate Retail Park to the NPDL site. Advice was provided by Alyn Nichols which outlined that the impact was unlikely to be significantly adverse and so the officer recommendation was to approve. Ultimately the Planning Committee took a different view over the likely impact and refused the application on this basis. The

---

18 Appeal reference APP/B3030/A/12/2174284

applicant appealed and the appeal was allowed and planning permission was granted for proposed erection of retail development bulky goods/open A1/open A1 convenience uses and provision of car parking on 9 September 2016. The Inspector concluded that with the imposition of the proposed variation to condition no. 25, the proposal would not have a significantly adverse effect on the vitality and viability of Newark Town Centre. Retail Monitoring Reports (2011-2015)

- 2.43 These reports prepared by the local planning authority monitor town centre retail provision in regards to the gain and loss of convenience and comparison floorspace in accordance with the requirements of the Newark and Sherwood Core Strategy DPD. They specifically monitor retail commitments and use class percentage in accordance with the criteria set out in Policy DM11 of the Allocations and Development Management DPD. We have referred to these reports to help inform our centre audits and health checks, and also our advice on the definition and extent of primary and secondary frontages, and Primary Shopping Areas.

### ***Housing and Employment Land Assessments***

- 2.44 The current housing and employment targets in the Core Strategy are based on figures from the former *East Midlands Regional Plan*. It requires 14,800 new dwellings be allocated and built out between 2006 and 2026 (at a rate of 740 dwellings per annum) and between 97-106 hectares of employment land. The employment targets have been developed to support the level of housing growth proposed and were derived from the housing land review which supported the Regional Plan. However the system of Regional Plans has since been removed and it is now the responsibility of Local Planning Authorities to set development targets.
- 2.45 In terms of housing requirements, Newark & Sherwood District sits within the '*Nottingham Outer*' Housing Market Area (HMA)<sup>19</sup>, alongside the Districts of Mansfield and Ashfield. These three Districts have been defined as a single HMA and a joint *Strategic Housing Market Assessments* (SHMA) was published in October 2015<sup>20</sup>. The SHMA identifies the *Objectively Assessed Need* (OAN) for new housing at the local level based on future population and household projections; taking into account migration in and out of the HMA and between Districts, affordable housing needs and economic growth prospects. The SHMA identified a final OAN for Newark and Sherwood of 9,080 new dwellings, which is equivalent to **454 dwellings per annum between 2013 and 2033**.
- 2.46 Through the recent '*Preferred Approach - Strategy*' document (July 2016) the Council has set out that its preference would be for the Plan to use the objectively assessed figure of 9080 dwellings (2013-2033) equating to 454 dwellings per annum, as the new housing target. Through cooperation with adjacent authorities, both within and beyond the HMA, it has been established that there is no need to allow for additional provision to meet any likely under provision in those areas. The Council has however signalled its intention of having sufficient sites to more than meet the OAN figure, in order to ensure that housing requirements can be met, and therefore supporting studies such as this need to take account of the fact that if all the development was to occur higher levels of housing growth could result.

---

<sup>19</sup> In simple terms, the HMA is a geographical area in which the majority of people, who move, will move within. It also reflects functional relationships between where people live and work. However, defining housing market areas is an inexact science and there is no single source of information that will clearly identify housing market areas.

<sup>20</sup> The full report is available to view on the Council's website at [www.newark-sherwooddc.gov.uk/planreview](http://www.newark-sherwooddc.gov.uk/planreview)

2.47 In order to inform the update of the various evidence-based documents to support the Plan Review (including the preparation of this updated Retail and Town Centres Study), the Council has prepared a development scenario that takes into account planning permissions, allocated sites and the potential for new development in opportunity areas.

2.48 The table below summarises the housing figures and distribution across the district based on the original Core Strategy targets, the OAN and identified potential development sites:

	Original Core Strategy Requirement	%	OAN using Core Strategy Splits	%	Deliverable Allocations/ Commitments (including completions post 2013)	%
<b>Newark Area</b>	<b>10,126</b>	<b>71.5%</b>	<b>6,492</b>	<b>71.5%</b>	<b>8,580</b>	<b>71.5%</b>
Newark Urban Area	9,913	70.0%	6,356	70.0%	8,400	70.0%
Collingham	142	1.0%	91	1.0%	120	1.0%
Sutton-on-Trent	71	0.5%	45	0.5%	60	0.5%
<b>Southwell Area</b>	<b>567</b>	<b>4.0%</b>	<b>363</b>	<b>4.0%</b>	<b>480</b>	<b>4.0%</b>
Southwell	425	3.0%	272	3.0%	360	3.0%
Farnsfield	142	1.0%	91	1.0%	120	1.0%
<b>Nottingham Fringe Area</b>	<b>71</b>	<b>0.5%</b>	<b>45</b>	<b>0.5%</b>	<b>60</b>	<b>0.5%</b>
Lowdham	71	0.5%	45	0.5%	60	0.5%
<b>Sherwood Area</b>	<b>1,770</b>	<b>12.5%</b>	<b>1,136</b>	<b>12.5%</b>	<b>1,500</b>	<b>12.5%</b>
Ollerton & Boughton	1,133	8.0%	727	8.0%	960	8.0%
Edwinstowe	283	2.0%	182	2.0%	240	2.0%
Bilthorpe	354	2.5%	227	2.5%	300	2.5%
<b>Mansfield Fringe Area</b>	<b>1,629</b>	<b>11.5%</b>	<b>1,044</b>	<b>11.5%</b>	<b>1,380</b>	<b>11.5%</b>
Rainworth	425	3.0%	272	3.0%	360	3.0%
Clipstone	850	6.0%	545	6.0%	720	6.0%
Blidworth	354	2.5%	227	2.5%	300	2.5%
<b>DISTRICT TOTAL:</b>	<b>14,163</b>	<b>100.0%</b>	<b>9,080</b>	<b>100.0%</b>	<b>12,000</b>	<b>100.0%</b>

Source: Newark and Sherwood District Council

2.49 For the purpose of this study the Council has advised that consideration needs to be given to the total levels of dwellings which could be delivered in the Plan period, which is greater than the target of 9,080 new homes. The Council's policy approach is to identify sufficient sites to more than meet the OAN figure, in order to ensure that housing requirements can be met and reflect the planning situation on the ground in terms of permissions and allocations. The most appropriate figure for the purposes of the study is therefore the 11,899 homes as this takes account of those commitments and allocations which are anticipated to come forward within the plan period. **The Council has confirmed that rounding the level of development up to 12,000 new homes would provide an appropriate and robust foundation on which to conduct the study.**

2.50 In terms of the employment targets, these are aligned with housing requirements and are informed by the joint *Employment Land Feasibility Study (ELFS)* published in August 2015<sup>21</sup>. This study analyses the economic prospects of Nottingham HMAs and identifies future employment land requirements for office and industrial development. It takes into account the changing nature of work – for instance increase in flexible working -

<sup>21</sup> The full study is available to view at [www.newark-sherwooddc.gov.uk/planreview](http://www.newark-sherwooddc.gov.uk/planreview)

which means less space requirements are generated than previously by job requirements. The future employment land requirements are based on four scenarios and these are set out in the table below.

## Employment Land Requirements to 2033

	Scenario 1: Job Growth based on Experian Baseline	Scenario 2: Job Growth with Experian Data and LEP Jobs Target	Scenario 3: Labour Supply Housing Requirements	Scenario 4: Projections based on Past Completions Continue
<b>B1c/B2/B8 (Ha)</b>	66.4	71.36	74.53	62.60
<b>B1a/b (sqm)</b>	91,192	93,770	96,877	113,040

Source: ELFS (August 2015)

Notes: B1c/B2/B8 refers to industrial processes, general industry and storage and distribution. Baa/b refers to offices and research establishments

- 2.51 The main allocation of B1a/b is currently at Fernwood, where the Council wishes to see high quality landscaped business park development of the sort that will be of a lower density. In terms of office use, although this is encouraged in town centres the Council, has through the *Plan Review Issues Paper*, identified that it is unlikely that all future provision can be accommodated within these locations. As part of the subsequent stages of its Plan Review the Council will therefore need to establish if there are any potential locations for office development in town centre and/or edge of centre locations other than the sites already identified that can accommodate the range of additional new office employment floorspace.

## Summary

- 2.52 In summary, the underlying objective of both the NPPF and Local Plan policy is to maintain and enhance the vitality and viability of town centres, and to promote new sustainable development and economic growth in town centre locations “first”. This policy objective is crucial as town centres are facing increasing economic challenges associated with alternative forms of retailing; in particular online shopping and competition from major out-of-centre developments (discussed further in Section 3).
- 2.53 Notwithstanding the town centre first policy, this does not rule out edge of centre development where identified needs cannot be met in existing PSAs. Indeed the NPPF (paragraph 23) encourages local planning authorities to assess the potential to expand town centres to ensure a sufficient supply of suitable sites. If edge of centre sites cannot be identified to meet the identified needs “*in full*”, then local planning authorities are required by the NPPF to set policies for meeting the identified needs in other accessible locations that are well connected to the town centre, subject to an assessment of the impact of any proposed retail and town centre uses on the vitality and viability of existing centres.
- 2.54 Finally, Newark and Sherwood Council is engaged in a review of its Development Plan. The principal aim of this review is to ensure that the allocations and policies contained within the two DPDs continue to be appropriate, up-to-date and effective. The NPPF also now requires local planning authorities to prepare a single Local Plan rather than a series of DPDs.
- 2.55 It is against this policy context and as part of the Plan Review that the Council has commissioned this 2016 ***Retail and Town Centre Study Update*** (2016 RTCSU). This study will specifically address the issues raised by the Inspector at the A&DM EiP and by the Issues Paper with regard to the need for new retail and town centre uses, as well advising on the appropriateness of the current definition of the retail hierarchy, primary and secondary frontages and Primary Shopping Areas.

## 3 NATIONAL RETAIL TRENDS & TOWN CENTRE FUTURES

3.1 This section summarises some of the key trends that have fuelled the changes in the retail sector over the last three decades, and the impact of these trends on the UK's town centres. It provides a commentary on the impact of the downturn in the economy since 2007 and the growth of internet ('multi-channel') retailing on consumer spending, retail development and retailers' business strategies. Drawing on the latest research it also describes how these trends may continue to shape changes in the future, and whether and how town centres can respond to help maintain and enhance their overall vitality and viability.

### Retail Trends

3.2 Following an unprecedented period of growth in retail sales and expenditure since the mid-1990s, the onset of the longest and deepest economic recession in living memory in 2007/08 had a dramatic impact on consumer spending and market demand. Business and consumer confidence was further weakened by public sector cuts, the rise in VAT, increasing unemployment, less expansionary consumer credit and the rising cost of living (including higher energy costs, petrol and housing prices). This reduced disposable income and retailers' margins were squeezed further.

3.3 Official figures show that the UK recovery began in early 2013 and although GDP growth peaked at 2.9% in 2014, it slowed to 2.2% in 2015 against the backdrop of a waning global economy and further uncertainty on financial markets. The Brexit vote will further dampen business/consumer confidence and the prospects for growth in 2016/17.

3.4 The table below shows the actual and forecast growth in retail (convenience and comparison goods) spending per head identified by Experian Business Strategies in their latest post-Brexit Retail Planner Briefing Note 14, published in November 2016.

**Table 3.1 Forecast year-on-year growth in retail expenditure per capita**

Vol. Growth per head (%):	-----ACTUAL GROWTH-----								EXPERIAN FORECASTS			TRENDS	
	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	1997-07	1997-15
Total Retail Spend	1.8	-3.1	-0.1	-0.4	1.3	1.1	3.6	2.5	2.1	0.9	0.3	5.1	3.3
Convenience	-4.3	-4.4	-1.5	-2.5	-0.5	-0.6	-1.7	-1.1	0.0	-0.2	-0.9	-0.3	-1.0
Comparison	4.4	-3.1	0.6	0.8	2.5	2.2	7.2	4.6	3.3	1.4	1.0	8.0	5.6

Source: Experian Retail Planner Briefing Note 14 (November 2015); Figures 1a and 1b.

Notes: The table also shows historic growth rates for the period 1997-2007 (the pre-recession period) and for 1997-2015).

3.5 As the table shows, there has been negative annual growth in convenience goods expenditure per capita levels since 2008 and this is forecast to continue in 2017 (-0.2%) and 2018 (-0.9%). For the period 2019-2023 Experian forecast no growth in convenience goods expenditure, and a modest +0.1% per annum over the longer term, between 2023 and 2035. The forecast growth rates are above previous negative historic trends (1997-2014) of -0.3% (1997-2007) and -1.0% (1997-2015).

- 3.6 For comparison goods Experian forecast that annual growth rates are recovering from a low of -3.1% in 2009, to a peak of +7.2% for 2014. However Experian forecast that growth will fall in the immediate post-Brexit period, to +1.4% in 2017 and +1.0% in 2018. The average year-on-year growth for the period 2019-2023 is forecast to be +2%, increasing slightly to +2.3% between 2024 and 2035. Despite the return to growth forecast by Experian, it is clear that comparison goods growth rates are well below historic trends of +8% per annum<sup>22</sup>. Furthermore, the retail sector is still vulnerable to fluctuations in the UK economy, and how it responds in the future to changes in the Eurozone (including the outcome of Brexit) and global economies (such as the slowdown in growth in China's economy). This further dampening of growth rates will have implications for the viability of existing retail businesses and the capacity for new retail floorspace over the short to medium term.
- 3.7 Experian's research also shows that retail sales have prospered in the past two years on the back of buoyant consumer confidence and spending. However Experian warn that this buoyancy is true only in sales volume terms, as values have been depressed by heavy discounting and persistent deflation of goods prices. Experian (pre-Brexit) forecast that retail sales volume growth will ease from around +4% growth on average over the past two years, to +2.9% in 2016 given the dampening in consumer spending power. The also forecast that growth will continue at the same levels in 2017 as welfare cuts and rising interest rates bear down on spending, offsetting the gains from continuing overall economic growth. However, these forecasts will need to be updated in light of the Brexit vote.

## Special Forms of Trading and Internet Shopping

- 3.8 One of the key trends that has impacted on the retail sector and shopping patterns over the last decade has been the growth in internet shopping, which forms part of special forms of trading (SFT)<sup>23</sup>. Based on ONS data, Experian Business Strategies (EBS) estimate that:
- the current (2016) value of internet sales is £48.9bn (current prices), which represents a +16.2% increase from £42.1bn in 2015; and
  - the value of other (non-internet) SFT sales stand at approximately £8.5bn in 2016, which represents a +7.6% increase from £7.9bn in 2015.
- 3.9 Total SFT sales therefore amount to some £57.4bn in 2016. This represent a 14.8% increase from £50bn in 2015 and a substantial increase from £17.1bn recorded in 2006.
- 3.10 The overall market share of SFT (as a proportion of total retail sales) has increased nationally from 5.5% in 2006 to 14.9% in 2016, and is forecast by Experian to increase to 19.7% by 2026 and 20.7% by 2033 (see table below)<sup>24</sup>.

---

<sup>22</sup> This covers the period 1997 to 2007

<sup>23</sup> Special Forms of Trading (SFT) comprises all non-store retail sales made via the internet, mail order, stalls and markets, door-to-door and telephone sales. On-line sales by supermarkets, department stores and catalogue companies are also included in the data collected by the Office for National Statistics (ONS).

<sup>24</sup> Such forecasts need to be treated with caution, as according to Experian approximately 25% of all SFT sales for comparison goods and some 70% for convenience goods are still sourced through traditional ('bricks-and-mortar') retail space, rather than from 'virtual' stores and/or distribution warehouses. On this basis Experian has produced revised forecasts to reflect the proportion of internet sales sourced from existing stores.

**Table 3.2 SFT's market share of total retail sales**

	2016	2021	2026	2033
TOTAL:	14.9%	18.2	19.7%	20.7%
Comparison	17.6%	20.8%	21.5%	21.9%
Convenience	10.1%	13.0%	15.4%	17.1%

Source: Appendix 3 of Experian Retail Planner Briefing Note 14 (November 2016)

- 3.11 This significant growth is being sustained by new technology (such as browsing and purchasing through mobile phones) and the development of interactive TV shopping. Although Experian forecast that the pace of e-commerce growth will slow after 2020, other commentators suggest that the growth and market share could be higher.
- 3.12 However such forecasts need to be treated with caution, as according to Experian approximately 25% of all SFT sales for comparison goods and some 70% for convenience goods are still sourced through traditional ('bricks-and-mortar') retail space, rather than from 'virtual' stores and/or distribution warehouses. On this basis Experian has adjusted the SFT market shares downwards to reflect the proportion of internet sales sourced from existing stores.

**Table 3.3 Revised forecast growth in SFT's market share of total retail sales**

	2016	2021	2026	2033
TOTAL:	9.6%	11.7%	12.7%	13.6%
Comparison	13.2%	15.6%	16.1%	16.4%
Convenience	3.0%	3.9%	4.6%	5.1%

Source: Appendix 3 of Experian Retail Planner Briefing Note 14 (November 2016)

- 3.13 Notwithstanding this, there is no question that the digital revolution and growth of online ('virtual') retailing has significantly impacted on Britain's high streets and sales, as it provides local consumers with convenient and often cheaper alternatives to more traditional shops. Up to now, the impact of Internet shopping has been mainly concentrated on certain retail products and services (such as, for example, electrical goods, books, music and travel). In turn, this has resulted in a reduction in the number of retailers selling these types of products and services on the high street (the most recent examples being the rationalisation of HMV stores across the UK and the loss of Blockbusters). However this does not mean that other comparison goods categories are immune to the impact of the internet, including clothing and footwear. This is illustrated by the survey-derived market shares for SFT and internet shopping in Newark and Sherwood District (see Section 4).
- 3.14 The impact of the digital revolution is also impacting on how and where people choose to spend their leisure time. For example, instead of visiting the cinema or theatre, consumers can digitally stream to their televisions a vast library of filmed entertainment on demand; and social media, Skype, email and instant messaging are displacing face-to-face interactions. The innovation and development of these alternative digital customer experiences is accelerating, and in the process exacerbating a "digital divide" between, on the one hand, those well-resourced companies investing and competing in the digital arena, and on the other hand the small independent merchants that comprise most of today's High street communities. Yet the success of firms at both ends of the "divide" is mutually dependent, and is essential to a successful high street.

- 3.15 Notwithstanding the clear and present impact of the digital revolution on how people shop and ‘play’, some town centres should be well positioned to benefit from the growth of new retail related services and multichannel retail, particularly through the provision of convenient ‘*click and collect*’ facilities to help drive footfall; whereby customers can order a product on-line and then collect it from a local store at their convenience. This not only addresses the major weakness of online shopping, which is that customers may not be at home when their goods are delivered, but also offers an opportunity for the successful adaptation of traditional high street retailing. John Lewis has led the way in this field and Argos has reported that sales through its ‘*click & collect*’ service account for circa 31% of the company’s total turnover. Amazon also has an agreement with the Co-operative to locate self-service lockers’ in local stores, an example of which was seen in Runcorn Old Town.
- 3.16 Further to this is the potential for ‘*showrooms*’ on the high street, where customers can view and test products in-store before purchasing online. This co-ordinated multi-channel strategy should therefore help to support the vitality and viability of town centres over time, and the demand for retail space. This represents a clear and present opportunity for Newark Town Centre given its excellent and improving transport communications

## Floorspace ‘Productivity’ Growth

- 3.17 Floorspace ‘*productivity*’ (or turnover ‘*efficiency*’) growth represents the ability of retailers to absorb higher than inflation increases in their costs over time (such as rents, rates and service charges) to help maintain their profitability and viability. It is standard practice for retail planning assessments to make an allowance for the year-on-year growth in the average sales densities of existing comparison and convenience goods retail floorspace. However there is limited evidence detailing actual changes in the turnover and profitability of retailers over time. Furthermore analysis of past data and trends is complicated by the fact that sales density increases have been affected by changes in the use of retail floorspace over the last 20 years; such as, for example, the growth in out-of-centre retailing; Sunday-trading; longer opening hours; and the very strong growth of retail expenditure relative to the growth in floorspace. Following the recession many retailers struggled to increase or even maintain sales density levels and, together with other financial problems, this resulted in some retailers going out of business.
- 3.18 The table below sets out the latest sales density growth forecasts for comparison and convenience goods floorspace published by Experian Business Strategies (EBS), based on predicted changes in retail floorspace over time and after making an allowance for ‘non-store’ (SFT) retailing.

**Table 3.4 Forecast ‘productivity’ growth rates**

	2014	2015	2016	2017	2018	2019-23	2024-35
Convenience	-2.0	-1.2	-0.3	-0.1	-0.4	-0.1	+0.1
Comparison	+5.4	+5.3	+2.7	+1.5	+1.0	+2.3	+2.2

Source: Figures 4a and 4b, Experian *Retail Planner Briefing Note 14* (November 2016)

- 3.19 The forecasts show that the scope for sales density growth is very limited for convenience goods retailing. This is mainly due to slow growth in sales volumes and limited additions to the floorspace stock. For comparison goods retailing, the trends towards more modern, higher density stores and the demolition of older inefficient space is forecast to continue, resulting in average growth rates of over +2.0% per annum over the next two decades. However, this is still well below the rate seen during the boom of the early years of this century.

3.20 The floorspace 'productivity' growth rates forecast by EBS have been used to inform the retail capacity assessment set out in Section 9 of this study. It should be noted however that we consider that existing retailers and floorspace will have to achieve higher annual growth rates to absorb increasing costs in order to remain viable.

## **Impact of Out-of-Centre Retailing**

3.21 Alongside the dramatic growth in online shopping and sales over the last decade, it is apparent that the appetite from investors and operators for new retail and leisure floorspace in out of centre locations has not diminished. Research<sup>25</sup> shows that there has been a significant shift of institutional retail investment away from town centres over the last 20 years. In 1993, the proportion of investment held out of town was less than a fifth of that in town centres; today the value of property owned out of town has overtaken that held in town centres.

3.22 Larger format units in out-of-centre shopping parks are increasingly attractive locations for more traditional high street retailers, with the benefits of good accessibility, lower costs and ample surface car parking compared with town centres. Out-of-centre retailing also accounts for a significant proportion of existing and new retail floorspace and sales in the UK. For example research has highlighted the fact that of the new retail developments approved since the NPPF was published in March 2012, 72% were in out of town locations, 16% were edge of centre and just 12% were in town centres.

3.23 Although planning policies and more restrictive conditions on what goods can and cannot be sold from some retail warehouses and parks has slowed down the growth of out-of-centre retailing to a degree, the sector continues to mature and move away from 'bulky' goods<sup>26</sup> retailing to the provision of larger stores selling fashion and homewares that compete directly with the high street. Examples include Next at Home (which now includes a significant proportion of fashion sales), John Lewis at Home and Outfit (which includes the Arcadia brands in one store, including Dorothy Perkins, Topshop, Burton, Wallis, etc.).

3.24 Continuation of this trend will further challenge the future vitality of many high streets as retailers choose edge and out of centre locations ahead of town centres. The impact of these changes will also affect centres differently depending on their function and the future growth in their catchment populations and expenditure. For many towns, the simple fact is that in the future they will require a smaller, more concentrated retail core repositioned for future consumer and retailer needs, and not focused on the past. This will further reinforce the polarisation trend already being witnessed. The impact is likely to be felt across all centres to a greater or lesser extent, manifested through high vacancy rates, falling rent levels, decreasing footfall, weakening multiple retail offer and, potentially, a worsening town centre environment.

---

<sup>25</sup> Property Data Report 2012, sourced from English Heritage Report (2013), The Changing Face of the High Street: Decline and Revival

<sup>26</sup> 'Bulky' goods retailing is generally defined as comprising DIY goods, furniture and floor coverings, major household appliances and audio-visual equipment.

## Changing Retailer Requirements

- 3.25 The economic downturn, the growth in internet shopping and the continued demand for out-of-centre shopping has resulted in national retailers reviewing and rapidly adapting their business strategies, requirements and store formats to keep pace with the dynamic changes in the sector and consumer demand.
- 3.26 This is probably best illustrated by the changes in the grocery sector over the last 2-3 years. Following a sustained period of growth over almost 20 years, which was principally driven by new store openings, the focus for the main grocery operators (i.e. Tesco, Sainsbury's, Asda, Waitrose and Morrisons) has now shifted to growing market share through new smaller convenience store formats (such as Tesco Express, Sainsbury's Local and Little Waitrose) and online sales. Over this period applications for large store formats have slowed to a virtual standstill and in some cases permissions are not being built out<sup>27</sup>. At the other end of the grocery spectrum, the European-led 'deep *discount*' food operators (namely Aldi and Lidl) are increasing their market shares through new store openings across the UK. This will inevitably have implications for the scale and type of new floorspace required by foodstore in the future.
- 3.27 In the non-food sector, those retailers that experienced significant growth up to 2007 have had to adapt to the very different market conditions. The retailers that have not been flexible enough to respond to changing consumer needs, or are being squeezed in the increasingly competitive '*middle ground*' between high-end and value retailing, have largely struggled to maintain market share. In some cases, this has resulted in a series of high profile 'casualties' and a number of key retailers have either disappeared from our high streets altogether (e.g. Woolworths, TJ Hughes, Jessops and Jane Norman), or have significantly reduced their store portfolio in centres across the UK (e.g. HMV, Blockbusters, etc.). Although the number of retailer 'casualties' has slowed over the last 12-18 months, there are still a number of traditional high street retailers that have recently been forced into administration, most notably BHS and Austin Reed.
- 3.28 Research also shows that there is an increasing concentration of retailer demand and investment interest in the larger regional and sub-regional centres (i.e. the 'top 100' centres), and specifically on the prime retail pitches, with the secondary and tertiary pitches deteriorating. This is because these centres usually have large and established catchment areas, and therefore represent less 'risky' investments in the current uncertain economic climate. These larger centres have also generally benefitted from recent new shopping centre development and investment over the last decade, and are therefore better placed than smaller and medium sized centres to accommodate retailers' requirements for modern larger format units. The continuation of these trends will impact on future operator requirements, with retailers looking to satisfy their demand for larger modern premises in prime shopping locations, with strong catchment areas and a good supply of appropriate retail space.
- 3.29 In addition to focusing their attention on larger, dominant centres, many of the multiples and traditional high street retailers are changing their store formats and locational requirements. For example, key anchor retailers such as Boots, Next, Mothercare, TK Maxx, John Lewis and Marks & Spencer are actively seeking larger format units to showcase their full product range and to provide an exciting shopper environment backed by the latest (digital) technology. As a result it is the larger centres and out-of-centre retail parks that are often best placed

---

<sup>27</sup> For example, Tesco is disposing of some 49 sites with relatively recent permissions for new foodstores, including sites in Ipswich, Basingstoke and Dartford.

to meet this demand; as larger units are difficult to accommodate within existing high streets and town centres, particularly historic areas characterised by conservation areas and listed buildings. As a result, some traditional high street retailers are moving out of town centres to retail parks. For example, Marks & Spencer has recently closed its traditional variety stores in Harlow, Great Yarmouth and Rugby, and opened new stores in out-of-centre locations. This further underlines the growing demand from multiple retailers for larger format shop units, and the need for town centres to provide a good mix of large modern units to help attract and retain high street retailers, or potentially risk their relocation to new competing shopping destinations.

- 3.30 These changes in retailer requirements and market demand will continue to have a significant impact on the UK's town centres and high streets, particularly in those cases where retailers make the decision to relocate from town centres to out-of-centre locations, or even out of the area altogether.

## Vacancy Levels

- 3.31 The impact of retail closures in town centres due to administration (beginning with Woolworths in 2008) and portfolio rationalisation has led to a dramatic increase in national vacancy rates. Experian indicate that national average vacancy levels almost more than doubled between 2006 and 2013, from circa 7% to 16%, and although vacancies fell back to just over 13% in 2015, these national average figures do 'mask' the reality for different centres and locations.

- First, research shows that there is a significant polarisation in vacancy levels between prime and secondary centres, and between centres in the north and south. The generally more "healthy" centres, closer to London and the south-east have vacancy levels of less than 10%, whereas the more challenging conditions in centres such as Blackpool, Grimsby and Hull is resulting in vacancy levels over 20-25%..
- Second, since 2012<sup>28</sup> a significant number of shopping centre and high street retail leases have expired as 25 year leases agreed in the late 1980's and early 1990's and more recently agreed sub-10 year leases all reach maturity. In some cases/locations this has helped retailers with their portfolio rationalisation as they adjust their store requirements for the new multi-channel environment.
- Third, in many centres, there can be as many as 25–30% of the occupied shops on temporary short-term lets, with little or no rent being paid<sup>29</sup>.

- 3.32 Experience shows that long-term vacancies and concentrations of vacant properties in centres can lead to a 'spiral of decline', engender feelings of neglect and lack of confidence in town centres, and act as a magnet for crime and antisocial behaviour. Redeveloping and bringing vacant and under-used sites and properties back into use can help stimulate vitality and economic viability, and kick-start local growth<sup>30</sup>.

- 3.33 In cases where these vacancies are long-term and units cannot be let, it will be necessary to consider alternative uses and options for redevelopment. This can include temporary uses that ensure town centres and frontages remain active, with the potential to accommodate business start-ups, art studios and galleries, community/youth

---

<sup>28</sup> Jones Lang LaSalle, Property Predictions, 2012.

<sup>29</sup> Sourced from Beyond Retail (2013)

<sup>30</sup> London Assembly Economy Committee: *Open for Business. Empty shops on London's high streets* GLA, March 2013.

centres, etc. Another option is 'meanwhile leases' which can facilitate temporary occupation of empty buildings while a permanent solution is being found. Furthermore local planning authorities can provide greater flexibility for changes of use in areas with high vacancy levels, particularly secondary frontages, through local plan policies, Area Action Plans and other planning tools.

## Trends in Retail-led Investment and Development

- 3.34 The weak UK retail economy, the low growth in retail sales volumes and the adverse impact of vacant space all combined with the absence of development finance to create a very difficult climate for new shopping centre development and investment in town centres since 2007. One of the key impacts was to 'weed out' some of the more expensive and unviable development schemes that were in the pipeline before the economic downturn.
- 3.35 The *Shopping Centre Development Pipeline Report* published by the British Council of Shopping Centres (BCSC) shows that the UK experienced, on average, nine new centre openings in each of the first 10 years of the 21st century. However, following the development of circa 260,000 sqm in 2009, 232,000 sqm in 2010 and 280,000 sqm in 2011, 2012 was the first year since records began in 1983 that no significant new shopping centres opened. Notwithstanding this, there are more positive recent signs of new shopping centre investment and development activity, with UK-based and international funds seeking assets, principally in prime and secondary locations, that offer the potential for growth. In terms of new development, three major schemes opened in 2013 with a total floorspace of circa 140,000 sqm (including Trinity Leeds). This was followed in 2014 by the scheme in Hereford, where the Old Market was redeveloped via a partnership between the Council, Stanhope and British Land, and is anchored by Debenhams, Waitrose and Odeon. In 2015 there were a number of significant openings, including Grand Central in Birmingham as part of the New Street station redevelopment and Friars Walk in Newport (see case study below).
- 3.36 Recent trends suggest that average scheme size is generally smaller than during the 'golden age' of shopping centre development - less than 27,870 sqm (300,000 sq ft) - other than in the largest cities with the strongest catchment populations and expenditure to support new floorspace. Furthermore, recent developments and schemes in the pipeline have a significantly higher proportion of leisure uses and space than earlier shopping centre developments. For example, Land Securities recently reported that leisure space had grown four-fold in their new development schemes over the last 10 years; as illustrated by their major Trinity Leeds scheme which includes a significant leisure and catering offer. In London, the High Street Quarter scheme in Hounslow Metropolitan Centre will also include a significant food and beverage offer, anchored by a multi-screen cinema, with a reduced retail offer (see case study below).

## CASE STUDY 1: FRIARS WALK, NEWPORT, GWENT

Following the failure of previous retail led regeneration projects in Newport, the City Council began to implement a CPO strategy in 2010 to acquire land in its own name. It also commissioned a full design team to redesign the scheme, hold developer workshops and secure a new development partner, with Queensberry Real Estate appointed in September 2011.

In order to expedite design, planning and pre-letting, the Council then supported the developer by contributing £2m towards seed funding which greatly reduced the overall delivery programme and provided confidence to retailers of an opening window. It then secured a £1.5m grant from the Welsh government to progress demolition and site enabling work, prudentially borrowed £90m to provide a development loan facility to its development partner on commercial terms and committed a transport grant and capital funding towards the cost of a new integrated bus station.

In a coordinated private / public sector collaboration akin to a commercial joint venture, Queensberry has been able to engage in direct dialogue with key anchor retailers throughout the entire process, helping to maintain momentum and confidence in the scheme. These same retailers have also been reassured to see the Council's £2m investment in high street public improvements and the renovation of the Municipal Market at the same time Friars Walk Shopping Centre (400,000 sq ft) opened on 12 November 2015. Major retailers secured include Debenhams, H&M, Next, Topshop and New Look, as well as an eight-screen Cineworld, and eleven restaurants.

By taking a direct interest in the financing of the development, and fully supporting its development partner, the Council ensured it achieved the scheme they wanted and was instrumental in creating a retail-led, mixed use project. Most importantly, the development is of sufficient critical mass to act as a catalyst to further future investment and deliver a step change in the perception of Newport City Centre.

## CASE STUDY 2: HOUNSLOW HIGH STREET QUARTER, LONDON BOROUGH OF HOUNSLOW

The development of the Blenheim Centre in 2006, intended as phase one of the town centre regeneration, with a major Asda store and surface parking, had become isolated with weak links to the existing high street pitch. The high street was also declining due to a lack of right sized larger units for modern retailing and phase two of the project re-establishing links to the high street had become essential.

Hounslow Council commissioned a comprehensive masterplan in 2012 which identified the preferred development site to enhance the town centre retail and leisure offer. The Council then selected a development partner - Barratt London and Wilson Bowden - following a comprehensive marketing and procurement strategy.

The Council also resolved to use its Compulsory Purchase Order (CPO) powers to assemble the site and secured £500,000 in Round One of the Outer London Fund for a programme of shopfront improvements, events, and street markets. It also secured the largest combined award in Round Two for Hounslow high street and Brentford, worth £3m, matched by £750,000 from Hounslow Council. The investment kick-started the regeneration of Hounslow and Brentford town centres. With £100,000 of support from the Mayor's Outer London Fund, Hounslow improved traders' shopfronts in Hounslow and Brentford.

The Council has a vision to transform Hounslow town centre into one of west London's most vibrant and exciting shopping and leisure destinations. Working with its development partners, the circa £100m leisure-led and mixed-use development in Hounslow town centre has been granted planning permission. Known as 'High Street Quarter', the scheme will provide 400 new residential units, a multiplex, restaurants, public space and underground parking.

- 3.37 Even smaller schemes, such as those in Hereford and Salisbury, are providing between 5-10 restaurant (Class A3) units. Such demand is especially true in those town centres which have wider employment, tourist or other attractions and offer the potential for longer stay shopping. It is apparent that the trend towards more eating out and more informal restaurants and catering outlets across town centres is now very much part of new investment and development. This is a trend that clearly has implications for the future planning and development of the District's main centres and the delivery of a realistic retail vision.
- 3.38 Given that it takes on average over ten years for a town centre scheme to be planned and developed, then it follows that it will take a number of years for centres to benefit from the economic upturn and renewed investment and development confidence. Town centre redevelopment is complex and complicated by

fragmented ownership in many centres, which acts as a barrier to site assembly and the creation of new development and infill schemes that might provide the right type of larger format retail units to attract expanding retailers. Small units and fragmented ownership are not conducive to accommodating many of today's retailer requirements. As a result, local planning authorities will need to take a more proactive role in attracting and/or delivering new investment and development in town centres. This was a key recommendation of the recent BCSC research *'Enabling Retail Development'* (2015) which identified the following interventions by local authorities based on their case study research:

- **Investor:** Newport (see case study), Sheffield, Oldham, Walsall
- **Developer:** Sheffield, Oldham, Bradford, Walsall
- **Masterplanner/site assembly:** Ealing, Hounslow (see case study), Newport
- **Owner and management company:** Woking (see case study)
- **Public Realm delivery:** Hemel Hempstead, Bradford
- **High Street improvements and grants:** Newport, Hounslow, Bradford

3.39 Furthermore, the more challenging retail environment means that those shopping locations outside the 'top 100' centres that missed the previous (pre-recession) development cycle may face a long wait for new town centre development, as investors look to reduce their exposure and risks. While existing shopping centres may provide the opportunity for asset management by their owners to improve their overall attraction, offer and turnover (such as, for example, through extensions and/or increasing the food, beverage and leisure offer), it can still be problematical and prohibitively expensive to reconfigure units in the more dated early generation shopping centres. In addition, a lack of finance in recent years has severely limited investment in these centres. So, even where there is single ownership and control, activity to create the right type of units for retailers has been restricted. However it is preferable to work with existing schemes, where possible, to avoid simply moving retailers from one scheme to another and creating yet more vacant units.

### CASE STUDY 3: WOLSEY PLACE, WOKING

Woking Council's business development strategy at the start of the millennium was to expand the number of major head office buildings in the Borough, and create new inward investment through business development. However these objectives were being undermined by the sub-standard town centre environment.

Lack of direct control in the town centre made a remedy difficult to achieve. The purchase of the Peacocks shopping centre by Northern Irish investors Moyallen was the catalyst for change. A willingness to engage positively and collaboratively with the local authority provided the foundation for a joint venture which has transformed the town centre. Woking Borough Council purchased Wolsey Place shopping Centre in 2010 to ensure direct control. It created a management structure with Moyallen to create Woking Shopping, to ensure the town centre enjoyed effective asset management and tenant mix planning. This saw private sector experience and expertise supporting the creation of a credible plan to deliver on key objectives over a defined timescale.

The first phase saw the exploration of deficiencies in the town centre offer and creation of plans to remedy these deficiencies quickly. This resulted in a phased programme to upgrade the public realm, introduce new family dining offers and further refine the retail offer, resulting in new traders opening in Woking.

The Council then looked at a more ambitious project to deliver a new M&S store – to provide an opportunity for associated development and new hotel accommodation, as well as a strong market for town centre apartments on Victoria Square.

Both the Borough Council and County Council have taken a direct interest in the proposals which provide for a new 60,000 sq ft M&S store with 58,000 sq ft of associated retail, a 190 bedroom hotel with Spa, conference facilities and

restaurants. The plan also features two new civic spaces and associated new public realm, 392 apartments in two towers and 380 new car parking spaces.

Site assembly for Victoria Square has required the relocation of the market, with a collaborative approach between Woking and Moyallen market specialising in food. The approach supported the vision to enhance the town centre environment by creating improved public realm, a better retail offer and a significantly improved and enhanced trading opportunity for the market.

The positive impacts to date have included increased footfall, improved car park usage, better quality retailers and improved engagement with the local shopping catchment. Also, to validate the original criteria, over 100 new inward investment enquiries have been received in the last two years, over 1,000 new jobs have been created and over £3.5m of new third party funding has been attracted.

- 3.40 Even with internet growth, additional floorspace remains one of the primary mechanisms which retailers use to grow profit and if they cannot occupy or adapt existing space, they will often look elsewhere. This means that new retail development solutions are likely to need to become more imaginative in the way in which existing properties (including listed buildings) are altered in order to help prevent further diversion of trade to out-of-centre locations. Notwithstanding this, the economic rationale for new floorspace in many town centres is much reduced and some commentators<sup>31</sup> argue that the focus will increasingly be on enhancing and updating the existing town centre fabric.

## Independents and Markets

- 3.41 Multiples continue to be a powerful force within the retail sector, both as marketable brands, and in their ability to secure the prime locations in our town centres. However this does not underestimate or undervalue the important role of small independent shops<sup>32</sup> and street markets, which help to improve consumer choice and convenience to the communities they serve, as well as generating significant benefits for town centre economies in terms of local employment and income generation. Furthermore, it is widely accepted that a good mix of independent shops and market stalls help to enhance the character, diversity and vibrancy of town centres, preventing the growth of so-called “clone towns”<sup>33</sup> due to the increasing colonisation of centres by larger chain stores.

*“Is the spread of clone towns and the creeping homogenisation of the high street anything more than an aesthetic blight? We think so. Yes, distinctiveness and a sense of place matter to people. Without character in our urban centres, living history and visible proof that we can in some way shape and influence our living environment we become alienated in the very places that we should feel at home.” (New Economics Foundation, Reimagining the High Street, 2010)*

- 3.42 Notwithstanding this research shows that the number of small shops in the UK has declined in the past decade. This decline has been caused by multiple factors, including changes in shopping behaviour, competition from supermarkets, internet shopping and rising costs (including rents and rates).
- 3.43 In terms of street markets, the 1994 Rhodes Report into the Retail Market sector demonstrated its collective and economic strength. From this report the industry has been successful in demonstrating its national

---

<sup>31</sup> English Heritage (2013), The Changing Face of the High Street: Decline and Revival

<sup>32</sup> Defined by the Town Centres SPG as a shop with a gross floorspace of 80 sqm or less.

<sup>33</sup> New Economics Foundation (NEF) Clone Town Britain Report (2005 and 2010)

economic value and successive governments have started to value the role of markets as a vibrant and active part of the future of our town centres and the High Street. This is illustrated by the NPPF (paragraph 23), which places weight on the need to “*retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive*”.

- 3.44 The Portas Review also identified markets as an important factor in the future of successful town centres. This review produced 28 recommendations for reforms and whilst the success (or otherwise) of the Portas Pilots and other interventions are still the subject of debate, recommendation No 17, a national market day, was grasped by the retail market industry. In May 2012 the first ‘*Love Your Local Market Fortnight*’ (LYM) was rolled out as an annual national celebration of all things positive about retail markets in the UK. The Department for Communities and Local Government (DCLG) have also been very proactive in supporting the positive role of markets in the UK and town centre economies, and there is a Minister with responsibility for Town Centres and Markets. The Great Yarmouth MP Brandon Lewis held this position in the first year and Marcus Jones MP is now the current Minister. It is important to note however that whilst DCLG continue to support the market industry the initial government funding for LYLM is ending.
- 3.45 Retail Markets continue to make a meaningful contribution to Towns and Cities across the UK. The successful markets we see today are those which have embraced change and adapted alongside the town in which they trade, as the demographics of a town change a successful market will reflect this change and continue to cater for and attract the residents of the District creating a vibrant and successful market, this will in turn attract visitors from outside the borough and increase the value of the market. Recent research documents supporting the benefits of Markets can be found via the following link: <http://www.nabma.com/publications/research-documents/>.
- 3.46 In summary, providing for the needs of modern retailers in larger format stores, principally through new retail-led developments, whilst maintaining the viability, representation and mix of independent businesses and market stalls is a difficult balancing act for local planning authorities. It will be a greater challenge going forward with the threat of internet shopping and a fragile economy in the post-Brexit age, but it is vitally important that the diversity of a centre’s offer is not undermined by the new retail brands.

## Summary

- 3.47 In summary, there are positive signs that the UK is emerging from the shadow of the longest and deepest economic downturn in living memory, but it is clear that it is clear that our town centres and high streets post-recession are facing a myriad of challenges and pressures to simply retain retail businesses, let alone attract new investment and development.
- First, although the economy in general and retail sector in particular is forecast to experience growth over the short to medium term at least<sup>34</sup>, albeit at a slower pace than in 2014 and 2015, there are risks to these growth forecasts; not least the slowdown in global economies, an increase in interest rates and the potential fallout from Brexit.

- Second, the growth of online shopping is impacting on the vitality and viability of many of Britain's centres and high streets.
- Third, although the NPPF reinforces the longstanding policy objective of promoting development and investment in town centres first, the market appetite for new and extended shopping facilities in out-of-centre locations shows no signs of slowing. The lack of available, suitable and viable sites in town centres to meet the demands of modern retailers and commercial leisure operators for larger format units will inevitably result in an increase in new out-of-centre applications and/or applications to widen 'bulky conditions' conditions on existing retail parks.

3.48 These trends, and others, are placing pressures on rental growth and market demand in many centres; particularly the smaller secondary centres and market towns outside the 'top 100' shopping locations. This has been further compounded by rising vacancy levels and the loss of key retailers. As a result, the share of non-food retail sales conducted through town centre shops has declined; from 64% in 2002 to just over 40% by 2013. Indeed research predicts that by 2020, the impact of declining in-store sales will result in a 31% reduction in high street stores<sup>35</sup>

3.49 As a result a far more uncertain future awaits the next wave of new retail investment and development. The evidence suggests that:

- At one end of the spectrum the larger, **more dominant centres** will get stronger; attracting high profile domestic and international retailers and combining these attractors with an increasingly diverse leisure and food and beverage offer.
- At the other end of the spectrum the **smaller local and neighbourhood centres** are less affected; they are principally meeting the everyday retail, service and community needs of their local ('walk-in') resident catchment populations.
- It is the **medium-sized towns** that occupy the middle ground that are increasingly being squeezed by the dynamic shifts in retailer demand and investment. Historically, such towns have had a reasonably large comparison shopping function, but this is beginning to shrink back because the demand from multiples is slowing and the space offered is often of the wrong size and configuration, and in the wrong location to meet today's retailer requirements.

3.50 Notwithstanding these threats, industry experts still predict that the demand from major retailers for new physical space in the right locations with strong catchments will continue, as it still remains one of the primary mechanisms for retailers to 'reach' their customers, to grow their businesses and to increase market share and profitability. Over the short to medium term any increased demand for space from retailers will have to be met by the current retail stock (i.e. existing shopping centres, the high street and out-of-centre facilities). This is because there is limited new retail floorspace in the pipeline in town centres and, in any case, it can take a long time to deliver new development on complex town centres sites.

---

<sup>35</sup> Javelin Group, How Many Stores Will We Really Need?, 10 October 2011.

- 3.51 With increased demand and the lack of supply over the short to medium term, research for the British Council of Shopping Centres (BCSC) predicts that this will effectively 'push up' rental levels for the larger modern desirable units until a significant amount of new development reaches completion. As a result, over the medium term, retailers will be competing for limited available space.
- 3.52 Therefore those shopping locations that are able to accommodate and deliver new developments over the next 5-10 years should be in a good position to attract operator interest. However, this will depend on the new retail floorspace being in the right location (i.e. preferably prime shopping locations, with good accessibility, parking, etc) and having the right size, format and specification to meet the needs of modern retailers. Due care and attention will also need to be paid to ensuring that the new floorspace and tenants complement rather than compete with the centre's existing offer, and strengthen rather than weaken the existing pedestrian circuit so as to generate the maximum benefits for the centre's overall vitality and viability.
- 3.53 In this context, it is clear that the 'top 50-100' prime centres and shopping locations in Britain should continue to flourish once the economy recovers. The greatest challenge facing local planning authorities will be how to revitalise the fortunes of struggling small and medium sized centres and market towns that do not have the critical mass of retail, leisure and other uses to compete for more limited investment and development.
- 3.54 This provides the important background and context for assessing and understanding the potential for new retail investment and development in Newark and Sherwood District over the short, medium and long term, and principally Newark Town Centre.

## 4 STUDY AREA AND HOUSEHOLD SURVEY SHOPPING PATTERNS

4.1 This section first defines the catchment/study area that provides the basis for the household telephone interview surveys (see **Appendix 1**). It then briefly describes the household telephone interview survey methodology and approach, including the scope of the questionnaire (also see **Appendix 2**). The full 'weighted' survey results and tabulations are included in **Appendix 3** to this report. In this section we briefly set out the headline findings of the survey-derived market share analysis for convenience and comparison goods retailing, including the impact of *Special Forms of Trading* (SFT) on shopping purchases.

### Study Area and Zones

4.2 The definition of an appropriate study (catchment) area is an important starting point for any retail and town centre assessment. In this case the study area has been defined using postcode geography and covers Newark and Sherwood District in full, as well as extending to the edge of the urban areas of Grantham, Sleaford, Lincoln, Mansfield, Retford and Nottingham (see Appendix 1).

4.3 The Study Area has been sub-divided into eleven zones based on postcode geography, and taking into account the location of the main centres and shopping facilities in the District. These zones provide the sampling framework for the household telephone interview survey (see Table 4.1). This zone-by-zone approach enables more detailed analysis of shopping patterns and expenditure flows both within and outside the study area for the purpose of the retail capacity assessment, which is in accordance with good practice.

**Table 4.1 Study Area – Zones, Postcode Sectors, Catchments and Population**

Zones	Postcode Sectors	Catchment / Geographic Area
1	NG24 1, NG24 4	Newark on Trent
2	NG24 3, NG24 2	Newark Urban Area incl. Balderton
3	NG23 5	Newark Rural Area
4	NG21 9, NG22 9	Clipstone, Edwinstowe, Boughton, Ollerton
5	NG23 6, NG22 0	Sutton on Trent
6	NG23 7, LN6 9, LN6 4, LN6 8	Collingham, Lincoln Fringe Area
7	LN5 0, LN5 9	Lincoln Fringe Area
8	NG32 2, NG32 3	Grantham Rural Area
9	NG13 0, NG13 9, NG13 8	Nottinghamshire Rural Area
10	NG14 6, NG14 7, NG25 0	Southwell, Lowdham
11	NG21 0, NG22 8	Rainworth, Farnsfield, Bilsthorpe, Blidworth

### Household Survey

4.4 NEMS Market Research was commissioned to carry out 1,000 telephone interview surveys across the defined study area and zones in May 2016. The questionnaire was designed by Carter Jonas (CJ) in collaboration with the local planning authority (see Appendix 2). The interviews were conducted across eleven zones and NEMS carried out structured interviews by telephone with the person responsible for the main household shop. A number of measures were put in place by NEMS to ensure each sample was representative of the profile of the

person responsible for shopping in the household. Responses across the study area were weighted by the population in each zone to ensure that the results of respondents in more sparsely or heavily populated areas were not under or over represented in terms of the market share assessment. This is a standard approach that helps to ensure the survey results provide a robust and realistic picture of shopping and leisure patterns. The full 'weighted' survey results are set out in **Appendix 3**.

## Convenience Goods - Market Share Analysis

- 4.5 Convenience goods<sup>36</sup> retailing is generally defined as comprising everyday essential items (including food, drinks, newspapers/magazines and confectionery), as well as an element of non-durable housing goods (such as washing up liquid, kitchen roll, bin bags, etc.). In order to determine and assess current food shopping patterns across the Study Area, the household survey comprised standard questions on:
- what store households “normally” carry out their main ‘bulk’ (trolley) food purchases (question 1), what they like about this store/centre (question 2), and how they normally travel there (question 3);
  - whether they link their main food shopping trip with any other activities (question 4) and where they go for this (question 5);
  - whether households also regularly visited any other stores for main ‘bulk’ convenience goods purchases (question 6);
  - where households carry out more frequent ‘top-up’ (basket) purchases (question 7) and whether they visit any other stores for this form of shopping (question 9); and
  - what proportion of their spend on food and household groceries is on main food shopping (question 8).
- 4.6 The results for main, secondary and top up shopping are then merged through the application of a weighting based on judgements as to the proportion of household expenditure normally accounted for by each type of convenience goods shopping. In this case we have assumed a standard weighting of 65% for primary main ‘bulk’ shopping, 10% for secondary main ‘bulk’ shopping, 15% for primary top-up shopping, and 10% for secondary top-up shopping<sup>37</sup>. This weighting produces a composite pattern of convenience goods spending and has been applied to identify market shares, expenditure and turnover throughout the remainder of this study.
- 4.7 As stated previously, for the purpose of the market share analysis commentary in this section we have included expenditure on *Special Forms of Trading* (SFT), including internet sales, but excluded ‘null’ responses<sup>38</sup>. Please note that a more detailed explanation of SFT is provided in Section 3.

---

<sup>36</sup> For the purpose of this retail assessment ‘convenience goods’ and ‘food’ shopping have the same meaning.

<sup>37</sup> Primary main ‘bulk’ food shopping and primary ‘top-up’ shopping accounts for expenditure at stores visited most frequently for convenience shopping categories. Secondary main ‘bulk’ food shopping and secondary ‘top-up’ shopping expenditure equates to spend directed to stores used less frequently. Primary and secondary stores are identified in the household survey.

<sup>38</sup> ‘Null’ responses include, for example, “don’t know”, “cannot remember”, “never purchased those types of goods”, etc.

- 4.8 The tables in **Appendix 5** provide the detailed market share analysis for all convenience goods shopping (Table 1), based on the market shares for main 'bulk' food shopping (Tables 2-3) and 'top-up' food shopping (Tables 4-5).

## **Online Food Shopping**

- 4.9 Table 1 (Appendix 5) shows that some 4.9% of respondents across the whole study area (Zones 1-11) shop online for all their food purchases. The survey results confirm the national trend that a higher proportion is recorded for those carrying out main 'bulk' food shopping purchases (7.4%), than for more frequent 'top-up' food shopping (0.5%).
- 4.10 In comparison, Experian's latest *Retail Planning Briefing Note 13* (October 2015) shows that the national average market share for non-store (SFT) convenience goods retail sales is 10% (see Section 3). Given that SFT currently accounts for a significantly smaller market share within Newark and Sherwood District (4.8%) than the national average (10.0%), this suggests that there could be potential to increase its market penetration in the future. If this was to occur, then it would potentially reduce the expenditure available to support the need ('capacity') for new ('physical') retail floorspace over the forecast period to 2036 (see Section 11)
- 4.11 Based on the zones that broadly comprise the district area (Zones 1-6 and 10-11), the market share of online shopping for all food (i.e. main and top-up) purchases ranges from a high of 9.9% in Zone 3, to a low of 1.5% in Zone 1. The lower market share in Zone 1 reflects the good choice and quality of foodstore provision in Newark. In general terms, there tends to be a greater reliance on online food shopping in areas that are not as well served or accessible to main food shopping facilities.

## **Main Food Shopping**

- 4.12 Table 2 (Appendix 5) shows that the food and convenience stores in Newark Town Centre's defined Primary Shopping Area (PSA)<sup>39</sup> are achieving a limited market share of main food shopping purchases of 0.8% across the whole study area (Zones 1-11) and the District (Zones 1-6, 10 and 11), increasing to 2% within the 'core' Newark zones (Zones 1 and 2). As we describe in Section 5, this reflects the relatively limited scale and choice of food and convenience stores in the town centre.
- 4.13 Notwithstanding this, the stores on the edge of the PSA clearly make a significant contribution to the town centre's overall food offer and diversity, as well as generating linked trips to the benefit of other shops, services and businesses in the town centre. The survey results show, for example, that Asda, Morrisons and Iceland are achieving a total market share of 19.3% across the whole study area, increasing to circa 66.7% within the 'core' Newark zones.
- 4.14 Newark Town Centre's limited food offer is further reflected by the fact that the District Centres of Ollerton and Southwell are achieving higher market shares of main food shopping within the District of 6.1% and 3.6%

---

<sup>39</sup> It is important to note that Asda, Morrisons and Iceland are not currently defined as being within the town centre's PSA.

respectively. This reflects the stronger food store provision in these centres. The District's other smaller centres have a limited market share for main food shopping.

- 4.15 The two main out-of-centre stores in Newark are Waitrose at Ossington Way and Aldi at Northgate. They are achieving market shares of 5.5% and 6.7% respectively across the whole study area, increasing to 7% and 13.6% within the 'core' Newark zones.
- 4.16 The other out-of-centre stores in the District identified by the survey mainly comprise smaller Co-Ops, a Spar (Farndown Road) and a One Stop (Seaford Road). The survey results confirm that they have a limited market share for main food purchases.
- 4.17 Overall the District's food and convenience stores are achieving a total market share of 42.6% across the entire study area. The 'retention' level increases to 91.3% within Newark's 'core' area (Zones 1 and 2), which reflects the relatively strong provision of edge and out of centre stores.
- 4.18 The survey results show that Lincoln (15.5%), Mansfield (9.6%), Nottingham (7.7%) and Grantham (6%) are achieving a good share of food shopping trips and purchases from within the wider study area (Zones 1-11), but limited penetration within the 'core' Newark zones. This 'leakage' of spend reflects the fact that for many respondents living in the 'outer' zones the stores in these other centres are more convenient, these zones being immediately adjacent to these centres, and accessible to their home and/or place of work. For example, Lincoln is achieving a strong market penetration in Zones 6 and 7 of 67.8% and 61.5% respectively; and Grantham also has a high market share in Zone 8 (67.4%).

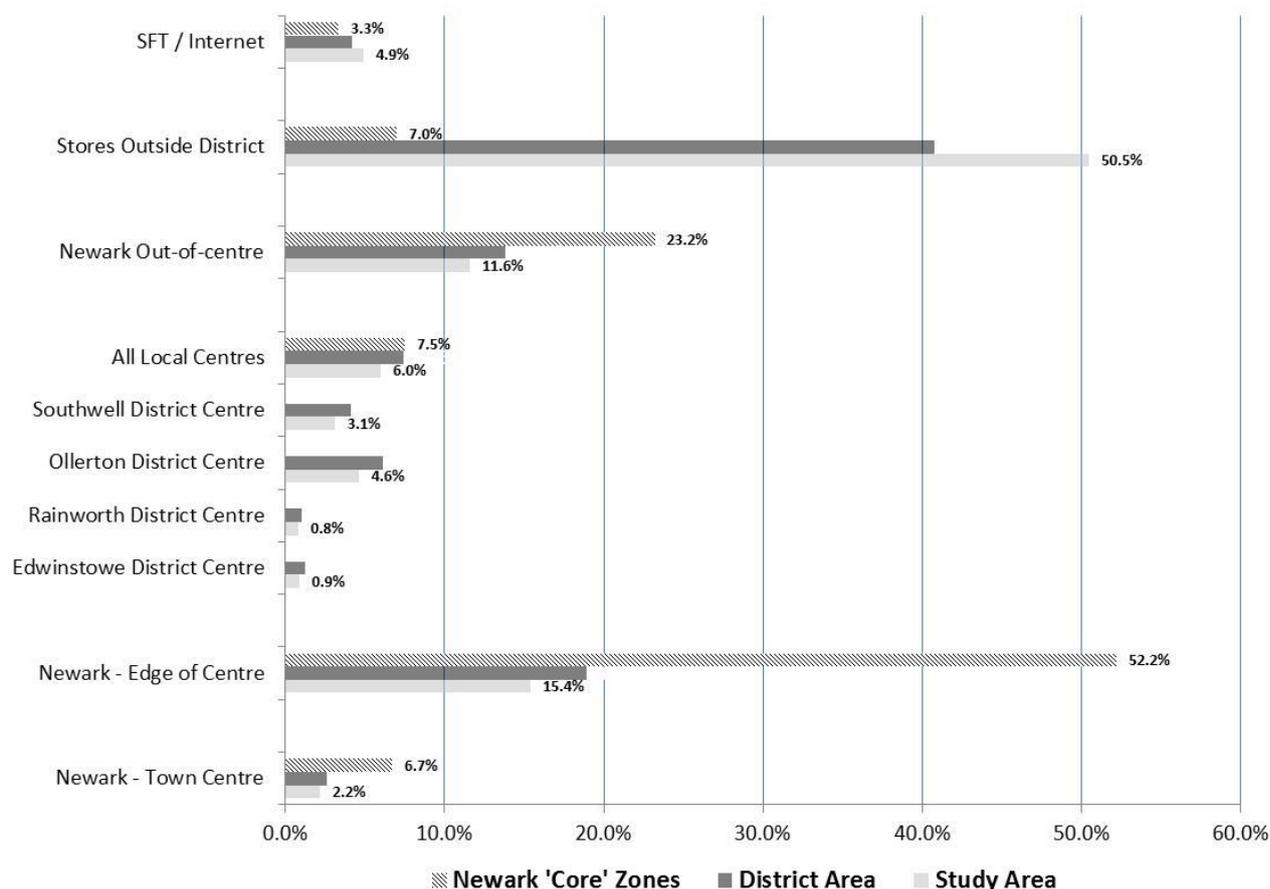
### ***Top Up Food Shopping***

- 4.19 The survey results confirm that to varying degrees the District's main centres have important roles catering for the day-to-day 'top-up' food shopping needs of their local catchment and working populations.
- 4.20 For example, Table 4 (Appendix 5) shows that the District's centres and edge-of-centre stores are achieving a total market share of 55.3% across the broadly defined District Area (Zones 1-6, 10 and 11), increasing to 56.3% in Newark's 'core' zones.
- 4.21 The centres with the highest market share of 'top-up' food shopping from within the District area include Balderton (8.1%), Ollerton (7.5%), Newark Town Centre (6.6%) and Southwell (%).
- 4.22 Although the District's out-of-centre stores have a more limited market share of 12.1% across the widely defined District area, this increases to 32.7% in Newark's 'core' zones. Apart from Waitrose (6.6%) and Aldi (7%), Newark's other smaller convenience stores (i.e. Co-op, Spar and One Stop) are also generally achieving a good market share of 'top-up' food purchases in Newark's 'core' zones. This reflects their main role and function serving the more frequent day-to-day food shopping needs of the local ('walk-in') resident catchment populations and passing ('car-borne') trade.
- 4.23 Overall the District's main food and convenience stores are retaining some 67.4% of 'top-up' food shopping purchases across the District, increasing to 88.9% within Newark's 'core' zones.

## All Food Shopping

4.24 The figure below illustrates the survey-derived market shares for all convenience goods shopping across the study area, District and Newark's 'core' zones based on Table 1 of Appendix 5.

**Figure 4.1 Market Shares for All Convenience Goods Shopping**



4.25 The figure shows that the stores in Newark Town Centre's Primary Shopping Area (PSA) are achieving a total market share of 2.2% across the wider study area, increasing to 2.6% across the District and 6.7% in Newark's 'core' zones. However, the town's edge-of-centre stores are achieving a combined market share of 15.4% across the study area, increasing to 18.9% in the District and 52.2% in Newark's 'core' zones. This is higher than for the main out-of-centre stores (Waitrose and Aldi), which are achieving a combined market share of 10.8%, 12.6% and 19.6% respectively.

4.26 Within the defined District area, Ollerton (6.1%), Southwell (4.1%), Balderton (2.6%), Collingham (1.7%), Edwinstowe (1.2%) and Rainworth (1%) are achieving the strongest market shares.

4.27 Overall the District's main food and convenience stores are retaining some 55.1% of all food purchases in the wider District area, increasing to 89.7% in Newark's 'core' zones. The strong 'retention' level in Zones 1 and 2 reflects the good provision and choice of foodstores principally located on the edge of, and outside the town centre.

## Comparison Goods- Market Share Analysis

4.28 Comparison goods<sup>40</sup> are generally defined as items not obtained on a frequent basis and include clothing, footwear, household and recreational goods (also see Glossary of Terms). The household survey comprised of questions on the following main non-food expenditure categories, as defined by Experian Business Strategies:

- 'clothing and footwear' (question 10);
- 'recording media for pictures and sound' (such as records, pre-recorded and unrecorded CDs & DVDs, unexposed films for photographic use, etc.) (question 12);
- 'audio visual, photographic, computer items' (such as stereos, radios, TVs, software, cameras, kindles, iPads, telephones, etc.) (question 13);
- 'all other electrical goods including domestic electrical appliances' (such as irons, kettles, fans, coffee makers, food mixers), white goods (fridges, freezers, dishwashers) and smaller etc.), (question 14);
- 'shopping for books (incl. dictionaries, encyclopaedias, text books, guidebooks and musical scores) and stationary (incl. writing pads, envelopes pens, diaries, etc.) and drawing materials', (question 15);
- 'games & toys; pets and pet products; hobby items; sport, camping goods and bicycles; and musical instruments', (question 16);
- 'furniture, carpets, other floor coverings and household textiles' (includes beds, sofas, tables, etc.), (question 17);
- 'DIY goods, decorating supplies and garden products' (such as drills, lawn mowers, hammers, hedge cutters, garden tools, plants, shrubs etc.), (question 18);
- 'personal care, including electric and non-electrical appliances, cosmetics, perfume, toothpaste, aftershave, sun tan lotions, etc.', (question 19);
- 'medical goods, other pharmaceutical products and therapeutic appliances / equipment' (e.g. medical drugs, spectacles, contact lenses, hearing aids, wheelchairs, etc.), (question 20); and
- 'all other goods including jewellery & watches; glassware, china, tableware and household utensils; and other personal effects', (question 21).

4.29 Table 1 (**Appendix 6**) sets out the detailed market share analysis for all comparison goods shopping across the wider study area (Zones 1-11), District area (Zones 1-6, 10 and 11) and Newark 'core' zones (Zones 1 and 2). The market share analysis (%) takes account of the distribution and weight of spend (£) by households on the different comparison goods categories analysed by the household survey (Tables 2-12)<sup>41</sup>. This helps to

---

<sup>40</sup> Please note that comparison goods and non-food shopping have the same meanings.

<sup>41</sup> The total market share analysis for all comparison goods has been derived by applying the market shares for the different categories of comparison goods to the available spend by goods type within each survey zone. This is an accepted approach as it provides a more accurate assessment of the distribution and weight of spend by respondents across each zone. The more detailed expenditure category approach means that the resultant market shares for centres and stores are not skewed by any one comparison goods expenditure category. As a result, the analysis provides a more robust picture of overall shopping patterns and market shares for comparison goods.

ensure that the resultant composite shares are not 'skewed' by any particular comparison goods expenditure category. This is a standard approach for retail assessments.

4.30 As for the analysis of convenience goods, the market shares include expenditure on Special Forms of Trading (SFT) but exclude all 'null' responses.

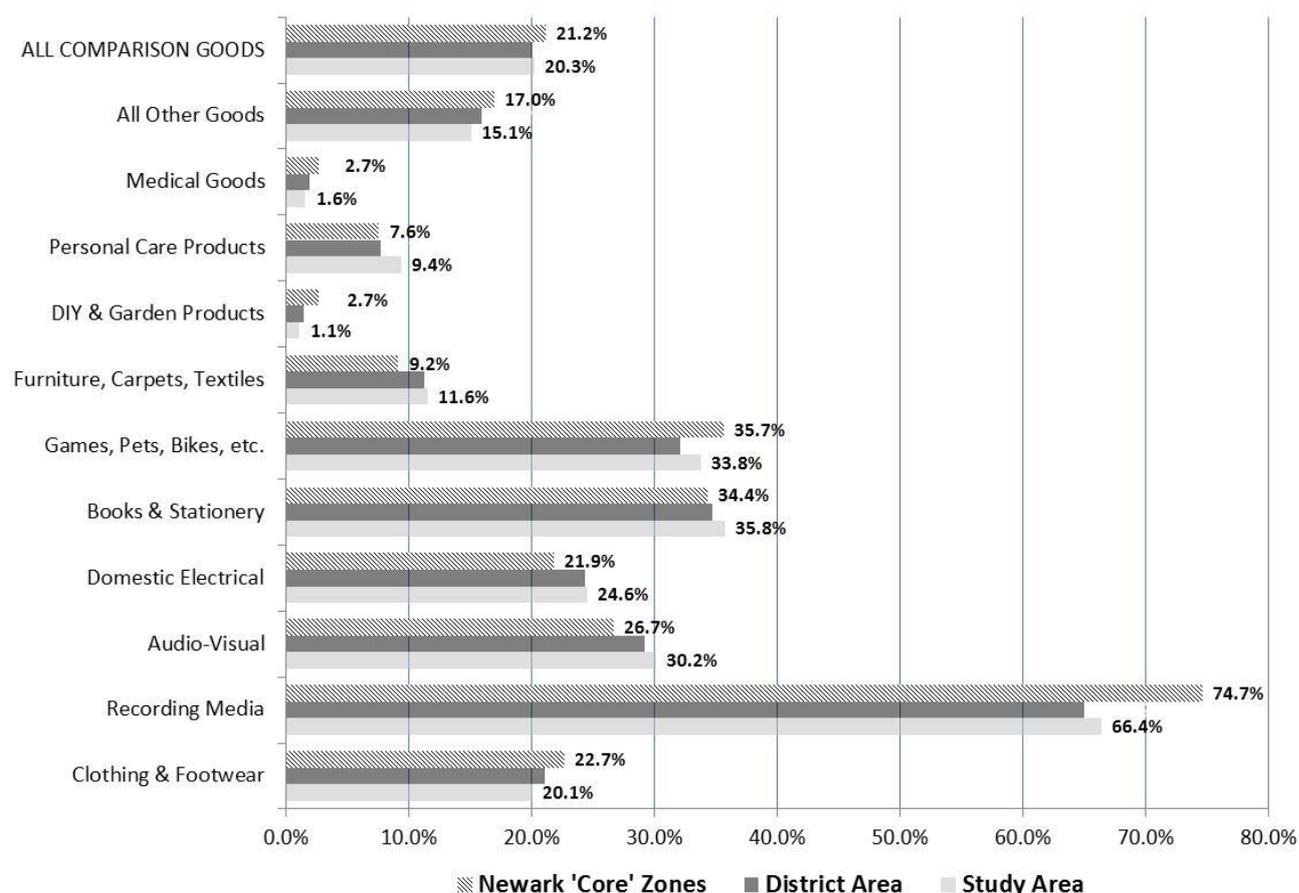
4.31 The headline findings of the market share analysis are briefly described below.

## Online Shopping

4.32 Table 1 (Appendix 6) shows that online shopping accounts for 20.3% of all comparison goods purchases across the study area. This market share is higher than the national average of 16.5% identified by Experian's latest *Retail Planning Briefing Note 13* (see Section 3). It should be noted that SFT's market share across the study area is slightly higher than for the District (20.1%), but lower than for Newark's 'core' zones (21.2%).

4.33 Figure 4.2 below shows the market shares for SFT/internet shopping for residents in the study area, District and Newark's 'core' zones for the different categories of comparison goods expenditure, based on the survey-derived results set out in Tables 2-12 (Appendix 6).

**Figure 4.2 SFT/Online Sales Market Share for Different Comparison Goods Shopping Purchases**



4.34 The figure shows the high market share of SFT, and principally internet shopping, on certain categories of comparison good expenditure. For example, across the District area (Zones 1-6, 10 and 11) SFT/online shopping is achieving a high market share of all shopping purchases across the following categories:

- recording media (65%);
- books and stationery (34.7%);
- toys, games, bikes, pet products, etc. (32.1%).
- audio-visual (29.2%);
- other domestic electrical goods (24.4%); and
- clothing and footwear (21.1%).

4.35 In contrast, SFT's market share of other non-food categories is more limited; including DIY (1.5%); medical goods (1.9%); personal care products (7.7%); and furniture and carpets (11.3%). However, this does not necessarily mean that these specific sectors will be 'immune' from the growth in internet shopping over the medium to long term.

4.36 In summary, these SFT/only shopping market shares generally reflect national trends and the market shares for other areas surveyed by Carter Jonas.

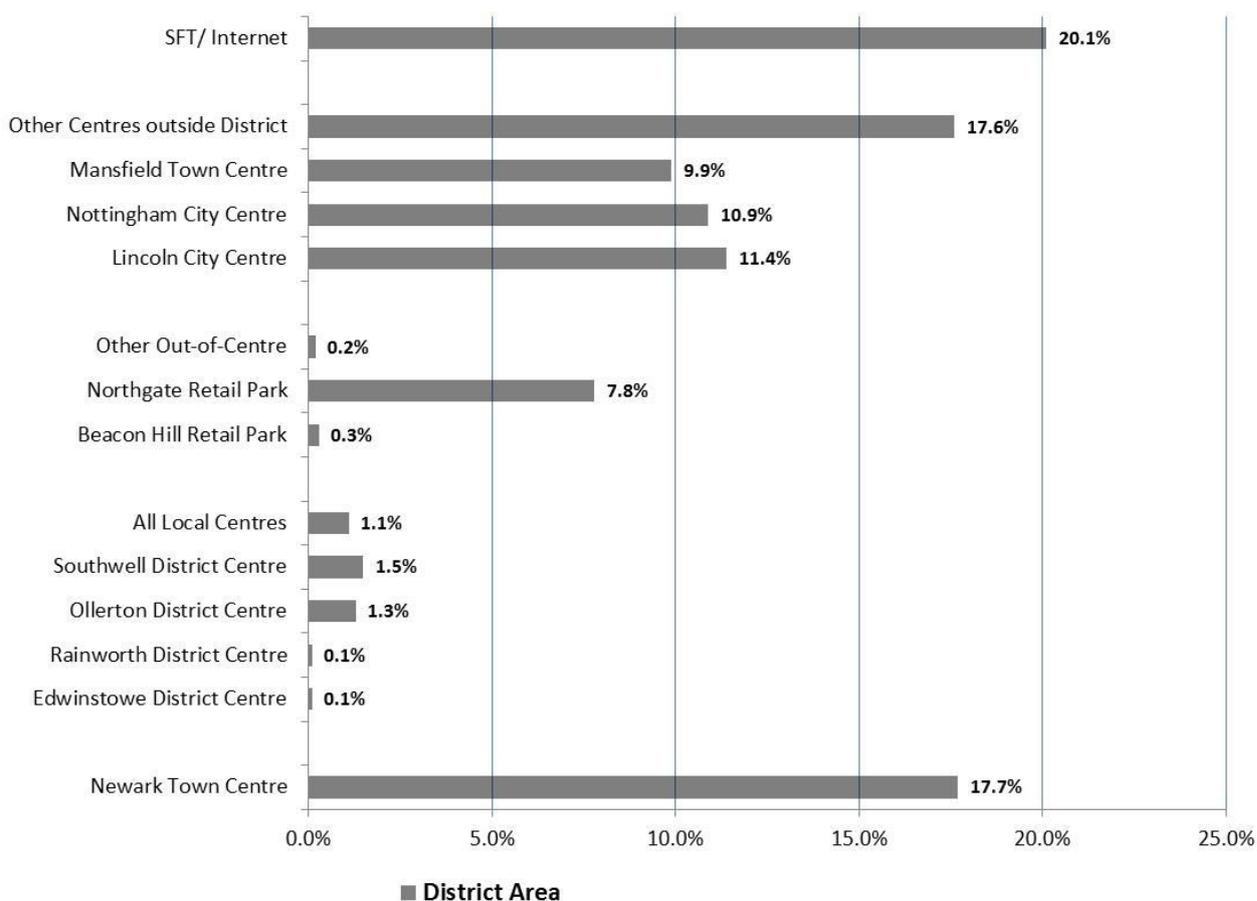
### ***All Comparison Goods***

4.37 Table 1 (Appendix 6) shows that all the District's centres and stores are achieving a 'retention level' of 25.3% of all comparison goods purchases across the wider study area. This 'retention' level increases to 30.2% across the broadly defined District area and to 59.5% in Newark's 'core' zones.

4.38 Figure 4.3 below illustrates the market shares within the broadly defined District area and shows that:

- Newark Town Centre is achieving a 17.7% market share, which reflects its principal role and function as the main town and shopping centre in the District.
- The smaller District and Local Centre have a combined market share of approximately 4.1%, although this is mainly accounted for by Ollerton (1.3%) and Southwell (1.5%).
- The District's out-of-centre stores are achieving a market share of 8.2% from within the defined District area. Northgate Retail Park (7.8%) is the main out-of-centre shopping destination, which reflects its wide-ranging non-food tenant mix including Next, Peacocks, Poundstretcher, Carpetright, Currys/PC World, Pets at Home, Boots, TK Maxx and Homebase.
- Of the 49.8% of comparison goods expenditure that is "leaking" to other centres and stores outside the District, the main destinations are Lincoln City Centre (11.4%), Nottingham City Centre (10.9%) and Mansfield Town Centre (9.9%). This reflects the greater scale, quality and choice of retailing in these larger neighbouring centres.

**Figure 4.3 Comparison Goods Market Shares of Centres/Stores in District Area**



4.39 Tables 2-12 (Appendix 6) set out the survey-derived market shares for the main comparison goods categories and some of the key trends are as follows:

- Clothing and footwear** – Newark Town Centre is achieving a market share of 17.3% across the defined District area, increasing to 35.3% within its ‘core’ zones. The other main shopping destination in the District is Northgate Retail Park, with a 3% market share in the District and 9.2% in Newark’s ‘core’ zones. The smaller District and Local Centres have a limited market share (0.7%) of fashion spend, which reflects their limited offer. The main fashion shopping destinations outside the District are Lincoln City Centre (17.8%), Nottingham City Centre (16.3%) and Mansfield Town Centre (11.5%).
- DIY and gardening products** - Newark Town Centre is achieving a market share of 10% across the District, increasing to 25.7% within its ‘core’ zones. Northgate Retail Park has a much higher market share across the District (22.3%) and the ‘core’ zones (53.6%), principally due to the draw of the Homebase store. The main shopping destinations outside the District are the out-of-centre stores in Lincoln (11.8%), followed by Lincoln City Centre (7.3%) and Mansfield Town Centre (7%).
- Furniture, floor coverings and household textiles** - Newark Town Centre is achieving a market share of 20.6% across the District, increasing to 48.3% within Newark’s ‘core’ zones. Northgate Retail Park has a 4.3% market share across the District and 7.1% share in the ‘core’ zones. The main shopping destinations outside the District are Nottingham City Centre (13%), followed by Lincoln City Centre (11.3%) and Mansfield Town Centre (8.7%).

4.40 Figure 4.4 below summarises the market share for the different categories of comparison goods expenditure both within and outside the District area (Zones 1-6, 10 and 11), as well as the impact of internet purchases on shopping patterns (see Tables 1-12, Appendix 6).

**Figure 4.4 Comparison Goods Market Shares by District's Centres, Other Centres and SFT/online sales**



4.41 The figure shows that the District's centres and stores are achieving a relatively high market share ('retention') of medical goods (60.9%), personal care products (46.5%) and DIY goods (43.2%) within the District. Although the share of expenditure on 'recording media' products is low (8%), this mainly reflects the impact of internet shopping on this particular retail sector. The market share of clothing and footwear expenditure is also relatively low at 21.6%, and there could therefore be potential to increase the quality and offer of Newark's fashion offer, subject to market demand and retail capacity.

## Summary

4.42 In summary, the survey-derived market shares show that Newark Town Centre has a limited market share of food shopping purchases, which reflects the limited provision within its defined *Primary Shopping Area* (PSA). Notwithstanding this, it is clear that the edge of centre Asda and Morrisons stores make an important contribution to the overall quality and choice of the town centre's food offer. They also help to underpin its vitality and viability by generating linked trips, footfall and expenditure to the benefit of other shops, services and businesses.

4.43 In terms of comparison goods shopping, it is clear that online shopping accounts for a high proportion of purchases on specific categories, including on books, recording media, games, toys and electrical products.

This market share is forecast to increase over the plan period in line with national trends and represents a threat to existing centres and shopping destinations.

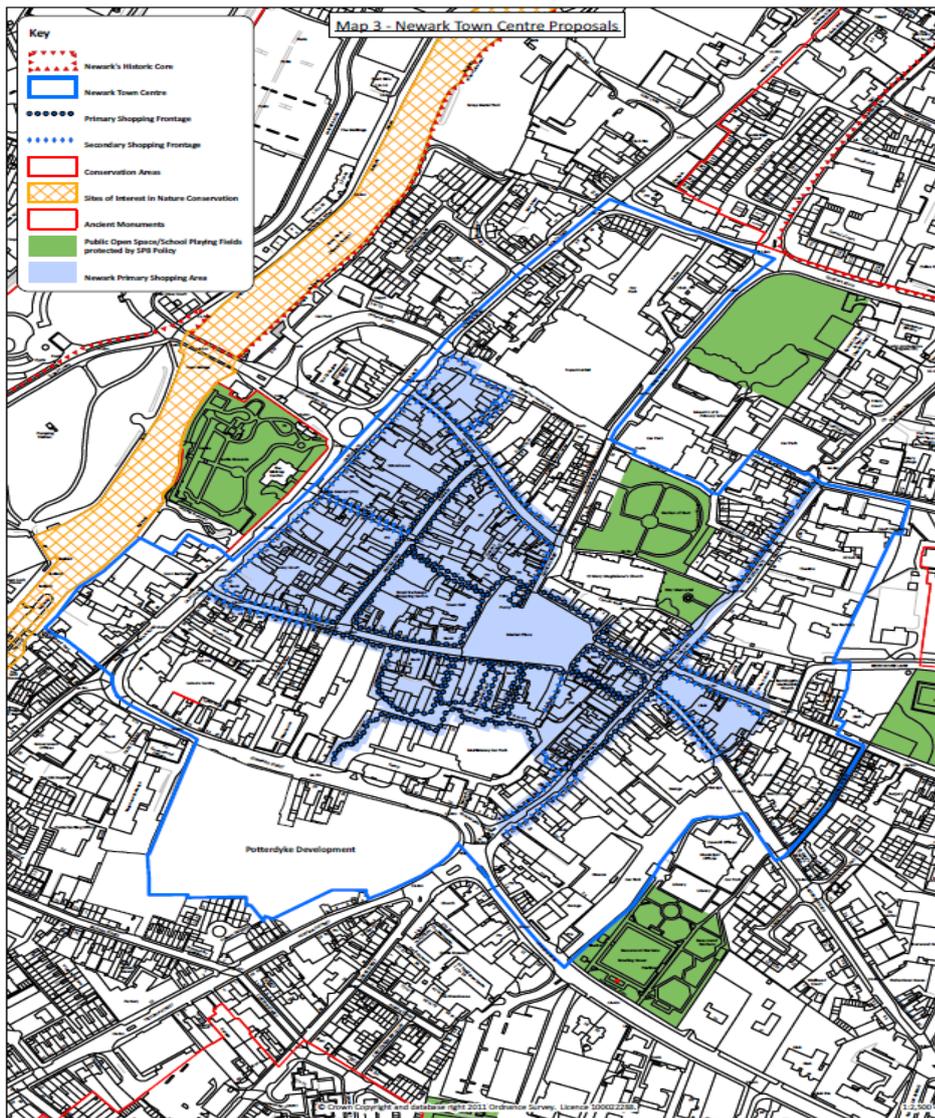
- 4.44 Although the survey results indicate that Newark Town Centre is achieving a relatively good market share of comparison goods purchases, particularly within its 'core' zones, it is nevertheless apparent that it is facing increasing competition from larger competing centres and shopping destinations outside the District (principally Nottingham, Lincoln and Mansfield), as well as out-of-centre retailing in Newark (principally Northgate Retail Park).
- 4.45 The challenge for the Council is how to maintain and strengthen the retail market shares of Newark Town Centre and the District's smaller centres in the face of the competition from larger neighbouring centres and the growth of internet sales.

## 5 NEWARK ON TRENT TOWN CENTRE – HEALTH CHECK

### Retail Context

- 5.1 Newark-upon-Trent ('Newark') forms part of the Newark Urban Area (NUA), along with Balderton and Fernwood, and is designated as a 'Sub-Regional Centre' in the adopted Core Strategy's settlement hierarchy.
- 5.2 It is the main destination for services, employment and retail and functions as a transport 'hub' for most of the District. The area is well connected with regular rail links to Nottingham, Leeds, Edinburgh and London, and the centre is situated adjacent to the A1. The town has a rich heritage which includes Newark Castle, the historic Market Place which is located within an extensive conservation area with a wealth of historic buildings.
- 5.3 The Council's vision for Newark as set out in the Core Strategy is to strengthen the town's role as a sub-regional centre through housing and employment growth, alongside promoting the town centre as a major focus for new retail, cultural and leisure development in the district. This includes the provision of new hotel accommodation, tourism facilities and development alongside the River Trent. By identifying opportunities for improving the retail provision both in and on the edge of the town centre, the Council aim to reduce the number of residents travelling to other centres located outside of the District.
- 5.4 Newark is ranked 170th in Javelin's 2014-2015 Venuescore and is classified as a 'Regional' centre. However, the town faces strong competition from the neighbouring centres of Nottingham, Lincoln, Mansfield and Grantham. Both Nottingham (7th) and Lincoln (44th) are placed much higher in the national rankings and are classified by Javelin as a 'Major City' and 'Major Regional' centres respectively.
- 5.5 Newark Town Centre has a traditional historic street pattern and is focused on the Market Place and surrounding streets including Middlegate, Stodman Street, the Buttermarket and St Mark's Place shopping centres which contains a strong independent retailer representation alongside a multiple retailer offer (which is primarily located along Stodman Street and St Marks Place). To the west of the centre lies a cluster of restaurants and cafés situated along Castle Gate and Town Wharf, which are close by to both the River Trent and Newark Castle. There is a strong convenience provision, with a number of major supermarkets located within the town. Morrisons and Asda are situated on the edge of the centre and Waitrose, Aldi and Iceland are located out of centre. There is also a food hall located within the Marks and Spencer store on Stodman Street.
- 5.6 The PSA (as set out in the Allocations and Development Management DPD) is reproduced in the figure below for ease of reference. The PSA is bounded by Slaughter House Lane/ Kirk Gate in the north, Castle Gate in the west, Stodman Street/St Mark's Place in the south and Carter Gate in the east.

**Figure 6.1 Newark Town Centre - Boundary and PSA**



Source: 2013 Allocations and Development Management DPD

5.7 The defined PSA and wider Town Centre boundary includes the following main shopping streets and areas:

- The pedestrianised **Market Place** forms part of the traditional core of the town centre and is home to the main street market. It provides links to Bridge Street, Church Street and Stodman Street. Surrounding the central courtyard is the Buttermarket Shopping Centre to the west and a mix of comparison, convenience and service provision situated in the smaller historic properties. The Buttermarket is the only covered shopping centre in Newark Town Centre and has dual frontages onto both Market Place and Middle Gate. Units which border the south of the Market Place are occupied by retailers including WH Smith, The Works and Bonmarche which complement the traditional market. Along Bridge Street, bordering the Market Place to the north, units are dominated by A1 and A2 services uses as well as a Starbucks coffee shop. To the east side of Market Place is a grade II listed shopping arcade ('The Arcade'). On the day of the site visit, the arcade appeared to be under-used and was generally used as a cut through between the Market Place and Carter Gate. Despite this the site is fully occupied. Overall the historic architecture of the buildings, traditional pavement, shopping lanes and arcades contribute to making this a unique shopping area.

- **St Mark's Place** is a pedestrianised open air shopping centre which can be accessed via Stodman Street, nearby to the Market Place and Lombard Street to the south of the town centre. The centre is characterised by smaller, newer units as opposed to the historic units located around the Market Place. However the site visit confirmed that the units were generally in better condition around the eastern side of the centre, nearer towards the Market Place than those units to the west nearby to Marks and Spencer. Retailers occupying units here mainly include low to mid-range national multiples, such as New Look, Clarks, Wilkinson, Game and Holland and Barrett.
- The upper part of **Stodman Street** is defined as being within the pedestrianised PSA. The modern building design and concentration of national multiples contrasts with the historical nature of Market Place. Along with St Mark's Place and Middle Gate the upper part of Stodman Street has the strongest representation of multiple retailers. A large Marks and Spencer, Boots, Monsoon/Accessorize, Superdrug and Dorothy Perkins occupy some of the units along the street. Towards the lower end of the street, there is a focus on independent retailers, some of which are of a lower quality, and restaurant and café provision.
- **Middle Gate** leads off from Stodman Street and together with St Mark's Place, Market Place and Stodman Street forms the core of the town's retail offer. There is a range of both independent and national multiple retailers located here and access to the Buttermarket Shopping Centre can also be gained from this street. This area is characterised by mid-range national multiple clothing retailers including Fat Face, White Company, CC and Phase Eight. The unit design also mirrors that of the modern units located on upper Stodman Street, providing visitors with a typical high street shopping experience.
- **Castle Gate** which runs to the west of the centre is enhanced by its proximity to Newark Castle, the Castle gardens and the River Trent. This area is focused upon the town's food and beverage offer with a wealth of independent restaurants, cafes and public houses being located along the length of the road. National multiples including Zizzis and Pizza Express are located towards the northwest of Castle Gate overlooking the river however these are not included within the centre boundary. There are also a number of antique and art retailers represented along Castle Gate however there is no other retail provision available here.
- **Slaughter House Lane** is a pedestrianised area which fronts onto the large Morrisons store which anchors this area of the town centre. Slaughter House Lane has links to Kirk Gate via the pedestrianised Paxtons Court. A handful of retail units alongside residential properties are located here. The narrow pedestrianised passage of Paxtons Court is dominated by smaller units and independent retailers. There are few multiple retailers in this location. The historic nature of the built environment along Kirk Gate enhances the shopping experience in this area. However retail provision is generally weak and is complemented by other uses including residential and food and beverage. Kirk Gate provides links to the leisure services located in the Castle Gate area and to the Market Place via Church Street
- **Carter Gate** is located to the south-east of the town centre and is connected to the Market Place via Bridge Street. The area is considered less appealing than the other shopping areas in the centre and retail provision is generally of a lower quality. Access to The Arcade can be gained from this street. The majority of retailers are independents however Argos and Sports Direct are located towards the south of Carter Gate. Appleton Gate provides more of a service function with unit occupiers including an estate agents, a barbers, a café and a bakery.

- 5.8 The Newark and Sherwood Plan Review Issues Paper sets out that the extent of the centre boundaries and frontage designations will be subject to review.

## Retail Composition and Diversity

- 5.9 The assessment of the current retail and service provision in Newark Town Centre (measured by outlets and floorspace) has been informed by the Council's 2016 Town Centre audit. The table below shows the composition and diversity of the town's retail and service outlets. The representation across the leisure categories (A3-A5) is considered in more detail in the leisure needs assessment.

**Table 6.1 Newark Town Centre Retail Composition 2016**

Category	2016		2012		2016 UK Average
	Units Nos.	%	Units Nos.	%	
Comparison	174	36.10%	142	30.54%	31.97%
Convenience	28	5.81%	31	6.67%	8.62%
Leisure	92	19.09%	81	17.42%	23.35%
Retail Services	61	12.66%	74	15.91%	13.94%
Finance and business service	59	12.24%	62	13.33%	10.64%
Sui-Generis/ other	18	3.73%	22	4.73%	
Vacant	50	10.37%	53	11.40%	11.17%
<b>TOTAL:</b>	<b>482</b>	<b>100.00%</b>	<b>465</b>	<b>100.00%</b>	

## Comparison Goods

- 5.10 Newark Town Centre has a high proportion of non-food units (36.10%), and provision is above the UK average of 31.97% and the proportion of comparison units identified in the 2012 survey (30.54%).
- 5.11 Although the town centre has no major national department store (as defined by Goad), such as a Debenhams or House of Fraser, there is a range of mid to high quality multiple fashion retailers (including Fat Face, Accessorize/ Monson, Marks and Spencer, Dorothy Perkins, New Look and Clarks Shoes). The majority of these uses are located along Middle Gate, Stodman Street and St Marks Place. Approximately 56 of the total 174 comparison goods units are occupied by national retailers. However a number of these include charity shops (i.e. Save the Children and YMCA) and discount retailers. Boots, Argos, WH Smith, Sports Direct and Holland and Barrett are also represented in the centre.
- 5.12 There is a strong representation of independent comparison retailers across the town centre (118 out of 174 units are occupied by independents). This provision includes independent fashion shops and boutiques, jewellers and particularly antique stores which are concentrated along Castle Gate.
- 5.13 The in-centre survey results show that 22.8% of respondents (question 4) were in the centre to buy non-food goods (i.e. shoes, clothing, and jewellery) and of these, 17.4% respectively visited or intended to visit New Look or Wilko. Other popular retailers included Superdrug (13.0%), WHSmith (13.0%) and Boyes (13.0%). Surprisingly only 8.7% visited the anchor Marks and Spencer store and only 4.3% visited Fat Face suggesting

that respondents tended to visit the low-mid range quality retailers rather than the higher quality retailers (question 10).

- 5.14 Newark also has a strong independent “bulky goods” offer which is situated around the edge of the centre, including Holdens.

## ***Convenience Goods***

- 5.15 Newark’s convenience goods provision is below the national average (5.81% compared to 8.62%) and this figure has decreased just slightly since the 2012 survey. There are a total of 28 convenience units including two major supermarkets, Asda and Morrisons (albeit they are defined as being on the edge of the PSA in Figure 5.1). Newark’s convenience offer also includes the out-of-centre Waitrose, Iceland and Aldi stores. The number of convenience retailers in the town centre has decreased by three units since the 2012 study. In addition to the town centre stores, such as Marks and Spencer (which also has a food hall), both Asda and Morrisons serve as important anchors for attracting footfall to the town centre and generating linked trips to the benefit of other shops, services and businesses. The large supermarkets are complemented by a number of smaller units including independent bakeries and butchers.
- 5.16 The in-centre survey results identified that 14.4% of respondents were visiting the centre for food shopping (question 4) which is a smaller proportion of respondents who were in the centre for non-food shopping (22.8%). Of this 14.4%, 58.6% were visiting or intended to visit Morrisons and 17.2% visited or intended to visit Asda (question 7). Morrisons is well linked to the town centre whereas Asda is located further to the far south of the centre which suggests that the close linkages between Morrisons and the town centre is possibly encouraging people to shop here more. This is supported by the fact that 31.0% of those who were visiting the centre for food shopping stated they intended to link their shopping trip with trips to other food shops in the centre and 58.6% of those visiting the centre for food shopping intended to link their shopping trip to other non-food shops in the centre (question 8).

## ***Retail, Leisure and Financial Services***

- 5.17 Retail services provision has decreased since the 2012 survey (-3.25%) and there are now 61 units; current provision is just below national averages. Retail services are concentrated within the Arcade indoor shopping parade which is accessed via the Market Place, Carter Gate, Barnby Gate and Appleton Gate. Services include hairdressers, opticians, dry cleaners and travel agents.
- 5.18 Leisure provision has increased since the previous survey (+1.67%), however it is still below the UK average. Restaurant and café provision contributes to the most of the leisure uses and there is a concentration of these uses along Castle Gate. These uses are dominated by independent occupiers and Zizzis and Pizza Express are located outside of the centre boundary to the southwest near to the Castle Gate roundabout. Costa and Starbucks are located near to the Market Place.
- 5.19 The centre also has 59 financial and business service occupiers, and current provision (12.24%) is above the national average figure (10.64%). Key businesses include retail banks (such as Lloyds, Halifax, Natwest, Co-op Bank, Barclays, Santander and Yorkshire Bank) and a number of estate agents.

## The Market

- 5.20 As stated above, the Market Place forms part of the traditional core of the town centre. The Market Place holds three weekly general retail markets, alongside two weekly collectors and antique markets which attracts visitors from outside the District. There is also a farmer's market held on the first Wednesday of each month. On the Thursday of the site visit the market place was at around half capacity, occupied with stalls selling products including clothing food, carpets, animal goods, jewellery, electricals and plants however we understand that the Market Place is full during weekends. The market creates a vibrant and distinctive shopping environment which supports pedestrian movement across the centre.
- 5.21 The in-centre survey results show that only 10.9% of respondents were in the town centre with the main purpose to visit the market (question 4). Of this proportion, half (50.0%) stated that they intended to visit food and grocery stalls, 13.6% intended to visit clothing and footwear stalls and 9.1% intended to visit arts and craft stalls (question 5). This represents the range of goods the market sells alongside their appeal to visitors to the town centre however it is evident that food stalls appeal the most to those visiting the market.
- 5.22 Respondents were asked what they liked most about Newark Market (question 15). Disregarding those that do not visit the market (17.8%), the most popular response was the variety of stalls (31.2%), the character of the market (23.8%) and the food stalls (17.3%). Respondents liking the character of the market reflects the findings of the site visit and responses regarding participants' likes of the centre overall which referred to the character/atmosphere of Newark. The fact that the majority like the variety of the stalls suggests that the market is healthy and appealing to a variety of visitors. However when respondents were asked about how they thought the overall centre could be improved, 23.8% claimed that they would like a better choice of market stalls suggesting that perhaps there is potential to improve the range of stalls on offer.
- 5.23 In terms of improvements that could be made to Newark Market to encourage respondents to visit more (question 17), the majority referred to a larger market (29.2%), nothing (24.3%) and a wider variety of stalls (14.9%). 'Nothing' or 'don't know' is often a common response in these surveys. A larger market and a wider variety of stalls reflects what is discussed above regarding the 23.8% who believed the overall centre could be improved by a wider range of products being sold.
- 5.24 Respondents were asked to rate the four different types of markets held on a scale of 1-10 (1=very poor and 10=excellent). The four types of market include the general retail market, the collectors/antique market, the farmers market; and the seasonal Christmas market. In regards to the general retail market which is the most frequently held, over half (57.4%) scored the market 7 or above (14.9% said 'don't know' which has not been considered). This suggests that the majority of respondents think that the market is good and appeals to them.
- 5.25 Approximately 54.0% claimed that they did not know how they rated the collectors market which is possibly due to the niche nature of the market attracting only those with an interest in antiques. Responses were split with 23.3% of respondents rating the market a score of 7 and above. Approximately 12.9% rated the market with a score of 5 and 5% gave it a score of fewer than 5. Therefore it is difficult to assess the success of the antiques market due to the niche range of shoppers it attracts and hence the smaller number of people that actually visit.

- 5.26 Similarly to the antique/collectors market, the farmers market is also likely to attract fewer people due to its more niche product range. However disregarding the 53.5% who claimed they do not know how they rate the market, the majority of respondents (33.3%) rated the market a score of 6 and above with the highest number of respondents (13.9%) giving a score of 8. Only 14.4% of respondents scored the market 5 and below. The Christmas market also received positive ratings with 47.5% scoring the market 6 or above compared to 13.5% rating it with a score of 5 or below.
- 5.27 Overall, it is considered that the general retail market is performing well and is popular with visitors to the centre however the expansion of the market and the range of goods sold could help to increase the appeal to new and existing visitors. The specialist and seasonal markets should also be maintained. Although not hugely popular with the respondents asked, the antique/collectors market provides Newark with a specialist offer which cannot be found elsewhere in the district. Annual events such as the Christmas market also help to increase activity levels within the centre.

## **Vacancy Levels**

- 5.28 Vacancy levels provide one of the key performance indicators (KPIs) for assessing the relative health of centres, and measuring how their attraction and performance may be changing over time. However, it should be noted at the outset that simple assessments of the number and proportion of vacant units in centres have to be interpreted with caution, as there is a natural 'churn' of units closing and opening in centres at any one time. For example, some shops may be vacant because they are undergoing refurbishment for immediate occupation, or they may be subject to redevelopment plans. Conversely, although low vacancy levels are often interpreted as a sign that a centre is performing strongly, it may also mask the fact that there is a limited supply of new floorspace to meet the needs of retailers and businesses seeking representation in the town centre.
- 5.29 There are currently 50 vacant units in the town centre, which is equivalent to a vacancy rate of 10.37% and is below the national average of 11.17%. Vacancy levels have fallen back from 53 units (11.40%) recorded in 2012. It should be noted that since the site visit and 2016 audit, Burtons menswear shop has closed down and this unit is now vacant.
- 5.30 Our site visits identified a concentration of vacant units within the smaller Buttermarket Exchange Shopping Centre, particularly on the ground floor where there are seven vacancies. The low occupancy rate of the building was reflected by the fact that there was limited footfall across the two-storey centre on the day of our site visit. It is important that vacancies levels are addressed in The Buttermarket, as it is an attractive and unique space which should be making a significant contribution to the town's retail and leisure offer.
- 5.31 Barnby Gate which connects the cinema site to the town centre also has a concentration of vacant units alongside Carter Gate. These two streets are located to the east of the centre and provide a lower quality retail and service offer compared to the rest of the town centre.

## **Retailer Requirements**

- 5.32 Retailer demand for representation in a shopping location normally provides a good indication of a centre's overall attraction, health and viability. The CoStar Focus national retailer requirements database is a standard

published dataset used to inform retail assessments and provides consistently sourced evidence detailing the changes in retailer requirements over a period of time.

- 5.33 In March 2016 there were a total of eleven retailer and leisure requirements for Newark Town Centre (see Table 6.2). Of the eight retail requirements, two were for major national multiples and two were for charity shops. There were also three requirements from leisure operators including Caffè Nero, Premier Inn and Frankie & Benny's.

**Table 6.1 Newark: Retailer Requirements**

Category	Name	Max floorspace (m <sup>2</sup> )
Retail	Conviviality Retail PLC	464.5
	Headway Charity Shops	92.9
	Select	464.5
	Rainbow Hospice	139.3
	Edinburgh Woollen Mill	464.5
	Ponden Home	278.7
	YTC	464.5
	Prominent Retailer F	464.5
Leisure	Caffè Nero Group Ltd	139.3
	Frankie & Benny's	743.2
	Premier Inn	4645.1

- 5.34 Those operators with a stated interest include national multiple retailers and food and beverage. However it should be noted that the majority of the retailers identified are seeking larger format units. Satisfying their requirements for representation in the town centre will therefore depend on providing a supply of new larger format units, either through the amalgamation of existing units and/or possibly through new development.
- 5.35 Notwithstanding this high level assessment of current market demand, the Council should be aware that many retailers prefer not to publish their requirements as it could damage their negotiating position where they are seeking representation in new locations. Moreover, such databases can only identify the current level of market demand and do not reflect how demand might change in the future following new development and investment. For example, experience shows that a new scheme that offers retailers modern, well-configured floorspace adjacent to like-minded tenants in a prominent location will generally generate a significant uplift in market interest and demand.

## Prime Zone A Rents

- 5.36 Evidence from local agent sources indicate that estimated prime Zone A rents in Newark stand at around £55 per sqft. This represents no change on the mid 2015 level of prime rents, and rents remain some 26.7% below the pre-recession peak of £75 per sqft.

## Accessibility and Parking

- 5.37 Newark-on-Trent is located in a strategic location with a number of main radial road routes leading into the town. The A1 runs to the east of the town connecting to locations north-west and south-east of the District whilst the A46 runs to the west connecting to Lincoln in the north-east and Leicester in the south-west (linking to the A52 at Saxondale Island for connections to Nottingham).

- 5.38 Whilst public transport provision across the town is good, the train stations are located on the edge of the town. However pedestrian accessibility to and from both the stations is generally good with Newark Castle Station being located around 300m from the town centre, connecting to the town centre via Great North Road linking to Castle Gate. Pedestrians from Newark North Gate are able to access the centre in just over 10 minutes via Appleton Gate to the north of the town centre. The East Coast Mainline runs through Newark North Gate station located to the north of centre. This provides links to Leeds, Edinburgh and London. Newark Castle is situated to the north-west of the centre and is on the Leicester-Nottingham-Lincoln line. There is also a good bus service that serves the town and the surrounding rural villages.
- 5.39 There are six council-run car parks within and on the periphery of the town centre. The largest of these is Livestock Market car park which has capacity for 213 vehicles and is located in close proximity to Newark Castle railway station. London Road/Baldertongate car park is located by the cinema and has 156 spaces. Private car parks include a multi-storey located above the St Marks Shopping Centre which can accommodate around 512 vehicles. The multi-storey to the rear of the Morrisons store also has capacity of approximately 600 car parking spaces. On the day of the 2016 site visit, the majority of the car parks were busy, which reflects the comments made by the survey respondents regarding issues with parking and traffic congestion.
- 5.40 Traffic flow throughout the centre is generally low with much of the core shopping area including the Market Place, Stodman Street, St Mark's Place, Bridge Street and Paxtons Court being pedestrianised or located along a one-way street; therefore accessibility on foot is very good. Where pedestrians are not given priority, pavements generally have raised curbs and some pavements have bollards to separate pedestrians and vehicles. However the main road that runs along Castle Gate provides a barrier between the Castle and gardens/Town Wharf (including Zizzis and Pizza Express restaurants) and the rest of the town centre. Also on the day of the 2016 site visit, this route was congested, particularly near the approach to the roundabout, which does not contribute to creating a pleasant pedestrian environment.
- 5.41 The in-centre survey results show that 60.4% of respondents travelled to the centre via car either as a passenger or driver (question 1) which is the highest proportion of respondents travelling to any centre using this mode of transport. Only 21.8% travelled to the town centre on foot which is the lowest proportion out of all the centres. This suggests that respondents are travelling from further afield to visit Newark town centre in comparison to the district centres (i.e. Southwell, Edwinstowe etc.) where there are a lot more local people visiting the centre and fewer from the surrounding towns and villages. Approximately 13.9% of respondents accessed the centre via bus which is the highest proportion across all the centres highlighting the good public transport facilities operating in the town.

## **Pedestrian Flows, Dwell Times and Frequency of Visit**

- 5.42 At the time of the 2016 site visit, the main pedestrian flow was concentrated around the Market Place, Stodman Street and Middlegate. Although this flow may have been influenced by the presence of the market on this day, at the time of the visit the market was beginning to shut down whilst this area still remained busy. There was also a high level of activity between Paxtons Court and Kirk Gate, with peak activity around the Morrisons supermarket.

- 5.43 Surprisingly both the shopping centres (Buttermarket and St Mark's Place) were the quietest areas of the town centre, with little pedestrian activity in comparison to the main walkthrough of Middle Gate, around the Buttermarket and St Mark's Place. Carter Gate also had limited pedestrian activity, although there was some flow and activity between Bridge Street and Balderton Gate which adjoin to Carter Gate; it is expected that this is due to the cinema and large car park accessed via these streets from the Market Place. On the day of the visit this car park was full.
- 5.44 The in-centre survey asked respondents how long they intended to stay in the centre (question 2). The majority of respondents intended to stay between one and two hours (44.1%) or two and three hours (22.8%). This is a longer dwell time compared to the four district centres reflecting the wider range of town centre uses which are on offer in Newark town centre. However it is still considered that increasing leisure provision within Newark could help to further increase dwell times.
- 5.45 Respondents were also asked about the frequency of their visits (question 3). The majority (29.7%) claimed that they visited the centre 2-3 days a week. Overall three quarters of respondents (75.7%) visit the centre at least once a week. Despite this large proportion of frequent visitors, the district centres generally have an even higher proportion of respondents visiting at least once a week. This is possibly due to the smaller size of the district centres and Newark attracting visitors from elsewhere in the district (as reflected by the high walk-in rate in the district centres and low walk-in rate for Newark). Newark is considered to be more of a 'destination' than some other centres within the district hence this may be why this proportion is lower. On the day of the in-centre survey, 4.5% of respondents were in the centre as day visitors.

## **Customer Views and Perceptions**

- 5.46 We have drawn on the findings of the household telephone interview survey and in-centre survey to help gauge customers' views and perceptions of the town centre as a place to shop and visit for a range of leisure uses and other activities.
- 5.47 The household telephone interview survey asked specific questions on respondents' views and perceptions of Newark Town Centre. This included asking people what key improvements they would like to see that might encourage them to visit Newark more often for shopping and other purposes. The household survey results showed that respondents mainly liked the following features of Newark Town Centre.

**Table 6.4 Feature respondents liked about Newark Town Centre**

Response	Study Area
Attractive environment/nice place	30.6%
The market	15.9%
Good range of non-food shops	15.3%
Close to home	15.0%
Nothing/very little	14.7%
Compact	13.5%
Traditional	10.4%
Easy to park	8.8%
Good range of independent shops	5.5%
Good pubs, cafes or restaurants	5.0%

5.48 The majority of respondents indicated that they liked Newark’s attractive environment which is in line with the findings of the site visit. Respondents also liked the market and Newark’s range of non-food shops, and its compact and traditional character. A key factor for respondents who visit Newark Town Centre is its proximity to their home.

5.49 Respondents were also asked what, if anything, they would improve in Newark that would encourage them to visit more. The table below provides a summary of the most frequently raised suggested improvements for the town centre from respondents.

**Table 6.5 Key Improvements for Newark Town Centre**

Response	Study Area
Nothing	41.0%
More/better parking	12.2%
Free/cheaper parking	9.1%
More/better comparison retailers (i.e. non-food shops)	8.5%
Don’t know	8.2%
More national multiple shops/High Street shops	7.7%
Less traffic congestion	3.6%
Improve the market	3.3%
Better access by road	2.9%
More independent shops	2.5%

5.50 The majority in each zone stated ‘nothing/very little’ or ‘don’t know’ (49.2% across the whole Study Area). Respondents highlighted a desire for free car parking or more/ better car parking in the town centre. Access by road and resolving issues with congestion were also identified. This confirmed our observations on our site visits. Other key improvements include the provision of more high street branded shops, including better comparison retailers.

5.51 In addition to the household survey some 200 face-to-face interviews were also carried out with visitors to Newark. The surveys were conducted across a number of days and times to ensure a representative sample

group. As part of this survey respondents were also asked what they liked about Newark Town Centre and the key responses are summarised in the table below.

5.52 The feature respondents liked most about Newark was its character/atmosphere (26.7%) and that it was near to where they live, or in a convenient location (26.2%). This confirms the findings from the HTIS and reflects the role played by Newark as serving mostly its local catchment population. Respondents also highlighted the importance of the market and the historic buildings and tourist attractions.

**Table 6.6 Features respondents liked about Newark Town Centre**

Response	Study Area
Character/atmosphere	26.7%
Near/convenient	26.2%
The markets	23.8%
Historic buildings/tourist attractions	19.3%
Selection/choice of independent/specialist shops	14.4%
Nothing in particular	9.9%
Nice busy feel	6.9%
Good public transport links	5.0%
Pedestrianised links	5.0%
General cleanliness of shopping streets	4.5%

5.53 Respondents were also asked what they disliked about the centre, and the results are set out in the table below. Respondents identified issues with parking, both in terms of cost and finding parking spaces, and also traffic congestion. This also confirms the results of the household survey. Issues of safety were also raised, with respondents stating that they “feel unsafe” in the town centre and identifying anti-social behaviour as a reason for this.

**Table 6.7 Features respondents disliked about Newark Town Centre**

Response	Study Area
Nothing in particular	35.6%
Road congestion	13.6%
Parking is expensive	13.4%
Difficulties in parking	10.4%
Feels unsafe/presence of threatening individuals/groups	5.9%
General lack of choice of multiple shops	5.4%
Anti-social behaviour	5.4%
Dirty shopping streets	5.0%
General lack of independent/specialist shops	5.0%
Shops too small	3.5%

5.54 In addition to likes and dislikes, respondents were asked how they would improve Newark town centre (question 13). Approximately 23.8% claimed that they would like a better choice of market stalls. This was included within the list of improvements suggested by 3.3% of respondents in the HTIS. Cheaper parking was referred to by

11.4% of respondents which is in line with the HTIS where 9.1% of respondents identified this as a way in which the centre could be improved. The potential for better quality shops was identified by 8.9% of respondents. The site visit and audit of the town centre confirmed that although there are a range of mid-higher quality retailers, there is potential to attract better quality retailers to the town centre. When respondents were asked if a specific shop would encourage them to visit the town centre (question 14), the majority of respondents said no (62.9%) however disregarding this, the most popular suggestion was Primark (5.9%) and John Lewis (2.5%). Newark is currently lacking a large multiple department store such as John Lewis or House of Fraser however this is typical for a centre of this size.

## Environmental Quality

- 5.55 In our judgement the quality of the buildings within the town centre are good and the historic buildings are a key feature of the centre which enhances its character. The Market Place in particular is an attractive space which is at the core of the centre's retail offer. The more modern building design of St Mark's Place and Middle Gate contrast with the traditional styles but are still generally in good condition. The town centre contains a number of small walkways and alleyways where retail units are situated; these features further contribute to the historic nature of the town centre.
- 5.56 Across the town centre the street paving is of a good quality and the traditional cobbles contribute to the overall environmental quality of the centre which is of a high standard. The shop frontages are generally in good repair, however in some areas of the centre, specifically around Carter Gate, there are a number of units in need of improvement to help boost the overall environment quality of that area. There are some large vacant character buildings including the former Charles 1<sup>st</sup> Coffee House on Kirk Gate; it is important that units like this are quickly occupied in order to avoid them becoming run down and detracting from the area's overall attractiveness.
- 5.57 Street furniture is of a good quality and is well-provided across the town centre with traditional style street lighting provided in the Market Place and a good provision of benches and seating. Signage and wayfinding is also generally good, with a number of signs distributed across the centre informing visitors of directions and local attractions. There is some street planting located around Stodman Street and the Market Place; although we consider this could be improved.
- 5.58 Alongside the large number of historic buildings, the town centre is also characterised by Newark Castle and the River Trent. This area of the town provides a pleasant setting for the cafés and restaurants located around Castle Gate and Town Wharf. Alongside the historic town centre and traditional market it also helps to create a unique offer which complements the experience gained in the larger competing centres of Lincoln and Nottingham. There is an abundance of green open space located mainly on the peripheries of the town centre including the Castle Gardens to the west of Castle Gate, Beaumont Gardens located adjacent to the cinema, and the St Mary Magdalene Church grounds which are situated to the north of the Market Place. The Castle Gardens are a key public space as they are often used for events during the summer months including outdoor concerts and performances.
- 5.59 Overall 26.7% of respondents in the in-centre survey said that they liked Newark because of the centre's character/atmosphere and the site visit supports this finding.

## Out of Centre

5.60 Out of town provision consists of two retail parks:

- **Northgate Retail Park** is located around 500 metres to the north of Newark Town Centre by the River Trent with easy access to the A46. This is the larger of the two retail parks and accommodates a total of nine retail and bulky good units with associated parking to the front of these units. Retailers located here include TK Maxx, Pets at Home, Home Bargains, Boots, Next, Peacocks, Carpetright, Poundstretcher, Currys PC World and Homebase. Pedestrian access to the town centre from the retail park is poor due to the busy main road route that runs between the two. At the time of the 2016 visit, the retail park was busy with a large proportion of the car park full.
- **Beacon Hill Retail Park** is the smaller of the two retail parks with now only one bulky goods retailer present (Topps Tiles), after B&Q recently closed down. The retail park is located to the east of the town centre and benefits from easy access to the A1. On the day of the 2016 site visit, there were very few cars parked in the car park to the front and there was no sign of any visitor activity.

5.61 There are also a number of standalone retail warehouses and foodstores located in this area, including:

- Aldi, Northgate
- Waitrose, Ossington Way
- Asda, Lombard Way
- Iceland, London Road
- Brantano, Ossington Way

## New Investment and Development Opportunities

5.62 The land at the current NSK factory on Northern Road is allocated under Policy NUA/MU/3 (Newark Urban-Area Mixed Use Site 3) within the *Allocations & Development Management* DPD for 4,000 sqm net of comparison retail floorspace, along with 150 new dwellings and employment provision. Other potential development and investment opportunities in the town centre are considered in more detail in Section 13 of this study, and include The Buttermarket and Corn Exchange.

## Summary

5.63 Newark's key strengths as a shopping and leisure destination include the following:

- The centre has a strong comparison offer with 36.1% of units being occupied by this use which is above the UK national average. There is a good range of mid-range national multiple fashion retailers including Fat Face, Accessorize/Monsoon, Dorothy Perkins, New Look, Clarkes and Marks and Spencer. However Newark is somewhat characterised by its strong independent offer including fashion boutiques and antique stores. Newark's role as an international centre for antiques (including the antique fairs which are held six times per year) should be utilised to distinguish an increasingly unique identify and to attract more visitors to the centre.

- Although convenience provision is below the national average, the boundary does not incorporate Aldi, Iceland and Waitrose and does not consider floor space figures. In addition to Asda and Morrisons which are included within the boundary alongside local convenience provision it is considered that actually food provision within the centre is good and there is a strong provision of both major supermarkets and independent food retailers.
- There is a good provision of financial and business services (12.24% of total town centre use) which includes high street banks such as Natwest, Lloyds, Halifax and Barclays. This means that local residents do not have to travel elsewhere outside of the district to access these services.
- Generally the public realm across the entire centre is of a high quality. The historic buildings are a key feature of the centre which contribute to the distinctiveness of Newark and enhances its appeal to visitors. There are a number of small walkways which further enhance this alongside the traditional cobbles and pedestrianisation of the Market Place, good signage, public seating and street planting. The results of both the household and in-centre surveys also indicate the character of the centre as being a strength.
- Newark Castle and its riverside setting is a key feature of the centre. It is a unique feature which helps to attract visitors from outside the district to the centre. It hosts a range of events throughout the year and the associated gardens contribute significantly to the levels of green open space within the centre. Despite this it is considered that the river could be utilised more as a setting for leisure activities.
- Newark market is considered to be a key asset of the centre. The results of the household and in-centre surveys identify this as being one of the features respondents like most about Newark. General retail markets are held three times per week and collectors and antique markets are held twice per week. The markets, particularly the latter, help to attract visitors from both inside and outside the district.

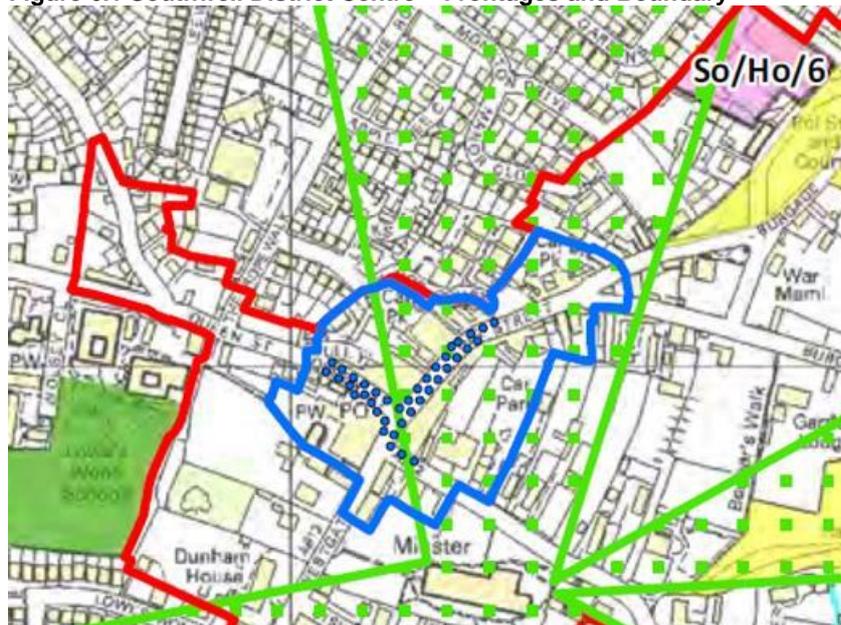
#### 5.64 Key weaknesses and challenges include the following:

- Leisure provision within the centre is below average and there is potential for the expansion of food and beverage offer. Attracting additional national multiples to the centre to complement local cafes/restaurant operators would appeal to visitors and could reduce leakage of expenditure to competing centres outside of the district. Expanding provision around the Market Place and river would provide a unique setting for visitors to enjoy.
- Although the vacancy rate is below the national average there are fifty vacant units which is considered to be quite high. Furthermore, the concentration of vacant units around particular areas of the centre means that vacancy rates are perceived to be higher than they are. For example The Buttermarket is an attractive and unique space that should enhance the town centre's offer, but it is clearly failing as demonstrated by the fact that it has a high vacancy level. Barnby Gate and Carter Gate also have a concentration of vacant units.
- The environmental quality around Carter Gate is in need of improvement. This is also reflected in the lower quality of the retail provision, due to the street being located to the far east of the centre away from the main town centre activity. Attracting higher quality retail provision and/or a mix of food and beverage uses to this street would help to ensure that activity continues through to this area of the town centre so it does not become underused.

## 6 SOUTHWELL DISTRICT CENTRE – HEALTH CHECK

- 6.1 Southwell is located approximately eight miles to the west of Newark, and is accessed from the town via the A612. Southwell is designated as a 'District Centre' in the Core Strategy. District centres are typically used for convenience shopping, with some comparison shopping and service provision which serves the local residents and surrounding communities.
- 6.2 The 2011 Core Strategy sets out that the Council will seek to maintain and enhance the role of District centres by supporting new retail and town centre uses; however such development must be consistent with the size and function of that centre and the size of the area which it serves. The retail hierarchy designates four District centres in all, namely Ollerton (see Section 7), Edwinstowe (Section 8) and Rainworth (Section 9).
- 6.3 Southwell is a compact centre and is the second largest centre after Newark in terms of the number of units. There is a significant contrast between Southwell and the neighbouring towns of Newark and Mansfield in terms of its higher relative affluence and house prices. The Core Strategy identifies Southwell as being a town of outstanding architectural and historic interest. The centre's identity is characterised by Southwell Cathedral and Minister, situated to the south of the centre, which attracts visitors and tourists to the town. There is also a wealth of historic buildings including the large prebendary houses that are located within the town's large Conservation Area. The Workhouse is a National Trust property and is located on Upton Road which is one of the main roads into the town centre.
- 6.4 Food stores in Southwell include a large Co-op which is situated on Ropewalk, near to the edge of the town centre just off Queen Street and Marks and Spencer Simply Food store which is trading from the petrol filling station on Upton Road outside of the town centre boundary. Comparison goods provision consists of mainly independent operators, with few national multiples. This is to be expected for a centre of its size and relative role and function in the retail hierarchy. The centre has a good provision of retail and leisure service providers, including hair and beauty salons, hot food takeaways, cafés and public houses. Other services include banks and Southwell Leisure Centre, which is located just outside of the town centre boundary.
- 6.5 The figure below shows the extent of the centre's Primary Shopping Frontages (PSF – blue dots) and Centre Boundary (blue line) as defined by the Allocations and Development Management DPD. The PSF (as indicated by the blue dotted line on the diagram below) is focused around Queen Street, King Street, Church Street and the Market Place. The Town Centre Boundary (as outlined in blue on the diagram below) encompasses all of these main streets extending to just south of Church Street to Piano restaurant and Bamboo Garden Restaurant along Market Place. To the west, the boundary extends to Bull Yard so does not incorporate the length of Queen Street. The boundary comes round to the Admiral Rodney and library car parks. In the north, the centre is bounded by King Street car park and by Church Street car park to the east. The Co-op store located on Rope Walk is not included within the Town Centre Boundary.

**Figure 6.1 Southwell District Centre – Frontages and Boundary**



Source: 2013 Allocations and Development Management DPD

## Retail Composition and Diversity

- 6.6 The assessment of the current retail and service provision in Southwell District Centre (measured by outlets) has been informed by the Council's 2016 Town Centre audit. The table below shows the composition and diversity of the town's retail and service outlets. The representation across the leisure categories (A3-A5) is set out in further detail in the leisure needs assessment.

**Table 6.1 Southwell District Centre Retail Composition 2016**

Category	2016		2012		2016 UK Average
	Units Nos.	%	Units Nos.	%	
Comparison	37	36.63%	37	37.37%	31.97%
Convenience	9	8.91%	9	9.09%	8.62%
Leisure	16	15.84%	16	16.16%	23.35%
Retail Services	16	15.84%	15	15.15%	13.94%
Finance and business service	10	9.90%	11	11.11%	10.64%
Sui-Generis/ other	9	8.91%	9	9.09%	
Vacant	4	3.96%	2	2.02%	11.17%
<b>TOTAL:</b>	<b>101</b>	<b>100.00%</b>	<b>99</b>	<b>100%</b>	<b>100%</b>

- 6.7 The table shows that Southwell has 101 retail and service units, which represents a slight increase from the 99 recorded in 2012. The following provides a brief overview of provision across the main retail and service categories:

### **Comparison goods**

- 6.8 Southwell has a good representation of comparison goods outlets; 36.63% of total outlets, which is above the UK average of 31.97%. This proportion of comparison units is also in line with Newark. There are three main national multiples in Southwell, namely Boots, Lloyds Pharmacy and Sue Ryder Charity Shop. The centre's

comparison offer is largely dominated by independent retailers, which contribute to Southwell's distinctive character. There are many specialist stores, including womens' fashion boutiques, DIY, interiors, aerial and television, home furnishings, florist and gift shops. The majority of comparison retail is concentrated along King Street. Overall the comparison retail offer caters for both tourists and day trippers visiting the attractions within the town (i.e. the Workhouse, Racecourse and Minster) and nearby rural areas, along with residents who visit the centre on a more frequent basis for their shopping and service needs.

- 6.9 The in-centre survey results show that only 18.0% of respondents were in the town centre to buy non-food goods (question 4) and of these, one third (33.3%) visited or intended to visit Boots. Other shops visited by respondents include charity shops (22.2%) and the garden centre (22.2%). Surprisingly, none of the independent clothing retailers were identified by respondents for this question (question 10), which suggests that perhaps these shops appeal more to tourists than residents of the town
- 6.10 In terms of competing centres, approximately 14.0% said they also tended to visit Nottingham and 40.0% said they tended to visit Riverside Retail Park, also in Nottingham (question 22). The majority claimed that they visited these other centres to buy non-food goods (58.1%). It is clear that people have to travel elsewhere for their non-food goods as provision is not sufficient to visitors' needs in Southwell.

### ***Convenience goods***

- 6.11 The nine outlets in this category represents 8.91% of total provision, which is above the national average of 8.62%. The number of convenience goods stores has stayed the same since the 2012 survey. Food stores in Southwell include a large Co-op, which is situated on Ropewalk near to the edge of the town centre just off Queen Street. This store is popular and busy, and at the time of our site visits the car park was fully occupied. The shop also stocks a small amount of non-food goods including electrical goods such as televisions and microwaves. There are also Amazon lockers, an ATM and a Well Pharmacy in-store. Since the 2016 audit and site visit took place, the Londis store located on Upton Road, outside of the town centre to the east, has now been re-occupied by an M&S Simply Food. There is also a One Stop located on King Street. There is also a range of smaller independent convenience stores including two confectionary stores, two butchers, a delicatessen and two bakeries.
- 6.12 The in-centre survey results show that 14.0% of respondents were in the centre for food shopping purposes (question 4) which similarly to Newark, is a smaller proportion of respondents than those who were in the centre for non-food shopping (18.0%) and services (24.0%). Of this 14.0%, 28.6% said that they had visited the local butcher and 14.3% respectively visited Co-op, One Stop and the Old Theatre Deli (question 7). Unlike the respondents in Newark, the findings show that a higher proportion of respondents visited independent provision than the national multiple supermarket. Only one respondent claimed that they did not intend to link their food shopping trip with a visit to other shops and services in the centre (question 8). Approximately 85.7% claimed they intended to visit non-food shops and 28.6% intended to visit a café/restaurant. This suggests that the compact nature of Southwell town centre is encouraging linked trips.

## ***Retail, Leisure and Financial Services***

- 6.13 Southwell has 16 retail services and provision (15.84%) is above the 2016 UK average (13.94%). Its offer includes hair and beauty salons, post office, dry cleaners and dog groomers.
- 6.14 There are also 16 leisure services in Southwell, which represents 15.84% of total outlets. This is significantly below the UK average of 23.35%. Despite this below average proportion, the centre's existing café and restaurant provision is of a good quality. Although there are no national multiples within the centre, the independent leisure services help to make Southwell a unique destination. There are four public houses located in the centre including the Saracens Head Hotel which is a historic Elizabethan public house and hotel located in the heart of the town centre.
- 6.15 Southwell also has a slightly below average proportion of businesses in this category (9.90% compared to the national average figure of 10.64%). This provision includes two high street banks (Barclays and Natwest), following the closure of HSBC on Church Street in 2015 (this is now a wine shop). Other financial and business uses include mainly estate agents.
- 6.16 Other uses in Southwell include a number of civic and community uses such as the Methodist church, Minster Centre, library and Women's Institute. The wide range of uses demonstrate that Southwell is performing an important role as a District Centre, meeting the shopping, leisure, service, community and civic needs of its local population.

## **The Market**

- 6.17 Southwell Market operates every Saturday and Thursday. The main Saturday market contains around 30 stalls whereas the Thursday market is smaller but expanding. There are a range of food and non-food goods sold including fish, fruit and veg, cakes, deli foods, cheese, toiletries, clothing, home furnishings and flowers. The market takes place in the pedestrianised Market Square located to the northeast of the centre just off King Street. This is considered to be a compact space therefore a large expansion of the market would possibly require the relocation of the street market.
- 6.18 The in-centre survey results did not record any respondents as being in the centre with the purpose of visiting the market despite interviews being conducted on a Saturday (question 4) however only 12.0% claimed that they do not visit the market at all (question 16). Approximately 26.0% claimed they like Southwell market for the food stalls and the variety of the stalls and 16.0% said they like the character of the market (question 16). When respondents were then asked what improvements could be made to the market, 76.0% answered 'nothing' or 'don't know' which is a common response in these types of surveys (question 17). Actual improvements listed included a larger market (12.0%), more variety of stalls (8.0%) and frequency of the market (6.0%). These results are all in line with the overall findings of the health checks and site visit. As stated previously, an expanded and more frequent market could benefit the centre as the main market currently only operates on a Saturday with just a few stalls open on a Thursday.

## Vacancy Levels

6.19 As described in Section 5, vacancy levels provide one of the key performance indicators (KPIs) for assessing the relative health of centres, and measuring how their attraction and performance may be changing over time. Based on the Council's audit there are just four vacant outlets in Southwell and the current vacancy level of 3.96% is significantly below the national average of 11.17%. However the number of vacant units has increased from two (2.02%) since 2012. Based on our site visits the vacant units are small; two are located along Harman Walk, which is just off Queen Street. It should be noted that since the 2016 audit took place, the unit previously occupied by HSBC on Church Street which was vacant is now a wine shop. Overall the low vacancy rate and quick turn over indicates the attraction and strength of Southwell, and suggests it is performing well as a District centre.

## Retailer Requirements

6.20 Retailer demand for representation in a shopping location normally provides a good indication of a centre's overall attraction, health and viability. The CoStar Focus national retailer requirements database is a standard published dataset used to inform retail assessments and provides consistently sourced evidence detailing the changes in retailer requirements over a period of time.

6.21 In March 2016 there were a total of four retailer requirements for Southwell Town Centre. There were no leisure requirements. Of the four retail requirements, three were for charity shops and one was for Edinburgh Woollen Mill, a national clothing multiple.

**Table 6.2 Southwell: Retailer Requirements**

Category	Name	Max floorspace (m <sup>2</sup> )
Retail	Cats Protection	232.3
	Mind	139.4
	Edinburgh Woollen Mill	464.5
	Rainbows Hospice	139.4

6.22 Those operators with a stated interest include a national multiple retailer. However it should be noted that they would be seeking a larger format unit.

6.23 Notwithstanding this high level assessment of current market demand, the Council should be aware that many retailers prefer not to publish their requirements as it could damage their negotiating position where they are seeking representation in new locations. Moreover, such databases can only identify the current level of market demand and do not reflect how demand might change in the future following new development and investment. For example, experience shows that a new scheme that offers retailers modern, well-configured floorspace adjacent to like-minded tenants in a prominent location will generally generate a significant uplift in market interest and demand.

## Accessibility

6.24 Southwell is linked to the A46, via the A6097 and A617, and is well connected to Nottingham City Centre. Although there is no railway station, Nottingham's mainline station provides connections to nearby Lowdham and Fiskerton. There are also regular bus services to Nottingham, Newark and Mansfield.

- 6.25 There are two council-run car parks located in the town. This includes Church Street car park, which is located close by to the Minster and has approximately 85 parking spaces and is free for the first two hours. King Street car park has approximately 50 spaces and is situated close by to the market and the town centre shops and also provides free parking for the first two hours. A large car park also serves the Co-op store. On the day of the 2016 site visit, the majority of the car parks were busy and fully occupied.
- 6.26 Despite King Street car park being full, traffic flow to the northeast of the centre is generally low which is influenced by the one-way road system preventing traffic from the south of King Street and Church Street travelling on this road. Because of this, pedestrian access is good overall. However it is expected that at peak times there could be conflicts between pedestrians and car users due to the narrow street. On the day of the visit the heaviest traffic flow was around the junction of Church Street and King Street.
- 6.27 The in-centre survey results show that 40% of respondents travelled to the centre via car either as a passenger or driver (question 1) which is the second lowest proportion of respondents travelling to any centre using this mode of transport. Over half (56.0%) of respondents travelled to the centre on foot which is one of the highest proportions of responses recorded for this travel mode. This reflects the compact nature of the town centre and easy pedestrian access to and around the town. However it also shows that compared to Newark, fewer visitors from outside the centre visit here despite the Minster which is a famous visitor attraction.

## **Pedestrian Flows, Dwells Times and Frequency of Visit**

- 6.28 Along with the low traffic flow in the northeast of the centre, the site visit confirmed that the lowest footfall levels were also in this part of the town centre. The market place is located in the northeast of the town centre so this lack of footfall may have been influenced by it not being a market day. Pedestrian flows were buoyant around the area near to the junction of King Street and Queen Street with many of the cafés and eateries full with customers. There was also evidence of linked trips being made from the Co-op store on Ropewalk to the rest of the town centre.
- 6.29 The in-centre survey asked respondents how long they intended to stay in the centre (question 2). The majority of respondents intended to stay between one and two hours (36.0%) or less than 30 minutes (34.0%). Approximately 16% said they were going to stay between 30mins and one hour. This is a much shorter dwell time than in Newark which is possibly due to the smaller size of the centre. It is particularly unusual that the proportion of those staying between 30 mins and one hour is so low compared to the other two responses.
- 6.30 Respondents were also asked about the frequency of their visits (question 3). The majority (42.0%) claimed that they visited the centre 4-6 days a week. Overall 90% of respondents visit the centre at least once a week. It is likely that this has been influenced by the large retired population. Additionally, the compact nature of the centre makes it more convenient for people to access the centre regularly on foot compared to the larger centre of Newark.

## **Customer Views and Perceptions**

- 6.31 We have drawn on the findings of the household telephone interview survey and in-centre survey to help gauge customers' views and perceptions of the centre as a place to shop and visit for a range of leisure uses and other activities.

6.32 The household telephone interview survey asked specific questions on respondents' views and perceptions of Southwell. This included asking people what key improvements they would like to see that might encourage them to visit the centre more often for shopping and other purposes. The table below lists 'top 10' features that respondents liked about Southwell.

**Table 6.3 Feature respondents liked about Southwell**

Response	Study Area
Attractive environment/nice place	39.6%
Good range of non-food shops	18.3%
Nothing/very little	16.0%
Close to home	9.8%
Good pubs, cafes, or restaurants	8.3%
Good range of independent shops	7.0%
Traditional	5.2%
Don't know	4.5%
Good food stores	3.6%
Quiet	3.6%

6.33 Not surprisingly the majority of respondents (39.6%) indicated that they liked Southwell's attractive environment, which is in line with the findings of the health check and site visit. Respondents also mentioned the good range of non-food shops (18.3%), independents (7%) and choice of places to eat and drink (8.3%). Convenience to where people live was also a key reason for visiting the centre, which reflects its local catchment.

6.34 Respondents were also asked what, if anything, they would improve in Southwell that would encourage them to visit more often. The table below summarises some of the most frequently raised suggested improvements.

**Table 6.4 Key Suggested Improvements for Southwell**

Response	Study Area
Nothing	63.1%
More/better parking	11.5%
Don't know	8.5%
More/better comparison retailers (i.e. non-food shops)	3.6%
More/better food shops	3.2%
More national multiple shops/ High Street shops	2.8%
Less traffic congestion	2.4%
Better access by road	2.1%
Free car parking	1.5%
More/better places for eating out (e.g. cafes and restaurants)	1.1%

6.35 Some 63.1% across the whole Study Area, and a high proportion in each study zone responded that there was nothing that would make the visit the centre more often. Of those that did make suggestions, 11.5% identified the need for more/better car parking and free parking in Southwell. Access by road and resolving issues with congestion were also identified. Other key improvements that were identified include the provision of more high street branded shops, including better non-food and food shops.

6.36 In addition to the household survey some 50 face-to-face interviews were also carried out with visitors to Southwell. The surveys were conducted across a number of days and times to ensure a representative sample group. As part of this survey respondents were also asked what they liked about Southwell and the ‘top 10’ responses are summarised in the table below.

**Table 6.5 Features respondents liked about Southwell**

Response	Study Area
Character/atmosphere	40.0%
Near/convenient	24.0%
Selection/choice of independent/specialist shops	20.0%
Like everything about the town centre	18.0%
Southwell Minster	12.0%
Range of services (banks, insurance, hairdressers etc.)	8.0%
Range of places to eat	6.0%
Parking is easy	4.0%
General cleanliness of shopping streets	4.0%
Feels safe/absence of threatening individuals/groups	4.0%

6.37 The features respondents like most about Southwell are its character/atmosphere (40.0%) and the fact that it is close to where they live or work (24.0%). This confirms the findings from the household survey and reflects the fact that Southwell mainly serves the day-to-day needs of its local resident catchment population. Respondents also highlighted the attraction of the independent/specialist shops and Southwell Minster. Approximately 18.0% of respondents also stated that they “like everything” about the centre which highlights the very positive customer perceptions and relatively high satisfaction levels.

6.38 Respondents were then asked what they disliked most about the centre, if anything. The results are set out in the table below. Although the majority of respondents stated nothing in particular (44.0%), a relatively high proportion did highlight road/traffic congestion (28%), difficulties in parking (12%), pedestrian/traffic conflict (10%) and not enough pedestrianisation (6%). This confirms the findings of the household survey, health check and our own observations as part of our site visits to the centre.

**Table 6.6 Features respondents disliked about Southwell**

Response	Study Area
Nothing in particular	44.0%
Road congestion	28.0%
General lack of choice of multiple shops	14.0%
Difficulties in parking	12.0%
Unsafe for pedestrians/traffic conflict	10.0%
Not enough pedestrianisation	6.0%
Too many charity shops	4.0%
General lack of independent/specialist shops	2.0%
Parking is expensive	2.0%
Poor public transport links	2.0%

6.39 In addition to likes and dislikes, respondents were asked how they would improve Southwell town centre (question 13). Approximately 18.0% claimed that they would like a better choice of market stalls. This was not included within the list of improvements in the HTIS. A better choice of shops in general was referred to by 8.0% of respondents which is in line with the HTIS where respondents identified more/better comparison and food shops as a way in which the centre could be improved. Less traffic/congestion was also identified by 8.0% of respondents which is in line with the HTIS where respondents stated better access by road and less traffic congestion would improve Southwell. When respondents were asked if a specific shop would encourage them to visit the town centre (question 14), the majority of respondents said no (48.0%) however disregarding this, the most popular suggestion was clothes/shoe shops (12.0%) and a new supermarket (8.0%). It is considered that additional clothing shops, particularly national multiples, could help to enhance Southwell's retail provision.

## Environmental Quality

6.40 Southwell is a town of outstanding historic and architectural interest, characterised by the Minster located to the south of the town centre. The Minster combined with the large number of historic buildings helps to create a distinctive town centre. The environmental quality of the centre is further enhanced by the one-way road network which runs through the majority of the centre including King Street and Queen Street however congestion was considered to be a potential problem throughout the centre. Overall we consider the general town centre environment and urban realm is of a high quality.

6.41 Across the centre, particularly around the market place, there were examples of seating and street planting. Signage is also good with information boards, maps and directions distributed around the centre. Generally shop frontages are well maintained and there are a number of distinctive character buildings including the Saracen's Head public house and hotel located at the Church Street/King Street junction which helps to provide an attractive shopping environment and visitor experience. In the far east of the town centre there are a number of units that could benefit from updates to their shop frontages. To protect this character, a Conservation Area has been designated which contains several listed buildings including the Saracen's Head.

6.42 Respondents were asked during the in-centre survey about the features Southwell has that they like. Approximately 40.0% of respondents stated that they like the character/atmosphere of the centre, 12.0% said

they liked the Minster and 4.0% claimed they like the general cleanliness of the shopping streets. These results reflect the findings of the health check in regards to the environmental quality of the centre. Road congestion was referred to by 28.0% of respondents as something they disliked about Southwell which again is in line with the findings of the site visit.

## Summary

6.43 In summary, the key strengths identified for Southwell include:

- The centre has an excellent comparison retail provision which is above the national average (36.63% compared to 31.97%). Retailers are predominately independents which contribute to the centre's individual character. There are an abundance of fashion boutiques, home furnishing stores, gift stores, DIY shops and florists. The range in goods caters for both local residents and tourists.
- The centre has a very low vacancy rate (3.96%) which is a sign of its relative strength and attraction as a shopping destination.
- There are a wide range of civic and community uses including a church, library and women's institute that supplement the centre's retail, leisure and service offer and help to generate trips to the centre.
- The Minster is a key attraction, drawing visitors and tourists to the centre. In addition to the Minster is the prebendal houses and the Workhouse which is a National Trust property located just outside of the town.
- The town centre's public realm is of the highest quality. It is a town of outstanding historic and architectural interest, "anchored" by the Minster. In the household and in-centre surveys, the character/atmosphere of the centre was the feature respondent's liked most about Southwell. There are a number of character buildings and planting, signage and seating are well distributed across the centre.

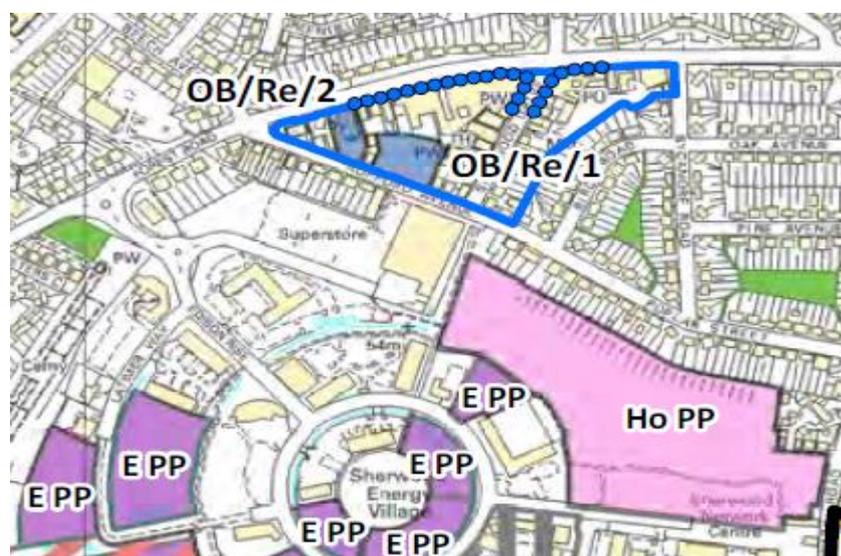
6.44 Key weaknesses identified for Southwell include the following:

- The centre could benefit from additional leisure provision including more quality restaurants, cafés and drinking establishments to help increase dwell times within the centre. Although the independent provision that is currently in the centre is of a good quality, attracting a national multiple may help to strengthen its overall offer and attraction.
- There is a lack of national multiples retailers within Southwell town centre. Similarly to the leisure provision, although the independent retail is strong the centre could benefit from attracting mid to high range multiples to the centre (such as, for example, Joules).
- The in-centre and household surveys identified the need for more/better parking and addressing road congestion. On the days of our site visits we noted that both of the town centre car parks were at nearly full capacity alongside the Co-op car park located on Rope Walk. There is also evidence of congestion around the Church Street and King Street junction. It is important that parking and traffic is managed effectively within Southwell, particularly because of the positive impact that visitors from outside the centre have on its overall economy.

## 7 OLLERTON DISTRICT CENTRE – HEALTH CHECK

- 7.1 Ollerton and Boughton are adjoining settlements. The centres are located to the north of the District approximately 14 miles from Newark. The larger of the two centres is Ollerton which is the main focus for services and is defined as a ‘District Centre’ within the Core Strategy. The neighbouring Boughton is designated as a ‘Local Centre’ and is considered in more detail in Section 10.
- 7.2 The Adopted *Allocations and Development Management* DPD states that over the plan period Ollerton will see new housing and employment growth alongside associated facility expansion to assist with the regeneration of the area and reinforce its role as the main centre within the Sherwood Area.
- 7.3 Ollerton’s retail offer is anchored by a Tesco and Asda which are located opposite each other, on the edge of the centre in close proximity to the Sherwood Energy Village. This is a former colliery site which now acts as a significant employment area, which helps to support the local shops in the town centre. It is an award winning mixed use sustainable development and the site features housing, green space and commercial and industrial floorspace. Around 600 jobs are now provided on the site which is the same as when the original colliery shut in 1994. The centre’s comparison retail offer includes shops selling a range of goods such as homewares, electrical goods, gift shops and charity shops. There are also a variety of civic uses including a library and town hall.
- 7.4 The figure below shows the extent of the centre’s Primary Shopping Frontages (PSF – blue dots) and Centre Boundary (blue line) as defined by the Allocations and Development Management DPD

**Figure 7.1 Ollerton District Centre – Frontages and Boundary**



Source: 2013 Allocations and Development Management DPD

- 7.5 As the figure shows, the PSF includes Forest Road and Sherwood Drive. Forest Road is the main route through the town centre and is a busy main road with town centre uses distributed along the southern side of the road, whereas Sherwood Drive is a quieter one-way street. The Tesco store can be accessed at the end of Sherwood Drive. However this store is not included within the centre boundary, which is bordered by Rufford Avenue to the south. The boundary here runs from Rufford Avenue/Forest Road junction to just east of Sherwood Drive to Fatboys hardware store on the corner of Sycamore Road/Forest Road in the north. It should be noted that

the Asda store located on the northern side of Forest Road is also not included within the Town Centre Boundary. The units across the centre are mainly small in size, although the Tesco, Asda and Fat Boys hardware store all occupy larger units. A street market does not operate in Ollerton town centre however there is an indoor market located on Sherwood Drive although this currently has only two occupied units.

7.6 As Figure 7.1 also shows, the *Allocations & Development Management* DPD sets out two policies which allocate land for retail development:

- **Retail Allocation 1 (Policy OB/Re/1):** This policy designates land at Rufford Avenue which is just off Forest Road for retail development. This vacant land provides an opportunity to link the site with The Forest Centre and Tesco. We consider the development potential of this site in more detail in Section 13.
- **Retail Allocation 2 (policy OB/Re/2):** This policy designates land at Forest Road for retail development. The Town Council subsequently purchased the site, which was previously an old Bingo Hall, and has successfully secured Boyes and the post office as key tenants. . Retail Composition and Diversity

7.7 The assessment of the current retail and service provision in Ollerton District Centre (measured by outlets and floorspace) has been informed by the Council's 2016 Town Centre audit. The table below shows the composition and diversity of the town's retail and service outlets. The representation across the leisure categories (A3-A5) is set out in further detail in the leisure needs assessment.

**Table 7.1 Ollerton District Centre Retail Composition 2016**

Category	2016		2012		2016 UK Average
	Units Nos.	%	Units Nos.	%	
Comparison	19	27.14%	21	32.31%	31.97%
Convenience	9	12.86%	8	12.31%	8.62%
Retail service	12	17.14%	9	13.85%	13.94%
Leisure	8	11.43%	8	12.31%	23.35%
Finance and business service	4	5.71%	6	9.23%	10.64%
Sui-Generis/ other	9	12.86%	9	13.85%	
Vacant	9	12.86%	4	6.15%	11.17%
<b>Total</b>	<b>70</b>	<b>100%</b>	<b>65</b>	<b>100%</b>	

Note: Both Tesco and Asda are located outside the defined Centre boundary and were not recorded by the Council's Centre Audits in 2012 and 2016

7.8 The table shows that Ollerton has 70 retail and service units, which represents an increase from the 65 recorded in 2012. The total number of outlets in the centre is lower than recorded for Southwell (101). The following provides a brief overview of provision across the main retail and service categories:

### **Comparison Goods**

7.9 Ollerton has 19 non-food units, which represents 27.14% of total outlets and is below the national average of 31.97%. This has also been a decrease in the number and proportion of comparison goods stores since the 2012 survey. Overall Ollerton's non-food offer is limited. There are no clothing/fashion stores located in the centre, which contrasts with Southwell District Centre.

- 7.10 Of the 19 units, three are charity shops (which do sell some second-hand clothing and footwear items). Whilst we recognise that these shops can be beneficial for town centres, particularly in meeting the needs of the wider community, the proliferation of charity shops can be a negative indicator of the relative performance of a centre and the limited market demand.
- 7.11 There are two national multiples in the centre (not including multiple charity shops), namely Boots Pharmacy and Boyes discount department store. There is also a strong representation of hardware shops, two mobility shops and an e-cigarette shop.
- 7.12 The majority of the centre's offer is lower quality and is mainly located along Forest Road, with only a few retail uses situated along Sherwood Drive. Ollerton indoor market is located on Sherwood Drive however since the audit and site visit, this building has now closed and is vacant. Due to the importance of Sherwood Drive in connecting pedestrians to and from Tesco to the centre, this is a key site which could be used to enhance activity in the area. The Forest Centre which is located along the PSF on Forest Road was mainly vacant at the time of the visit and has a large number of units that are available to be occupied by comparison retailers.
- 7.13 The in-centre survey results show that only 12.0% of respondents were in the town centre to buy non-food goods which is a lower proportion compared to Newark and Southwell (question 4). Of this figure, 33.3% intended to visit Boyes and 16.7% respectively intended to visit the chemist, Sue Ryder Care charity shop and the card shop (question 10). This low proportion of respondents shopping in Ollerton for non-food goods reflects the weak comparison provision within the centre.

## ***Convenience provision***

- 7.14 The centre's food and convenience provision (even excluding Tesco and Asda) is above the national average (12.86% compared to 8.62%) and is generally in line with the levels recorded in the 2012 survey.
- 7.15 Within the defined centre boundary Ollerton's food and convenience offer includes a frozen food shop (Heron Foods), located on Forest Road, along with a number of butchers, bakers and grocers. There is also a large Spar on the corner of Sherwood Drive and Forest Road, and One Stop is located next door. Despite the relatively small size of the centre, the convenience provision is strong.
- 7.16 Both Tesco and Asda are located outside the centre boundary and were not recorded in the Council's audit. Although these stores do help to generate some linked trips and expenditure to other shops, services and businesses across the District Centre, we consider that the linkages from both stores to the rest of the centre are relatively poor; although access to and from Tesco is more convenient than from Asda due to there being various routes from the store into the centre, including along Sherwood Drive.
- 7.17 The Tesco store has a café, pharmacy, petrol filling station and also sells a wide range of comparison goods including health and beauty, clothing and some electrical goods. The Asda is much smaller and at the time of our centre visits appeared to be less popular, as the car park was only one quarter full. The store has a more limited comparison goods sales area.
- 7.18 In summary we consider that the centre boundary should be extended to include Tesco at least, due to its close proximity to Sherwood Drive, which is included within the town centre boundary. Sherwood Drive should be

utilised due to it being the main route to and from the supermarket; enhanced retail provision along the road could help to increase linked trips between the food store and the town centre.

- 7.19 The in-centre survey revealed that a significantly higher proportion of respondents were in the centre for food shopping (34.0%) than non-food shopping (question 4). The majority of these respondents intended to visit or had visited Tesco (41.2%) or Heron Frozen Foods (35.3%). Importantly, only one respondent (5.9%) intended to visit Asda. It is clear that the large Tesco is the most popular food store within the centre but surprisingly the discount frozen food store is more popular than the other big brand supermarket retailer. Over half the respondents (58.8%) who were in the centre for food shopping intended to link their shopping trip with a visit to other food shops (23.5%) and other non-food shops (35.3%). Just under half (47.1%) said that they did not intend to link their trip with visits to other shops or services.

### ***Retail, Leisure and Financial Services***

- 7.20 Ollerton has 12 retail services and provision (17.14%) is above the national average (13.85%). The number of retail services has increased from none in 2012 and the main offer includes hair and beauty outlets. Indeed three of the five units in the Forest Centre are hairdressers/beauticians. Other uses include a funeral service and printing service. There is also a Post Office located in the centre. The in-centre survey results showed that the majority of respondents were in the centre for services (26.0%).
- 7.21 In terms of financial services there are two high street banks (Natwest and Lloyds TSB) which make up two of the four financial services. As Table 7.1 shows, provision is below the nation average in this category.
- 7.22 There are eight leisure services in Ollerton, which is the same as recorded in 2012. Current provision represents 11.43% of total outlets, which is significantly below the national average figure of 23.35%. Approximately 50% of leisure uses are hot food takeaways and there is only one café in the centre and no public house. On this basis Ollerton would benefit from attracting additional leisure services, particularly cafés and coffee shops and restaurants. This would help to increase the attraction of the centre and raise dwell times, to the benefit of other shops and businesses. More restaurants would also help to strengthen the centre's night time economy.

### **Vacancy Levels**

- 7.23 Vacancy levels provide one of the key performance indicators (KPIs) for assessing the relative health of centres, and measuring how their attraction and performance may be changing over time. Based on the Council's latest audit there are currently nine vacant units in the centre, which is more than twice the number recorded in 2012 (4 vacancies). The current vacancy rate in the town centre of 12.86% is also above the national average of 11.17%. The increase in the number of vacancies and the relatively high vacancy level in the District Centre is a cause for concern and should be closely monitored by the local planning authority, as it points to a decline in the vitality and viability of the centre over the last few years.
- 7.24 We also noted a concentration of vacant units in the Forest Centre during our site visits. This centre is significantly underused and the number of vacant units within it may be deterring investment from new businesses. The potential for the regeneration/redevelopment of the centre should be assessed by the Council due to the centre's prime position within the centre and the opportunities it will afford to the overall enhancement and revitalisation of the centre's retail offer and general shopping environment.

## Accessibility

- 7.25 Ollerton Town Centre is located on the A6075 which provides links to the west to Mansfield. There is just one council-run car park in the centre located on Forest Road, to the rear of Pinders Opticians and NatWest. The Tesco store is served by a large car park which was full on the day of the visit to the town. There is also a car park which serves Asda, although this was around only one quarter full at the time of our visits. On-street parking is also available to the front of some of the units along Forest Road.
- 7.26 Despite the majority of the retail being concentrated on the northern side of the street, which reduces the need to cross over the roads, the presence of heavy traffic flow on Forest Road does detract from a pleasant, pedestrian environment. However we note that there is a good provision of pedestrian crossings to allow for easier access to the centre by those travelling on foot and wide pavements also run along Forest Road. The linkages between Tesco and the centre (via Sherwood Drive) are more pedestrian friendly due to the one-way system on Sherwood Drive and the surrounding residential character. The link between Asda and the centre requires pedestrians to walk along and cross the busy main road, which will limit the potential for linked trips.
- 7.27 There is no railway station in Ollerton and Worksop railway station is around a twenty minute drive away. There are also regular bus services to Retford, Newark, Lincoln and Nottingham. *The Allocations and Development Management* DPD includes Policy OB/Tr/1 (Ollerton and Boughton - Transport Allocation 1) which allows for the potential reopening of the Dukeries railway line. A general area of search for a new station and car park has been identified at Sherwood Energy Village, therefore development either on or around this site will not be permitted where it would prejudice this scheme from coming forward.
- 7.28 The in-centre survey results show that only 26.0% of respondents travelled to the centre by car (question 1) compared to over double this figure in Newark (60.4%). This centre had the lowest proportion of respondents accessing the centre by car. It also had the highest proportion of respondents accessing the centre on foot (58.0%). This reflects Ollerton's role as more of a local centre, appealing less to residents from outside of the centre compared to other district centres.

## Pedestrian Flows, Dwell Times and Frequency of Visit

- 7.29 The site visit confirmed that footfall was highest around the Tesco store, but we also identified limited pedestrian flow and activity along Sherwood Drive, which suggests that only a small proportion of 'Tesco shoppers' link their food shopping trips with visits to the centre. We also identified that footfall was generally high around One Stop, Well Pharmacy and Spar. The lowest levels of footfall were in and around the Forest Centre, which is no doubt explained by the high number of vacant/closed units within the centre. Pedestrian flow was also low around the secondary cluster of units along Sherwood Drive.
- 7.30 The in-centre survey results show that the majority of respondents (44.0%) intended to stay in the study centre for less than 30 minutes (question 2). This is a short dwell time which reflects the responses regarding the purpose of respondents' visits which were mainly for food shopping and the use of services. There are a lack of leisure uses in the town centre which would help to increase dwell times.
- 7.31 The majority of respondents (44.0%) claimed that they tended to visit the town centre 4-6 times per week which is in line with the results found in the Southwell in-centre survey (question 3). The survey results identify that

50% of respondents were not in paid work, 22.0% were over 65 years and 60.0% had workplaces within the town centre which may have skewed the results.

## Customer Views and Perceptions

7.32 We have drawn on the findings of the household telephone interview survey and in-centre survey to help gauge customers' views and perceptions of the centre as a place to shop and visit for a range of leisure uses and other activities.

7.33 The household telephone interview survey asked specific questions on respondents' views and perceptions of Ollerton. This included asking people what key improvements they would like to see that might encourage them to visit the centre more often for shopping and other purposes. The table below lists the 'top 10' features that respondents liked about Ollerton.

**Table 7.2 Feature respondents liked about Ollerton**

Response	Study Area
Close to home	23.60%
Nothing/very little	21.87%
Good range of non-food shops	13.91%
Don't know	12.18%
Attractive environment/nice place	9.78%
Good food stores	7.78%
Close to friends or relatives	5.09%
Good pubs, cafes or restaurants	3.82%
The Tesco store	3.61%
Good facilities	3.02%

7.34 The majority of respondents indicated that they liked Ollerton because it was close where they live. This confirms the fact that the District Centre is mainly serving the day-to-day needs of its local resident catchment population. A further 21.87% stated that there was "nothing/very little" they liked about the centre, which was higher than recorded for Southwell (16%). Compared to the responses for both Southwell (39.6%) and Newark Town Centre (30.6%), fewer respondents stated that Ollerton has an "attractive environment and/or is a nice place" (9.78%). Notwithstanding this, the 'attractors' that people like most about the town include the good range of non-food shops and good food stores, specifically the Tesco store.

7.35 Respondents were also asked what, if anything, they would improve in Ollerton that would encourage them to visit more often. The table below highlights some of the most frequently mentioned suggested improvements.

**Table 7.3 Key Suggested Improvements for Ollerton**

Response	Study Area
Nothing	50.23%
Don't know	16.27%
More/better comparison retailers (i.e. non-food shops)	6.28%
More/better food shops	5.48%
More national multiple shops/High Street shops	5.48%
More/better parking	5.02%
More/better entertainment	3.69%
Modernise/update/facelift	3.29%
Cleaner streets	2.00%
Facilities which would assist you if shopping with children	1.84%

7.36 As the table shows, 66.5% of respondents in the Study Area stated 'nothing' or 'don't know'. Less than 10% of respondents in each case highlighted a need for more/better comparison retailers, including more high street branded shops and improved or additional parking facilities. Modernisation of the town and cleaner streets were also identified which confirms the findings of the health check and our observations on our site visits.

7.37 In addition to the household survey some 50 face-to-face interviews were also carried out with visitors to Ollerton. The surveys were conducted across a number of days and times to ensure a representative sample group. As part of this survey respondents were also asked what they liked about Ollerton and the 'top 10' responses are summarised in the table below.

**Table 7.4 Features respondents liked about Ollerton**

Response	Study Area
Near/convenient	58.0%
Nothing in particular	24.0%
Selection/choice of independent/specialist shops	12.0%
Charity shops	10.0%
Selection/choice of multiple shops (i.e high street chains)	8.0%
Feels safe/absence of threatening individuals/groups	8.0%
Not too crowded	4.0%
Character/atmosphere	4.0%
Parking is free	4.0%
Good public transport links	2.0%

7.38 The majority of respondents (58%) indicated that they liked Ollerton because it was convenient to where they live, which reflect the role of the centre meeting the day-to-day needs of its local resident catchment population. Some 24.0% indicated that they liked nothing in particular about the centre, which also corresponds with the household survey results. A further 12% liked the selection of independent and specialist shops, and 10% identified the charity shops, which suggests that the charity shops do make a positive contribution to the centre's overall offer rather than detracting from it.

7.39 Respondents were also asked what they disliked about the centre, and the ‘top 10’ responses are set out in the table below.

**Table 7.5 Features respondents dislike about Ollerton**

Response	Study Area
Nothing in particular	28.0%
General lack of choice of multiple shops	20.0%
General lack of independent/specialist shops	14.0%
Difficulties in parking	10.0%
Dirty shopping streets	10.0%
Feels unsafe/presence of threatening individuals/groups	8.0%
Shops too small	8.0%
Road congestion	6.0%
Not busy enough	4.0%
Too many charity shops	4.0%

7.40 Although the majority of respondents stated nothing in particular (28.0%), others identified the lack of choice for both multiple (20%) and independent shops (14%), difficulties in parking (10%), “dirty” shopping streets (10%), and lack of pedestrian safety (8%). The responses underline some of the feedback from the household survey.

7.41 Respondents were also asked how they would improve Ollerton town centre (question 13). In response, 42.0% of respondents claimed that a better choice of shops in general would improve the centre and 8% claimed that an improved appearance/environment would improve the centre. These findings are in line with the other results of both the HTIS and the in-centre survey and the overall health check. Additional clothing shops were identified by 14.0% of respondents as a type of shop that would encourage them to visit Ollerton more frequently. Primark was also mentioned by 8.0% of respondents. Approximately 42.0% of respondents said there is not a shop that would encourage them to visit the centre more often (question 14). It is clear that overall a wider range of comparison goods retailers would enhance the town centre’s offer and would help to attract more people to the centre.

7.42 A street market was considered by 68.0% of respondents as a feature that would encourage them to visit the centre more often (question 20). The majority (67.6%) claimed that food and grocery stalls would be the most important stalls to have alongside clothing and footwear (38.2%).

## Environmental Quality

7.43 Ollerton’s main shopping, leisure and service offer is concentrated along Forest Road, which functions as a high street and is supplemented by some additional units on Sherwood Drive, which links the centre to Tesco. The units across both these streets are generally two storeys and of 1970’s architectural style. Although the centre is generally clean, there was some evidence of litter and some shop facades are in need of updating as they are currently dated and appear untidy.

- 7.44 The public realm is generally pleasant with a good provision of street furniture including litter bins and benches. Although some trees line the path along Forest Road, we consider that additional planting is needed to counteract the busy main road and help create a more appealing centre. Compared to the other centres such as Southwell and Newark, there is a lack of signage across the centre. However it is recognised that fewer tourists/ visitors from outside the District travel to Ollerton and it is mainly used by local residents who will be familiar with the centre's layout and offer.
- 7.45 When respondents were asked during the in-centre survey what they disliked about the centre (question 12), 10.0% of respondents said dirty shopping streets which is in line with the findings of the site visit discussed above. When asked what they would improve about the centre, 8.0% of respondents said the appearance/environment of Ollerton compared to only 4.0% of respondents who said they liked the character/atmosphere. The environmental quality and appearance of a centre is critical to its success and in competing with other centres, therefore attention should be given to this.

## Summary

- 7.46 In summary, Ollerton's key strengths and opportunities include the following:
- It has a strong food and convenience retail offer which is above the UK average, albeit that the two main 'anchor' foodstores (Tesco and Asda) are located outside the defined centre boundary. Provision within the centre includes a frozen food shop, along with a butchers, bakers and grocers. There is also a Spar and One Stop.
  - Ollerton has an abundance of retail services including a post office, hair and beauty outlets and printing services.
  - Despite the busy A6075 (Forest Road) running through the centre, there is a good provision of pedestrian crossings and wide pavements to help enhance accessibility for pedestrians across the town centre.
  - The Town Council was successful in facilitating the successful development of the Boyes and post office site and this suggests it could have an important role in helping to deliver further development and investment opportunities in the centre, working alongside the local planning authority.

The centre's key weaknesses and challenges include the following:

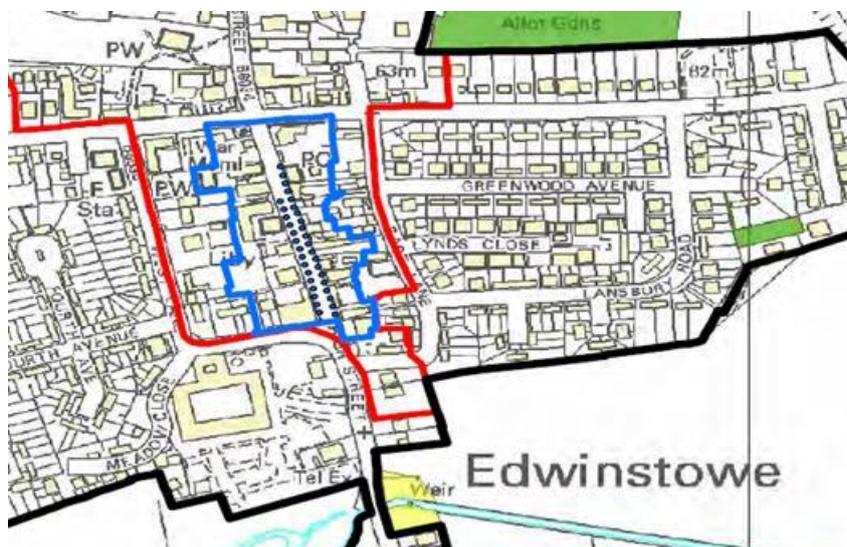
- Linkages between Tesco and the town centre are poor. Although it is located only a short walk away via Sherwood Drive, which is a one-way street, this street has a lack of town centre uses located along it. Similarly, the connections between Asda and the town centre are also poor.
- Vacancy levels in the town centre are high. There are nine vacant units (more than twice the number recorded in 2012) and the vacancy rate is above the national average. There is a significant concentration of vacant units within the Forest Centre and currently this is not functioning as a successful retail space.
- The centre's comparison retail provision is relatively weak and below the UK average. The non-food goods offer is lacking in variety and there are currently no clothing stores within the centre (other than Tesco which stocks a clothing range). The centre is dominated by a lower quality retail provision including an e-cigarette shop, charity shops and two mobility scooter shops.

- Ollerton also has a limited leisure services offer. Around half of this provision consists of hot food takeaways, and there is only one café and no public house. Opportunities should therefore be explored to attract leisure operators to help increase dwell times within the centre and strengthen its overall vitality and viability during the daytime and evenings.

## 8 EDWINSTOWE DISTRICT CENTRE – HEALTH CHECK

- 8.1 Edwinstowe is located approximately 16 miles to the north-west of Newark. The Core Strategy identifies Edwinstowe as a 'Principal Village' in the settlement hierarchy, comprising its own day-to-day facilities such as a primary school, convenience store and health facilities.
- 8.2 The centre is compact with the majority of units being small in size, with the exception of the public houses and community buildings. It benefits from visitor and tourist trade due to its close proximity to Sherwood Forest, Center Parcs Holiday Village and Go Ape tree-top adventure attraction. The Sherwood Forest Art and Craft Centre is also located to the north of the centre.
- 8.3 There are a relatively good choice of comparison goods shops and leisure services in the centre which cater for both visitors to nearby Sherwood Forest and local residents. Amongst the range of leisure services there are public houses, restaurants, takeaways and cafés which add to the centre's overall attraction. Overnight accommodation mainly consists of bed and breakfast provision within the public houses and a youth hostel located on the edge of Sherwood Forest to the north of the town centre boundary. Edwinstowe does not have a street market.
- 8.4 The figure below shows the extent of the centre's Primary Shopping Frontages (PSF – blue dots) and Centre Boundary (blue line) as defined by the *Allocations and Development Management* DPD.

**Figure 8.1 Edwinstowe District Centre – Frontages and Boundary**



Source: 2013 Allocations and Development Management DPD

- 8.5 As the plan shows, the PSF is concentrated along High Street with retail and town centre uses distributed on both sides of the street. There are also some units located along Church Street, to the north of the centre and a number of units located around Mansfield Road; however these are located outside of the town centre boundary. The boundary runs from Mansfield Road in the North to West Lane in the south and incorporates the units either side of High Street. The centre is anchored by a Co-op store which is situated at the far south of the High Street

## Retail Composition and Diversity

- 8.6 The assessment of the current retail and service provision in Edwinstowe (measured by outlets) has been informed by the Council's 2016 Town Centre audit. The table below shows the composition and diversity of the town's retail and service outlets. The representation across the leisure categories (A3-A5) is set out in further detail in the leisure needs assessment.

**Table 8.1 Edwinstowe District Centre Retail Composition 2016**

Category	2016		2012		2016 UK Average
	Units Nos.	%	Units Nos.	%	
Comparison	10	24.39%	8	21.05%	31.97%
Convenience	5	12.20%	4	10.53%	8.62%
Leisure	8	19.51%	8	21.05%	13.94%
Retail Services	7	17.07%	9	23.68%	23.35%
Finance and business service	1	2.44%	2	5.26%	10.64%
Sui-Generis/ other	5	12.20%	6	15.79%	
Vacant	5	12.20%	1	2.63%	11.17%
<b>TOTAL:</b>	<b>41</b>	<b>100.00%</b>	<b>38</b>	<b>100.00%</b>	

- 8.7 The table shows that Edwinstowe has 41 retail, leisure and service units, which represents a slight increase from the 38 recorded in 2012. It has fewer units than Southwell (101) and Ollerton (70). The following provides a brief overview of provision across the main retail and service categories:

### **Comparison Goods**

- 8.8 Edwinstowe has 10 non-food units, which represents an increase from eight in 2012. Notwithstanding this increase current provision of 24.4% is below the national average of 31.97%. All of the comparison goods retail units are located along High Street.
- 8.9 More detailed analysis has identified that approximately 40% of the centre's total comparison goods outlets are occupied by craft/gift stores, which is a high proportion compared with other centres in the District. This reflects Edwinstowe's role as a visitor and tourist destination, due to its close proximity to Sherwood Forest and Centre Parcs. Although there are three clothing shops in the centre, two of these are specialist children's wear shops and the other is a specialist bridal store. The centre could potentially benefit from a general clothing shop. There is also a pharmacy in the centre.
- 8.10 The centre has no national multiples and although it could possibly benefit from attracting such retailers to the centre, its compact nature and size means that the current units are too small to meet multiple retailer requirements. In any case the independent retailing makes a significant contribution to Edwinstowe's overall appeal as a visitor and tourist destination.
- 8.11 Only 4.1% of respondents in the in-centre survey said that they were in the centre to buy non-food goods which is the second lowest proportion across all of the centres (question 4). This proportion consists of only two respondents who both claimed they did not know the non-food stores they intended to visit which reflects that

there are no destination comparison stores in the town centre. Similarly to Ollerton, this low proportion of respondents shopping in Edwinstowe for non-food goods reflects the weak comparison provision.

- 8.12 Lady Bay Retail Park was identified by 24.5% of respondents as another centre which they regularly visit (question 22) and 54.3% of total respondents claim that they visit other centres for the purpose of non-food shopping (question 23). This again reflects the need for an enhanced comparison retailer provision in Edwinstowe.

## ***Convenience Goods***

- 8.13 There are five convenience units in the centre. This represents an increase from the four recorded in 2012. Current provision represents 12.20% of total outlets, which is above the national average of 8.62%. Although Edwinstowe does not have a large supermarket, the centre is anchored by a Co-op food store which is located on the corner of the High Street and West Lane and was busy at the time of our site visit. The Co-op's offer is complemented by local convenience stores including a grocers, butchers and bakery.
- 8.14 A significantly higher proportion of respondents were in the centre for food shopping (42.9%) compared to non-food shopping (question 4). The majority of these respondents (76.2%) had visited the Co-op store. Additionally 9.5% visited the local butchers and 4.8% visited the local convenience store (question 7). These results reflect Co-op's role as an anchor store for the centre. Nearly half (47.6%) of respondents who were in the centre for food shopping claimed that they did not intend to link their shopping trip with a visit to other shops/services in the town centre which again reflects Edwinstowe's weak retail provision. However 23.8% said they intended to visit another food shop, 14.3% intended to visit a café/restaurant and 14.3% intended to visit non-food shops (question 8).

## ***Retail, Leisure and Financial Services***

- 8.15 Edwinstowe has eight retail services, and current provision (19.5%) is above the national average (13.85%). The majority of retail services include health and beauty outlets, which is similar to provision across all the District Centres. In addition to this there is a post office and vehicle repair garage.
- 8.16 There are seven leisure services outlets in the centre, which represents a decrease from the nine recorded in 2012. The two businesses that have closed since 2012 are the Old Library café (which is currently vacant) and Ococo Foods and Emporium Café (which is now by a bridal shop). Other leisure services include two public houses; The Royal Oak is located at the High Street/Mansfield Road junction to the north of the centre and Black Swan Public House is within the heart of the centre on the High Street. There are also four hot food takeaways, which represents an overrepresentation of this use. However there is only one café and the centre's total leisure services provision (17.07%) is significantly below the national average (23.35%). There would therefore appear to be the potential to increase the number and quality of cafés, coffee shops and restaurants given the centre's attraction to visitors and tourists, as well as to local residents.
- 8.17 There is only one financial services outlet in this category and current provision (2.44%) is below the national average of 5.26%. Significantly there are no high street banks in the centre, which is a disadvantage to local residents. However the post office does provide banking facilities.

- 8.18 With regards to 'other' uses Edwinstowe has a library and health centre. Community uses like this are important and contribute to the overall health and success of a District centre.

## Vacancy Levels

- 8.19 As described in Section 5, vacancy levels provide one of the key performance indicators (KPIs) for assessing the relative health of centres, and measuring how their attraction and performance may be changing over time. Based on the Council's audit there are five vacant outlets in Edwinstowe and the current vacancy level of 12.20% is above the national average of 11.17%. The number of vacancies has increased significantly since 2012 when there was only one recorded vacant unit. This is a cause for concern and should be carefully monitored by the local planning authority.
- 8.20 More detailed analysis of the vacant units in Edwinstowe indicates that some of them are large units occupying prominent positions along the High Street. For example the Old Bakery located towards the northern end of the street was previously a Methodist Chapel. The position of this building on the western side of the street further increases its prominence. In addition the former 'Ye Olde Jug and Glass' public house also occupies a large building on the eastern side of the High Street. The building appears to be deteriorating into a poor condition and the boarded up windows and doors deters from the attractiveness of the street. Planning permission was granted here in 2013 for the change of use and alterations to the public house to create four self-contained flats (ref: 13/00267/FUL). The Old Library is also vacant and again occupies a prime position on the High Street, set back from the street with a garden and paving to the front of the building. An application is currently pending for the refurbishment and alterations to the Old Library to convert the property to a café and multi-use facility (including a hairdressers and photography studio). It is important that priority is given to the maintenance, marketing and letting of these vacant buildings due to their locations.

## New Investment and Development

- 8.21 Thoresby Colliery situated outside of the town centre boundary to the northeast closed in July 2015. At the time of its closure, the colliery employed approximately 600 people. As part of the Plan Review, the Preferred Approach to Strategy consultation document outlines the preferred approach to new development, a refined spatial strategy and other changes to current planning policy. Within this document proposals have been put forward for the redevelopment of the colliery site to provide housing, employment and leisure uses which would link into the adjacent Sherwood Forest and relocated visitor centre. As at 1<sup>st</sup> April, the preferred approach would result in Edwinstowe accommodating, as a minimum, an additional 545 dwellings. The potential retail implications of this are outlined in Section 13.
- 8.22 A new Sherwood Forest Visitor Centre is also proposed for a site on Forest Corner, where the arts and crafts centre, cricket club and youth hostel are currently situated. A planning application was submitted in September 2016. Although this site is closer to Edwinstowe town centre than the existing visitor centre, the crossroads which separate the north and south of the town remain a barrier.

## Accessibility

- 8.23 Edwinstowe is linked to the A614 which provides good connections to Nottingham. There is no railway station but the *Adopted Allocations and Development Management* DPD refers to Policy ED/St/1 which allocates land

for the potential reopening of the Dukeries railway line. The centre is well served by local buses. There are three council-run car parks located in the town, and all three provide free parking.

- West Lane car park has a total of 41 spaces and is located close to the Co-op;
- East Lane has approximately 33 spaces and is also located close to Co-op; and
- Mansfield Road car park is located further north of the centre.

8.24 On the day of the site visit, both East and West Lane appeared to be nearly full. On-street parking is also available along the eastern side of the High Street and at the time of the visit, all spaces were being used. Although there is a one-way system operating along High Street, the lack of crossings and on-street parking may cause a hazard for pedestrians. However the street has a calm traffic flow in comparison to the busy junction at B6034/A607 which acts as barrier between the north (where attractions including the craft centre are located) and south of the centre.

8.25 The in-centre survey results show that 53.1% access the centre by car (question 1). This is the centre with the second highest proportion of visitors accessing the centre via car. Approximately 38.0% of respondents travelled to the centre on foot. These results suggest that Edwinstowe has both a local role and is a visitor destination as 6.1% of respondents were in the centre as a day visitor on the day of the survey. Approximately 6.1% also travelled to the centre via bus.

## **Pedestrian Flows, Dwell Times and Frequency of Visit**

8.26 Our site visits identified that the strongest pedestrian flows are focussed close to the Co-op store, at the southern end of the High Street. This suggests that the store is well used and attracts people to the centre. The weakest pedestrian flows were identified to the northern end of the high street and across the road along Church Street. This is probably explained by the impact of the busy junction on pedestrian activity between the two sides of the centre.

8.27 The in-centre survey results show that the majority of respondents (34.7%) intended to stay in the town centre for between 30 minutes to one hour (question 2). This is a short dwell time compared to the 16.3% who claimed they intended to remain in the centre for four hours and over. It is likely that these are either day visitors to the town centre or are in the centre for work purposes (10.2% of respondents were in Edwinstowe for work).

8.28 The majority of respondents (34.7%) claimed that they tended to visit Edwinstowe 7 days per week which makes it one of the most frequently visited centres (question 3). However similarly to some of the other centres, those working in the centre may have slightly skewed this results. Nevertheless it highlights that Edwinstowe is a well visited centre.

## **Customer Views and Perceptions**

8.29 We have drawn on the findings of the household telephone interview survey and in-centre survey to help gauge customers' views and perceptions of the centre as a place to shop and visit for a range of leisure uses and other activities.

8.30 The household telephone interview survey asked specific questions on respondents' views and perceptions of Edwinstowe. This included asking people what key improvements they would like to see that might encourage them to visit the centre more often for shopping and other purposes. The table below lists 'top 10' features that respondents liked about Edwinstowe.

**Table 8.2 Feature respondents liked about Edwinstowe**

Response	Study Area
Attractive environment/nice place	28.3%
Don't know	13.0%
Close to home	11.9%
Nothing/very little	10.3%
Good range of non-food shops	10.1%
Good pubs, cafes or restaurants	10.0%
Traditional	8.9%
Quiet	7.6%
Compact	4.3%
Good range of independent shops	4.3%

8.31 The majority indicated that Edwinstowe has an attractive environment (28.3%), and this confirms the findings of the health check and our own observations of the centre. As for the other centres in the District, respondents also like the centre because it is close to where they live. Some respondents also considered the centre to have a good range of both non-food shops (10.1%) and places to eat and drink (10%).

8.32 Respondents were also asked what, if anything, they would improve in Edwinstowe that would encourage them to visit more. The table below sets out some of the most frequently raised suggested improvements.

**Table 8.3 Key Suggested Improvements for Edwinstowe**

Response	Study Area
Nothing	59.9%
Don't know	11.8%
More/better parking	5.1%
More national multiple shops/High Street shops	4.7%
More advertising	4.4%
Better signposting	3.9%
More/better comparison retailers (i.e. non-food shops)	3.8%
Free car parking	1.9%
Fewer empty shops	1.8%
Modernise/update/facelift	1.7%

8.33 The majority in each zone stated either that there was 'nothing/very little' would make them visit the centre more often than they currently do, or they did not know what changes would improve the centre (71.7% of respondents across the whole Study Area). A small proportion of respondents did identify the need for more/better car parking, more/better multiples and comparison retailers and fewer empty shops. Some of the respondents also identified the potential for more advertising of the centre and better signposting.

8.34 In addition to the household survey some 50 face-to-face interviews were also carried out with visitors to Edwinstowe. The surveys were conducted across a number of days and times to ensure a representative sample group. As part of this survey respondents were also asked what they liked about Edwinstowe. The 'top 10' responses are summarised in the table below.

**Table 8.4 Features respondents liked about Edwinstowe**

Response	Study Area
Near/convenient	49.0%
Character/atmosphere	34.7%
Historic buildings/tourist attractions	20.4%
Not too crowded	16.3%
General cleanliness of streets	16.3%
It is quiet	8.2%
Nice busy feel	6.1%
Range of leisure facilities	6.1%
Selection/choice of independent/specialist shops	4.1%
Play area for children	4.1%

8.35 The feature respondents liked most about Edwinstowe is its close proximity to their home (49%) along with the town's character/atmosphere (34.7%), its historic buildings/tourist attractions (20.4%) and the fact that it is not too crowded (16.3%). This reflects Edwinstowe's relative attraction to its local resident catchment population, and to visitors and tourists to the area.

8.36 Respondents were then asked what they disliked about the centre, if anything. The 'top 10' responses are summarised in the table below.

**Table 8.5 Features respondents disliked about Edwinstowe**

Response	Study Area
Nothing in particular	55.1%
Difficulties in parking	6.1%
General lack of choice of multiple shops	6.1%
Road congestion	2.0%
General lack of independent/specialist shops	2.0%
Inadequate range of services	2.0%
Anti-social behaviour	2.0%
Lack of range of shops in general	2.0%
Too many empty shops	2.0%
Specified shops absent- clothing	2.0%

8.37 Although the majority of respondents stated nothing in particular (55.1%), a small proportion did highlight parking difficulties (6.1%) and road congestion (2%) as an issue. Some respondents also highlighted the lack of choice of multiple shops (6.1%) and the fact that there were too many empty shops (2%). These responses reflect the findings of the household survey, health check and our own site visits. Difficulties in parking (12%),

pedestrian/traffic conflict (10%) and not enough pedestrianisation (6%) were also identified. This confirms the findings of the household survey, health check and our own observations as part of our site visits to the centre.

- 8.38 Respondents were asked how they would improve Edwinstowe town centre (question 13). In response, 18.4% claimed that better market stalls would improve the centre (the centre does not currently have a market) and 12.2% suggested improved parking. This is in line with the other results of the in-centre survey and HTIS where respondents referred to difficulties in parking as something they disliked about Edwinstowe.
- 8.39 Approximately 73.5% of respondents claimed that a street market in the town centre would encourage them to visit Edwinstowe more frequently (question 20). The majority (55.6%) thought that food and grocery produce should be sold on the market (question 21).

## Environmental Quality

- 8.40 The built environment comprises a mix of both new and old architecture and is generally of a high quality.
- 8.41 Traffic flow along the High Street is one-way which enhances the pedestrian environment in this area where the most pedestrian activity takes place. A pedestrian crossing links Church Road to High Street at the busy A6075/B6034 junction; this acts as somewhat of a barrier between the north and south of the centre.
- 8.42 The public realm is also generally of a high quality. There is evidence of planting and trees lining the western side of the street around the Co-op store. Generally the centre appears clean, with adequate street furniture including litter bins and public seating. Signage is also good in our opinion, with 'village trail' boards which inform visitors of the history of the centre. At the time of the visit bunting was hung along the High Street which further enhanced the public realm and character of the centre.
- 8.43 However, as highlighted above, there are two large vacant buildings on the High Street which detract from the overall environment and public realm; principally the former public house, 'Olde Jug and Glass', which is currently boarded up. It is important that these two buildings are maintained so these significant buildings do not become vacant and have a further negative impact on the centre's character.
- 8.44 When respondents were asked during the in-centre survey what they liked most about the centre (question 11), 16.3% said the cleanliness of the streets, 34.7% said the character and atmosphere of the centre and 20.4% said the historic buildings and tourist attractions. These results are in line with the findings of the site visit and overall health check. The public realm is a key factor which appeals to respondents therefore it is important that this is maintained to attract visitors to the centre.

## Summary

- 8.45 In summary, Edwinstowe's key strengths and opportunities are as follows:
- The centre benefits from visitor and tourist trade due to its close proximity to Sherwood Forest, Centre Parcs and Go Ape. As a result, similar to Southwell, the centre's retail, leisure and service offer caters for both visitors from outside the centre and the District, and also for its local resident catchment population. There is a youth hostel and craft centre located outside of the town centre boundary to the north which attracts tourists to the centre.

- Convenience provision within the centre is strong (12.20% compared to a national average of 8.62%) and its food offer is anchored by Co-op. This store is supported by a range of local retailers including a grocers, butcher and bakery.
- The built environment and public realm is generally of a very high quality. The centre is compact and comprised of both new and old architectures. The majority of buildings are well maintained and there is a good provision of signage, public seating, planting and litter bins.
- There is an above average provision of retail services in the centre. This reflects the fact that Edwinstowe is catering for both its local resident population, as well as visitors to the centre. Occupiers include health and beauty outlets and a post office.
- As part of the Plan Review, the *Preferred Approach to Strategy* consultation document proposes the redevelopment of the Colliery site to provide new housing, employment and leisure uses which would link into the adjacent Sherwood Forest and relocated visitor centre. As at 1st April, the preferred approach would result in Edwinstowe accommodating, as a minimum, an additional 545 dwellings. This would increase the catchment population and expenditure available to Edwinstowe, which could increase the demand for new retail and leisure uses to meet the potential need in a sustainable manner. We consider the implications of this and the preferred strategy in more detail in Section 13.

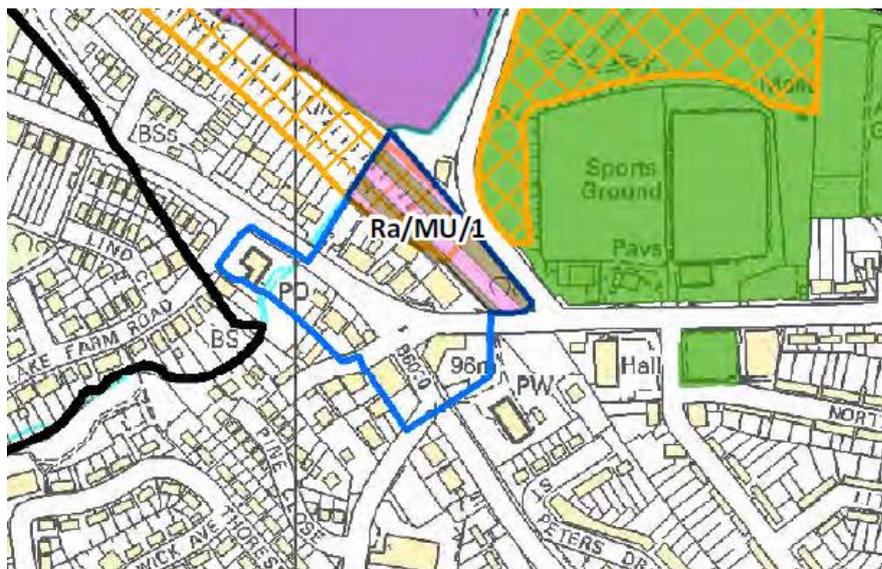
8.46 Some of the weaknesses identified for Edwinstowe include the following:

- The centre has a below average comparison goods offer. The range and choice of comparison goods retailers is also limited. For example around 40% of units are occupied by craft/gift stores..
- There are no national multiples in the centre; although this is to be expected given its small size and its relative role and function in the District's retail hierarchy.
- Leisure provision is also weak and there has been a decline in leisure uses since the 2012 survey. The majority of leisure uses comprise hot food takeaways as there are four of these located within the centre. There are also two public houses and one café. Edwinstowe would benefit from additional café and restaurant provision.
- There are few financial and business services in the centre, including no high street banks. As a result of this, local residents will have to travel elsewhere for these services and consequently will be more likely to shop in other centres.
- The centre's vacancy rate is above the national average (12.20% compared to 11.17%) and there are five vacant units in the centre. Many of these vacancies include large, character buildings.

## 9 RAINWORTH DISTRICT CENTRE – HEALTH CHECK

- 9.1 Rainworth is a former colliery settlement and located to the west of the District, approximately four miles from Mansfield and 16 miles from Newark Town Centre. It is the smallest of all the defined District Centres in terms of unit numbers and its retail offer is anchored by a Co-op and Tesco Express.
- 9.2 The figure below shows the extent of the centre's Primary Shopping Frontages (PSF – blue dots) and Centre Boundary (blue line) as defined by the Allocations and Development Management DPD.

**Figure 9.1 Rainworth District Centre – Frontages and Boundary**



Source: 2013 Allocations and Development Management DPD

- 9.3 The retail and service offer is distributed along both sides of two major roads, Kirklington Road and Southwell Road East, with a concentration of uses at the junction of these two roads. The Tesco and Co-op store are also located at the junction, at the centre's southern border. The boundary runs from the western side of the junction to the Nisa Local store, on the corner of Southwell Road East/Lake Farm Road and then extends north-east to the Junction Fish Bar and the retail parade on Southwell Road East. The land behind these units is allocated for mixed use development within the Adopted *Allocations and Development Management DPD (Policy Ra/MU/1)*, for six dwellings and retail and town centre uses. North along Southwell Road East and outside of the town centre boundary are small parades dispersed with residential properties; these units are mainly small in size and not of a uniform design. In contrast Co-op and Nisa Local are purpose-built and are much larger with designated car parks. Tesco Express, located adjacent to Co-op, is a former public house and is also served by a large car park. Rainworth does not have a street market.

### Retail Composition and Diversity

- 9.4 The assessment of the current retail and service provision in Southwell District Centre (measured by outlets) has been informed by the Council's 2016 Town Centre audit. The table below shows the composition and diversity of the town's retail and service outlets. The representation across the leisure categories (A3-A5) is set out in further detail in the leisure needs assessment.

**Table 9.1 Rainworth District Centre Retail Composition 2016**

Category	2016		2012		2016 UK Average
	Units Nos.	%	Units Nos.	%	
Comparison	1	6.67%	2	15.38%	31.97%
Convenience	3	20.00%	3	23.08%	8.62%
Leisure	3	20.00%	3	23.08%	13.94%
Retail Services	4	26.67%	4	30.77%	23.35%
Finance and business service	1	6.67%	0	0.00%	10.64%
Sui-Generis/ other	1	6.67%	1	7.69%	
Vacant	2	13.33%	0	0.00%	11.17%
<b>TOTAL:</b>	<b>15</b>	<b>100%</b>	<b>13</b>	<b>100%</b>	

9.5 The table shows that Rainworth has 15 retail and service units, which represents a slight increase from the 13 recorded in 2012. The total number of outlets in the centre is significantly lower than recorded for Southwell (101) and Ollerton (70). The following provides a brief overview of provision across the main retail and service categories:

### ***Comparison Goods***

9.6 Rainworth has a weak comparison offer with only one non-food retailer in the town centre; namely the Motorist Discount and DIY store. The card/gift shop which was trading in the centre in 2012 has since closed and the unit is vacant.

9.7 The limited comparison goods provision in Rainworth, particularly when benchmarked against other District Centres in the District, does raise the question of whether it is fulfilling its role in the District's retail hierarchy.

9.8 Only one person who responded to the centre survey was in Rainworth only to buy non-food goods, which is the lowest proportion across all the centres (question 4). This respondent identified that the non-food shop they intended to visit was actually the post office, which is in the Nisa Local convenience store and should therefore be classified as a service use. This supports the findings regarding the relative poor provision and attraction of comparison retailing in Rainworth.

### ***Convenience Goods***

9.9 There are three convenience stores in the centre, which is the same as recorded in 2012. The centre's retail offer is anchored by the Co-op and Tesco Express stores located either side of Southwell Road East by the Kirklington Road junction. Both stores have designated car parks and both were full on the days we visited the centre. Further along Southwell Road East at the western border of the town centre boundary is a Nisa Local which has an internal post office and a car park. Along one of the small shopping parades outside of the centre boundary to the north there is also a small Premier store.

9.10 Just under half (45.1%) of respondents to the centre survey indicated that they were visiting the centre to buy food items only (question 4). Surprisingly the majority of these respondents (73.9%) had visited or intended to

visit Co-op, whereas only 8.7% of respondents were visiting Tesco Express (question 7). Only 4.3% were visiting Nisa Local, which reflects its smaller convenience offer and its less central location. The majority (82.6%) of respondents claimed that they did not intend to link their shopping trip with a visit to other shops in the town centre (question 8). The remaining 17.4% of respondents who said they were linking their shopping trip intended to do so with a visit to another food shop. This further reflects the weakness of the comparison provision in Rainworth compared to the convenience goods stores which attract visitors to the centre.

## ***Retail, Leisure and Financial Services***

- 9.11 there are also three retail service uses in Rainworth (a funeral directors, barbers and vehicle repair garage), which represents 20% of the centre's total units and is above the national average of 13.94%. We note that there are no hairdressers or beauty salons unlike in the other District centres surveyed.
- 9.12 Rainworth has a relatively good leisure services offer given its size. The four leisure uses include two takeaways, a Chinese restaurant/takeaway and a snooker/social club located near to the Southwell Road East/ Kirklington Road junction. Current provision is equivalent to 26.67% of total uses, which is higher than the national average of 23.35%.
- 9.13 In terms of financial services, there is only one estate agent in the centre and provision is below the national average. There are no high street banks which alongside the poor comparison offer, suggests that Rainworth's is not fulfilling its designated role as a District Centre.
- 9.14 Other services in Rainworth include the health centre, which is situated on Warsop Lane. The building is currently not included within the town centre boundary.

## **Vacancy Levels**

- 9.15 Vacancy levels provide one of the key performance indicators (KPIs) for assessing the relative health of centres, and measuring how their attraction and performance may be changing over time. Based on the Council's latest audit there are currently two vacant units in the centre, compared with no vacancies in 2012. The current vacancy rate in the town centre is 13.33%, which is above the national average of 11.17%.
- 9.16 One of the vacant units is located on the western side of Southwell Road East and was previously a card/gift shop. This is a small unit which is attached to a house, and it has grills covering the window and is in poor condition. The second vacant unit is located to the rear of this building and was a commercial garage. This is quite a large unit and is set back from the road. Due to the already declining state of the centre it is important that attention is given to reoccupying these units to help revive the centre's retail provision.

## **Accessibility**

- 9.17 Rainworth has good connections to the A617 which links the centre to both Mansfield and Nottingham. There is no railway station, although the centre is well served by local buses.
- 9.18 There is on-street parking located to the front of the shopping parades. To the north of the centre there was evidence of people parking on the wide street immediately to the front of the retail units. Tesco, Co-op and Nisa

Local all have designated car parks. Co-op is served by approximately 10 parking spaces and Nisa Local has approximately 15 spaces.

- 9.19 We noted from our site visit that the linkages between Nisa Local and Tesco Express and the Co-op are poor, and they are situated a significant distance apart. Both Tesco Express and Co-op are located on the busy B6020 Kirklington Road and Southwell Road East junction. Although there are pedestrian crossings that contribute to the creation of a safe pedestrian environment, the junction does act as a barrier to the north of the centre. Although they are not included within the town centre boundary, the parades to the far north of the centre are even more separated from the main centre.
- 9.20 The in-centre survey results show that 47.1% of respondents access the centre by car (question 1) possibly because of the main road location of the prime retail area. Approximately 13.7% also travelled to the centre on the bus. When asked what the purpose of their visit to the centre was, 7.8% of total respondents said that they were in the centre to catch a bus. Only 33.3% access the centre on foot which is the second lowest proportion out of all the centres. Again, this may be due to the centre being located on a busy junction which deters pedestrians.

## **Pedestrian Flows, Dwell Times and Frequency of Visit**

- 9.21 Our site visit identified the strongest concentration of pedestrian activity around the Co-op store and the car park was full at the time of our visits. There was also a strong pedestrian flow around the Tesco Express store. However the flow was not concentrated along the street and was instead to the rear of the building where the car park is located (the car park was also full). Outside of the boundary to the north around the shopping parades there was a very low pedestrian flow and at the time of the visit there appeared to be very few people visiting the parades. The small parade to the immediate north of the junction, set back along Southwell Road East, also appeared to be underused. The Nisa Local also appeared to be well-used at the time of our visit, as the car park was full. However, as highlighted above, there was no evidence of pedestrians making linked trips between the Tesco Express and Co-op stores to Nisa Local.
- 9.22 The in-centre survey results show that the majority of respondents (51.0%) intended to stay in the centre for less than 30 minutes which perhaps suggests that Rainworth is fulfilling more of a local centre role rather than a district centre role (question 2). Visitors appear to be visiting the centre for mainly convenience shopping and are spending only a minimal time within the centre due to there being a lack of other town centre uses. The majority of respondents (39.2%) tend to visit the centre 7 days per week suggesting again that Rainworth has more of a local centre role and is possibly serving 'top-up' shopping needs.

## **Customer Views and Perceptions**

- 9.23 We have drawn on the findings of the household telephone interview survey and in-centre survey to help gauge customers' views and perceptions of the centre as a place to shop and visit for a range of leisure uses and other activities.
- 9.24 The household telephone interview survey asked specific questions on respondents' views and perceptions of Rainworth. This included asking people what key improvements they would like to see that might encourage

them to visit the centre more often for shopping and other purposes. The table below lists the ‘top 10’ features that respondents liked about Rainworth.

**Table 9.2 Feature respondents liked about Rainworth**

Response	Study Area
Nothing/very little	25.24%
Don't know	20.63%
Close to home	17.85%
Good food stores	9.10%
Close to friends or relatives	7.39%
Good range of non-food shops	7.30%
Attractive environment/nice place	6.70%
Quiet	5.11%
Good range of leisure activities/facilities	4.77%
Good facilities	4.68%

9.25 The majority of respondents indicated that they there was nothing they liked about Rainworth (25.2%), or they did not know what they liked (20.6%). Others referred to the fact that the centre was close to whether they live (17.85%), or to friends/relatives (7.39%). Some respondents also considered the centre has a good selection of food stores (9.1%) and non-food stores (7.3%), and an attractive environment (6.7%).

9.26 Respondents were also asked what, if anything, they would improve in Rainworth that would encourage them to visit more. The table below sets out the ‘top 10’ responses.

**Table 9.3 Key Suggested Improvements for Rainworth**

Response	Study Area
Nothing	47.37%
Don't know	20.20%
More/better food shops	8.26%
Jewellery/food markets/other events	6.71%
More national multiple shops/high street shops	4.98%
More/better places for eating out (e.g. cafes and restaurants)	3.38%
More/better comparison retailers (i.e. non-food shops)	2.38%
Less traffic congestion	1.94%
Modernise/update/facelift	1.89%
More independent shops	1.17%

9.27 The survey results show that the majority in each zone stated ‘nothing/very little’ or ‘don't know’ (67.57% across the whole Study Area) which is a common response in these surveys. Some respondents did highlight a need for more/better food shops (8.28%), which suggests that although current provision is good some people would like to have more choice. Others mentioned a need for markets/other events (6.71%) and therefore there may be merit in considering the potential benefits of a street market or regular events to attract people to the centre.

9.28 In addition to the household survey some 50 face-to-face interviews were also carried out with visitors to Rainworth. The surveys were conducted across a number of days and times to ensure a representative sample group. As part of this survey respondents were also asked what they liked about Rainworth and the 'top 10' responses are summarised in the table below.

**Table 9.4 Features respondents liked about Rainworth**

Response	Study Area
Near/convenient	52.9%
I like everything about the town centre	31.4%
Character/atmosphere	19.6%
Not too crowded	17.6%
Feels safe/absence of threatening individuals/groups	13.7%
Parking is easy	11.8%
Range of places to eat	7.8%
General cleanliness of the shopping streets	5.9%
It's quiet	3.9%
Range of pubs/bars	3.9%

9.29 The feature respondents like most about Rainworth is its close proximity to their home (i.e. convenient). Approximately 31.4% of respondents claimed that they like everything about the town centre which is a positive response in comparison to the household survey. The centre's character/atmosphere was also highlighted; however this does not marry up with our observations of the centre.

9.30 Respondents were also asked what they disliked about the centre, and the 'top 10' responses are set out in the table below.

**Table 9.5 Features respondents disliked about Rainworth**

Response	Study Area
Nothing in particular	72.5%
Dirty shopping streets	3.9%
General lack of choice of multiple shops	3.9%
Too many new houses	3.9%
Not enough pedestrianisation	2.0%
Feels unsafe/presence of threatening individuals/groups	2.0%
Lack of police presence	2.0%
Lack of independent/specialist shops	2.0%
Inadequate range of places to eat	2.0%
Inadequate range of services	2.0%

9.31 Apart from those who did not identify any dislikes (72.5%), a small proportion of respondents identified issues with dirty shopping streets (3.9%), lack of multiple shops (3.9%) and the need for more pedestrianisation (2%). This confirms the findings of the health check and site visit. Issues regarding safety, including a lack of police presence and presence of threatening individuals/groups were also mentioned suggesting improvements to

safety measures such as lighting, CCTV and other methods would help to increase perceptions of safety across the centre.

9.32 Respondents were also asked how they would improve Rainworth town centre (question 13). Disregarding the 54.9% of respondents which stated they did not know or did not provide a response, 23.5% of respondents claimed that better market stalls would improve the centre (Rainworth does not currently have a market). The introduction of a street market could help to encourage activity in the centre and could enhance Rainworth's retail offer. Additionally, 7.8% of respondents claimed that better quality restaurants/cafes would also help to improve the town centre. Enhancing the leisure provision within the centre would assist in attracting more visitors to the centre and would help Rainworth to increase its range of town centre uses. These results are in line with the improvements listed in the responses to the HTIS.

## Environmental Quality

9.33 Generally we consider the built environment is dated and would benefit from modernisation and some improvement. Notwithstanding this the Nisa Local, Tesco Express and Co-op stores are well-maintained and are more modern compared to the rest of the centre. The Tesco Express store is accessed via the rear entrance which faces away from the road, as a result the road-facing wall is a blank frontage which deters from creating a pedestrian flow around this area and side of the road. Furthermore 'The Venue' social club, located on the northern side of Kirklington Road opposite Tesco Express, is a large building with pebbledash walls which along with the blank frontage of the Tesco, does not create an attractive access route into the centre.

9.34 There is very little landscaping across the centre, although there is a public seating area and a number of flower beds and trees located on the corner of Kirklington Road (north)/Southwell Road (east) by the junction. The small parade of shops which are set back from this landscaped area are in a generally good condition; although the retail unit opposite the parade, 'Katre', is rundown and is in need of maintenance. The grass area outside of Nisa Local was overgrown on the day of the visit.

9.35 The parades located to the north of the centre outside of the town centre boundary are of a poor quality, due to the low quality public realm, varying design and dated signage. The parades were also untidy at the time of our site visits, particularly around Premier where the grassed area adjacent to the store was overgrown and littered. One of the buildings also appeared to be derelict.

## Summary

9.36 In summary, some of Rainworth's key strengths identified by the health check include the following:

- It has a relatively good food/convenience store provision. The centre's offer is anchored by three national multiple food stores - Tesco Express, Co-op and Nisa Local – and all three benefit from designated car parks and are well-used.
- Rainworth also has four leisure uses and provision (measured as a proportion of total outlets) is above the national average of 23.4%. There are two takeaways, one restaurant and a snooker/social club. For such a small centre it is considered that Rainworth's leisure provision is relatively strong.

- The centre also benefits from good accessibility by car and a good choice of car parks, including those that serve the food stores and the on-street parking along Southwell Road East

9.37 Some of Rainworth's key weaknesses and challenges include the following:

- It has only one comparison goods outlet and its provision is very poor benchmarked against the District's other centres. .
- There are two vacant units and, because it has relatively few outlets, its vacancy rate is therefore high (13.33%) and above the UK average (11.17%).
- The small size of the centre and the close proximity of both of the vacant units mean that vacancies have a significant impact on the centre's overall attraction and viability.
- Pedestrian routes and linkages across the centre are poor. Although there is a good provision of pedestrian crossings, the separation of Tesco Express and Co-op from the rest of the centre by the B06020 appears to be deterring pedestrians from walking to the rest of the centre, including to the small parade opposite the two stores and the Nisa Local. It could also deter those from the north of the centre from walking to Tesco Express and Co-op and instead choosing to travel via car. Additionally, the lack of retail units across the centre means that for many there will be little reason to make a linked trip from any of the three convenience stores to elsewhere in the town centre.
- Outside of the town centre boundary the units located to the north of the centre including the small parade is of a very poor quality in terms of visual appearance. The buildings are run down and poorly maintained which may create a negative perception about Rainworth from visitors accessing the centre from this direction.

## 10 LOCAL CENTRES – HEALTH CHECK

- 10.1 Local Centres provide for the day-to-day needs of local residents (being important centres for those less mobile) and are based around the sale of convenience goods with a limited provision of other services. The 2011 Core Strategy sets out the importance of these centres in acting as focal points for various community facilities and the Council will seek to ensure that this continues throughout the plan period.
- 10.2 The District's retail hierarchy designates nine local centres and three strategic sites that are yet to be built out/completed. The table below outlines the number of town centre and retail uses within each of the nine local centres; each centre's retail composition will be discussed in more detail below:

**Table 10.1 Local Centres - Mix of Uses and Key Occupiers**

	BLIDWORTH	BALDERTON	BILSTHORPE	BOUGHTON	CLIPSTONE	COLLINGHAM	FARNSFIELD	LOWDHAM	SUTTON ON TRENT
Total Outlets	22	28	11	8	21	17	17	15	8
A1 Comparison	7	3	1	1	4	2	3	3	0
A1 Convenience	4	4	3	1	2	2	5	2	3
Retail Services	4	3	2	2	5	2	6	1	2
Financial Services	0	0	0	0	0	1	0	1	0
Leisure Services	5	7	3	3	5	1	0	5	1
Vacant	0	5	0	1	3	2	2	1	0
Other	2	6	2	0	2	7	1	2	2
Key Multiples / Anchors	Co-op	Farm Foods, Mark Jarvis, Well Pharmacy, Tesco Express, Lidl (u/c)	One Stop	-	Co-op	Co-op	Co-op	Co-op	
Other Uses	Pharmacy, medical centre	Nursery, library, post office	Library	-	Post office			Post office, village hall, nursery	Co-op

Source: Newark & Sherwood District Council, 2016 Centre Audits

- 10.3 In summary, the table shows that the Local Centres vary in size and offer; ranging from Balderton; which has the most outlets (28), multiples and other town centre uses, to Bilsthorpe and Sutton on Trent which have just eight outlets and no multiples or significant town centre uses. The table also highlights the fact that Rainworth would be a mid-ranking Local Centre in the hierarchy based on its total outlets (15).

## Balderton

- 10.4 Balderton is the largest local centre in the District. It is located within the Newark Urban Area, just over one mile to the south of Newark town centre. It consists of an older area of traditional retailing ('Old Balderton'), which is situated along Main Street to the south, and a purpose built shopping parade located at the Lakeside Shopping Centre to the north of London Road ('New Balderton'). The traditional retailing area is considered to be of a higher environmental quality than the parade which is quite dated. Traffic flow dominates London Road as this is one of the direct routes into Newark Town Centre; however this weakens along Main Street which is more pedestrian friendly.
- 10.5 Balderton has a Sainsbury's located on London Road towards the more traditional retailing area of the centre as well as a Tesco Express on Main Street also within the traditional centre. Within the Lakeside Shopping Centre, a Lidl store has been granted planning permission on the site of the former Co-op store and was still under construction at the time of our audit. Additional provision at the Lakeside Centre includes a frozen food store and takeaway. The centre's main convenience provision is complemented by a bakery and a frozen food store. There is also a Premier store located on Main Street with an internal post office.
- 10.6 The comparison provision across the local centre is limited and includes a car shop, wool shop and pharmacy. There are three retail service occupiers occupying units in the centre including two hair salons and a vehicle repair shop.
- 10.7 There are a number of leisure operators including four takeaways and two public houses. Three of the four takeaways are located in the Lakeside Shopping Centre, which is an over-representation of this use. In terms of community uses, provision is strong with an offer including a nursery, church and library,
- 10.8 Balderton has a high vacancy rate which is above the national average (17.86% compared to 11.17%). However, all but one of these vacant units is located at Lakeside Shopping Centre and this is due to the disruption caused by the Lidl development.

## Bilsthorpe

- 10.9 Bilsthorpe is situated to the east of the A614 and is approximately 14 miles from Newark and only eight miles from Mansfield. It is one of the smallest centres within the District with only 11 units. The *Allocations and Development Management* DPD defines Bilsthorpe as being a principal village that is located within the Sherwood Area. It is comprised of two separate areas which both have small shopping parades. In the northern end of the village, retail and town centre uses are located around The Crescent. In the southern end retail uses are located at the junction of Maid Marian Avenue and Kirklington Road. There is also a pharmacy and post office.
- 10.10 The parade in the north of the village includes a One Stop convenience store and two takeaways. There is also a tanning shop and pet supply store. A library and the Miners Social Club are both located opposite the parade within a central 'crescent' area. This is a largely residential area and there is very little new development in the area. To the front of the retail parade there is a pedestrianised area with seating and bike storage facilities. On street parking is available.

- 10.11 The parade located in the south of the village is comprised of four units including a Premier Foodstore, a hair salon, butchers and bakers and takeaway. Retail uses are located within the ground floor units, with residential uses above on the first and second floors. There are weak linkages between the different retail areas and the style of housing also varies between the two areas. There is a large park adjacent to the parade located in the south. Again, on street parking is available.
- 10.12 The previous retail study identifies that the two separate retail areas should be distinguished as two different local centres called Bilsthorpe North and Bilsthorpe South however within the 2011 Core Strategy these areas are still considered to be one local centre.
- 10.13 We advise that the two areas should be considered as two different Neighbourhood Parades rather than Local Centres due to the large distance between the two retailing areas and the small number of uses in each retail area. It takes approximately twenty minutes to walk between the two sites and these areas are not operating as one centre.

## **Blidworth**

- 10.14 Blidworth is one of the District's largest Local Centres with some 22 units. It is a principal village situated only five miles from Mansfield; as a result it sits within the Mansfield Fringe Area. The centre is focused along Mansfield Road (B6020) which links Blidworth to Rainworth District Centre, which is less than two miles away. The majority of the retail and service offer is situated along the western side of Mansfield Road and residential properties are located opposite.
- 10.15 In terms of its convenience offer, there are four units occupied by retailers selling food goods. The offer is anchored by a Co-op and includes a grocers, butchers and bakery. There is also a Tesco Express located outside of the centre boundary, to the north of Mansfield Road. We advise that the boundary could be extended to encompass the store.
- 10.16 The centre has a high number of comparison stores compared to the other local centres (seven units). This includes a charity shop, pharmacy, carpet shop and flooring and blind shop. This specialist provision is likely to attract visitors from beyond its local resident catchment population. In terms of retail services there are two hair salons and a beauty salon. The centre has three leisure occupiers which include two takeaways and a café.
- 10.17 A leisure centre is situated on the eastern side of Mansfield Road to the north of the centre; however this is not included within the local centre boundary. There is also a health centre located on Mansfield Road.
- 10.18 Overall the centre considered to be attractive with an adequate supply of street furniture (including benches and litter bins) and the pavements are wide, encouraging pedestrian activity to the front of the retail units. The units are also well maintained and appear clean and tidy. There is on-street parking available to the front of the units.
- 10.19 The centre is identified within the Core Strategy as a settlement which would benefit from regeneration. The Allocations and Development Management DPD sets out four housing site allocations for a combined total of 210 residential units.

## **Boughton**

- 10.20 Boughton is located to the east of Ollerton and consists of a small cluster of independent shops and services. The centre is located along the busy A6075 (Tuxford Road) and the pedestrian environment is compromised by the volume of traffic. The retail and leisure units are situated along the northern side of Tuxford Road and are interspersed between residential uses.
- 10.21 There is a limited convenience and comparison goods offer, comprising only a small newsagents and a specialist gift shop. There is also a vehicle showroom situated at the gateway to the centre (outside of the centre boundary). In terms of leisure services, there is a restaurant, hot food takeaway and a small gym. Retail services include a hair and beauty salon and a trophy engraving service.
- 10.22 There is on-street parking available along Tuxford Road. The public realm is considered to be basic with little seating or planting. Shop frontages are also basic and some are in need of updating.
- 10.23 The small size of Boughton and limited retail and services provision means that the centre is operating more as a local parade than a Local Centre. This is underlined by the limited convenience provision and a lack of community facilities. Against this background we advise that the role of Boughton within the retail hierarchy should be reviewed, and consideration should be given to removing its Local Centre designation and categorising it as a neighbourhood parade.

## **Clipstone**

- 10.24 Clipstone is located in close proximity to Mansfield (only 3.5 miles away) and its offer is focused along Mansfield Road. Although the units are set back from the road along a long parade, the busy main road does detract from the centre's attractiveness and does compromise pedestrian movement across the centre in our judgement.
- 10.25 The Core Strategy states that due to the major Clipstone Colliery site which lies to the east of the centre on Mansfield Road, the area would benefit from regeneration arising from new development. The Grade II listed Clipstone Colliery Headstocks are Europe's tallest coal mining headstocks, standing at around 200ft. Policy CI/MU/1 in the Allocations and Development Management DPD (2013) allocates this site for mixed use development. Assuming the retention of the headstocks and powerhouse, the site could accommodate around 120 dwellings, 12 hectares of employment provision, retail and enhanced Public Open Space. The retail element will be of a size and scale which helps facilitate the wider delivery of the scheme and may include a small convenience store and other complementary facilities to help to meet the needs of the site and the wider settlement. There have been more recent reports of ambitions to transform the site into a zip-line ride and adventure park featuring climbing walls and indoor sky diving.
- 10.26 The terms of convenience provision, the centre has two convenience goods stores comprising a Co-op food store which anchors the centre and a deli. There are also four comparison goods retailers, including a charity shop and car sales shop.

- 10.27 There are five retail services, although three of these are hairdressers. There is also a post office. The centre's leisure services provision is dominated by four hot food takeaways and a social club. There is potential therefore to improve the range and quality of the centre's service provision.
- 10.28 There are three vacant units in the centre including one of significance; a large unit which was previously a music bar.
- 10.29 There is off-street parking provision to the front of the retail units due to the parades set-back position from the road. In terms of public realm, many of the shop frontages appear dated and there is little planting or seating.

## **Collingham**

- 10.30 Collingham is an attractive historic rural centre which is situated approximately 6.5 miles from Newark Town Centre. The retail and service offer is interspersed along the High Street in between residential units; hence there is no clearly defined retail centre. Although the public realm is pleasant, with many buildings of interest, the large distances between retail units may deter pedestrian activity and instead encourage car use.
- 10.31 The main convenience provision is anchored by a Co-op supermarket. The store has a designated car park and re-opened in late 2015 following its relocation just off the high street. The centre's convenience and food offer is also supplement by a local butcher shop. There is a limited comparison offer, principally a newsagent and pharmacy. There is also a post office situated in the centre and a hairdressers.
- 10.32 The majority of uses in Collingham are comprised of community uses including a dental surgery, medical centre, library, church, fire station and pre-school. Therefore it is considered that Collingham is strongly performing its role as a local centre by catering for the daily needs of residents and those living within the surrounding area.
- 10.33 There is a railway station outside of the town centre boundary to the south-east which provides direct links to Newark and Lincoln. In addition to the Co-op car park, there is on-street parking available to the front of the retail and service units.

## **Farnsfield**

- 10.34 Farnsfield is located just over 14 miles to the north-west of Newark and approximately 9 miles to the southeast of Mansfield. The centre's offer is concentrated along Main Street and runs east to west, with units located on both sides of the street dispersed between residential properties. The main retail provision begins in the west at the church and finishes in the east near The Pot Yard.
- 10.35 The centre is anchored by a Co-op food store. On the day of the site visit the store was busy and the designated car park was nearly at full capacity. The centre's food and convenience offer also includes a bakery, convenience store and grocer. Although there is limited comparison provision in the centre, there is an adequate retail service provision including three hairdressers, an ironing service and repair shop. There are no leisure uses within the centre, but there is a village hall which is used by the local community for events. At the time of the audit there were two vacant units within the centre, including the former post office.
- 10.36 There are two public houses that serve the centre however these are located outside of the centre boundary. 'The Lion' at Farnsfield is located to the northwest of the centre boundary and 'The Plough' is situated to the

east; both are on Mansfield Road. We advise that the local centre boundary could be extended to include the public houses.

- 10.37 Overall the centre is considered to be attractive, with a high quality public realm. A car park serves the Co-op store as well as the public houses, although the majority of the parking is on-street.

## **Lowdham**

- 10.38 Lowdham is located within the Nottingham Fringe Area, approximately ten miles from Nottingham City Centre. The Epperstone Bypass (A6097) lies to the west of the centre and Southwell Road (A612) lies to the south. Despite lying on the junction of these two roads, the main retail centre is located on Main Street where traffic is not an issue. The retail, leisure and service units are interspersed between residential properties on Main Street. Overall the centre is attractive and well maintained.
- 10.39 A Co-op store anchors the centre and is supported by a small convenience store. There is a good comparison offer, including an independent book shop, home interior shop and pharmacy. The leisure services provision is particularly strong compared to other centres and comprises one public house, two takeaways, one café and one restaurant. This range and choice of leisure services will draw people from beyond its local resident catchment population. Additionally, there is a nursery and village hall situated in Lowdham.
- 10.40 Lowdham railway station is located to the south of the centre and provides regular links to Newark and Nottingham. The Co-op store is served by a car park alongside the public houses.

## **Sutton on Trent**

- 10.41 Sutton on Trent is an attractive rural village which is located nine miles north of Newark. It is one of the smallest centres within Newark and Sherwood District with a total of only eight units. The units are distributed throughout the centre and there is no real focus of retail and town centre use activity. Whilst it has been recently defined as a District Centre in the Core Strategy, there is no centre boundary defined on the Policies Map.
- 10.42 Policy ST/MU/1 seeks to provide a more recognisable local centre. The policy allocates residential development, retail and additional car parking for the adjacent doctor's surgery. Policy ST/LC/1 also sets out that to promote the strength of Sutton on Trent as a Principal Village it has been defined as a Local Centre.
- 10.43 Despite the lack of defined boundary, the current uses across the village, located mainly on High Street and Main Street were audited. The centre is anchored by a Co-op which is situated between residential uses. This is supported by two butchers located on Main Street and Great North Road which is to the far south of the centre. There are also two hair salons and a public house. Additional community uses include a library and post office which operates within the community centre on a Friday morning.
- 10.44 It is considered that the local centre designation is appropriate due to the convenience goods and services provided by the centre to the local community. However it is important that a local centre boundary for Sutton on Trent is defined so that town centre uses can be confined in order to concentrate activity levels within the main retail area.

## 11 QUANTITATIVE RETAIL NEED ASSESSMENT

11.1 This section sets out the results of the quantitative retail need ('capacity') assessment for new retail (comparison and convenience goods) floorspace in Newark and Sherwood District covering the period from 2016 to 2033, broken down into five year periods (i.e. 2021, 2026, 2031 and 2033). This assessment updates and supersedes the findings of the Council's previous evidence-based studies.

### THE CREATE MODEL: KEY ASSUMPTIONS & FORECASTS

11.2 The CREATE<sup>e</sup> model has been specifically designed and developed by Carter Jonas over a number of years to assess the capacity for, and impact of new retail (convenience and comparison goods) development and investment. The (Excel-based) model adopts a transparent '*step-by-step*' approach in which all the key assumptions and forecasts can be easily tested, in accordance with good practice advice. The model draws on the market share analysis derived from the household telephone interview to help inform the assessment of the current turnover and trading performance of existing centres, shops and stores at the base year.

11.3 In simple terms the quantitative capacity for new retail floorspace is broadly derived from the forecast growth in population and expenditure, after making an allowance for new commitments, and the increased 'productivity' (or 'efficiency') of all existing and new floorspace. In certain cases capacity can also occur where there is a clearly identified 'imbalance' (or 'over-trading') between the turnover of existing facilities at the base year (2016), and the total available expenditure in the defined study/catchment area.

11.4 The assumptions and forecasts underpinning the CREATE<sup>e</sup> model are based on robust evidence, research and best practice (also see Section 3):

- The **2014 population figures** have been sourced from the retail planner reports derived from CJ's in-house Experian MMG3 Geographic Information System (GIS). The population figures for each zone are based on the latest ONS Sub-National Population Projections.
- The **average retail (convenience and comparison goods) expenditure per capita** levels by zone 2014 have also been sourced from Experian's MMG3 GIS (please note all expenditure and turnover figures are expressed in 2014 prices).
- The **annual expenditure growth forecasts** for convenience and comparison goods have been informed by the latest available Experian *Retail Planner Briefing Note* (RPBN)<sup>42</sup>. As described in Section 3 (Table 3.1) Experian forecast no growth in convenience goods expenditure levels between 2019-23, and +0.1% per annum over the long term to 2033. For comparison goods the forecast growth is +3% between 2019 and 2023, and +3.2% up to 2033.
- The survey-derived market shares for **Special Forms of Trading** (ie. 'non-store' retail sales, including internet sales) have been deducted from the expenditure per capita figures at the outset. This is standard practice for retail capacity and impact assessments. The forecast growth in SFT up to 2033 is in line with

---

<sup>42</sup> In this case Retail Planner Briefing Note 14 (see Section 3, Table 3.1), published in November 2016.

the national forecasts set out in Experian's latest RPBN, based on data published by the Office for National Statistics (ONS). As described in Section 3 (Table 3.2) Experian estimate that SFT currently accounts for a 13.2% market share of comparison goods sales, and 3.0% for convenience goods (adjusted downwards to reflect the proportion of online sales sourced from traditional retail space).

- An allowance for the increased annual '**productivity**' **growth** in the retail sales densities of existing and committed retail (convenience and comparison goods) floorspace to 2033 has also been informed by Experian's latest RPBN. As described in Section 3 (Table 3.4), for comparison goods Experian forecast annual average growth of +2.3% for the period 2019-23 and +2.2% between 2024-2033. For convenience goods Experian forecast negative growth (-0.1% per annum) between 2019 and 2023, and modest growth of +0.1% per annum up to 2033.

11.5 It is important to state at the outset that long-term forecasts should necessarily be treated with caution, as they will be influenced by changes in economic, demographic and market trends. As a result we advise that greater weight should be placed on the short term forecasts carried out over a five year period (see NPPG, para 003).

11.6 Notwithstanding this, the Council will need to take account of the forecast capacity for new retail floorspace over the plan period to inform its policy making and site allocations, as the NPPF (paragraph 23) states that local planning authorities should meet the need for retail and town centre uses "*in full*" (see Section 2 of this study)

11.7 The updated capacity forecasts set out in this section are intended as a guide to enable the District Council to assess the broad strategic options for the spatial distribution of new retail-led development over the plan period, and make informed policy choices about where any forecast need should be met, in accordance with the advice set out in the NPPF. It follows that the allocation of sites to meet any identified need over the next five years, and over the lifetime of the development plan, will depend on a range of key considerations, including the suitability, viability and availability of sites in or on the edge of existing centres, and the potential to expand existing centres to accommodate the forecast needs.

11.8 The key steps in the retail capacity assessment, and the main assumptions and forecasts underpinning the CREAT<sup>o</sup> Model are described in more detail below.

## POPULATION AND EXPENDITURE FORECASTS

### Population Projections

11.9 To help inform the assessment of population growth over the forecast period we have identified the following three different population growth scenarios for the defined study area and zones in **Appendix 8** (Tables 1a-1c):

- **Scenario 1 (Table 1) - Experian Growth Scenario:** The population forecasts under this scenario are based on Experian's '*demographic component model*', which takes into account age, gender, birth rates, ageing, net migration and death rates based on ONS Sub-National Population Projections. However, these projections do not make an allowance for the impact of significant new policy-led housing and employment allocations at the local level.

- **Scenario 2 (Table 1a) – Adjusted Dwelling Requirements:** the population forecasts under this scenario are informed by the Council's initial assessment of the need for 9,080 new homes (circa 454 dwellings per annum) by 2030. However, as explained in Section 2, the Council has confirmed that in order to ensure that the Council has a robust understanding of future growth all evidence-based studies need to take account of the fact that higher levels of development could occur.
- **Scenario 3 (Table 1b) – Deliverable Allocations Commitments (including completions post 2013) –** The population forecasts under this scenario are based on the delivery of 11,899 new homes by 2033, rounded up to 12,000 homes for the purpose of this capacity assessment (see Section 2). We forecast that this will result in a total population increase of 26,520 across the District by 2033 based on a reasonable occupancy rate<sup>43</sup>. It has been assumed that the majority (70%) of this new housing will be provided in the Newark Urban Area (the NUA comprises Newark-on-Trent, Balderton and Fernwood) in accordance with the spatial distributions identified by the Core Strategy and A&DM DPDs. This is equivalent to 8,400 new homes in the NUA over the plan period and a total population increase of 18,564 people.

11.10 The Council has confirmed that Scenario 3 represents the 'best fit' for the purpose of this retail capacity assessment. As Table 1B shows, this scenario produces the following population growth:

- **Study Area (Zones 1-11)** – the population is forecast to increase from 218,562 in 2016 to 255,333 by 2033 (+16.8%). This compares with a +9.8% growth under Scenario 1 and +14.3% under Scenario 2.
- **Local Authority Area (Zones 1-6, 10 and 11)**<sup>44</sup> – a forecast growth in population from 168,315 to 199,627 (+18.6%), which is higher than for Scenarios 1 (9.5%) and 2 (15.3%).
- **Newark 'Core' Area (Zones 1-2)** – which is broadly equivalent to the Newark Urban Area (NUA), is forecast to have a population growth of +32.8% (15,779) between 2016 and 2033; from 48,156 to 63,936 people. This growth compares with +10% under Scenario 1 and +25% for Scenario 2.

## Expenditure Per Capita and Special Forms of Trading (SFT)

11.11 **Appendix 9** sets out the average expenditure per capita estimates for convenience goods (Table 1) and comparison goods (Table 3) in 2016 for each of the study zones, after making an allowance for Special Forms of Trading (SFT)<sup>45</sup>.

11.12 The base year average expenditure per capita figures have been derived from our in-house Experian MMG3 GIS and have been grown up to 2033 in line with the annual forecasts set out in Experian's latest RPBN. As described in Section 3 Experian forecast more limited year-on-year growth in convenience and comparison goods expenditure than previous (pre-recession) forecasts and their historic 'ultra' long (1974-2014) and 'medium' term (1997-2007) trends.

---

<sup>43</sup> This is based on an average household size of 2.21 persons per dwelling as agreed with the Council

<sup>44</sup> although these zones extend beyond the District boundary and cover a much wider area, they have been broadly defined as the 'local authority area' for the purpose of the market share and retail capacity assessments.

<sup>45</sup> SFT comprises non-store sales via the internet, mail order, stalls and markets, door-to-door and telephone sales.

- 11.13 Our allowance for SFT at the local level has been informed by the results of the household survey. The survey-derived shares have necessarily been adjusted downwards to reflect the fact that a proportion of online sales are still sourced from traditional stores rather than from dedicated ('dotcom') warehouses<sup>46</sup>.
- 11.14 The adjusted market share analysis shows that SFT's current share of available expenditure in the total study area is 16.7% for comparison goods in 2016, which is above the national average figure of 13.2% identified by Experian. For convenience goods the locally adjusted SFT market share is 1.4%, which is below the national average of 3.0%.
- 11.15 Clearly if the growth in SFT is higher in the District than the national projections, then this will effectively reduce the total available expenditure to support existing and new floorspace over the forecast period.

## Total Available Expenditure

- 11.16 Tables 2 and 4 (**Appendix 9**) set out the total available retail expenditure for convenience and comparison goods respectively in the Study Area. This is derived by multiplying the population and average expenditure per capita levels together. In brief the expenditure forecasts show:
- **Convenience Goods Expenditure** - is forecast to increase by +15.1% (+£69.8m) within the Study Area between 2016 and 2033; from £461.3m to £531.2m. For the Newark 'Core' Area (NCA) total expenditure is forecast to increase by +31.3% (£29.1m).
  - **Comparison Goods Expenditure** – is forecast to increase by +79.4% (£544m) within the Study Area, from £685.3m to £1,229.2m by 2033. The forecast growth for the NCA is +74% (+£98.1m).
- 11.17 The growth in available comparison goods expenditure significantly outstrips convenience goods spend up to 2033. This effectively means that there should be greater capacity potential for new comparison goods floorspace over the forecast period than for convenience goods retailing, although this will be dependent on the level of retail commitments in the pipeline and the forecast growth in the '*productivity*' levels of existing floorspace and stores.

## MARKET SHARE ANALYSIS

- 11.18 Section 4 described the headline results of the survey-derived (%) market share analysis, including SFT. For the purpose of the retail capacity assessment the market share analysis (including SFT) has been adjusted for both convenience goods (Table 1, **Appendix 10**) and comparison goods (Table 1, **Appendix 11**) retailing to exclude SFT<sup>47</sup>.
- 11.19 The next key stage in the capacity assessment involves allocating the baseline convenience and comparison expenditure (£ million) within the Study Area and zones to the identified centres, stores and floorspace based on the survey-derived market shares (%). This helps to establish the current 'baseline' (2016) trading

---

<sup>46</sup> Drawing on Experian's latest research we have assumed that some 25% of SFT comparison goods sales and 70% of convenience goods sales are sourced from traditional ('physical') retail space.

<sup>47</sup> This is in accordance with the standard approach for retail assessments, which make a deduction for SFT at the outset from the expenditure per capita figures.

performance for the main centres and stores across the District area based on expenditure drawn from the Study Area zone (Table 2).

- 11.20 It should be noted that no allowance is made at this stage for any potential “inflow” (trade draw) of expenditure to centres and stores from outside the defined Study Area.
- 11.21 For both convenience and comparison goods the ‘baseline’ turnovers are projected forward to 2021 (Table 3), 2026 (Table 4), 2031 (Table 5) and 2033 (Table 6), assuming no changes in market shares.
- 11.22 This ‘*constant market share approach*’ is standard practice, and is widely used and accepted for strategic retail assessments. However, the Council will be aware that it is a highly theoretical in that it does not, for example, take account of the potential impact of new retail investment and development (both within and outside the District) on existing shopping patterns and market shares over time.

## **‘INFLOW’ (TRADE DRAW FROM OUTSIDE STUDY AREA)**

- 11.23 In order to provide a complete picture of the current trading (turnover) performance of the main centres and stores in the District we have necessarily made informed judgements with regard to the likely ‘inflow’ (trade draw) from outside the Study Area (see Table 10).
- 11.24 In the absence of detailed published turnover and trade draw information at the local level, our judgements have been informed by previous studies and retail assessments, as well as the survey and health check evidence. The ‘inflow’ assumptions also take account of:
- the scale, offer and location of all existing centres and stores in the District;
  - the likely extent of their catchment areas;
  - the competition from centres, stores and shopping facilities outside the District and the wider Study Area; and
  - the likely retail expenditure derived from people who live outside the Study Area (including visitors and commuters) to main centres and stores in the District.
- 11.25 Although the assessment of ‘inflow’ is not a straightforward exercise, due to the complex nature of overlapping catchments and shopping patterns, it is reasonable to assume that the District’s main centres will draw a proportion of their comparison goods expenditure from outside the widely defined study area.
- 11.26 In this case we estimate that 5% of Newark Town Centre’s total comparison and convenience turnover (including the edge of centre Asda and Morrisons) will be drawn from outside the Study Area. We have also assumed that the out-of-centre Waitrose and Aldi stores in Newark and the retail parks draw some 5% of their total turnover from outside the Study Area. This reflects the relative scale and quality of their retail offer.
- 11.27 Of the District Centres we have assumed that Southwell will draw approximately 15% of its total comparison turnover from outside the Study Area to reflect the positive impact of visitors/ tourist expenditure its local economy and turnover. We have assumed more limited or no “inflow” for the other District Centres.

- 11.28 For convenience goods we have assumed no 'inflow' of expenditure to the District and Local Centres based on the reasonable assumption that food and convenience stores in these smaller centres principally serve their local resident catchment populations, as households generally choose to shop at their most convenient and accessible stores.
- 11.29 Based on the (survey-derived) market analysis and the 'inflow' assumptions, Table 1 sets out the revised (survey-derived) 'current' turnover levels for convenience goods (**Appendix 12**) and comparison goods (**Appendix 13**) for Newark and Sherwood District's main centres and stores.

## RETAIL FLOORSPEACE COMMITMENTS & ALLOCATIONS

- 11.30 Table 2 sets out the major known commitments and policy-led floorspace allocations<sup>48</sup> in the District based on information provided by the Council, and our forecasts of the likely convenience goods (**Appendix 12**) and comparison goods (**Appendix 13**) turnovers of the new floorspace based on the available evidence and our own judgements.
- 11.31 The following provides a brief overview of the major new retail floorspace commitments and allocations known at the time of preparing this study (also see the footnotes to Table 1).

### *(i) Redevelopment of Lakeside Shopping Centre, Balderton*

- 11.32 Permission was granted in November 2015 for the demolition of four existing units in the shopping centre, including the former Co-op store, and the development of a new Lidl discount foodstore (ref: 14/01433/FULM). In February 2016 (ref: 15/02104/FULM) the Council also allowed for the demolition of the existing petrol filling station and the development of a slightly larger Lidl store with a gross floorspace of 2,470 sqm and a sales area of 1,424 sqm net (of which it is assumed that 80% will be set aside for comparison goods sales). We understand from the local planning authority that the net additional retail sales area arising from the redevelopment will be approximately 250 sqm net.

### *(ii) New retail warehouse units on land off North Gate, Newark*

- 11.33 The application by Newark Property Developments Limited (NPDL) in 2011 was for the development of seven larger format ("bulky goods") retail units with a total (Class A1) retail floorspace of 6,754 sqm gross (including mezzanine space) and 222 car parking spaces (ref. 11/01067/OUTM) on land to the north west of Newark Town Centre, between a former brewery to the north and a petrol station to the south. The Northgate Retail Park is located adjacent to the brewery. The site is in an out-of-centre location in retail planning terms and the scheme will effectively extend the retail offer at Northgate Retail Park and along North Gate. The application was originally refused by the Council, but allowed at a (Section 78) appeal in February 2013, subject to a number of conditions (APP/B3030/A/12/2174284).
- 11.34 The applicant subsequently submitted a revised application in 2013 (13/00997/OUTM) for the same quantum of retail floorspace, but with amendments to the scheme's layout and configuration. For example, the application was for a reduction in the number of units to four (Units A-D) and for a modest increase in the

---

<sup>48</sup> The major allocations are also described in some detail in Section 2 to this study.

floorspace of the A1 convenience foodstore (unit A) from 1,375 sqm gross, as permitted at appeal, to 1,520 sqm gross. This revised application was not considered significant by the Council as to fundamentally undermine the appeal decision, and planning permission was granted on 4th December 2013 subject to conditions.

- 11.35 NPDL submitted a further application in October 2015 (ref: 15/01858/OUTM) seeking to vary Condition 25 pertaining to Unit B (which permitted the sale of electrical goods, furniture, DIY or car maintenance and goods) to allow the sale of unrestricted non-food goods (i.e. an Open A1 condition). The application did not seek to vary the conditions on the three other permitted units (i.e. Units A, C and D). The Council subsequently refused the application in February 2016 and the applicant appealed the decision under section 78 of the Town and Country Planning Act 1990.
- 11.36 The appeal was allowed and planning permission granted by the Inspector in September 2016. In allowing the appeal the Inspector agreed to the appellant's revised wording of Condition 25 as being necessary and reasonable to ensure that the vitality and viability of Newark Town Centre is not significantly harmed. The revised condition allows for the following sales across the retail park and specifically the four units:
- Unit A – up to 1,520 sqm gross of Open A1 (food/non-food) retail floorspace.
  - Unit B – up to 2,225 sqm gross of Open A1 (non-food) retail floorspace.
  - Unit C – up to 2,480 sqm gross of Class A1 retail floorspace, restricted to the sale of electrical goods, bathroom suites, kitchen units, floor and wall tiles, DIY, motor and cycling goods, furniture, bedding, floors coverings, soft furnishings and textiles.
  - Unit D – up to 528 sqm gross of Class A1 retail floorspace which shall not be used for the sale of convenience goods, but may be used for the bulk sale of wine and spirits.

### **(iii) Land South of Newark**

- 11.37 As described in Section 2, the land south of Newark is allocated under adopted Core Strategy Policy NAP 2A as one of three major strategic sites for new housing, employment uses and two local centres. Outline planning permission was subsequently granted on 29<sup>th</sup> November 2011, subject to 44 conditions, for a major mixed use urban extension (known as '*Newark Future*') which allows for a mix of uses including: up to 3,150 dwellings (Class C3); two local centres including retail and commercial premises (Classes A1 to A5); a 60-bed care home (Class C2); 2 primary schools; multi-use community buildings, including a medical centre (Class D1); a mixed use commercial estate of up to 50 hectares comprising employment uses (Classes B1, B2 and B8); and a crèche (Class D1); and associated uses and works (ref: 10/01586/OUTM).
- 11.38 Condition 31 of the outline permission allowed for a maximum of 3,000 sqm gross across the two local centres. These centres are intended to provide facilities and shops to meet the day to day needs of the new residents and therefore ensure a sustainable neighbourhood is created. One will be located in the western part of the Application Site, and one in the eastern part. The 'Eastern Local Centre' will be the larger of the two, and will be anchored by a supermarket to enable main food shopping trips to be undertaken within the Proposed Development. The 'Eastern Local Centre' will also have the capacity to accommodate a range of comparison

goods shops and an appropriate amount of other Class A uses (banks, estate agents, takeaways, cafes, restaurants, drinking establishments etc.) to ensure a balanced and inclusive range of facilities. .

11.39 A Section 73 application was subsequently submitted in November 2014 to amend the approved development by varying seven and removing three of the 44 planning conditions on the outline planning permission (ref: 14/01978/OUTM). This application was subsequently permitted by the Council.

11.40 Of particular relevance to the retail capacity assessment, Condition 31 of the original outline permission was amended to allow for a larger supermarket of 1,800 sqm gross in the '*Eastern Local Centre*'. The other uses and gross floorspace which could be developed in total as part of the Local Centres remained unchanged from the original outline permission, as follows:

- '**Eastern Local Centre**' - apart from the larger supermarket (1,800 sqm gross), this centre could provide an additional 800 sqm gross of Class A1 retail floorspace. 800 sqm gross of Class A2-A5 uses and some 1,600 sqm gross of Class B1(a) office floorspace (small units above the retail floorspace).
- '**Western Local Centre**' – this centre would provide a smaller quantum of retail floorspace comprising a 100 sqm gross (Class A1) convenience store, 300 sqm gross of other Class A1 retail floorspace and 300 sqm gross of Class A2-A5 floorspace.

#### **(iv) Malt Park. Malt Kiln Lane, Newark**

11.41 The site comprises part of the Malt Park commercial development site (formerly the British Diamalt manufacturing site) located at the northern end of Northgate, Newark, immediately to the north-east of the Northgate Retail Park. The application was submitted in September 2014 and permitted in November 2014 (14/01664/FUL). The wider site has been progressively developed for a range of commercial uses; most recently Mole Country Stores opened a unit on the northern portion of the site abutting the railway line (11/01229/FUL). Condition 12 of the permission allows for the sale 'bulky' goods including: electrical goods/other domestic appliances/ bathroom suites/ DIY products/ motor and cycle goods/ furniture and floor coverings/ and the bulk sale of wines and spirits. Condition 13 prevents the subdivision of the unit.

#### **(v) Potterdyke (Phase 2)**

11.42 The second phase of Potterdyke comprises Units 6-8 (planning ref: 07/01460/FULM; updated by 10/00537/FULM). The consent allows for 1,923 sqm (gross) retail (Class A1) floorspace. The local planning authority has indicated that this will be taken up by comparison goods retail.

#### **(vi) Allocated Land for new Retail Floorspace in Newark**

11.43 As described in Section 2, there are a number of sites identified by the adopted *Core Strategy* (2011) and *Allocations and Development Management Document* (2013) that could potentially deliver new retail floorspace over the lifetime of the plan. However, these sites do not currently benefit from planning permission and are not therefore treated as full commitments for the purpose of the retail capacity assessment. Nevertheless, all the sites do represent material considerations in the assessment of future capacity and the allocation of new retail floorspace across the District, and specifically in Newark.

- 11.44 One of the key sites allocated in the A&DM DPD (Policy NUA/MU/3) is for land at Northern Road, Newark (the 'NSK Bearings site') for 4,000 sqm net of (as yet undefined) comparison goods floorspace (see Section 2). The policy states that the delivery of new retail floorspace on this site should not come forward until after 2019.
- 11.45 In addition to the land south of Newark (Policy NAP 2A), Spatial Policy 5 of the adopted Core Strategy also identifies two other Strategic Sites for new mixed use sustainable settlements to help meet the identified growth for the Newark Urban Area (NUA). The strategic sites are described in Section 2 and comprise land east of Newark (Policy NAP 2B) and land around Fernwood, focussed on the former Balderton Hospital site (Policy NAP 2C). Both sites are identified for substantial new housing and employment uses, and each will be served by a local centre comprising retail and service, community uses. However the quantum of Class A1 floorspace to be provided in each local centre has not been assessed or fixed at this point in time.

## Summary

- 11.46 In summary, Table 2 (**Appendix 12**) shows that the known retail commitments will achieve a total convenience goods turnover of £18.6m in 2021. This turnover is assumed to remain relatively constant over the forecast period to 2033 in line with Experian's 'productivity' growth forecast for convenience goods floorspace.
- 11.47 All the major comparison goods floorspace commitments identified above are forecast to achieve a total combined turnover of £34.4m in 2021, increasing to £42.8m by 2031 and £44.7m by 2033 (see Table 2, **Appendix 13**). This is based on Experian's 'productivity' growth rate of over +2% per annum.
- 11.48 In terms of the allocated land at Northern Road, Newark (the 'NSK Bearings site') it could achieve a total comparison goods turnover of £19.8m in 2021, increasing to £25.7m by 2033; although the total forecast turnover potential will depend on the type and format of non-food retailing.
- 11.49 Please note that we have not forecast the turnover of the other major Strategic Sites in Newark as the quantum of retail floorspace is not known at this stage. This will be informed, in part, by the findings of this study.

## NEWARK & SHERWOOD DISTRICT: CAPACITY FORECASTS

- 11.50 The 'global' capacity forecasts for new retail floorspace in the District up to 2031 and 2033 are set out in Table 3 for convenience goods (**Appendix 12**) and comparison goods (**Appendices 13-15**).
- 11.51 It has necessarily been assumed for the purpose of the capacity assessment that the District's retail market is in '*equilibrium*' at the base year. In other words it is assumed that the existing centres and stores in the District are broadly trading in line with appropriate 'benchmark' turnover levels at the base year. We believe this approach is reasonable, robust and realistic in this case. It is supported by the findings of the centre audits and site visits which did not show any strong indication of 'overtrading'<sup>49</sup> in the main town centres and free-standing stores in our judgement. This approach also reflects the impact of the economic recession and the growth in

---

<sup>49</sup> Overtrading normally manifests itself at the local level in terms of pedestrian and car park congestion, long queues at checkouts, congestion in aisles, etc.

internet sales, which has reduced trading levels across the UK, as well as the potential impact of Brexit on the economy and retail sector.

11.52 On this basis any residual expenditure available to support new retail floorspace over the development plan period will be derived from the difference between the forecast growth in 'current' (survey-derived) turnover levels and the growth in 'benchmark' turnovers based on applying robust year-on-year 'productivity' ('efficiency') growth rates to all existing and new retail floorspace<sup>50</sup>.

## Convenience Goods Capacity

11.53 Table 3 (**Appendix 12**) sets out and explains the key steps underpinning the convenience goods capacity assessment. The 'baseline' expenditure and floorspace capacity forecasts are summarised below:

**Table 11.1 District-wide Convenience Goods Capacity**

	2021	2026	2031	2033
<b>RESIDUAL EXPENDITURE (£ million)</b>	<b>£16.6</b>	<b>£30.1</b>	<b>£43.2</b>	<b>£48.3</b>
<b>FLOORSPACE CAPACITY (sqm net)</b>				
Superstore Format:	-160	926	1,963	2,367
Supermarket/ Discounter Format:	-285	1,653	3,505	4,227

Source: Table 3, Appendix 12

11.54 In order to convert the residual expenditure into a net sales figure we have assumed that new 'superstore format' floorspace will be occupied by a 'top 6' grocer (i.e. Tesco, Sainsbury's, Asda, Morrisons, Waitrose and Marks & Spencer) and will achieve an average sales density of approximately £12,500 per sqm in 2016 (2014 prices). On this basis the forecasts show that there is no capacity for new convenience goods floorspace by 2021 after allowing for all known commitments (but excluding any allocations). The capacity increases to 926 sqm net by 2026, 1,963 sqm net by 2031 and to 2,367 sqm net by 2033. This capacity is mainly explained by the forecast growth in population over the plan period, as the average forecast growth in expenditure is limited.

11.55 Alternatively, assuming the residual expenditure capacity is taken up by a supermarket (e.g. Co-Op, Budgens, etc.) and/or 'deep discount' retailer (principally Aldi and Lidl) trading at lower average sales levels of circa £7,000 per sqm in 2016, then the forecast capacity increases to 1,653 sqm net by 2026, and to 4,227 sqm net by 2033.

11.56 To further help inform the Council's assessment of the potential scale and optimum location for new retail (convenience and comparison goods) floorspace in the District, we have also carried out a more refined (location-by-location) capacity assessment. However, it should be noted at the outset that any forecast capacity identified for a specific centre/area does not necessarily mean that all the retail floorspace can and/or should be provided within that centre per se. For example, there may be a lack of suitable and viable sites available in some centres, or there may be other policy, heritage, transport and physical constraints to development. Alternatively it may be more appropriate to locate the floorspace capacity in one centre over another to

<sup>50</sup> The 'productivity' growth rates are informed Experian's latest Retail Planner Briefing Note. However, it should be noted that individual centres, stores and shopping facilities will be capable of achieving higher and/or lower annual 'productivity' growth depending on a range of trading factors (including the size, quality and type of retail floorspace).

encourage more sustainable travel patterns and/or help to achieve specific policy, regeneration and/or investment objectives.

11.57 Against this background, Tables 4-10 disaggregate the District-wide 'global' capacity for the main centres, after allowing for new planned commitments. The results for 'superstore format' floorspace only are reproduced in the table below.

**Table 11.2 Convenience Goods Capacity (Superstore-Format Floorspace) – Main centres and stores**

	2021	2026	2031	2033
NEWARK URBAN AREA	-606	180	938	1,235
EDWINSTOWE	28	41	53	57
RAINWORTH	31	48	64	71
OLLERTON	147	210	269	293
SOUTHWELL	102	149	192	206
ALL LOCAL CENTRES	90	218	338	384
ALL OTHER OUT-OF-CENTRE FLOORSPACE	47	79	109	122
<b>TOTAL DISTRICT-WIDE CONVENIENCE GOODS CAPACITY</b>	<b>-160</b>	<b>926</b>	<b>1,963</b>	<b>2,367</b>

Source: Tables 4-10, Appendix 12

11.58 It should be noted that for Newark the capacity forecasts include all edge and out of centre convenience floorspace, as well as the know commitments on the land of North Gate and south of Newark with planning permission, as this floorspace serves Newark's existing and future catchment population.

11.59 As the table shows there is no capacity for new convenience floorspace in Newark at 2021. By 2026 the capacity increases to 180 sqm net, which would support a small convenience store format or an extension to existing stores. By 2031 the capacity increases to 938 sqm net and to 1,235 sqm net by 2033. In our judgement this level of capacity could support a larger format store of circa 2,000-2,500 sqm gross, assuming a proportion of the floor area is set aside for comparison goods sales. Alternatively it could support a number of smaller format convenience stores, or extensions to existing stores.

11.60 For the smaller District Centres there is limited forecast capacity for new convenience goods floorspace in Edwinstowe (57 sqm net) and Rainworth (71 sqm net) by 2033. This would sustain a small independent store, or possibly an extension to an existing store.

11.61 There is slightly higher forecast capacity for Southwell (206 sqm net) and Ollerton (293 sqm net) by 2033. This scale of capacity could sustain a small convenience store format (such as, for example, Tesco Express or Sainsbury's Local), or possibly an extension to existing stores depending on viability and the availability of a suitable building/site.

11.62 There is forecast capacity for 218 sqm net of new convenience goods floorspace across all the District's Local Centres in 2026, and this is forecast to increase to 384 sqm net by 2033. This could also support smaller convenience store formats in some of the centres where the demand exists and where suitable sites/buildings are available to accommodate the forecast need.

11.63 There is limited forecast capacity for new out-of-centre convenience goods floorspace in the District as it has been assumed that any capacity generated by the District's main out-of-centre foodstores (namely Waitrose and Aldi) should be directed to Newark Town Centre first in accordance with the NPPF and Local Plan policy.

11.64 In summary, meeting this forecast need in full over the lifetime of the development plan period will depend on whether there are any suitable and viable sites in or on the edge of the main centres that are capable of accommodating a larger quantum of convenience goods floorspace; and whether these sites are currently available and/or will become available over the lifetime of the development plan. If sufficient town centre and/or edge of centre sites are not available to meet the forecast capacity, then local planning authorities are required by the NPPF (paragraph 23) to set policies for meeting the identified needs in other accessible and sustainable (out of centre) locations that are well connected to the town centre and are capable of generating benefits for the centre's overall vitality and viability, such as through linked pedestrian trips and increased footfall. We consider the potential availability and suitability of sites in and on the edge of the District's main centres later in this study.

## Comparison Goods Capacity

11.65 Table 3 (**Appendix 13**) sets out the detailed steps in the comparison goods capacity assessment and the results are summarised below.

**Table 11.3 District-wide Comparison Goods Capacity**

	2016	2021	2026	2031	2033
<b>RESIDUAL EXPENDITURE (£ million)</b>	-	<b>£34.4</b>	<b>£38.4</b>	<b>£42.8</b>	<b>£44.7</b>
<b>FLOORSPACE CAPACITY (sqm net)</b>		<b>-3,479</b>	<b>421</b>	<b>4,977</b>	<b>6,815</b>

Source: Table 3, Appendix 13 (Steps 5 & 6)

11.66 As the table shows, there is a no forecast capacity for new comparison goods floorspace in the District until 2026 (421 sqm net), after allowing for all known commitments. The forecasts capacity increases thereafter to 4,977 sqm net by 2031 and to 6,815 sqm net by 2033. For comparison goods the growth in capacity is driven by both the strong population growth over the plan period and by Experian's expenditure growth forecasts of +3% per annum between 2019-23, and +3.2% per annum over the rest of the forecast period, up to 2033.

11.67 The forecast residual expenditure capacity has been converted into a net retail sales area based on an assumed average sales density for all new non-food floorspace of circa £6,000 per sqm at 2016. This is broadly equivalent to an average sales density for retail units in prime shopping locations. However, average sales levels inevitably vary between different locations, different retail formats, and different operators<sup>51</sup>. Where this is the case it will have implications for assessing the capacity for, and impact of new retail floorspace. The local planning authority will therefore need to take this into account when assessing and determining applications for

<sup>51</sup> This includes the type of goods sold by the retailer, the location and quality of the retail floorspace, and the size and affluence of the catchment population. For example, published trading figures show that 'bulky goods' retailers in the DIY, carpet and furniture sectors generally achieve lower average sales levels of between £1,500 and £4,000 per sqm, whereas large format electrical goods retailers can achieve much higher average sales levels of £7,000 per sqm and above.

different operators and different types of retail floorspace in different locations (such as, for example, 'bulky goods' retail warehousing which typically trades at lower average sales levels).

- 11.68 The forecast 'global' capacity has been allocated to the District's main shopping locations based on their relative trading performance and market shares at the base year.

**Table 11.4 Comparison Goods Capacity – All main centres and edge/out of centre floorspace**

	2021	2026	2031	2033
NEWARK	-3,596	-91	3,997	5,667
EDWINSTOWE DISTRICT CENTRE	2	12	23	28
RAINWORTH DISTRICT CENTRE	6	20	36	43
OLLERTON DISTRICT CENTRE	26	128	250	301
SOUTHWELL DISTRICT CENTRE	33	178	349	415
LOCAL CENTRES	45	155	284	337
ALL OTHER OUT-OF-CENTRE FLOORSPACE	4	19	36	25
<b>TOTAL DISTRICT-WIDE COMPARISON GOODS CAPACITY</b>	<b>-3,479</b>	<b>421</b>	<b>4,977</b>	<b>6,815</b>

Source: Table 4-10, Appendix 13

- 11.69 As the table shows, there is no forecast capacity for new comparison goods floorspace in Newark until 2031 (3,997 sqm net), after making an allowance for all know commitments in the urban area. Capacity is forecast to increase to 5,667 sqm net by 2033.
- 11.70 There is limited forecast capacity for Edwinstowe and Rainworth by 2033, and higher capacity for Ollerton and Southwell District Centres. For all the local centres the total forecast capacity is 337 sqm net by 2033.
- 11.71 In our judgement this need for new floorspace in the District and Local Centres can be met through extensions to existing stores and/or small-scale infill development, where market demand exists.

### ***Impact of Allocations on Comparison Goods Capacity***

- 11.72 To help inform the assessment of the need for new comparison goods floorspace over the forecast period we have also made a reasonable allowance for the land allocated at Northern Road (the 'NSK Bearings site') in the A&DM DPD (Policy NUA/MU/3) for 4,000 sqm net of new comparison goods floorspace.
- 11.73 For the purpose of the capacity assessment we have assumed that this (as yet undefined) floorspace will achieve a total turnover of £20.7m in 2021, depending on the type of retailers and range of products that could be sold from this site. This turnover is forecast to increase to £25.7m by 2033.
- 11.74 The revised capacity forecasts are set out in **Appendix 14** and summarised in the table below.

**Table 11.5 Comparison Goods Capacity – All main centres and edge/out of centre floorspace**

	2021	2026	2031	2033
NEWARK	-7,572	-4,100	80	2,667
EDWINSTOWE DISTRICT CENTRE	-1	8	20	28
RAINWORTH DISTRICT CENTRE	3	17	33	43
OLLERTON DISTRICT CENTRE	-5	95	215	301
SOUTHWELL DISTRICT CENTRE	-12	132	299	415
LOCAL CENTRES	17	126	252	337
ALL OTHER OUT-OF-CENTRE FLOORSPACE	0	15	32	25
<b>TOTAL DISTRICT-WIDE COMPARISON GOODS CAPACITY</b>	<b>-7,570</b>	<b>-3,708</b>	<b>931</b>	<b>3,815</b>

Source: Table 1-9, Appendix 14

- 11.75 As the table shows, the District-wide capacity will fall from 6,815 sqm net to 3,815 sqm net by 2033 after allowing for the forecast turnover of the new floorspace allocated on the 'NSK' site. This reduced capacity is focussed on Newark, where the need for new comparison goods floorspace decreases from 5,667 sqm net to 2,667 sqm net.
- 11.76 We advise the Council that the need for new comparison and convenience floorspace in the District, and specifically in Newark, will be reduced further over the plan period depending on the scale and type of floorspace that could potentially be needed to serve the sustainable settlements on the two Strategic Sites allocate in the adopted Core Strategy; namely on land east of Newark (Policy NAP 2B – up to 1,600 new homes) and around Fernwood (Policy NAP 2C – up to 3,200 new homes) (see Section 2).

### ***Impact of Higher Floorspace 'Productivity' Growth Rate on Capacity Forecasts***

- 11.77 For the purpose of this retail assessment we have also tested the sensitivity of increasing Experian's floorspace 'productivity' growth rate to +2.5% for the period 2024 to 2033. We consider that this higher growth rate is a reasonable assumption in this case, as it reflects the fact that existing retailers are facing increased pressures on their turnover and profitability (see Section 3). This is due to the fact that a significant proportion of retailers' sales and profits are being taken up by increasing costs (including, for example, rents, rates and wages). Existing retailers will therefore need to achieve a higher 'productivity' growth over time to remain viable in our view.
- 11.78 In this context we have first tested the impact of the higher 'productivity' growth rate on the capacity forecasts after allowing for all known commitments (but not the land allocations). The results are set out in **Appendix 15** and summarised in the table below.
- 11.79 As the table shows the total District-wide capacity is forecast to fall from to 6,815 sqm net to 5,359 sqm by 2033 after making an allowance for all know commitments. For Newark the total forecast capacity is reduced from 5,667 sqm net to 4,389 sqm net.

**Table 11.6 Comparison Goods Capacity – Higher ‘productivity’ growth + commitments**

	2021	2026	2031	2033
NEWARK	-3,596	-428	3,010	4,389
EDWINSTOWE DISTRICT CENTRE	2	10	19	23
RAINWORTH DISTRICT CENTRE	6	19	32	38
OLLERTON DISTRICT CENTRE	26	115	212	252
SOUTHWELL DISTRICT CENTRE	33	159	295	346
LOCAL CENTRES	45	143	250	292
OUT-OF-CENTRE FLOORSPACE	4	17	31	19
<b>TOTAL DISTRICT-WIDE COMPARISON GOODS CAPACITY</b>	<b>-3,479</b>	<b>35</b>	<b>3,851</b>	<b>5,359</b>

Source: Table 1-9, Appendix 15

11.80 Finally, we have tested the impact of the higher ‘productivity’ growth forecasts, all known commitments and the new floorspace allocated at the ‘NSK’ site on the capacity forecasts. The results are set out in **Appendix 16** and are summarised in the table below.

**Table 11.7 Comparison Goods Capacity – Higher ‘productivity’ growth + commitments + NSK allocation**

	2021	2026	2031	2033
NEWARK	-6,596	-3,428	10	1,389
EDWINSTOWE DISTRICT CENTRE	2	10	19	23
RAINWORTH DISTRICT CENTRE	6	19	32	38
OLLERTON DISTRICT CENTRE	26	115	212	252
SOUTHWELL DISTRICT CENTRE	33	159	295	346
LOCAL CENTRES	45	143	250	292
ALL OTHER OUT-OF-CENTRE FLOORSPACE	4	17	31	19
<b>TOTAL DISTRICT-WIDE COMPARISON GOODS CAPACITY</b>	<b>-6,479</b>	<b>-2,965</b>	<b>851</b>	<b>2,359</b>

Source: Table 1-9, Appendix 16

11.81 Under this scenario the total District-wide capacity is forecast to fall to 2,359 sqm net. For Newark the forecast capacity is reduced to 1,389 sqm net.

11.82 As stated above, we consider that the residual capacity forecast towards the end of the plan period (i.e. 2031 and 2033) can be met by new floorspace to serve the sustainable settlements on the two Strategic Sites allocated in the adopted Core Strategy, along with other potential ‘infill’ development and extension to existing stores/ floorspace elsewhere.

## SUMMARY

11.83 This section has assessed the capacity for new (convenience and comparison goods) retail floorspace in Newark and Sherwood District’s main centres and shopping locations.

11.84 As its starting point, the capacity assessment assumes that the District’s (convenience and comparison goods) retail market is in ‘*equilibrium*’ at the base year and tests a ‘*constant market share approach*’ over the forecast period. This approach is in accordance with good practice for retail assessments.

11.85 For convenience goods there is a District-wide forecast capacity for 2,367 sqm net of new 'superstore format' floorspace by 2033. The majority of this floorspace capacity (1,235 sqm net) is focussed on Newark Town Centre and the wider Newark Urban Area. In our judgement the majority of the identified need for new convenience goods floorspace in Newark over the forecast period could be met through new foodstore provision as part of the two Strategic Sites on land east of Newark (Policy NAP 2B) and around Fernwood (Policy NAP 2C), and/or by the extension of existing stores (where possible).

11.86 To help inform the forecasts for new comparison goods floorspace we have necessarily tested the 'sensitivity' of the District-wide capacity based on four different scenarios:

- **Scenario 1:** assumes Experian's annual 'productivity' growth rate of +2.2% for the period 2024 to 2033 and allows for all known major commitments (see Appendix 13).
- **Scenario 2:** assumes Experian's annual 'productivity' growth rate of +2.2% for the period 2024 to 2033 and allows for all known major commitments and the 'NSK' site (see Appendix 14).
- **Scenario 3:** assumes a 2.5% annual 'productivity' growth rate from 2024 to 2033 and allows for all known major commitments (see Appendix 15).
- **Scenario 4:** assumes a 2.5% annual 'productivity' growth rate from 2024 to 2033 and allows for all known major commitments and the 'NSK' site (see Appendix 16).

11.87 The table below sets out the differences between the District-wide capacity forecasts based on the different scenarios.

**Table 11.8 District-wide Comparison Goods Capacity – Different Scenarios**

	2021	2026	2031	2033
Scenario 1: 2.2% 'productivity' (2024-35) and all commitments	-3,479	421	4,977	6,815
Scenario 2: 2.2% productivity, all commitments and 'NSK' allocation	-7,570	-3,708	931	3,815
Scenario 3: 2.5% productivity and all commitments	-3,479	35	3,851	5,359
Scenario 4: 2.5% productivity, all commitments and 'NSK' allocation	-6,479	-2,965	851	2,359

11.88 For comparison goods the District-wide capacity forecasts range from 2,359 sqm net (Scenario 4), up to 6,815 sqm net (Scenario 1) at 2033.

11.89 The majority of this capacity is focussed on Newark. The table below summarises the results of the different capacity forecasts for Newark under Scenarios 1-4.

**Table 11.9 Newark Comparison Goods Capacity – Different Scenarios**

	2021	2026	2031	2033
Scenario 1: 2.2% 'productivity' (2024-35) and all commitments	-3,596	-91	3,997	5,667
Scenario 2: 2.2% productivity, all commitments and 'NSK' allocation	-7,572	-4,100	80	2,667
Scenario 3: 2.5% productivity and all commitments	-3,596	-428	3,010	4,389
Scenario 4: 2.5% productivity, all commitments and 'NSK' allocation	-6,596	-3,428	10	1,389

11.90 Based on current market trends and uncertainties with regard to the future growth of the retail sector, we advise the Council that the more cautious forecasts based on a slightly higher 'productivity' growth rate of +2.5% per annum represents the most realistic capacity scenario in this case. On this basis the District-wide forecast capacity under **Scenario 3** (i.e. excluding the NSK site) is 5,359 sqm net by 2033, of which 4,389 sqm net is

identified for Newark. After allowing for the 'NSK' site under **Scenario 4**, the District-wide capacity for new comparison goods floorspace falls to 2,359 sqm net, of which 1,389 sqm net is forecast for Newark.

- 11.91 Based on the preferred capacity forecasts identified by Scenario 4 we believe that a combination of the 'NSK' site and the other key Strategic Sites in Newark and elsewhere in the District will help to meet the forecast need for new retail floorspace in full over the plan period in compliance with the NPPF. It should be noted that the majority of the forecast capacity occurs towards the end of the plan period, between 2031 and 2033.
- 11.92 Finally, it is important to restate that capacity forecasts beyond five years should be treated with caution, as they are based on various layers of assumptions and forecasts with regard to the trading performance of existing centres and stores, the growth in population and retail spending, constant market shares, etc. For example, if the growth in Internet and multi-channel shopping is stronger than current forecasts suggest, then this could further "*dampen*" the future demand and capacity for new (physical) floorspace over the long term. The Council should therefore take into account these margins for error when assessing the need for new retail floorspace over the medium to long term.

## 12 COMMERCIAL LEISURE NEEDS - 'GAP' ASSESSMENT

12.1 The NPPF (paragraph 23) states that in drawing up Local Plans to ensure the vitality of town centres, local planning authorities should promote competitive town centres that provide customer choice and a diverse retail offer that reflects the individuality of town centres. Against this background it has been highlighted in Section 3 that leisure uses can make a significant contribution to a centre's overall vitality and viability. A good provision and choice of leisure facilities and uses can help to increase 'dwell times', footfall and turnover in centres, with significant benefits for a centre's daytime and evening economies.

12.2 However, the commercial leisure sector is highly complex and dynamic, as leisure preferences and uses are particularly sensitive to changes in economic, population, lifestyle and fashion trends. As a result, forecasting the growth of this sector and identifying the need for new facilities is more complicated than for retailing, and the approaches are generally less sophisticated. The NPPF recommends that need assessments for new leisure uses and floorspace should take account of both quantitative and qualitative considerations (paragraph 161). In this context our leisure needs assessment focuses on the following key approaches:

- a review of the key trends driving market demand in the leisure sector over the last 10-15 years;
- an audit of current commercial leisure uses in the District (both town and out-of-centre) to help identify any potential 'gaps' in provision;
- a review of the results of the household and in-centre surveys to understand current commercial leisure participation rates and preferences across the District; and
- a broad economic assessment of the need for new additional leisure facilities across the District and its main centres based on different approaches.

12.3 For the purpose of our assessment we have necessarily focussed on the main commercial leisure uses that can make a significant contribution to the overall vitality and viability of town centres (i.e. cafés, bars, restaurants, cinemas, healthclubs, bowling alleys etc.).

### Leisure Expenditure Growth

12.4 The most recent leisure spend projections by Experian Business Strategies (EBS) are set out in *Retail Briefing Note 14* (November) and summarised in the table below.

**Table 12.1 Actual & Forecast Growth in UK Leisure Spend (% change per annum)**

Vol. Growth per head (%):	-----ACTUAL GROWTH-----								EXPERIAN FORECASTS			TRENDS	
	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	1997-07	1997-15
Total Retail Spend	1.8	-3.1	-0.1	-0.4	1.3	1.1	3.6	2.5	2.1	0.9	0.3	5.1	3.3
Total Leisure Spend	-2.9	-10.1	-0.7	0.7	1.1	2.3	2.1	1.3	1.9	0.5	0.2	-0.9	-1.0

Source: Experian Business Strategies, Retail Planner Briefing Note 14 (November 2016)

12.5 Experian’s forecasts show positive and relatively strong growth in spend since 2014 following a period of negative and low growth in the years leading up to and after the economic recession).. This year-on-year growth is forecast to continue over the plan period; by +1.3% per annum between 2019-23, and +1.5% between 2024-33. These forecasts are largely being fuelled by growth in cinema and gym patronage, and the food and beverage sector. In turn this is driving significant new investment and development in these commercial leisure sectors, as developers and investors seek to capitalise on this growth. As a result many of the new mixed use development schemes in town centres over recent years have multiplex cinemas rather than department/variety stores as anchors, and a strong mix of cafés, restaurants, bars and other commercial leisure uses alongside a reduced retail offer (see Section 3; for example, High Street Quarter, Hounslow).

## Cinema Provision and Need

12.6 As described above, the cinema sector has grown significantly over the last decade, and attendance levels do not appear to have been significantly affected by the recession.

**Table 12.2 UK Cinema Admissions by Year**

	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
Total Admissions (million)	156.6	162.4	164.2	173.5	169.2	171.6	172.6	165.5	157.5	171.9
% Change on Previous Year	-	+3.7	+1.1	+5.7	-2.5	+1.4	+0.5	-4.1	-4.8	+9.1

Source: BFI Research and Statistics “The Box Office 2015” (April 2016)

12.7 This overall increase in cinema admissions has been accompanied by an increase in both the number of cinema sites operating within the UK and the number of cinema screens. By 2015 there were 751 cinema sites in the UK, which represented an increase of 54 from 2006 (+7.8%). The number of screens also increased by 17.6% (606 screens) from 3,440 to 4,046 over the 10 year period<sup>52</sup>. This growth in cinemas has primarily been in multiplex cinemas; up from 249 sites in 2006 to 316 in 2015. The number of screen in multiplex cinemas has also increased from 2,512 to 3,096 (+23.2%), whilst those in traditional and mixed use locations have increased from 928 to 950 (+2.4%) (BFI “Exhibition”).

12.8 According to research by Dodona<sup>53</sup> the cinema sector is largely polarised between the large multiplex and IMAX cinemas, and the smaller multi-screen operators and independents which tend to operate non-multiplex cinemas (i.e. less than five screens) and screens in mixed-use venues (such as arts centres). In recent years, cinema operators have also introduced changes to the cinema experience, including premium seating areas and better quality refreshments, such as alcohol and higher quality food. For example, Vue Cinemas introduced their ‘*Evolution*’ concept which provides a mix of seating types comprising bean bags and sofas, as well as regular seats. Cineworld has also introduced the smaller ‘*Screening Room*’ concept, characterised by leather chairs and table service, and the first (558 sqm) cinema opened in June 2011 in the Brewery, Cheltenham. Research by Dodona indicates there has been a growth in smaller (Digital) cinemas to serve smaller catchment areas. These Digital cinemas are more flexible and less “space-hungry” as they do not require the large sloping auditoriums needed to accommodate traditional projectors. There are therefore opportunities for the modern

<sup>52</sup> BFI Research and Statistics “Exhibition”, June 2016.

<sup>53</sup> a specialist market research consultancy in the cinema industry

cinema offer to be provided in existing buildings. Examples include the HMV in Wimbledon which has a small Curzon cinema above the store.

12.9 There is currently only one cinema in the District; the five screen Odeon located towards south-east of the town centre, which also includes Costa and Domino's Pizza in neighbouring units. The household survey identified the relative popularity of this cinema for Newark's residents, and other key trends across the Study Area:

- Just over half (56%) of the Study Area's population visit the Odeon in Newark Town Centre.
- The cinemas located in the larger cities and towns outside the Study Area are also popular. For example, 21.5% visit the nine-screen Odeon in Lincoln; 17.4% visit the eight-screen Odeon in Mansfield; and 9.9% visit the twelve-screen Showcase in Nottingham.
- In terms of frequency of visits, the respondents across the Study Area normally visit a cinema at least one every month (27.23%), or once every two months (34.32%). Only 8.25% of all respondents in the Study Area visit the cinema on a more frequent basis (e.g. once a week or fortnight).
- Of those that visit the cinema, the survey showed that the Odeon in Newark is the most frequented.
- Across the different zones respondents are more likely to visit the nearest cinema venue to where they live. For example in Zones 1 and 2 (the Newark Urban Area) the main cinema visited is the Odeon Newark, which is achieving a very strong market share of 96.50% in Zone 1 and 93.25% in Zone 2. The Odeon in Newark also draws a high proportion of respondents from Zone 3 (75.1%) and Zone 5 (71.8%). In Zone 4 (which covers Clipstone and Ollerton) and Zone 11 (which covers Rainworth) a significantly higher proportion of cinema-goers (69.82% and 94.31% respectively) visit the Odeon Cinema in Mansfield. Similarly in Zones 6 and 7, which mainly include centres outside of the District boundary, respondents mainly visit the cinema in Lincoln (73.46% and 85.57% respectively).
- Only a small proportion (1.5%) of all respondents in the Study Area said that a new multi-screen cinema would improve leisure in the District; although a higher proportion in Zone 4 (8.41%), which covers Ollerton, identified a need for a new cinema; this centre is located farthest away from the District's only cinema in Newark.

12.10 The survey evidence shows that the retention of cinema trips within some parts of the District is relatively low, particularly in those zones that are located closer to Mansfield and Lincoln, but this reflects the attraction and draw of the multiplex cinemas in these larger centres. In our judgement there will be limited market demand to support a major cinema operation in any of the District's smaller centres, although the potential interest from multiple and independent operators should be carefully monitored given the trend towards smaller cinemas.

12.11 We have assessed the potential capacity for new cinema provision across the District, but principally in Newark Town Centre, based on whether existing provision (i.e. the Odeon) meets current demand and the forecast growth in population over the Plan period. This assessment is informed by latest research by Dodona, which

indicates that the average screen density for cinema provision in the East Midlands is 4.8 screens per 100,000 people<sup>54</sup>. The key assumptions and forecasts are summarised in the table below.

**Table 12.3 Newark and Sherwood District Potential Capacity for New Cinema Screens**

	2016	2021	2026	2031	2033
District Area population (Zones 1-6, 10 & 11)	166,529	171,738	176,625	180,812	182,270
Cinema Screen Density	4.8	4.8	4.8	4.8	4.8
Cinema Screen Potential	8	8	8	9	9
Existing Screen Provision	5	5	5	5	5
Screen Capacity (Minus existing)	3	3	3	4	4

Source: Screen density for the East Midlands region derived from Dodona Research

Notes: Forecast population for the Study Area is derived from the population projections (including new housing growth) that informed the retail capacity assessment

12.12 The results of our assessment indicate that there is potential quantitative capacity for four new cinema screens in the District by 2031. This will inevitably be focussed on Newark Town Centre, as it is the only centre in the District that has the necessary critical mass in terms of its catchment population and expenditure to support new cinema screens. However, delivering a new cinema in the town centre will need to be subject to a more detailed assessment of market demand. Any proposals for a new cinema in addition to the existing Odeon will also need to demonstrate that they will not result in a significant adverse impact on the town centre's existing vitality, viability and investment in compliance with the NPPF (paragraph 26).

## Food & Beverage Provision and Need

12.13 As described above the food and beverage sector, including cafés, restaurants, bars and pubs (Class A3, A4 and A5), provide an increasingly important part of a town centre's wider offer and help to underpin both daytime and evening economies, helping to lengthen 'dwell times' (the time people spend in centres) and increase expenditure as part of the same trip.

12.14 Average household spending on leisure services in the UK is dominated by eating and drinking out. Even during the height of the economic recession this sector has remained relatively buoyant. Some of the key trends over recent years impacting on the restaurant, pub and café sectors are highlighted below:

- **Restaurants/Takeaways** – there has been a polarisation in the sector, with the growth of fast-food and take-away businesses serving the increasing 'eat-at-home' market (e.g. Domino's Pizza) at one end of the spectrum, and the growth of high quality, but 'value-for-money' restaurants at the other end of the spectrum (such as Jamie's Italian, Bill's and Cote). There has also been a growth in 'all-you-can-eat' style restaurants which are aimed at offering value for money (examples include the Taybarns brand owned by Whitbread).
- **Pubs/Bars** – the move to more flexible opening hours (resulting from licensing reforms implemented in November 2005), combined with pressures arising from lower alcoholic drink prices (particularly in supermarkets), has resulted in a number of pub operators widening their food and non-alcoholic beverage offer. There has also been a growth of so-called "gastro-pubs" as eating-out destinations in their own right,

<sup>54</sup> British Film Institute, Statistical Yearbook 2016

in competition with more established restaurants. However the pub sector is also experiencing contraction, consolidation and closures. According to the Campaign for Retail Ale (CAMRA) there have been 5,800 pub closures since 2008<sup>55</sup>. Recent research by CAMRA also suggests that on average around 29 pubs closed every week in the UK between June and December 2014<sup>56</sup>. The sale of pubs for conversion to alternative uses has also increased over recent years, particularly for convenience retailing (e.g. Tesco Express and Sainsbury's Local) and residential uses.

- Café/Coffee Shops** – this sector has experienced strong growth over the last five years. The branded coffee chains dominate the market with some 6,495 outlets in 2014 and a £3.3bn turnover. Of these, the three leading multiple chains are Costa Coffee (1,821 outlets), Starbucks Coffee Company (824) and Caffè Nero (590), representing a combined 56% of the branded chain market by outlet numbers<sup>57</sup>. Notwithstanding the rise of the multiples, there has also been growth in independent and specialist cafés and coffee houses, particularly those serving a more luxury or specialist offer (e.g. Organic and Fairtrade). The strong independent coffee sector has fuelled many new start-up businesses in local centres. While many forecasters considered the café market to be saturated a few years ago, a recent study by management consultancy Allegra Strategies predicts that the total UK coffee shop market still has potential for strong growth, and there is forecast to be over 20,500 outlets by 2018, with a total turnover of £8.7 billion. There would therefore appear to be potential for further growth in the café market, driven mainly by branded coffee chain expansion and non-specialist operator growth.

12.15 In terms of existing provision in Newark and Sherwood District, the most recent audit and site visit to the main town centres (see **Sections 6-11**), has identified the current mix of Class A3 (restaurants and cafés), A4 (Pubs, bars etc.) and A5 (hot food takeaways) uses:

**Table 12.2 Current Provision of Food and Beverage Uses (%)**

Location	Class A3	Class A4	Class A5	Total A3-A5	
	Cafés & Restaurants	Drinking Establishments	Hot Food Takeaways	No. of Units	% of Total
Newark	8.30%	3.94%	2.70%	72	14.94%
Southwell	8.91%	3.96%	2.97%	16	15.84%
Edwinstowe	2.44%	4.88%	9.76%	7	17.08%
Rainworth	6.67%	0.00%	13.33%	3	20.00%
Ollerton	1.43%	0.00%	5.71%	5	7.14%
<b>UK (Experian Good) Average</b>	8.8%	4.3%	5.7%	-	18.8%

12.16 As the table shows the food and beverage offer in the majority of the District's centres, including Newark Town Centre is below the Experian UK average of 18.8%. The exception is Rainworth (20%), but its overall provision is skewed by the small number of total units in the centre and its takeaway offer (just two units). The main provision and trends are as follows:

<sup>55</sup> Source: Article published by CAMRA on 20th March 2013, [www.camra.org.uk](http://www.camra.org.uk)

<sup>56</sup> Source: Published results from the CGA-CAMRA Pub Tracker published in January 2015

<sup>57</sup> Source: Allegra Strategies

- **Newark** has the highest number of Class A3-A5 outlets (72) which is to be expected given its size, role and function in the District's network and hierarchy of centres. It has a relatively good provision of cafés and restaurants (8.30%), although there will be scope to improve the number and quality of national and independent businesses in this sector. The town centre has below average provision of drinking establishments and hot food takeaways. If Newark's Town Centre boundary was extended to include the restaurants located at Town Wharf, the proportion of café/restaurant provision would be higher.
- **Edwinstowe** has seven Class A3-A5 outlets, which represent 17.08% of total provision in the centre. This is largely due to an overprovision of A5 Hot Food Takeaways. It also has an above average representation of A4 uses.
- **Southwell** has 16 Class A3-A5 outlets, which is the second highest provision after Newark. It has the highest proportion of café and restaurants (8.9%) compared with the District's other centres, which is in line with the national average.

12.17 In terms of the mix and quality of their food and beverage offer, it is apparent that the District's main centres have a limited representation of key branded operators. Even Newark Town Centre's multiple offer is limited to Costa Coffee, Starbucks, Pizza Express and Zizzis. The level of choice for shoppers and visitors to Newark Town Centre and the District's other centres mainly comprises independent occupiers, although they do provide an attractive choice and offer. In contrast, the larger competing centres, including Lincoln and Nottingham, have attracted a range of branded food and drink operators. There is therefore potential for the centres, and particularly Newark Town Centre, to improve and expand the scale and quality of its food and beverage offer in the future. This could include, for example, better quality restaurants targeted at families to help draw more people to the town centre and encourage them to stay longer. However this will be subject to market demand and the availability of suitable units and/or development opportunities to accommodate the identified needs and demand.

12.18 The results of the household and in-centre surveys also identify where people living in the Study Area currently choose to eat and drink, and the key results are as follows:

- A high proportion of the respondents (77.54%) visit restaurants and cafés. Of this total, 27.24% visit a café or restaurant at least once a fortnight and 23.12% visit once a week. Less than 1% of respondents said that more quality restaurants would improve leisure provision in the District.
- The largest proportion of respondents across the Study Area normally choose to eat out at restaurants in Newark (30.35%), followed by centres outside of the District, including Lincoln (18.15%) and Nottingham (9.64%).
- The proportion visiting the District's centres was generally higher for respondents in the local area/zone. For example, a higher proportion visited Newark Town Centre for eating out in Zones 1-3 (86.32%, 85.01% and 61.03% respectively) and similarly Lincoln was the most visited for eating out in Zones 6-7 (65.26% and 70.44% respectively). Nottingham also captures 40.55% of visitors in Zone 10. This indicates that although residents living in the zones surrounding Newark are generally choosing to use the restaurants and cafés there, the centre is failing to attract those living further out in the District. The District centres are generally failing to capture a high proportion of visitors and again, those choosing to eat out in these

locations are generally only from the locality. For example the largest proportion of respondents choosing to eat out in Southwell came from Zones 9 (22.37% and 17.73%). and 10 and the largest proportion of respondents choosing to eat out in Ollerton came from Zone 4 (26.15%).

- Some 53.64% of respondents in the Study Area visit pubs, bars, nightclubs and/or music venues. In terms of frequency, 32.50% go at least once a week and 21.53% visit once a fortnight.
- Across the Study Area, the most frequently visited locations for pubs and bars are Newark (21%), Lincoln (17.91%) and Southwell (5.35%). The majority of respondents in Zone 1 visited pubs and bars in Newark (95.96%) along with 76.70% of respondents in Zone 2. Similarly the majority of those in Zone 10 visited pubs and bars in Southwell (26.51%). Outside of the district, Nottingham is relatively popular attracting 4.22% of all study area respondents.

12.19 In order to assess the potential capacity for new eating and drinking establishments we have adopted a standard and robust approach based on the assumption that between 15% and 30% of the forecast capacity for new comparison goods floorspace (as identified in Section 11) could support a mix of new leisure services including cafés, restaurants, hot food takeaways, pubs and wine bars. This assumption is supported by research that specifically identified that the hospitality industry, in its widest sense, “...forms an important and sizeable proportion of premises averaging 24% of ground floor stock”<sup>58</sup>. Furthermore Experian GOAD’s centre reports show that on average cafes, restaurants, bars, pubs and takeaways account for over 15% of floorspace and 18% of outlets in the 2,500 shopping areas that they cover.

12.20 Reference to Section 11 shows that there is capacity under Scenario 3 for 5,359 sqm net (7,655 sqm gross) at 2033, which could potentially support between 1,150 sqm and 2,300 sqm gross of Class A3-A5 floorspace by 2033<sup>59</sup>. Under Scenario 4, the lower forecast capacity after allowing for the ‘NSK’ allocation (of 2,359 sqm net) results in the potential for between 500 sqm and 1,010 sqm gross of new Class A3-A5 floorspace by 2033.

12.21 However the local authority should be aware that these are only indicative capacity forecasts and we advise that greater weight should be placed on the actual market demand from food and beverage operators for representation in the District’s main centres, and particularly Newark Town Centre. Given current trends it is highly likely that demand will outstrip forecast capacity over the plan period.

12.22 In summary, the forecast need for new food and beverage uses should be directed to the District’s main centres first to help increase competition and choice, and to stimulate their daytime/evening economies in accordance with national and local policies. Meeting any forecast need for new cafés, restaurants and bars is highly dependent on the level of market demand and confidence in the centres as trading locations. In simple terms the more successful, vital and viable a centre is, the more likely it will be that café and restaurant operators and other commercial leisure business will want to locate there.

---

<sup>58</sup> The Streetscape of major UK cities’, Savills (Winter 2004, pg.3).

<sup>59</sup> This is based on applying the 15% and 30% proportions to the gross comparison goods capacity forecasts

## Health & Fitness Need

- 12.23 The health and fitness market has generally performed well during the economic downturn. The latest statistics from the *Leisure Database Company*<sup>60</sup> show that over the twelve month period to March 2016, the industry has grown its total market value by 5.3% to £4.4 billion, and its member base by 5.3%. According to LDC there were an estimated 6,435 private health clubs and public fitness centres facilities in the UK in 2016, which represented a small +1.9% net increase from the 6,312 facilities the previous year<sup>38</sup>. The main operators in the market currently include:
- Esporta, Greens and David Lloyd Leisure – at the premium end of the market focus on health, racquet and tennis clubs;
  - Virgin Active and Nuffield Health (previously Cannons) – dominate the mid-range family-oriented health and fitness market. Nuffield Health has recently purchased over 60 of Virgin Active's gym portfolio;
  - LA Fitness, Fitness First and Bannatyne's Health Clubs – operate smaller in-centre clubs at the more value end of the market; and
- 12.24 However, the most significant growth in the sector in recent years has been fuelled by value and budget operators. The new wave of ("no frills") fitness clubs is growing steadily and lead by *Pure Gym*, which opened 60 clubs across the UK in 2015. Other popular low cost brands include *EasyGym*, *Fitness 4 Less*, *Fitspace*, *TruGym* and *SimplyGym*. The low cost business models is based on 24-hour opening, discounted monthly subscriptions (of between £10 and £20 on average) and 'pay as you go' membership. According to LDC, the low cost gym sector now accounts for 12% of total private clubs and 32% of private sector membership.
- 12.25 Overall, the proportion of the population in 2016 with a gym membership was estimated at 14.6%, up from 13.7% in 2015. According to LDC, the '**average membership rates**' in the UK are 1,426 per club; which takes into account the average for independent venues (726 per club) and leisure chains (2,198 per club). For the larger fitness chains (e.g. David Lloyds, Virgin, LA Fitness, etc.) the average club membership increases to 2,897, while budget chains are even higher at 3,452 members<sup>61</sup>.
- 12.26 The rapid growth of this sector has also been characterised by a marked shift in the location of clubs from out-of-centre locations to town centres, often as part of wider mixed use developments. This is helping to create a wider range of attractions and activity in town centres, particularly in the evenings and at weekends. More flexible planning policies will therefore need to be introduced which help to encourage an element of such uses within existing buildings or as part of mixed use schemes.
- 12.27 The table below summarises the current representation of national, regional and independent privately-owned health and fitness operators in the District, as well as the Council-owned leisure centres.

---

<sup>60</sup> LDC is a market research specialist for the leisure industry

<sup>61</sup> Sourced from the 2014 State of the UK Fitness Industry, the Leisure Database Company.

**Table 12.4 Existing Leisure Centres, Fitness Clubs & Gyms in the District**

Location	Facility	Private Sector	Public Sector (or Trust)
<b>Newark</b>	Arena Fitness	✓	
	Bootiful Booty's Gym	✓	
	Code Fitness	✓	
	Energized UK Fitness	✓	
	Gym 1 Gymnastics Club	✓	
	Newark Sports and Fitness Centre (Active 4 Today)		✓
	JSB Swim, Winterdale Close, Newark	✓	
	Sports Direct, Northern Road, Newark	✓	
	Suggy's Gym, Castlegate, Newark	✓	
<b>Southwell</b>	Southwell Leisure Centre (Active 4 Today)		✓
<b>Edwinstowe</b>	South Forest Complex	✓	
<b>Rainworth</b>	Wentworth Club	✓	
<b>Ollerton</b>	Thoresby Hall Hotel, Thoresby Park, Ollerton	✓	
<b>Boughton</b>	Dukeries Leisure Centre (Active 4 Today)		✓
<b>Blidworth</b>	Blidworth Leisure Centre (Active 4 Today)		✓

Source: Various

- 12.28 The health and fitness offer is concentrated in the main towns and built up areas. There is a good provision of public sector leisure facilities, which include the Leisure Centres in (or close to) the main town centre of Newark, Southwell, Boughton and Blidworth. Newark has the widest range of providers and the highest level of provision, with nine providers in total and a mix of public and private provision. Surprisingly there are leisure centres within the smaller local centres of Boughton and Blidworth which is unusual considering the small size of the centres.
- 12.29 Newark's main leisure centre (The Grove) located in Balderton closed in April 2016 after being replaced by the opening of a new £9.4 million leisure centre on Bowbridge Road in May 2016, located to the south of the town centre. It was built by the District Council and is being run by operator *Active 4 Life*. New facilities include a pool, sports hall, squash courts, badminton courts, fitness suite, two exercise studios, children's soft play area and café. The Leisure Centre will ultimately form part of the development referred to locally as the '*Sports Hub*' with outside facilities expected to be delivered soon. Facilities will include an athletics track, football facilities (including a small-scale stadium), cricket nets, cycle track, multi-use hard court area and various grass pitches.
- 12.30 There are a number of other privately managed sports and fitness centres in the District. Notwithstanding this, it is apparent that despite the District's strong population, there is a notable gap in the provision of branded health and fitness clubs. David Lloyd, Fitness First, LA Fitness and Virgin Active for example are not currently represented in the District, and there could be opportunities to attract these types of branded operators, along with the '24-hr' gyms in the future as the population grows. However, as for the assessed need for other

commercial leisure uses this will all be subject to market interest and demand from operators to locate in the District and Newark specifically.

12.31 The survey results indicated that a small proportion (1.2%) of respondents wanted more or better health club or sports facilities to improve leisure in the district, and 5% said that a new swimming pool would improve leisure in the District. The in-centre survey showed that in Zone 7 people specifically identified a swimming pool as a facility that the centre was lacking in (15.2% of respondents). The survey also identified the following trends:

- Approximately 23.28% of all the respondents in the Study Area visit a gym or health club (the '**participation rate**'). The majority of respondents (54.2%) use facilities more than once a week.
- Only 44.95% of study area respondents who carry out this activity were likely to visit venues outside of the district.
- The former Grove Leisure Centre in Newark was the most frequently visited health and fitness facilities in the study area; attracting 46.7% of gym-users in Zone 1, 21.7% in Zone 2 and 47.7% in Zone 3 (11.6% across all zones). As noted above, this facility closed in April 2016 with Newark's new Health and Fitness Centre opening soon after. At the time of the HTIS, 4.5% of respondents across all zones visited the new centre although it is expected that this will have increased since this date with the transfer of The Grove memberships to the new leisure facility.
- Southwell Leisure Centre was the second most frequented leisure facility in the District, some 7.85% of respondents from across the Study Area. Some 42.9% of respondents in zone 10 and 19.4% in Zone 11 use Southwell Leisure Centre.
- The most frequently visited locations outside of the district for health and fitness are Lincoln Sports Direct (7.31%); Mapperley Nuffield Health Fitness & Wellbeing (4.53%); Bingham Leisure Centre (3.65%); and Lincoln Total Fitness (2.94%).

12.32 The remaining usage was spread across a variety of local providers. The survey results suggest that investment in health and fitness facilities would help to claw back some of this leakage and would also have the potential benefit of improving the current participation rate identified by the survey (23.28%).

12.33 The need for health and fitness clubs can be linked to the potential demand arising from population growth at the local level. In this case the Study Area population is estimated to increase by 15,741 between 2016 and 2033 (+9.5%). In broad terms it is likely that existing facilities will absorb some of this demand, and average membership levels will change over time in line with the constant changes in fitness facility formats. Notwithstanding this, there would appear to be capacity to support an increase in leisure provision in the district over the medium to long-term. Based on the Study Area average '*participation rate*' of 23.28%, this would potentially result in an additional 3,665 gym and health and fitness members over the forecast period. Based on '*average membership rates*' for private fitness clubs identified earlier in this section, this growth could potentially support one larger fitness chain (e.g. David Lloyds, Fitness First, Bannatynes, etc.) and an independent gym, or a budget operator (e.g. EasyGym, PureGym, etc.). The new health and fitness centre is likely to satisfy demand for public sector facilities therefore we therefore consider there should be a focus on attracting private chain operators.

12.34 As for the other leisure sectors, addressing this forecast capacity will be dependent on the level of market interest and demand. Given that most of the larger chain operators are not represented in the District, there may be scope for a new facility. There could also be potential to attract a budget or value operator, as this type of facility would appeal to a wider customer base. In turn this could help to increase participation and/or capture some of the 'leaked' trips to health and fitness facilities outside the district.

## **Bingo & Gambling**

12.35 Gambling represents a significant element of the leisure industry. The main sectors of the gambling industry comprise 'games of chance' (i.e. bingo clubs, casinos, betting shops, amusement arcades, etc.). We briefly describe the key trends in this sector and the forecast need/demand for new facilities in the District, if any, based on the available evidence.

12.36 The latest research by *The Gambling Commission* (Industry Statistics November 2015) indicates that there are over 599 licensed bingo premises in operation in the UK, which is a reduction from 653 recorded in 2014. Within the district, we are aware of just one facility; Riva Bingo in Newark. Gala Leisure and Mecco Bingo are the leading operators accounting for over a third (36.9%) of all premises. Research by Mintel indicates that the industry has experienced a fall in revenues and admissions over recent years as a result of legislative changes (such as the ban on smoking in public places), the impact of the economic downturn and the growth of online gaming. In response to falling admissions, bingo operators are increasingly taking advantage of the online market and embracing smart-phone technology through new 'app' development. This forms part of a wider trend and growth in 'remote/online' gambling, which including gambling activities through the internet, telephone, radio, etc. Bingo operators are also increasingly looking to diversity their customer profile, and are marketing their clubs at a younger, predominantly female audience. As a result there has been an increase in the number of younger and more affluent bingo players over recent years, particularly as deregulation has enabled clubs to offer bigger (national) prizes. The above has resulted in the closure of many bingo halls across the UK.

12.37 In terms of Casinos, research shows that there were some 147 active casinos in the UK in September 2015. The number of premises has remained fairly static over the past five years<sup>62</sup>. This sector is dominated by three companies: the Rank Group (incorporating Grosvenor Casinos and Gala Coral Casinos); and Genting UK. There has been consolidation of the sector in the past few years, with acquisitions such as Rank Group's purchase of Gala Coral Casinos making it the largest operator in the UK. While casino attendance has grown from 18.24m in 2012 to 20.44m in 2015, attendance dropped by 2.6% from 2014 (20.99m). The increase in attendance since 2012 is largely explained by larger new casino venues granted licences under the 2005 Gambling Act. As far as we are aware there are no casinos located within Newark and Sherwood District with the nearest facility being Grosvenor Casino in Nottingham.

12.38 The household survey results indicate that bingo and casino gambling is not a major leisure activity for the vast majority of respondents living in the District, with just 5.03% indicating that they frequent bingo clubs, casinos or bookmakers. Of those that do, 16.50% visit at least once a week with the greatest proportion frequenting

---

<sup>62</sup> Source: Gambling Commission Industry Statistics 2016.

facilities once every six months. Riva Bingo in Newark was the most frequented as 18.46% of respondents who go to Bingo visited this facility. Outside of the District, respondents tended to visit facilities in Skegness (16.98%) however it is expected that this is as part of a day trip to the seaside town and not a dedicated trip to play bingo. There is also a Mecca Bingo in Beeston, Nottingham.

- 12.39 In our judgement, there is no demonstrable need to enhance existing provision to improve competition and choice at the local level; although this will be subject to market interest and demand from other bingo and casino operators. If demand arises in the future, we advise that this should be directed to the district's main town centre of Newark first, in accordance with national and local plan policy. Given that current trends for bingos and casinos show activity moving online instead of physical venues, future demand for new venues is expected to be very limited. Furthermore none of the respondents to the surveys indicated that additional bingo facilities would help to improve Newark and Sherwood's leisure offer.

## Family Entertainment Facilities

- 12.40 Family entertainment facilities include tenpin bowling, rolling skating, ice skating, and similar activities.
- 12.41 Tenpin bowling is possibly the most popular of this category and has been established as a commercial leisure activity in the UK for over 40 years. It remains a strong family and group activity. Research shows that there are currently over 321 bowling centres in the UK<sup>63</sup>. This sector benefited from a period of growth from the mid-1990s onwards, fuelled by the development of large entertainment 'boxes' and leisure parks at one end of the spectrum, and smaller independent specialist bowling facilities at the other end. A number of the successful bowling facilities opened over the last 15-20 years tend to form part of larger leisure complexes that include multi-screen cinemas, restaurants and nightclubs. It is the critical mass of leisure uses under one roof or as part of leisure parks that helps to underpin the viability of ten-pin bowling centres, which can struggle as standalone attractions. Examples of the smaller specialist operators include All Star Lanes which operates five bowling venues in the UK (four in London and one in Manchester) and largely targets the corporate/private hire market. Bloomsbury Bowl Lanes also operates from smaller venues with sites in Bloomsbury (8 lanes) and Bristol (5 lanes). The company offers a 1950's American-themed bowling venue with ancillary karaoke rooms, venue rooms for hire, DJ booths, bars, small scale cinema and a venue for bands and live performers/comedy nights.
- 12.42 There is one ten-pin bowling facility located in the district; UK Superbowl in Newark. Alternative provision outside of the district is located in Lincoln (Lincoln Bowl), Mansfield (Mansfield Superbowl), Grantham (Grantham Bowl) and Nottingham (Tenpin Nottingham). The facility at Nottingham is located on an out of centre leisure complex which includes laser tag, bowling, cinema and food and beverage provision.
- 12.43 There are no ice skating or roller skating venues in the district, with the nearest facilities located in Nottingham (Motorpoint Arena Nottingham) and Lincoln (Lincoln Ice Rink). Additional family entertainment provision in Newark and Sherwood includes: White Post Farm (just west of Farnsfield) is a well-known attraction particularly for families with young children however only 0.98% of respondents visit here; Robin Hoods Wheelgate Family

---

<sup>63</sup> Tenpin Bowling Market UK, Mintel (November 2012)

Theme Park in Farnsfield which includes play areas, a park and farm; and Sherwood Forest Amusement Park in Edwinstowe.

- 12.44 The household survey indicates that family entertainment activities are a reasonably popular leisure activity, with 23.4% of respondents living in the Study Area participating in the different activities. Compared to other commercial leisure activities family activities are carried out less frequently with a greater proportion (30.6%) of respondents engaging in family activities up to twice a year, followed by every one to two months (23%). The bowling facility at Newark appears to be most popular with respondents with 27.98% choosing UK Superbowl. However 18.4% of respondents also visit Lincoln Bowl and 12.6% visit Mansfield Bowl.
- 12.45 In terms of future needs, the district could benefit from a wider range of family activities, particularly a multi-use venue that could compete with venues in Nottingham and Lincoln. As the District's population increases, particularly concentrated in and around Newark Town Centre, there is likely to be demand for such a facility over the long term. If this is the case and market demand exists, then a new facility should be directed to the main town centre of Newark to help maintain and strengthen the diversity of offer and evening economies.

## Cultural Activities

- 12.46 Cultural activities include a broad range of activities that are focused on the arts and historic attractions. For the purpose of this assessment consideration is given to the provision of theatres, music venues, and historic/cultural attractions across the district and the main provision is set out in the table below.

**Table 12.5 Key cultural venues in Newark and Sherwood District**

Activity	Venue and Location
Theatre & Music Venues	Palace Theatre, Newark
Museums/attractions	Newark Castle and Gardens, Newark; National Civil War Museum, Newark; Town Hall Museum and Art Gallery, Newark; Newark Air Museum, Newark; Vina's Doll Gallery, Norwell; National Holocaust Centre and Museum, Laxton; British Horological Institute, Upton; Laxton Visitor Centre, Laxton; Thurgaton Hundred; Workhouse, Southwell; Southwell Minster, Southwell; Sherwood Forest Visitor Centre, Edwinstowe; Sherwood Forest Art and Craft Centre, Edwinstowe

- 12.47 The results of the household survey indicate that 30.7% of respondents in the District area visit museums, galleries and places of historical/cultural interest with a higher proportion visiting the theatre, concerts or music venues (45.4%). The household survey confirms that these forms of activity are carried out infrequently, with the majority of respondents visiting places of cultural interest (i.e. museums, galleries, etc) once every six months (35.1%); and the majority visiting theatre, concerts or music venues also once every six months (41.5%).
- 12.48 The results of the household survey show that *The National Civil War Centre* in Newark Town Centre is the most popular cultural/historic venue (19.7%). This reflects the fact that despite the choice of venues available outside of the district, the quality of the cultural activities within the district is helping to retain respondents from the study areas. The second most popular destination for these type of venues and activities was Central London. which attracted 15.36% of those from the study area, which reflects the vast choice of venues available in London.

- 12.49 Additional museums in Newark include the *Town Hall Museum* and *Art Gallery* which is situated within the Georgian Grade I listed town hall, the *Newark Air Museum* which is located on a former RAF station at Winthorpe, near to Newark and the castle and gardens. The medieval castle is a key part of Newark town centre's history. The gardens are bordered by the remaining walls of the early 12<sup>th</sup> Century Castle. Guided tours of the castle's towers are available and the Gilstrap Heritage Centre hosts both permanent and temporary exhibitions. The castle holds numerous events throughout the year including the Newark Festival and theatrical and musical performances. In Southwell, the Minster is a popular tourist attraction alongside '*The Workhouse*' which was built in 1824 for the Victorian poor.
- 12.50 In terms of theatres and music venues, the majority (33.24%) visit *Theatre Royal* in Nottingham. The second most visited destination is *Palace Theatre*, Newark which is the district's only venue of this type and 26.3% of respondents visit this facility. The theatre is situated just off the Market Square and was built in the 1920s. It seats approximately 600 people and hosts around 200 performances a year.
- 12.51 There is likely to be some level of demand for new cultural facilities (such as theatres and museums). Alternatively, better marketing and promotion of existing facilities, particularly those which appear to rarely be visited by those in the district in Southwell (the Minster and Workhouse), Newark (Newark Castle, Newark Air Museum and Town Hall Museum and Art Gallery) and Edwinstowe (Sherwood Forest Art and Craft Centre) could help to increase awareness of the district's offer and thereby attract more visitors to its venues. It is likely that these places of interest attract mainly tourists from outside of the district therefore provision needs to be developed which is targeted towards residents or both residents and visitors to help retain local people living within the district.

## Hotel Provision

- 12.52 Hotel provision in Newark and Sherwood includes a range of operators, from branded budget hotels to niche independents. Provision varies throughout the district's main centres:
- **Newark:** The majority of Newark's hotel provision is located outside of the town centre and is on the edge of the centre. It is comprised of mainly mid-range traditional, locally run B&Bs however Best Western is located just off London Road to the southeast of the centre and Premier Inn is located to the far north of the centre off the A1 and A46 roads, nearby to Newark Showground. Kelham Hall is located approximately 3.4 miles southwest of Newark town centre and is a Grade I listed building set in 52 acres of parkland. Camping is currently permitted within the grounds, however there is an intention that the proposed purchaser of the property will seek its conversion into luxury hotel accommodation from 2017/2018. Kelham House Country Manor Hotel is situated less than one mile away from the hall and is comprised of 12 luxury rooms and suites. The venue is often used to host weddings. The lack of town centre hotels indicates that the majority of visitors to the town centre are there only for a day trip. The results of the in-centre survey did not pick up that any respondents were overnight visitors. The out of the centre locations suggest that the majority of overnight visitors are either people in the area for business or for the antiques fairs and events at the Newark Showground (discussed below). Although the quantity of overnight accommodation is good, the centre could benefit from additional provision within the town centre boundary.

- **Southwell:** There are a number of independently owned hotels alongside B&B accommodation within the public houses in Southwell. The Old Vicarage Boutique Hotel is an exclusive hotel with eight guest rooms and is a popular wedding venue. It is located half a mile outside of the town centre boundary to the southwest of the centre. The Reindeer Inn (4 rooms), The Saracens Head (27 rooms) and The Crown (7 rooms). All hotel provision is either in the centre or within close walking distance to the centre and is mainly targeted towards tourists. It is likely that there is potential to extend overnight accommodation provision due to the town's role as a tourist attraction and the nearby Southwell Racecourse.
- **Edwinstowe:** The Dukeries Lodge, The Black Swan and Forest Lodge Hotel all providing B&B style accommodation in a public house setting. All three are located in or immediately on the edge of the centre boundary. YHA Sherwood Forest is a 48 bed hostel situated to the north of the town centre, outside of the boundary adjacent to Sherwood Forest. Due to the nearby Centre Parcs and additional lodges within Sherwood Forest, it is considered that Edwinstowe has an adequate amount of overnight accommodation.
- **Ollerton:** Hop Pole Hotel is located outside of the town centre boundary to the south in a traditional Georgian coaching inn. Thoresby Hall Hotel is a spa hotel set in a Victorian stately home and is five miles north of Ollerton town centre.
- **Sherwood:** Centre Parcs holiday village is situated just three miles south of Edwinstowe and just over three miles south of Ollerton. Visitors from across the country travel to the resort which was the first of the brand's resorts to open. There are a range of other holiday villages within the forest.

12.53 In summary based on our assessment there would appear to be scope to expand the number and quality of the district's hotel provision within the main town centres of Newark and Southwell. Newark's antique fairs and Southwell's tourist attractions means there is a potential need for more accommodation in the town centres. In the current time, the Sherwood Forest holiday villages mean demand for accommodation in nearby Edwinstowe and Ollerton is low.

## Newark Showground and Antique Fairs

12.54 Newark Showground is situated approximately 3.7 miles to the north east of the town centre just off the A46 and A1. The event space has 11 purposely-built halls and pavilions offering 14,000sqm of internal space on 120 acres of flat land. The space is used for exhibitions, conferences, occasions (i.e. weddings), outdoor events (i.e. agricultural, equine, camping, caravanning, animal shows), craft shows, food and drink festivals and specialist antique and collector's fairs. The Newark International Antiques and Collector's Fair is world renowned and is Europe's largest antique fair. The fair operates six times per year and attracts visitors from across the world. During these weekends, overnight accommodation availability becomes limited.

## Summary

12.55 As for retailing, the commercial leisure industry faces considerable challenges and pressures, even as the economy improves. It is clear that consumers are becoming increasingly selective in terms of where and how they spend their discretionary leisure spending. There will also be a continued increase in competition from 'in-home' leisure activities due to the advances in computers, tablets, television, gaming, and audio technology.

The challenge for town centres and leisure operators in the future will therefore be to attract customers away from their homes to attractive, exciting and safe leisure facilities.

- 12.56 The table below shows the percentage of the survey respondents in the Study Area who indicated that they participate in the various leisure activities.

**Table 19.8 Respondents in Study Area who participate in leisure activities**

Leisure Activity	% who do participate in these activities
Eating out in restaurant and/or café	77.54%
Cinema	56.04%
Drinking out in a pub/bar/nightclub	53.64%
Concert/theatre/music venue	45.36%
Museum/gallery or place of historical/cultural interest	30.71%
Family entertainment (incl. ten pin bowling, skating rink)	23.37%
Gym/health club/ sports facility	23.28%
Bingo/casino	5.03%

Source: HTIS 2016

- 12.57 The table shows that eating out, cinema going and visiting bars and pubs are the most popular leisure activities. To a lesser extent respondents in the study area engage in cultural activities and the arts, visit gyms and health facilities, as well as visiting family entertainment centres. A very small proportion of respondents also engage in gambling activities (e.g. bingo, casino, and bookmakers).
- 12.58 The fact that participation rates for certain leisure activities is particularly high (e.g. restaurants and cinemas) points to the potential to enhance the overall offer, particularly in the main town centre of Newark.
- 12.59 In summary we recommend that the number and quality food and beverage branded operators in the district should be promoted to help maintain and enhance the overall vitality and viability of the main centres, subject to market demand. Potential demand has been identified for eating and drinking out, and this would help to enhance each centre's day and evening time economies, particularly where provision is under served. For eating out this includes Newark, Edwinstowe, Rainworth and Ollerton where opportunities for new A3 and A4 offer should be explored. Although provision in Southwell is in line with national averages, there is still potential in our view to expand on the existing A3/A4 offer. Improvements in the choice of drinking venues could be directed towards Newark, Ollerton and Southwell where provision appears to be under-served. However, new facilities would be dependent on the suitability of sites/ premises, the surroundings, and licencing. In addition, increased provision should not be to the detriment of maintaining an appropriate balance of uses in the district's centres, particularly retail uses.
- 12.60 In terms of cinema provision, the needs assessment identified that a high proportion of respondents in the Study Area visit the cinema, the most popular venue (and only one in the district) is the Odeon at Newark. However, the survey found that leakage to Odeon in Lincoln is particularly high in the northern part of the district. With capacity identified for up to four new screens in the District over the plan period, this highlights the opportunity to provide a new multiplex cinema which could strengthen the District's overall offer. A new cinema facility should ideally be provided within one of the District's main centres, as part of a mix used development.

However, this would be dependent on the availability of sites and the level of market interest and demand from cinema operators. In this case we consider that market interest and demand is more likely to be focussed on providing a second cinema in Newark Town Centre in preference to the District's other main centres.

## 13 EXECUTIVE SUMMARY: KEY FINDINGS & RECOMMENDATIONS

- 13.1 This final section provides a summary of the key findings of the *Newark and Sherwood Town Centre and Retail Study 2016* (NSTCRS, 2016) and recommendations to help inform plan-making and future strategies for the District and its main centres. It sets out high level advice on how the local planning authority can effectively plan for, manage and promote the vitality and viability of the main town and district centres over the development plan period.
- 13.2 Our advice is based on the updated assessment of the quantitative and qualitative need for new retail (comparison and convenience goods) floorspace and commercial leisure uses up to 2031 and 2033. The need assessment draws on a robust and up-to-date evidence base and new primary research, including:
- a health check of the District's main centres;
  - a visitor survey comprising 200 interviews in the main town centre of Newark and 50 across each of the four district centres; and
  - a telephone interview survey of some 1,100 households across the Districts and a wider defined Study Area to help establish current shopping patterns, leisure preferences and market shares.
- 13.3 The study has been prepared in the context of national and development plan policy guidance, as well as other key material considerations. This includes the *National Planning Policy Framework* (NPPF) and the *Planning Practice Guidance* (PPG), which place weight on the development of positive plan-led visions and strategies for town centres, and promote new investment and development in town centres first ahead of edge and out of centre locations.

### DISTRICT-WIDE RETAIL AND LEISURE NEEDS

- 13.4 Section 11 assessed the overall quantitative capacity for new (convenience and comparison goods) retail floorspace and leisure uses in Newark and Sherwood District over the development plan period, and Section 12 assessed the need for new commercial leisure uses and the 'gaps' in provision.
- 13.5 The retail capacity assessment is informed by CJ's **CREAT<sup>e</sup>** Capacity Model. The more detailed tabulations are set out in Appendix 8 for convenience goods and Appendices 9-12 for comparison goods based on different scenarios.
- 13.6 The retail capacity assessment is underpinned by robust evidence and forecasts; it assumes that the retail market is in '*equilibrium*' at the base year (2016) and that market shares remain constant over the study period.
- 13.7 For convenience goods the District-wide capacity forecasts identified the need for 926 sqm net of new (superstore-format) floorspace by 2026, increasing to 1,963 sqm net by 2031 and to 2,367 sqm net by 2033. This District-wide capacity has been disaggregated across the main centres as follows:

**Table 11.2 Convenience Goods Capacity (Superstore-Format Floorspace) – Main centres and stores**

	2021	2026	2031	2033
NEWARK URBAN AREA	-606	180	938	1,235
EDWINSTOWE	28	41	53	57
RAINWORTH	31	48	64	71
OLLERTON	147	210	269	293
SOUTHWELL	102	149	192	206
ALL LOCAL CENTRES	90	218	338	384
ALL OTHER OUT-OF-CENTRE FLOORSPACE	47	79	109	122
<b>TOTAL DISTRICT-WIDE CONVENIENCE GOODS CAPACITY</b>	<b>-160</b>	<b>926</b>	<b>1,963</b>	<b>2,367</b>

Source: Tables 4-10, Appendix 6

13.8 For comparison goods the capacity assessment tested four different growth and development scenarios:

- **Scenario 1:** assumes a 2.2% annual 'productivity growth rate from 2024-2033 in line with Experian's latest forecasts, and allows for all known major commitments.
- **Scenario 2:** also assumes a 2.2% annual 'productivity growth rate over the same period and allows for all known major commitments, but also includes the 'NSK' site (one of the key sites allocated under Policy NUA/MU/3 of the A&DM DPD for new comparison goods floorspace on land at Northern Road, Newark).
- **Scenario 3:** assumes a slightly higher 2.5% annual 'productivity growth rate from 2024-2033 for the reasons set out in Section 11, and allows for all known major commitments.
- **Scenario 4:** assumes a 2.5% annual 'productivity growth rate from 2024-2033 and allows for all known major commitments and the 'NSK' site.

13.9 The different District-wide capacity over the short (0-5 years), medium (6-10 years) and long term (10+ years) based on these different scenarios is summarised in the table below.

**Table 13.1 District-wide Comparison Goods Capacity – Different Scenarios**

	2021	2026	2031	2033
Scenario 1: 2.2% 'productivity' (2024-35) and all commitments	-3,479	421	4,977	6,815
Scenario 2: 2.2% productivity, all commitments and 'NSK' allocation	-7,570	-3,708	931	3,815
Scenario 3: 2.5% productivity and all commitments	-3,479	35	3,851	5,359
Scenario 4: 2.5% productivity, all commitments and 'NSK' allocation	-6,479	-2,965	851	2,359

13.10 For the reasons set out in Section 11 of this report we advise the Council that the more cautious forecasts based on a higher 'productivity' growth rate of +2.5% per annum represents the most realistic capacity scenario in this case. On this basis:

- **Scenario 3** (i.e. excluding the NSK site) forecasts limited District-wide capacity up to 2026 of 35 sqm net after allowing for all known commitments, increasing to 3,851 sqm net by 2031 and to 5,359 sqm net by 2033.
- **Scenario 4** (i.e. including the NSK site) forecasts no capacity until 2031 (851 sqm net), with capacity increasing to 2,359 sqm net by 2033. This is some 2,000 sqm net lower than forecast under Scenario 3.

13.11 The table below provides a breakdown of the capacity for the District's main centres based on the forecasts identified under the preferred Scenario 4.

**Table 13.2 Comparison Goods Capacity – 2.5% 'productivity' growth + commitments + NSK allocation**

	2021	2026	2031	2033
NEWARK	-6,596	-3,428	10	1,389
EDWINSTOWE DISTRICT CENTRE	2	10	19	23
RAINWORTH DISTRICT CENTRE	6	19	32	38
OLLERTON DISTRICT CENTRE	26	115	212	252
SOUTHWELL DISTRICT CENTRE	33	159	295	346
LOCAL CENTRES	45	143	250	292
ALL OTHER OUT-OF-CENTRE FLOORSACE	4	17	31	19
<b>TOTAL DISTRICT-WIDE COMPARISON GOODS CAPACITY</b>	<b>-6,479</b>	<b>-2,965</b>	<b>851</b>	<b>2,359</b>

Source: Table 1-9, Appendix 10

13.12 This scenario shows no forecast capacity for new comparison goods floorspace in Newark until 2031 (10 sqm net), increasing to 1,389 sqm net by 2033.

13.13 As we advise the Council in Section 11, capacity forecasts beyond five years should be treated with caution, as they are based on various layers of assumptions and forecasts with regard to the trading performance of existing centres and stores, the growth in population and retail spending, constant market shares, etc. For example, if the growth in Internet and multi-channel shopping is stronger than current forecasts suggest, then this could further reduce the future demand and capacity for new 'physical' space over the long term. The Council should also take into account these margins for error when assessing the need for new retail floorspace.

13.14 Turning to the need for new commercial leisure floorspace and uses identified in Section 12 of this report, we have identified a potential qualitative and quantitative need for up to four additional screens in the District by 2033. Subject to market demand, this could be provided through the potential extension of the existing Odeon cinema in Newark, or possibly through the provision of a second new cinema in the town. If demand exists from an operator for a second cinema in Newark then this should be directed to the town centre first in accordance with the NPPF to help benefit the town's overall vitality and viability. If a cinema is proposed outside the town centre then it will need to be demonstrated that there are no alternative sites that are available and suitable to accommodate the identified need, and that it will not result in a significant adverse impact on the town's overall vitality and viability, and specifically on the attraction and performance of the existing Odeon cinema which makes a significant and important contribution to the town's daytime and evening economy.

13.15 A quantitative and qualitative need has also been identified for new high quality food and beverage (Class A3-A4) uses in all of the District's main centres. There is also potential to promote new gyms and health and fitness facilities, particularly those run by private chain operators, as part of mixed use schemes in the District's main centres, where the demand exists. We have also identified the potential for new hotels in Newark and Southwell to help underpin the daytime, evening and visitor/tourist economies.

## MEETING NEEDS IN THE DISTRICT'S MAIN CENTRES

13.16 Based on the District-wide and centre capacity forecasts, the following provides a brief summary of:

- each centres' relative health, role and function;
- the forecast quantitative and qualitative need for new retail floorspace and leisure uses;
- the preferred options for accommodating some and/or all of the identified need over the short, medium and long term;
- the preferred definitions of primary and secondary shop frontages for each centre, as well as suitable Primary Shopping Area (PSA) and town centre boundaries that reflect both current and future provision and needs; and
- a reasonable and robust impact 'threshold' in accordance with the NPPF and PPG that will allow the local planning authority to assess and understand any likely impacts from new edge and out of centre applications on the vitality and viability of each main centre.

13.17 Our review of the current performance of the District's main centres has been informed by the findings of the most up-to-date evidence and research, including the health checks, centre audits and household survey. It also takes into account the current policy framework and strategic visions for each centre. Our assessment is based on our understanding of the potential availability and suitability of key sites in the main town centres based on discussions with the local planning authority. It also draws on our market knowledge of the current businesses models and requirements of retailers and commercial leisure operators, and the likely scale, format and location of space that they will be seeking over the development plan period.

### Newark Town Centre

13.18 Newark is the largest town and principal shopping centre in Newark and Sherwood District. It performs an important role serving the District's retail, leisure and service needs, as well as a wider visitor market. The Core Strategy defines it as a Sub-Regional/Town Centre in the settlement and retail hierarchy, and we recommend that this classification is retained.

13.19 Overall the centre appears to be performing well against a number of the key (health check) performance indicators. However it does remain vulnerable to competition from higher order centres (principally Lincoln and Nottingham), investment in out-of-centre shopping/leisure destinations and the growth in internet shopping.

13.20 The household survey results show that the food and convenience stores in Newark town centre's PSA are achieving a relatively low market share (2.6%) for all convenience goods shopping (main food and top-up shopping) across the District, which reflects the limited provision within its defined PSA. Notwithstanding this, it is clear that both Asda and Morrisons stores on the edge of the PSA make an important contribution to the overall quality and choice of the town centre's food offer. Together these stores are achieving a total market share of 18.9% across the District and are generating significant linked trips and expenditure to the benefit of other shops and businesses in the town centre. For this reason we believe that these two key foodstore anchors should be included within the town's Primary Shopping Area (see below).

- 13.21 In terms of the need for new convenience goods floorspace over the plan period, the capacity forecasts show a requirement for just 180 sqm net by 2026. In our judgement this need could be met either by a small extension of one of the town's existing foodstores, or by a new convenience format store in Newark. It is only over the long term, towards the end of the plan period, that the capacity for new convenience goods floorspace increases to 938 sqm net by 2031 and to 1,235 sqm net by 2033. In our judgement the majority of the identified long term need for new convenience goods floorspace in Newark can be met through new foodstore provision as part of the two Strategic Sites on land east of Newark (Policy NAP 2B) and around Fernwood (Policy NAP 2C). However it is important that the any food stores proposed for the two Strategic Sites are of an appropriate scale and format to serve the needs of the new populations in these areas in a sustainable manner and do not draw shoppers and trade from a wider catchment area that could result in a significant adverse impact on existing stores and shops in the Newark Town Centre and other District and Local Centres.
- 13.22 Newark's role as the District's principal shopping centre is reflected by its 17.7% market share of comparison goods shopping within the broadly defined District area. This is significantly higher than for the District's other main centres; namely Southwell(1.5%) and Ollerton (1.3%). In terms of out-of-centre stores, the Northgate Retail Park is also achieving a relatively strong market share of 7.8%, which reflects its wide-ranging non-food tenant mix that includes Next, Peacocks, TK Maxx and Pets at Home. The influence of Lincoln, Nottingham and Mansfield on comparison goods shopping in the District, and particularly fashion shopping, is illustrated by their respective market shares of 11.4%, 10.9% and 9.9%.
- 13.23 The town centre health check and audits have identified that Newark's shopping offer is essentially divided into seven distinct shopping areas:
- **Market Place** is the pedestrianised traditional core of the town centre and is home to the market. The Buttermarket Shopping Centre can be accessed via the Market Place. Surrounding the market place are units occupied by mainly A1 and A3 uses;
  - **St Mark's Place** is a pedestrianised open air shopping centre which is characterised by low-mid range national multiples;
  - **Stodman Street** is strongly represented by multiple retailers including the anchor Marks and Spencer store, Monsoon/Accessorize and Boots;
  - **Middle Gate**, along with the above, forms the core of the town's retail offer. The street is characterised by a range of both independents and national multiple clothing retailers;
  - **Castle Gate** is located close to Newark Castle and the River Trent. The area is characterised by a strong food and beverage offer and antique and art retailers;
  - **Slaughter House Lane** is a pedestrianised area which fronts onto Morrisons and links to Kirk Gate via the pedestrianised Paxtons Court. The narrow Paxtons Court passage is dominated by smaller units and independent retailers. Retail provision along Kirk Gate is generally weak; and
  - **Carter Gate** offers a generally lower quality retail provision than other areas of the town centre.
- 13.24 As identified above, under the preferred Scenario 4 capacity assessment there is no outstanding quantitative need for new retail floorspace in Newark until towards the end of the plan period; just 10sqm net by 2031, after

making an allowance for all known commitments and the NSK allocation site, increasing to 1,389 sqm net by 2033.

13.25 Section 12 of this report has also identified a potential qualitative and quantitative need for four additional cinema screens, new food and beverage floorspace, gym/health and fitness facility and hotel(s) in Newark to help maintain and strengthen its daytime, 'twilight' and evening economy. These uses should preferably be accommodated in the town centre, through the potential redevelopment and extension of the existing Odeon cinema (where demand exists), and through infill development and reuse of existing buildings where available and suitable.

13.26 Based on our audit of the town centre and discussions with the local planning authority and key stakeholders we understand that there are limited development opportunities in or on the edge of the Primary Shopping Area at the present time. We consider that the main options and opportunities to accommodate the forecast need over the plan period, include the following:

- **The Buttermarket** (also referred to as the Royal Exchange Shopping Centre) is a unique character building and is the only covered shopping centre in Newark. It has dual frontages on to Middlegate and Market Place, but has a high vacancy level and would benefit from new investment. We understand that despite the site's outstanding architectural features, there are no conservation constraints. It could therefore provide an opportunity to accommodate new more viable retail/leisure uses in the PSA, or possibly a boutique hotel development. To help achieve the appropriate redevelopment and reuse of The Buttermarket we advise that the Council should consider whether there is the potential to purchase the centre.
- **The Corn Exchange** is another example of a large vacant space occupying a unique character building within the town centre. The Corn Exchange is situated on Castle Gate, a site close to the route taken by those entering the town centre by train or car from the north-west. It is therefore in a prominent location and could accommodate additional food and beverage uses to complement the existing provision in this area.
- **Carter Gate** has a more secondary function compared to the rest of the PSA due to the high number of services and lower quality retailers located along parts of the street. We consider that this area has the potential to grow and flourish as a restaurant and leisure quarter over the plan period due to its close proximity to the cinema and a street environment which could be conducive to alfresco eating and drinking. Furthermore, we consider that parts of lower Carter Gate, towards Beaumont Cross, may also present a redevelopment opportunity with the potential to create a stronger pedestrian link to the Odeon cinema. This would need to be subject to more detailed assessment of ownerships, land assembly, market demand and viability.
- **Lombard Street multi-story car park** may also represent a potential option for redevelopment. It is a large strategic site that could help to improve the integration between Potterdyke and the Town Centre. However, any comprehensive redevelopment of this site would probably need to re-provide the current car parking in full and may therefore not be a viable proposition. This would also need to be subject to more detailed assessment of ownerships, land assembly, market demand and viability.

13.27 To help promote, guide and deliver new investment and development over the plan period we strongly advise that the local planning authority takes a proactive role, starting with the preparation of an overarching strategic

vision and town centre masterplan (and/or prospectus) setting out the principles for the scale, location, format and design of new development and investment across the town centre. The masterplan would need to cover the deliverability and phasing of new development/investment on the key sites identified above, and any others that may be emerging in the town centre. It would have to assess and test amongst other key issues:

- current land ownerships and the potential need for land assembly/CPO;
- the development potential of identified sites, and any constraints to development;
- the current and likely market interest and demand for representation in the town centre and specifically on the identified sites;
- the preferred development option and mix of uses;
- the financial costs and viability of the preferred development options, and any potential funding 'gaps';
- an action plan for delivery, including the potential phasing and funding of new development; and
- the Council's key role in the delivery of new development.

13.28 Depending on the outputs the Council could subsequently use the findings to procure a development partner or partners to help redevelop the most viable sites over the plan period.

13.29 Notwithstanding this, any residual need for new comparison goods floorspace that cannot be accommodated in or on the edge of Newark Town Centre over the forecast period could be provided as part of the provision of new sustainable local centres to meet the new housing and population growth forecast for the two Strategic Sites on land east of Newark (Policy NAP 2B) and around Fernwood (Policy NAP 2C). As for convenience goods retail floorspace, it would need to be demonstrated that any new retail floorspace would not have a significant adverse impact on the Town Centre and other District and Local Centres.

13.30 Finally, we advise that the definition of shop frontages and the extent of the PSA and Town Centre Boundary identified by Policy DM10 is reasonable and robust. The only changes we would recommend at this stage would be to extend the existing PSA to incorporate Morrisons to the north-east of the centre and Asda to the south-west. In support of this recommendation we note that the previous retail study advised the Council that it was not appropriate at that time to include the Potterdyke site (Asda) within the PSA, as it was necessary to assess how the site functioned with the rest of the town centre once Asda had opened and gone through its 'settling down' period. Considering the key anchor role of the Asda food store (and Morrisons), the close linkages to the town centre and the proximity of the town's bus station it is clear that the Asda store is well related to the PSA. Both foodstores also help to generate linked trips, footfall and expenditure to other town centre uses within Newark town centre which makes a significant and important contribution to the town's overall vitality and viability. For these reasons we consider that both these important anchor foodstores should be incorporated with the town's PSA.

## **Southwell Town Centre**

13.31 Southwell is the second largest centre after Newark in terms of unit numbers. It is designated as a District Centre within the 2011 Core Strategy and we consider this is an appropriate classification based on its

attraction, role, offer and function. It is recognised as a town of significant architectural and historic interest, and is characterised by Southwell Cathedral and Minster and other attractions which help to attract tourists and visitors throughout the year.

- 13.32 The centre is attractive and compact. The historic shopping 'heart' is focussed around Queen Street, King Street, Church Street and Market Place. The centre is characterised by a range of high quality independent and specialist retailers and service businesses, mainly concentrated along King Street, which contribute to Southwell's attraction and distinctive character. The centre also has a good mix of food and beverage uses, including cafés and restaurants. As described in Section 6, Southwell is performing well against a number of the key health check indicators; for example, vacancy levels are significantly below the national average and there is a relatively strong market demand for representation in the centre.
- 13.33 Comparison provision in Southwell is above the national average in terms of the proportion of outlets. Its independent and specialist retail offer caters for both tourists and day trippers visiting the attractions within the town (including the Workhouse, Racecourse and Minster) and nearby rural areas, along with residents who visit the centre on a more frequent basis for their shopping and service needs. Notwithstanding this, the survey results confirm that the town's residents have to travel elsewhere for their main non-food shopping purchases; principally to Nottingham City Centre and its out-of-centre shops. This is to be expected and reflects Southwell's principal role and function as a District Centre in the hierarchy.
- 13.34 Southwell's convenience offer is mainly characterised and anchored by its independent shops located in the centre, and the larger Co-op store, located outside of the town centre boundary on Ropewalk, off Queen Street. M&S Simply Food has recently opened a new store in the former Londis store located on Upton Road, outside of the town to the east. There is also a One Stop located on King Street that serves the day-to-day convenience needs of the shopping population.
- 13.35 Southwell's popular street market operates every Saturday and Thursday, and makes an important contribution to the town's overall retail offer and attraction. The main Saturday market contains around 30 stalls whereas the Thursday market is smaller but expanding. The market stalls sell a wide range of food and non-food goods, which are popular with shoppers and tourists. The market is located on the pedestrianised Market Square to the northeast of the centre, off King Street. However this area is relatively compact and limits the potential to extend the number of stalls. There may however be an opportunity to test the popularity of the market on different days of the week and test different themed markets, particularly during the main holiday periods. The wider promotion/marketing of the street market and its offer, possibly alongside other markets in the District, could also help to improve its attraction.
- 13.36 In terms of the potential for improvements to the centre, the findings of the surveys, health checks and stakeholder consultations have all identified the need for more/better parking and raised the issue of congestion across the centre. Parking can be limited during peak times, which reflects the relative success and popularity of the centre. It is therefore important that parking is proactively managed and signposted due to the importance of tourism and day trippers to the centre's overall economy.
- 13.37 Turning to the economic capacity assessments, there is a forecast need for 192 sqm net of new convenience goods floorspace in Southwell by 2031, increasing to 206 sqm net by 2033. This forecast capacity is not

substantial and could be met in our judgement by either a new convenience store in Southwell, or by the extension of an existing food store.

- 13.38 In terms of comparison goods there is forecast capacity under Scenario 4 for 295 sqm net by 2031, increasing to 346 sqm net by 2033.
- 13.39 The leisure 'gaps' analysis has also identified the potential need for more hotels in the town centre, along with food and beverage uses, to help meet growing visitor and tourist demand, subject to market demand.
- 13.40 In terms of accommodating the forecast needs for new comparison goods and retail uses over the plan period no specific development opportunity sites have been identified at this point in time by the local planning authority. This reflects the historic nature of the centre. Notwithstanding this we consider that the forecast need could be met through the change of use of existing vacant buildings (such as the Post Office for example) and/or through incremental infill development where demand exists. For example there are some car parks on the edge of the centre that could provide an opportunity for redevelopment; although it is vitally important that parking provision is maintained and increased through redevelopment, not lost.
- 13.41 Based on our review of the extent of the centre's frontages and boundaries as defined by the *Allocations and Development Management DPD* (see Section 6, Figure 6.1), we consider that the current definitions are robust, reasonable and realistic.

## Ollerton Town Centre

- 13.42 Ollerton is defined as a District Centre by the Core Strategy. The centre's local economy benefits from its proximity to the Sherwood Energy Village, which is a significant employment area. The Adopted *Allocations and Development Management DPD* states that over the plan period the town will see new housing and employment growth, alongside associated facility expansion, that will assist with the regeneration of the area and reinforce its role as the main centre within the Sherwood Area.
- 13.43 The centre's retail, service and leisure offer is focused along Forest Road, which is the main route through the town centre, and Sherwood Drive, which is a quieter one way street. The health check set out in Section 7 has identified that Ollerton's non-food offer is limited and below the national average. The majority of the centre's offer is value-led and includes a number of charity shops. Boyes is also popular with local shoppers according to the survey results.
- 13.44 The Forest Centre on Forest Road was mainly vacant at the time of health check and Ollerton indoor market on Sherwood Drive has also recently closed leaving all the units vacant. The relatively high and increasing vacancy levels in the District Centre is a cause for concern and should be closely monitored by the local planning authority, as it points to a decline in the overall vitality and viability of the centre over the last few years.
- 13.45 Notwithstanding this, Ollerton does have a strong food and convenience retail offer which is above the UK average. The main food and convenience provision in the defined centre currently includes a Spar, One Stop, Heron Foods, a butchers, bakers and greengrocers. However both Ollerton's main foodstores - Tesco and Asda - are located outside the defined centre boundary and the pedestrian linkages with Forest Road are poor.

- 13.46 The household survey results confirm that Ollerton is achieving the strongest market share of convenience goods out of all of the District Centres (6.1%), but it has a limited market share of comparison goods (1.3%) shopping.
- 13.47 The economic capacity assessment forecasts limited need for new convenience goods floorspace in Ollerton up to 2031 of 269 sqm net, increasing to 293 sqm net by 2033. This could possibly sustain a small convenience store format (such as a Co-op or Sainsbury's Local for example), depending on the availability of a suitable building/site and market interest. For comparison goods the forecast capacity is 212 sqm net by 2031, increasing to 252 sqm net by 2033. The leisure 'gaps' assessment also identified a potential opportunity for additional Class A3-A4 uses in the centre, subject to market demand.
- 13.48 In terms of meeting the potential need for new retail, leisure and other uses in Ollerton, the *Allocations & Development Management* DPD (Policy OB/Re/1) designates the vacant land at Rufford Avenue owned by the Town Council, to the rear of The Forest Centre, for new retail development. We advise the local planning authority and Town Council that there is a clear and present opportunity here to link the redevelopment of the Rufford Avenue site with the failing Forest Centre, to help generate stronger, more direct and more attractive pedestrian linkages with the existing Tesco store and car park to the south, with Forest Road to the north. In order to facilitate the comprehensive redevelopment of the Rufford Avenue site and The Forest Centre to provide a high quality mixed use scheme, we recommend that the local planning authority and/or Town Council acquire The Forest Centre; either through purchase or, failing that, through the use of its CPO powers. This would be similar to the purchase of the old Bingo Hall site (Policy OB/Re/2) by the Town Council, which enabled them to successfully secure Boyes as a key retail anchor for the centre. If this larger development opportunity site can be assembled we also recommend that a planning and development brief is prepared to: (i) help identify the appropriate scale, mix, quality and design of uses on the site; and (ii) to possibly help procure a development partner to help deliver the scheme.
- 13.49 Finally, we have reviewed the frontages and centre boundaries identified by the *Allocations & Development Management* DPD (see Section 7, Figure 7.1) and we advise that the current boundary definition is robust and appropriate in our judgement. It should be noted that we did consider the potential to extend the centre boundary to include Tesco, but consider that it should remain outside of the defined boundary at the present time as it will provide flexibility for the Council to assess the merits and impacts of any potential future applications for an extension to the store on Ollerton's overall vitality and viability (the same applies to the Asda store). Notwithstanding this, if the comprehensive redevelopment of the Rufford Avenue site and The Forest Centre can be achieved over the plan period, resulting in stronger and more direct linkages between Tesco and Forest Road, then we advise that the centre boundary be reviewed by the Council to consider the potential for including Tesco within the boundary.
- 13.50 In terms of the extent of the primary shopping frontages (PSF), we broadly agree with the definitions in the *Allocations & Development Management* DPD, but we do recommend that the PSF be extended to include the Post Office and Boyes along Forest Road due to the positive impact of these stores on the town centre's overall vitality and viability.

## Edwinstowe Town Centre

- 13.51 Edwinstowe is located approximately three miles to the west of Ollerton and 16 miles to the north of Newark. It is allocated as a District Centre in the Core Strategy, along with Southwell, Ollerton and Rainworth.
- 13.52 The centre is compact and the built environment and public realm is generally of a very high quality. The majority of the centre's shop units are small in size and situated along the High Street. Edwinstowe benefits from its close proximity to Sherwood Forest, Centre Parcs Holiday Village and other attractions, and this is reflected by its retail and leisure offer which caters for the needs of local residents, as well as tourists and day-trippers to the area. Further to its tourist attractions, a new Sherwood Forest Visitor Centre is proposed for a site on Forest Corner which is outside of the town centre boundary. This site is closer to Edwinstowe town centre than the existing visitor centre, although the crossroads act as a barrier between the north and south of the town.
- 13.53 As described in Section 8, Edwinstowe's retail offer is underpinned by its food and convenience retailing which is above the national average (12.20%). The centre's food offer is anchored by a Co-op supermarket located on the corner of the High Street and West Lane. The Co-op's offer is complemented by local convenience stores including a grocers, butchers and bakers. Notwithstanding this, Edwinstowe is achieving a limited (1.2%) market share of all food and convenience goods purchases within the District, which reflects its relative role and function in the hierarchy.
- 13.54 The centre's comparison offer is significantly below the national average. There is a relatively high proportion of craft/gift stores in the centre, which reflects its wider tourist and visitor market. Leisure provision is also below average with two public houses and just one café, but an overprovision of takeaways.
- 13.55 Vacancy levels are just above the national average (12.20%) and there were a number of large character buildings that were empty at the time of our centre audits. However, we understand that the vacant public house ('Ye Olde Jug and Glass') has the benefit of a recent permission for change of use into four flats and there is an application currently before the Council for the conversion of the vacant Old Library to a multi-use facility.
- 13.56 In terms of the need for new retail floorspace in the centre over the plan period, the assessment identified a very limited capacity of 57 sqm net of convenience floorspace and 23 sqm net of new comparison goods floorspace by 2033. In our judgement this limited need for Edwinstowe could be sustained by infill development, and/or possibly an extension to an existing store in the centre, and/or the reuse of existing buildings.
- 13.57 Alternatively this forecast need could be allocated towards the end of the plan period to meet the potential local demand that will be generated by the redevelopment of the Thoresby Colliery site for new housing, employment and leisure uses. We understand that that this mixed use allocation would provide approximately 600 new dwellings and could result in an increase in the catchment population of over 1,500. We advise the Council that this could potentially support a small convenience store of up to 500 sqm gross and other small-scale retail, leisure and service uses as part of a small neighbourhood (shopping) parade (of no more than ten units) that is well located to meet the day-to-day needs of the new population in a sustainable manner.

- 13.58 The leisure 'gaps' assessment identified an opportunity for additional A3 and A4 provision; there is potential for Edwinstowe to benefit from visitors passing through the town from Sherwood Forest and associated attractions, including the Sherwood Forest Art and Craft Centre and Visitor Centre. Further promotion of this existing offer should also be implemented.
- 13.59 Finally, based on our review of Edwinstowe's frontages and town centre boundary as defined by the *Allocations and Development Management* DPD (see Section 8, Figure 8.1), we advise that the existing town centre boundary should be retained. However, we do recommend that the Primary Shopping Frontage (PSF) is extended along the western side of the High Street to the north to include no. 12 and reduced along the eastern side of the High Street up to and including no. 35, as there are no retail or commercial beyond this point.

## Rainworth Town Centre

- 13.60 Rainworth is a former colliery settlement and is located to the west of the District, approximately four miles from Mansfield and 16 miles from Newark Town Centre. It is the smallest defined District Centre in Newark and Sherwood District with just 15 outlets, compared with Southwell (101 outlets) and Ollerton (70 outlets).
- 13.61 The centre's retail and service offer is distributed along both sides of the two busy major roads that run through the centre (i.e. Kirklington Road and Southwell Road East), and is mainly concentrated at the junction of these two roads.
- 13.62 Rainworth mainly meets the day-to-day convenience and service needs of its local catchment population, and passing car-borne trade, and its offer is anchored by three convenience stores; namely Co-op, Tesco Express and Nisa Local. However, the majority of people visiting Co-op and Tesco Express do not necessarily link their trips with other shops and services in the centre mainly because the offer is limited (for example, there is only one non-food retailer in the centre) and also because both stores are separated from the rest of the centre by the busy roads. The busy road and Kirklington Road junction which separates Tesco Express, Co-op and the retail parade also detract from the environmental quality of the centre.
- 13.63 The economic capacity assessment has forecast the potential need for 71 sqm net of new convenience goods floorspace in the centre up to 2033 and 38 sqm net of comparison goods floorspace. In our judgement this limited forecast need could be met in full over the plan period through the extension of existing stores (where possible), the reuse of existing buildings or infill development, subject to market demand.
- 13.64 The leisure 'gaps' assessment identified that for such a small centre, Rainworth's leisure provision is relatively strong with two takeaways, one restaurant, and a snooker/social club. However there could be an opportunity for additional Class A3-A4 uses in the centre, dependent on market demand and conditions.
- 13.65 Considering Rainworth's scale, offer and performance we do not consider that the centre is naturally fulfilling the role of a District Centre in the hierarchy, particularly when benchmarked against the other District Centres (i.e. Southwell, Ollerton and Edwinstowe). The centre's close proximity to Mansfield also means that the potential to expand its retail and leisure offer is limited, as its local population will still choose to visit Mansfield's shops and stores for their main convenience, comparison and service needs. Based on the findings of the health check, surveys and capacity assessments we therefore recommend that Rainworth is redefined as a

Local Centre, as it better fulfils this role in the District's overall town centre hierarchy; meeting the day-to-day convenience and service needs of its local residents.

## Local Centres

- 13.66 Section 10 provides a brief summary of the relative attraction, offer and performance of the main Local Centres in Newark and Sherwood District based on health checks and audits of each centre.
- 13.67 The adopted Core Strategy identifies nine Local Centres as providing for the day-to-day needs of local residents and based around the sale of convenience goods with a limited provision of other services.
- 13.68 The audit revealed that the nine Local Centres vary significantly in terms of their size and offer. Balderton is the largest of all the centres (28 units), and Boughton and Sutton on Trent are the smallest (8 units).
- 13.69 The analysis further supports the reallocation of Rainworth as a Local Centre, as based on the total number of outlets (18) it would be placed as a mid-ranking Local Centre.
- 13.70 Balderton is the largest Local Centre and it is characterised by two separate shopping areas; namely 'Old Balderton' a traditional retailing along Main Street and 'New Balderton', a purpose built shopping parade. Its retail offer includes a number of national multiples, such as Farm Foods, Tesco Express, Mark Jarvis and Sainsbury's. There is also planning permission for a Lidl store at the Lakeside Shopping Centre to the north of the centre, which will benefit its overall vitality and viability. Overall we consider that Balderton is relatively healthy and is fulfilling its role as a Local Centre.
- 13.71 The health check identified the following two centres that we consider function as Neighbourhood Parades in the hierarchy rather than Local Centres.
- **Bilsthorpe** is split into two separate and distinct retailing areas that are a considerable distance apart. We recommend that the two areas should be redefined within the retail hierarchy as two different neighbourhood parades.
  - **Boughton** is one of the smallest Local Centres located along the busy A6075 (Tuxford Road). Its convenience provision is limited to a small newsagent and there is a lack of community uses.
- 13.72 Of the other Local Centres, Clipstone's offer comprises a Co-op food store which anchors the centre and a deli. There are also four comparison goods retailers, including a charity shop and car sales shop. Clipstone could benefit from the wider redevelopment of the Clipstone Colliery site nearby under Policy CI/MU/1 of the *Allocations and Development Management DPD (2013)* for a mixed-use scheme that has the potential to accommodate 120 dwellings, 12 hectares of employment land, retail uses and Public Open Space. The retail element will be of a size and scale which helps facilitate the wider delivery of the scheme and may include a small convenience store and other complementary facilities to help to meet the needs of the site and the wider settlement.
- 13.73 In terms of the five other Local Centres in the district, they vary in terms of the scale, mix and quality of their retail, leisure and service provision. However we have identified that they are all relatively healthy and perform

an important role and function in the retail hierarchy as Local Centres, meeting the day-to-day needs of their local (predominately walk-in) catchment populations.

## **LOCAL IMPACT THRESHOLD: RECOMMENDATIONS**

- 13.74 Finally, we assess whether there is a requirement for the local planning authority to set a local (floorspace-based) impact threshold, rather than use the default of 2,500 sqm gross identified by the NPPF (paragraph 26). This is important as it will determine whether applicants should carry out an impact assessment for new retail, leisure and office development outside of town centres that are not in accordance with an up-to-date Local Plan.
- 13.75 In summary the Planning Practice Guidance (PPG) published in March 2014 provides advice in setting a locally appropriate threshold and states that it will be important to consider the:
- 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.
- 13.76 While the quantitative and qualitative research evidence indicates that the main towns and smaller centres in Newark and Sherwood District appear to be vital and viable, they are nevertheless vulnerable to increased competition from out-of-centre retailing and the growth of internet shopping. It is apparent, for example, that Newark Town Centre has lost market share to competing out-of-centre foodstores, retail warehouses and retail parks.
- 13.77 Our assessment of retail trends in Section 3 has highlighted the dynamic growth in smaller convenience stores operated by the major grocers (i.e. Sainsbury's Local, Tesco Express, Little Waitrose, etc.). Although sizes vary from location-to-location, the main grocers are generally seeking new convenience stores (e.g. Tesco Express, Sainsbury's Local, Little Waitrose) with a minimum gross floorspace of circa 4,000 sq ft (372 sqm) gross. In circumstances where these smaller stores are proposed on the edge or outside of smaller local and village centres, often as part of petrol filling stations, they could result in a significant adverse impact on their trading performance, and overall vitality and viability. This will particularly be the case where smaller centres and villages are dependent on smaller supermarkets and convenience ('top-up') stores to anchor their retail offer and generate footfall and linked trips/expenditure to the benefit of other shops, services and facilities.
- 13.78 In addition, modern retailers selling a range of comparison goods (including fashion, homestore and 'bulky' goods retailers) generally have requirements for larger format shop units with a minimum floorspace of approximately 5,000 sq ft (465 sqm) gross. This scale of floorspace provides operators with the necessary minimum 'critical mass' of sales needed to display their full range of goods in-store and attract customers from a wider catchment area, particularly where they are co-located alongside similar stores in town centre and out-

of-centre locations. In general terms larger format non-food stores of over 5,000 sq ft gross are also unlikely to trade as a purely local facility.

- 13.79 We therefore conclude in this case that it is reasonable for applicants proposing developments for new comparison and convenience goods retailing of 350 sqm gross and above to demonstrate that they will not have a significant adverse impact on the District's main Town Centres or the network of smaller District and Local Centres, either on their own or cumulatively with other commitments in the area, in accordance with the NPPF.
- 13.80 In our judgement this is a reasonable impact threshold as it will provide the local planning authority with sufficient flexibility to assess the merits and implications of edge and out-of-centre foodstore applications that could potentially have significant implications for the viability and delivery of new or extended floorspace in these existing centres. We also advise that this threshold should be applied, where relevant, to change of use applications and applications seeking variations of conditions.
- 13.81 In our experience a 350 sqm gross impact threshold is reasonable in this case based on our experience of advising other local planning authorities, and also drawing on the minimum impact thresholds identified in recently adopted local plans (including, for example, Richmondshire District Council, Rother District Council, Rotherham Metropolitan Council, Stafford Borough Council, Warrington Borough Council and Norwich City Council).
- 13.82 Notwithstanding the adoption of a lower locally set impact threshold, it is important that the scope of any *Retail Impact Assessment* (RIA) in support of planning applications is discussed and agreed between the applicants and the Council at an early stage in the pre-application process. The level of detail included within a RIA should be proportionate to the scale and type of retail floorspace proposed, and should be agreed between the Council and applicant on a case-by-case basis. In all cases the local planning authority should adopt a pragmatic and reasonable approach with regard to the scope and detail of evidence required in support of planning applications; and it may be in certain cases that an impact assessment is not required by the local planning authority.

## 14 GLOSSARY

<b>CITY CENTRES:</b>	The highest level of centre identified in development plans. In terms of hierarchies, they will often be a regional centre and will serve a wide catchment. The centre may be very large, embracing a wide range of activities and may be distinguished by areas which may perform different main functions.
<b>TOWN CENTRES:</b>	Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability.
<b>DISTRICT CENTRES:</b>	District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.
<b>LOCAL CENTRES:</b>	Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette.
<b>TOWN CENTRE USES:</b>	Main town centre uses are 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, nightclubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, cultural and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).
<b>TOWN CENTRE BOUNDARY:</b>	Defined area, including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. The extent of the town centre should be defined on a proposals map.
<b>PRIMARY SHOPPING AREA (PSA)</b>	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). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, therefore the town centre may not extend beyond the primary shopping area.
<b>PRIMARY &amp; SECONDARY FRONTAGES</b>	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.
<b>EDGE-OF-CENTRE</b>	For retail purposes, a location that is well connected up to 300 metres from 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.
<b>OUT-OF-CENTRE</b>	A location which is not in or on the edge of a centre but not necessarily outside the urban area.
<b>OUT-OF-TOWN</b>	A location out of centre that is outside the existing urban area.
<b>CONVENIENCE SHOPPING</b>	Convenience retailing is the provision of everyday essential items, including food, drinks, newspapers/magazines and confectionery.
<b>SUPERMARKETS</b>	Self-service stores selling mainly food, with a trading floorspace less than 2,500 square metres, often with car parking.
<b>SUPERSTORES</b>	Self-service stores selling mainly food, or food and non-food goods, usually with more than 2,500 square metres trading floorspace, with supporting car parking.
<b>COMPARISON SHOPPING</b>	Comparison retailing is the provision of items not obtained on a frequent basis. These include clothing, footwear, household and recreational goods.
<b>RETAIL WAREHOUSES</b>	Large stores specialising in the sale of household goods (such as carpets, furniture and electrical goods), DIY items and other ranges of goods, catering mainly for car-borne customers.
<b>RETAIL PARKS</b>	An agglomeration of at least 3 retail warehouses.
<b>WAREHOUSE CLUBS</b>	Large businesses specialising in volume sales of reduced priced goods. The operator may limit access to businesses, organisations or classes of individual.
<b>FACTORY OUTLET CENTRES</b>	Groups of shops specialising in selling seconds and end-of-line goods at discounted prices.

<b>REGIONAL &amp; SUB-REGIONAL SHOPPING CENTRES</b>	Out-of-centre shopping centres which are generally over shopping centres 50,000 square metres gross retail area, typically comprising a wide variety of comparison goods stores.
<b>LEISURE PARKS</b>	Leisure parks often feature a mix of leisure facilities, such as a multi-screen cinema, indoor bowling centres, night club, restaurants, bars and fast-food outlets, with car parking.
<b>CONVENIENCE GOODS EXPENDITURE</b>	Expenditure (including VAT as applicable) on goods in COICOP categories: Food and non-alcoholic beverages, Tobacco, Alcoholic beverages (off-trade), Newspapers and periodicals, Non-durable household goods.
<b>COMPARISON GOODS EXPENDITURE</b>	Expenditure (including VAT as applicable) on goods in COICOP Categories: Clothing materials & garments, Shoes & other footwear, Materials for maintenance & repair of dwellings, Furniture & furnishings; carpets & other floor coverings, Household textiles, Major household appliances, whether electric or not, Small electric household appliances, Tools & miscellaneous accessories, Glassware, tableware & household utensils, Medical goods & other pharmaceutical products, Therapeutic appliances & equipment, Bicycles, Recording media, Games, toys & hobbies; sport & camping equipment; musical instruments, Gardens, plants & flowers, Pets & related products, Books & stationery, Audio-visual, photographic and information processing equipment, Appliances for personal care, Jewellery, watches & clocks, Other personal effects.
<b>SPECIAL FORMS OF TRADING</b>	All retail sales not in shops and stores; including sales via the internet, mail order, TV shopping, party plan, vending machines, door-to-door and temporary open market stalls.
<b>GROSS GROUND FLOOR FOOTPRINT FLOORSPACE</b>	The area shown on the Ordnance Survey map or other plans as being occupied by buildings and covered areas measured externally.
<b>GROSS RETAIL FLOORSPACE</b>	The total built floor area measured externally which is occupied exclusively by a retailer or retailers; excluding open areas used for the storage, display or sale of goods.
<b>NET RETAIL SALES AREA</b>	The sales area within a building (i.e. all internal areas accessible to the customer), but excluding checkouts, lobbies, concessions, restaurants, customer toilets and walkways behind the checkouts.
<b>RETAIL SALES DENSITY</b>	Convenience goods, comparison goods or all goods retail sales (stated as including or excluding VAT) for a specified year on the price basis indicated, divided by the net retail sales area generating those sales.
<b>QUANTITATIVE NEED</b>	Is conventionally measured as expenditure capacity (i.e. the balance between the turnover capacity of existing facilities and available expenditure in any given area). Expenditure capacity, or 'quantitative need' can arise as a result of forecast expenditure growth (either through population growth or increase in spending), or by identification of an imbalance between the existing facilities and current level of expenditure available in an area.
<b>QUALITATIVE NEED</b>	Includes more subjective measures such as, for example, consumer choice; the appropriate distribution of facilities; and the needs of those living in deprived areas. 'Over trading' is also identified as a measure of qualitative need, although evidence of significant over-crowding, etc., may also be an indicator of quantitative need.
<b>OVERTRADING</b>	The extent to which the turnover of existing stores significantly exceeds benchmark turnovers may be a qualitative indicator of need, and in some cases inform quantitative need considerations. For example it may be an expression of the poor range of existing facilities or limited choice of stores and a lack of new floorspace within a locality. In certain cases 'overtrading' occurs when there is an imbalance between demand (i.e. available spend) and supply (i.e. existing floorspace capacity).
<b>BENCHMARK TURNOVER</b>	In the case of specific types of provision (such as foodstores) company average turnover figures are widely available and can provide an indication of a 'benchmark' turnover for existing facilities. However, turnover benchmarks should not be used prescriptively or in isolation to indicate a measure of 'need'. It is important to recognise that a range of factors (such as rental levels and other operating costs) mean that operators are likely to trade at a wide range of turnover levels. Given the inherent margins of error involved in this type of exercise, the use of company averages as benchmarks should be treated with caution unless they are corroborated by other independent evidence of under-performance, or strong trading. Examples might include the results of in-centre health checks, or the extent of congestion in stores and queuing at checkouts.