Tameside Retail and Leisure Study

Final Report

ON BEHALF OF TAMESIDE BOROUGH COUNCIL

December 2025

Contents

1. Introduction

Instruction and Purpose

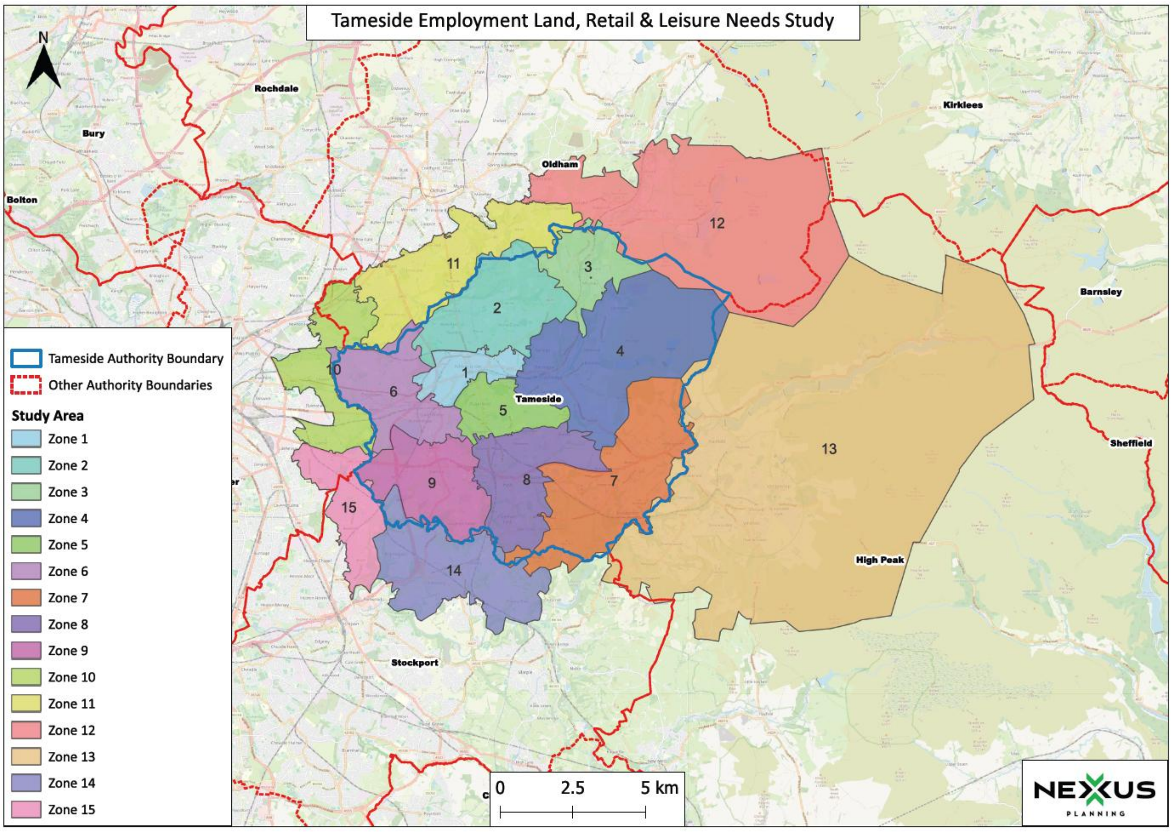
1.1 Nexus Planning has been instructed by Tameside Borough Council (hereafter referred to as 'the Council') to undertake a new Retail and Leisure Study. The Retail and Leisure Study forms one half of a joint commission working with BE Group, who have prepared the Employment Land Study, which is produced as a standalone evidence base document for the Council.

1.2 The primary focus of the Study is to establish the current position in respect of the need for additional retail and leisure facilities in the Tameside authority area, and to consider the vitality and viability of the principal centres within the borough, comprising Ashton-under-Lyne, Hyde, Droylsden, Denton, Hattersley, Mossley and Stalybridge town centres.

1.3 The Study replaces the previous Tameside Retail and Leisure Study (TLRS), which was authored by Hollis Vincent in 2018. The Study is underpinned by new empirical evidence in the form of a new household shopper survey, and our site visit to survey and assess the health of the defined principal town and district centres.

1.4 The household survey was undertaken by NEMS Market Research in July 2025 and covers 15 separate zones, which are collectively considered representative of the principal catchment area for retail facilities and leisure facilities located within the Tameside authority area. The zones have been developed with regard to those utilised in the previous Study, which provides us with the opportunity to compare shopping and leisure patterns. The Study Area also includes areas of neighbouring authority areas including High Peak (Zone 13), Oldham (Zones 11 and 12), Manchester (Zone 10) and Stockport (Zones 14 and 15). A plan of the Study Area is provided at Figure 1.1 and in Appendix 1, and the tabulated household survey results are provided at Appendix 2.

Figure 1.1: Study Area and Zones



1.5 Whilst the Study Area largely corresponds with the boundaries of the Tameside authority area, it does include small parts of neighbouring authority areas, where residents sometimes look to facilities within Greater Manchester, High Peak and further afield such as Stockport and Oldham, to meet at least some of their retail and leisure needs.

1.6 In this regard, it is important to recognise that shopping habits are not governed by local authority area boundaries. It is therefore appropriate to consider the 'inflow' of retail expenditure from residents of neighbouring authority areas to destinations in Tameside in order to identify retailers' overall turnover and understand the role of centres and standalone stores across the wider area. The household survey also allows us to identify expenditure that originates within Tameside but which 'leaks' to destinations outside of the authority area.

1.7 It is important to state at the outset of this study that any medium to long term forecasts should be treated with caution. They are influenced by the dynamic changes in economic, demographic, lifestyle and market trends; including the rise of online shopping over the last decade, and wider implications on the market across the country and further afield.

1.8 On 12 December 2024 a new National Planning Policy Framework (NPPF) was published, replacing previous versions. For the purposes of preparing plans, paragraph 234 of the NPPF identifies transitional arrangements. Part c) of paragraph 234 is considered to apply to Tameside, in that this Plan, Homes, Spaces, Places, is a plan which includes policies to deliver the level of housing and other development set out in a preceding local plan (such as a local plan containing strategic policies), Places for Everyone, adopted since 21 March 2024.

1.9 Paragraph 235 of the NPPF instructs where such a scenario in paragraph 234 applies, that the plan will be examined under the relevant previous version of the Framework. Relevant, is considered to mean the July 2021 Framework, which is the Framework which Places for Everyone was examined under. As such, this Study is formed on the basis of the policies as provided in the 2021 NPPF and NPPG.

1.10 The inherent uncertainties in forecasting are recognised by both the NPPF and NPPG. For example, the NPPG states that assessments **'….may need to focus on a limited period (such as the next five years)'** but will also need to take the lifetime of the plan into account and be regularly reviewed. The NPPF also advises that planning policies should allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, **'…looking at least ten years ahead'** (paragraph 86d).

Structure of Report

1.11 Our report firstly provides an overview of prevailing retail and leisure trends, before then going on to consider the planning policy context for the updated Study. We then consider the vitality and viability of the town centres.

1.12 The remainder of the report identifies retail and leisure needs arising within the borough to 2042. To undertake this assessment, we identify population and expenditure growth across the Study Area. The final sections of the report provide our conclusions in respect of retail and leisure needs and provide our planning policy recommendations.

1.13 Accordingly, this report is structured as follows:

- Section 2 sets out key retail and leisure trends of relevance to the commission;
- Section 3 provides an overview of the planning policy context;
- Section 4 summarises our assessment of the vitality and viability of the town centres;

- Section 5 provides an overview of forecast changes in Study Area population and expenditure;
- Section 6 provides an overview of the market share attracted to key destinations within the borough and how this has altered since the production of the previous study;
- Section 7 provides an assessment of retail needs;
- Section 8 provides an assessment of leisure needs; and
- Section 9 summarises our key findings and sets out our conclusions and policy recommendations.

2. Current and Emerging Retail and Leisure Trends

2.1 In order to provide a context for this Study and to help identify the sectors that are more likely to be the subject of additional development proposals, we set out a summary of current retail and leisure trends below. In reading the summary, it should be noted that the retail and leisure sectors are dynamic and, whilst online shopping and economic conditions have impacted on the high street, new retailers and formats continue to evolve to meet shoppers' needs.

2.2 The below commentary should therefore be taken as a 'snapshot' in respect of current market conditions; it will be necessary to judge future development proposals for main town centre uses with reference to the prevailing circumstances at the time of a proposal's determination.

Economic Conditions

2.3 In March 2025, Experian published its Retail Planner Briefing Note 22 ('ERPBN22'), which identifies anticipated future growth in the retail and leisure sectors and considers likely changes in bricks and mortar retail floorspace and online sales.

2.4 ERPBN22 anticipates that retail spending has been squeezed in 2022 and 2023 as a consequence of inflationary pressure and increases in the cost of living. ERPBN22 provides the following summary of the economic outlook:

'Since our last publication, the UK economy rebounded from the mild technical recession endured in the second half of 2023, reporting robust growth in the first half of 2024, supported by a strong service sector. However, the economy broadly stalled in the second half of the year, underpinned by weakness in business and consumer confidence both before and after the Autumn Budget. Ahead of the fiscal announcement firms deployed a wait and see approach to investment decisions, while in recent months companies appear to be in cost cutting mode given an upcoming increase in employers' National Insurance Contributions (NICs), a rise in the National Minimum Wage, and a reduction in business rates relief in April.'

2.5 It is clear that the Covid-19 pandemic has accelerated the shift to online retailing with a consequent reduction in bricks and mortar retail floorspace. As a consequence, the proportion of expenditure committed via special forms of trading (i.e. internet and mail order sales) has increased.

2.6 More generally, as a result of relatively modest growth forecasts and the shift to online retailing, Experian forecasts that there will be a reduction in the stock of retail floorspace over the next few years.

2.7 In terms of inflation, Office for National Statistics data[1] indicates that the rate of inflation (as measured by the consumer price index) increased from 0.8% at April 2020 to 1.5% at April 2021, before then increasing significantly to 9.0% at April 2022. The rate of inflation appears to have peaked at 11.1% in October 2022 and has reduced significantly to 6.7% at August 2023 and to 2.6% as of September 2024. By January 2025, this rose again to 3.9% and the latest figure in August 2025 indicates it has risen slightly again to 4.1%.

2.8 Retail has been an industry under significant stress, as many retailers find themselves squeezed between rising costs and the increasing volume of sales over the internet. Such difficulties have, of course, been exacerbated by the Covid-19 pandemic and the cost of living crisis associated with rising energy prices and inflation.

2.9 As consumer spending accounts for around 60% of GDP, the financial health of households and their willingness to spend are crucial factors in determining an economy's performance. Traditionally, consumer spending is the driving force behind GDP growth in the UK. In recent years, however, this has not been the case. First, the Covid-19 pandemic and associated lookdowns resulted in temporary large drops in spending and big changes to spending

[1] ONS 'Consumer price inflation tables' dataset, August 2025.

patterns (such as a greater share of spending on goods and less on services). Then, just as spending had recovered to its pre-pandemic level, the period of high inflation in 2022 and 2023 squeezed household budgets, resulting in stagnant spending in real (inflation-adjusted) terms.

2.10 Household incomes, on average across the country, have increased since 2023 mostly because wage growth has been higher than inflation. As of mid-2024 this hadn't led to a noticeable increase in consumer spending, but forecasters believe that spending growth will accelerate heading into 2025. The consensus forecast among economists surveyed in October was for consumer spending to rise by 0.7% in 2024 and by 1.3% in 2025.This seems largely due to the improvement in household incomes, with further gains anticipated in 2025. A further boost to spending could come from households saving less than they have in recent years. The proportion of income that households saved rose from 4.5% of total income in Q2 2022 to 10.0% in Q2 2024, a relatively high rate historically (excluding the pandemic).

2.11 In addition, consumer confidence has improved and hit a three-year high in July and August 2024. It did, however, fall in September 2024. It is likely that the new Labour government's warnings about the state of the economy and "difficult decisions" announced as part of the Budget might be factors behind the deterioration in confidence.

2.12 There will still be the need and demand for physical stores, despite the increase in shopping online. This is particularly the case for convenience goods sales given that online shopping orders are typically picked from the shelves of physical stores. In respect of comparison goods, there is a need for the offer to become more 'experiential' to encourage shoppers onto the high street, and to ensure that shopping is viewed as a pleasurable pastime. The shopping experience needs to evolve and diversify both to attract footfall and convert increased activity into sales. Independents clearly have an important role to play in adding interest and in providing differentiation between shopping venues.

Available Expenditure and the Impact of the Internet

2.13 Experian expenditure data and growth forecasts confirm that the pandemic has resulted in turbulent short term changes in per capita convenience and comparison goods expenditure.

2.14 In this regard, ERPBN22 identifies that per capita convenience goods expenditure decreased by -5.0% in 2022 with a further reduction of -3.5% in 2023. This follows a previous reduction of -1.3% in 2021. Before this, in 2020, per capita convenience goods expenditure increased by 6.8%. The strong level of growth at 2020 is largely attributable to consumers spending more on such goods as a result of lockdown measures. Limited annual per capita convenience expenditure growth (relative to that which has been achieved historically) is anticipated to return across the medium to long term.

2.15 As the below Table 2.1 shows, the position in respect of annual per capita comparison goods expenditure has been changeable in the past few years. Whilst annual per capita comparison goods growth of 6.8% was recorded in 2021, this followed a reduction of -8.3% in 2020. Forecast per capita comparison goods expenditure increases over the medium and longer term are positive but still below the level apparent at the turn of the millennium.

Table 2.1: Experian's Identified and Forecast UK Convenience and Comparison Goods Per Capita Expenditure Growth

Volume Growth per Head (%)	2019	2020	2021	2022	2023	2024	2025	2026	2027-31	2032-40
Convenience goods	-1.2	6.8	-1.3	-5.0	-3.5	-1.8	-0.8	-0.6	-0.3	-0.2
Comparison goods	2.9	-8.3	6.8	3.4	-3.2	-1.0	0.1	1.3	2.5	2.6

Source: Figure 1a and Figure 1b of Experian Retail Planner Briefing Note 22

2.16 Whilst the above figures identify a level of growth which is significantly below that which has historically been achieved, the situation for high street stores is exacerbated through the increasing amount of expenditure which is committed through special forms of trading[2] and, in particular, through online sales.

2.17 The below Table 2.2 sets out Experian's identified and forecast level of special forms of trading as a proportion of overall convenience and comparison goods expenditure. Experian estimates that special forms of trading will account for just under four out of every ten pounds spent on comparison goods and almost a quarter of convenience goods expenditure at 2040.

Table 2.2: Experian's Identified and Forecast Market Share of Non-Store Retail Sales for Convenience and Comparison Goods Sectors

Volume Growth Per Head (%)	2019	2020	2021	2022	2023	2024	2029	2034	2039	2040
Convenience goods	11.0	15.3	17.1	17.1	16.5	17.0	19.4	21.7	23.9	24.4
Comparison goods	22.0	35.6	34.8	32.0	30.9	31.6	34.1	36.3	38.6	39.0

Source: Figure 5 of Experian Retail Planner Briefing Note 22

2.18 The ongoing popularity of internet shopping continues to have clear implications in respect of the viability of some 'bricks and mortar' retailers. However, it is important to note that changes in how people shop also bring about some opportunities for retailers trading from the high street. In particular, many stores sell online but fulfil orders from regular stores rather than warehouses[3], with purchases therefore helping to sustain tangible retail floorspace. As a consequence, Experian also provides an 'adjusted' estimate of special forms of trading, which relates to expenditure which is not available to actual stores.

2.19 These figures are provided in Table 2.3 below. The figures demonstrate the high proportion of online sales which are fulfilled from physical stores, and therefore the importance of retaining this offer on our high streets.

Table 2.3: Experian's Identified and Forecast Adjusted Market Share of Non-Store Retail Sales for Convenience and Comparison Goods Sectors

Volume Growth Per Head (%)	2019	2020	2021	2022	2023	2024	2029	2034	2039	2040
Convenience goods	3.3	4.6	5.1	5.1	5.0	5.1	5.8	6.5	7.2	7.3
Comparison goods	16.5	26.7	26.1	24.0	23.1	23.7	25.6	27.3	28.9	29.3

Source: Figure 5 of Experian Retail Planner Briefing Note 22

Convenience Goods

2.20 Recent socio-economic conditions have led to significant shifts in convenience goods retailing, which have resulted in the 'big four' supermarket operators' market share being cut. Indeed, analysis from Kantar[4] has identified that the traditional 'big four' supermarket operators are no longer such, with Aldi's market share overtaking that of Morrisons over the 12 weeks to 4 September 2022. Aldi continues to achieve a market share (10.8%) higher than Morrisons (8.4%) as of August 2025.[5]

[2] Including internet sales, mail order, stalls and markets, door-to-door and telephone sales.
[3] This is particularly the case with food shopping and speciality comparison goods purchases, where retailers often try to tap into a wider market through an online presence.
[4] An international market research company based in London.
[5] Kantar, Great Britain Grocery Market Share (12 Weeks Ending), 10 August 2025.

2.21 Mintel[6] finds that the decline of the food superstore is well-established and can be attributed to two matters as follows:

- Firstly, people are undertaking food shopping in different ways. More people are living in town and city centres and are generally purchasing their own home at a later age than was previously the case.[7] Mintel indicates that such people are more likely to undertake food shopping on an 'as needs' basis and are more likely to eat out or use takeaways. As such, they are less likely to have need to undertake a weekly 'main food shop'.
- Secondly, the current uncertainty in the economy has made discount foodstore operators (namely Aldi and Lidl) a more attractive proposition, and many such foodstores are thriving given that shoppers are currently having to be 'money savvy'. Discounters have also made efforts to try to compete more directly with the 'big four' supermarket operators, with larger stores, greater ranges of goods, fresh foods, and premium products becoming increasingly prevalent. It is evident that the likes of Aldi and Lidl are no longer 'hard discounters' in quite the same way they once were, as they now fulfil a wider range of customers' needs by offering a greater range of products. The move towards the middle ground has allowed discounters to secure market share from both superstores and smaller convenience stores. In addition, we note that discount retailers are often happy to trade alongside more upmarket convenience goods retailers (such as M&S Foodhall) as, collectively, the two stores can meet a comprehensive range of grocery shopping needs.

2.22 The shifts in the sector are illustrated with reference to changes in retailers' market share in recent years, as shown in Table 2.4. The past few years have seen the closure of a number of unprofitable grocery stores (from small convenience stores to large superstores) and the continuation of Aldi and Lidl's expansion programme. Whilst the traditional 'big four' remain more cautious in respect of new openings, a limited number of proposals for mid-sized foodstores are currently being promoted by these operators in areas where there is a growing population, or an obvious shortfall in existing provision. These stores are often of a scale that is broadly comparable to that provided by Aldi and Lidl, which allows customers to shop in a convenient and efficient manner.

Table 2.4: Market Share of Convenience Goods Operators

Operator	December 2017	December 2018	December 2019	December 2020	December 2021	December 2022	December 2023	December 2024
Tesco	28.1%	27.8%	27.4%	27.3%	27.9%	27.5%	27.6%	28.1%
Sainsbury's	16.5%	16.1%	16.0%	15.9%	15.7%	15.5%	15.8%	15.9%
Asda	15.3%	15.2%	14.8%	14.3%	14.2%	14.0%	13.6%	12.3%
Morrisons	10.8%	10.6%	10.3%	10.4%	10.1%	9.1%	8.8%	8.6%
Aldi	6.8%	7.4%	7.8%	7.4%	7.7%	9.1%	9.3%	10.3%
Co-op	5.8%	5.9%	6.1%	6.0%	5.8%	5.6%	5.4%	5.5%
Lidl	5.0%	5.3%	5.9%	6.1%	6.3%	7.2%	7.7%	7.7%
Waitrose	5.2%	5.0%	5.0%	5.0%	5.1%	4.7%	4.6%	4.4%
Iceland	2.2%	2.2%	2.3%	2.5%	2.4%	2.5%	2.4%	2.2%
Symbols & Independent	1.7%	1.5%	1.6%	1.7%	1.6%	1.4%	1.4%	1.4%
Other Outlets	1.6%	1.7%	1.6%	1.8%	1.8%	1.8%	1.8%	1.8%
Ocado	1.1%	1.2%	1.3%	1.6%	1.7%	1.7%	1.7%	1.8%

Source: KANTAR Grocery Market Share. Figures shown are for the final reporting period in each calendar year
A symbol group is a form of franchise of convenience shops, found primarily in the United Kingdom and Ireland.

[6] 'UK Retail Rankings', Mintel (a market research company), April 2018.
[7] Article headlined 'Average UK first-time buyer is now older than 30, says Halifax', The Guardian, January 2022.

Comparison Goods

2.23 The comparison goods sector is currently being squeezed by a number of factors, including increasing operator costs and a reduction in discretionary spending as a result of increases in the cost of living.

2.24 Whilst the sector is continually evolving and there are a number of retailers performing well (including JD Sports, Next, Primark, and Zara), recent headlines have focused on failing retailers and store closures. High profile retailers that have struggled include Debenhams, which announced the closure of all 124 stores in December 2020, and the Arcadia Group, which owned Topshop, Topman and Dorothy Perkins. Furthermore, Intu Properties, one of Britain's biggest shopping centre owners, fell into administration in June 2020 after failing to secure an agreement with its creditors.[8]

2.25 More recently, Wilko entered into administration in August 2023 and ceased trading shortly after, and The Body Shop announced the closure of 75 stores at the end of February 2024, after falling into administration. Furthermore, WHSmith announced the closure of some of their stores in March 2025 prior to closing all of its high street stores later in the year, Homebase closed a number of stores throughout 2024 and New Look announced the closure of approximately 40 stores across the UK and Ireland in July 2025.

2.26 Whilst the loss of some of the above names will have significant repercussions for certain towns (particularly those that have lost one or more of Debenhams, Marks & Spencer, or House of Fraser from their high street), some well-known retailers have failed to 'move with the times' and update their offer, accommodation, and online presence. This is partly a consequence of retailers struggling to reinvest in their business when margins are tight (or non-existent).

2.27 Many operators have also rationalised their portfolio with the aim of serving the UK by concentrating on larger centres, supplemented by a strong online presence. It will be interesting to see whether any permanent change in respect of working from home may act to counterbalance this 'polarisation' trend, given the prospect of fewer commuters travelling to larger centres and greater numbers of people spending the working day in and around their home. The impact on larger centres may be to reduce footfall, particularly within the week, and result in the shift in expenditure being directed to the smaller town, district, and local centres. Whilst this will be a positive for the smaller centres, larger centres may suffer as a result.

2.28 Whilst structural changes have had a material impact on the vitality and viability of many UK high streets, there are some beneficiaries. Notwithstanding Wilko's recent problems, some 'discount variety' operators – such as B&M Bargains, Home Bargains and Poundland – have taken advantage of lower rents and reoccupied a number of medium to large retail units. However, as evidenced by recent events, including the closure of Wilko, the discount variety market may be approaching capacity. As we go on to explore in more detail below, the ongoing competition of out of centre destinations for national multiple representation is continuing to have impacts on the performance of some high streets.

Leisure and Food & Drink

2.29 The greater availability of high street units appears to have helped stoke an entrepreneurial spirit in recent years, with a number of centres beginning to benefit from a greater focus on independent retailers and also modern markets, which are frequently focused around food and drink operators.

2.30 More generally, the food and drink sector was buoyed pre-pandemic by the success of mid-market national multiples, which expanded quickly across the UK. However, this market has become saturated in many locations and a number of high-profile operators have been in financial difficulty, including the closure of Byron Burger,

[8] Article headlined 'Shopping centre owner Intu collapses into administration', The Guardian, 26 June 2020.

Chiquito, and Frankie & Benny's branches. Given the problems suffered by such operators, the market has become more cautious and mid-market operators are picking new sites carefully as a result. Instead, we have seen a number of independent operators flourish, both before and throughout the pandemic, and a desire from customers to choose local operators over larger regional and national brands.

2.31 A further significant recent high street success story has been the resurgence of the town centre leisure sector, which has resulted in new cinemas being developed close to the shopping core and the emergence of 'competitive socialising' concepts, which include bowling, crazy golf, table tennis, darts, axe-throwing, escape rooms and other seemingly niche pursuits.

2.32 Cinema openings have been on the up in the early part of this century (until the Covid-19 pandemic) and 'boutique' cinema operators – including Curzon, Everyman, and The Light – are able to operate from smaller sites in town centres (partly as a consequence of digital technology). Town centre cinema development has successfully underpinned wider mixed-use developments, as food and drink operators are typically keen to locate in close proximity to benefit from spin-off custom. New, innovative leisure operators have been particularly beneficial both in re-using existing difficult-to-let premises, and in driving the evening economy.

2.33 More generally, the gym market continues to perform well, with there now being around 5,600 health and fitness clubs across the UK, with 11.5 million members and a market of approximately £5.7bn in 2024.[9] Around one in every seven Britons has a gym membership. Budget gyms are currently particularly popular, with operators such as Pure Gym, The Gym Group, and easyGym utilising a format that is based on low costs and high volume.

The Night-Time Economy

2.34 The term night-time economy is used to describe a wide range of activities that (typically) take place after 5pm. This could range from a trip to the theatre or cinema, to a family meal, to a night out at a club. A successful night-time economy generally caters for a wide range of demographics and interests.

2.35 Creating a safe, vibrant and well-balanced evening and night-time offer is a challenge that can dramatically improve the overall health of a town centre and boost the economy.

2.36 The Association of Town and City Management ('ATCM') has identified a number of themes to help improve the attraction and operation of the night-time economy, which are summarised as follows:

- **Alive After Five** – This relates to revisions to trading hours to better suit customers' shopping needs and availability. A Retail Trading Hours Study commissioned by ATCM found that sales between 5 pm and 8 pm are typically 50% greater than those between 9 am and 11am. Revising trading hours to open and close later could increase sales by around 10% to 12%.
- **Late Night Transport** – The lack of frequent, efficient and safe public transport late at night, or at least the perception of this being the case, could be having a detrimental effect on night-time economy and social scene. One way of increasing night-time visitor numbers is to promote late-night travel provision and its publicity.
- **Purple Flag** – This is an accreditation scheme which recognises excellence in the management of town and city centres at night. Obtaining Purple Flag accreditation demonstrates that a town's night-time economy offers clean and safe environments, great bars and clubs, a variety of arts and cultural attractions, and excellent transport links.

[9] UK Health & Fitness Market Report, April 2025, published by ukactive in collaboration with 4GLOBAL and Sport England

- **Evening Economy Ambassadors** – The ambassadors improve the evening and night-time experience in a town centre by liaising between visitors, police, door staff, licensees, and transport operators.
- **Light Night** – This is an initiative where town or city centres stays open after dark for people to enjoy local shops and services within a wider cultural event involving music, art and, most importantly, through the lighting up of buildings and light-based art installations.

2.37 The above list is not exhaustive, and the development of a bespoke evening economy strategy can help prioritise and deliver events and initiatives which draw on a town centre's strengths and address weaknesses.

Planning Reform on the High Street

2.38 One of the most impactful planning reforms in recent times has been the consolidation of a number of separate Use Classes under a single Class E 'Commercial, Business and Service' use. This update to the Town and Country Planning (Use Classes) Order 1987 (the 'UCO') came into effect in September 2020. The new Use Class combines shops, restaurants, offices, gyms and nurseries (amongst other uses) such that planning permission is no longer typically required to switch uses.

2.39 Furthermore, in March 2021, an update was made to the General Permitted Development (England) Order 2015. This allows for the change of use from Class E properties to residential from August 2021 (extending a right that had previously been restricted to office uses). This permitted development right is subject to maximum size requirements, the property having been in use as Class E for two years and having been vacant for three months. An application to the determining authority for 'prior approval' is also required for limited consideration of impacts relating to transport, contamination, flood risk, noise, light, and neighbouring amenity. Further limitations apply in Conservation Areas and for nurseries, as well as in areas covered by 'Article 4 directions' where permitted development rights are extinguished.

2.40 On 20 July 2021, paragraph 53 of a new iteration of the National Planning Policy Framework ('NPPF') set out limitations on the use of Article 4 directions. The then revised national policy seeks to qualify the areas in which it is justified to introduce Article 4 directions, limiting local authorities' ability to control development. This has been brought forward into the latest NPPF (December 2024).

2.41 The changes in the application of Article 4 directions were first put forward in the January 2021 consultation for draft revisions to the NPPF. However, the actual policy provision differs from the initial consultation in a couple of key areas. Paragraph 53 of the previous NPPF of July 2021 recognised that the loss of the 'essential core of a primary shopping area' could result in wholly unacceptable adverse impacts on an area's vitality and viability. This was the Government's first acknowledgement of the potential for the permitted development rights to undermine the health of centres in the NPPF. The updated text also introduced a requirement for 'robust evidence' to support the removal of development rights. The most recent iteration of the NPPF, published in February 2025, retains these changes.

2.42 This can be seen as generally good news for local authorities concerned about the erosion of retail and service uses, and the need to protect vulnerable centres from potentially poor-quality residential development. Protection of the vitality and viability of a high street or town centre against the adverse impacts of change of use is now established as justification for issuing an Article 4 direction.

Out-of-Centre Retailing

2.43 Another key format of retailing (and provision of leisure uses) are out-of-centre retail warehouse destinations. Whilst local authorities need to retain control over out-of-centre provision from a planning perspective, such provision does play an important part in providing space for operators who may not be able to viably trade from in-centre locations. Such uses include 'bulky' retail operators, including DIY stores, electrical goods retailers, furniture stores and so on.

2.44 In their UK Retail Warehousing April 2025 Spotlight Report, Savills note that: **'…despite the failure of two of the sector's longest-running operators, it is important to point out that at no point did national vacancy climb above 5%. The level of interest and speed at which the best vacant Carpetright and Homebase units were acquired is tantamount to the strong competitive tension that still exists in the market.'** In terms of the nature of the operators, it is the value orientated brands which continue to top the charts of the most acquisitive retail and leisure operators.

2.45 In this regard, Savills note that the retailers with a focus on essential product categories have continued to drive footfall to out-of-centre schemes, which remain at near parity with the levels seen pre-Covid. Furthermore, operators which focus on essential products have dominated the new openings, including Aldi and Lidl, Home Bargains, B&M Retail and leisure operators such as PureGym, Greggs and Starbucks. Indeed, the Savills' Spotlight Report notes that:

'…as we have seen in the past, when consumers swing into belt-tightening mode, large parts of the retail warehouse market stand to benefit. As we explored in the previous issue of this Spotlight, the out-of-town market is less dependent on big-ticket discretionary spend and increasingly focused on essential and value-based retail, especially with the growth of discount variety retailers and value-oriented grocers.'

2.46 In addition to the above, most out-of-centre shopping locations retain their apparent significant competitive advantages over town centres and high streets in terms of their supply of larger format modern outlets, their lower occupancy costs, extensive free parking and easy and convenient access to the surrounding highways and key arterial routes. This is still an attractive proposition for those retailers that are still seeking space in the current market, but the implications of the attraction of out-of-centre facilities on defined centres, needs to be monitored carefully and the ongoing ease of access, parking and overarching attraction of out-of-centre facilities can of course have implications for town centre operators and retail and leisure planning policy.

Implications for the Tameside Authority Area

2.47 The above trends have a number of potential implications for retail and leisure provision within Tameside. Whilst Ashton and Hyde are the principal retail and leisure centres within the Study Area, out of centre destinations also accommodate a wide range of retail and leisure operators. Both types of destinations are susceptible to structural changes in the retail marketplace and the propensity of shoppers to buy increasing amounts of comparison goods online.

2.48 As we go on to explore in more detail later in this Study, it is evident that the town centres within Tameside benefit (to varying degrees) from the presence of anchor convenience goods retailers within or around their boundaries. Tameside's grocery market is relatively self-contained, with the proportion of shopping trips and convenience expenditure attracted to destinations within the authority area being high and with good retention rates on the whole. The Study goes on to identify a degree of overtrading in some of Tameside's major foodstores, indicating that there is perhaps a qualitative demand to further this convenience provision and increase consumer choice.

2.49 Whilst the growth of online retailing is likely to have had a detrimental impact on the turnover Tameside's centres, going forward there may be opportunities for retail facilities to benefit from multi-channel retailing in order to help drive footfall and sustain retailer representation. It will be important to adopt a holistic approach to place management in order to ensure that centres support an experiential offer and are able to attract visitors to linger throughout the day and into the evening. There is a need for increased flexibility in centres, which need to be adaptable in order to address changing needs.

2.50 In this regard, out of centre destinations will continue to have the potential to draw trade from the defined centres, and particularly those which provide for a more diverse comparison offer including selling clothing and footwear. As such, continuing to encourage comparison retailing into the defined centres and particularly the defined centres will be key to encouraging footfall and expenditure and policies which seek to protect the defined centres from out of centre development are fundamental to realising this.

2.51 Given the above, it is important that there is more emphasis on a wider range of uses within the defined centres in Tameside, which seeks to encourage visitors in, and to lengthen their 'dwell time'. This is an aspiration which is clearly shared by the Council through their current regeneration initiatives and future aspirations for the centres within the authority area.

2.52 As part of a series of regeneration initiatives, the Council has outlined projects aimed at revitalising Ashton, Hyde, Stalybridge, Denton and Droylsden town centres, enhancing their connectivity, appeal and economic vitality. A key focus of the plans is to ensure they adapt and evolve to better meet the needs of the local communities, focusing around diversifying the commercial offer, public realm and environmental improvements, but also encouraging substantial levels of residential growth. This in turn will help to support businesses, keep town centres active and create local community hubs which are desired by the local population.

2.53 These regeneration projects represent a significant opportunity for the authority area, strengthening the town centres' connectivity, enhancing footfall, and attracting a wider demographic. By improving accessibility, expanding offerings, and celebrating the town centres' heritage and catchment areas, the initiatives will support the long-term economic viability of the centres while creating a more engaging and dynamic environment for residents and visitors alike

2.54 In respect of the convenience goods sector, as would be expected, there is generally good provision across the borough. Notwithstanding this, the discount foodstore market remains highly competitive and retailers are now able to support multiple stores in relatively focused areas, particularly where this may dissuade the competition from securing representation. Within Tameside, the foodstores remain important elements of the offer of the defined centres and protecting this moving forward will be key to protecting the vitality and viability and drawing shoppers into centres. Wider support around the independent sector and food and drink operators will also help to support Tameside's centres as destinations.

2.55 In addition to the retail and leisure offer of the centres within Tameside, the Council is working with Marketing Manchester as part of their Visitor Economy Accelerator programme to support the visitor economy businesses and attractions within Tameside. This wider cultural offer within the authority area is also a key attractor to visitors and should be further supported to help draw footfall and expenditure into the defined centres.

3. Planning Policy Context

3.1 In order to shape the direction of this Study, it is helpful to understand relevant retail and town centre planning policy at a national and local level. As such, we first summarise national planning policy of relevance before considering retail and town centre development plan policy as set out in the current development plan. We also consider changes to the Use Classes Order and the application of permitted development rights to town centre uses.

Revised National Planning Policy Framework

3.2 On 12 December 2024 a new National Planning Policy Framework (NPPF) was published, replacing previous versions. For the purposes of preparing plans, paragraph 234 of the NPPF identifies transitional arrangements. Part c) of paragraph 234 is considered to apply to Tameside, in that this Plan, Homes, Spaces, Places, is a plan which includes policies to deliver the level of housing and other development set out in a preceding local plan (such as a local plan containing strategic policies), Places for Everyone, adopted since 21 March 2024.

3.3 Paragraph 235 of the NPPF instructs where such a scenario in paragraph 234 applies, that the plan will be examined under the relevant previous version of the Framework. Relevant, is considered to mean the July 2021 Framework, which is the Framework which Places for Everyone was examined under. As such, this Study is formed on the basis of the policies as provided in the 2021 NPPF and NPPG.

3.4 The NPPF reflects the fact that the traditional role of town centres has been somewhat undermined by structural changes in the retail sector, and that there may be a need to plan for a more diverse range of uses going forward. As such, the NPPF advocates a more flexible policy framework to support the future vitality and viability of town centres.

3.5 NPPF policies from the 2021 publication are considered on a thematic basis below.

Plan-Making

3.6 Paragraph 20 of the NPPF indicates that development plans should set out an overall strategy for the pattern, scale and design quality of development, including policies to deliver retail, leisure and other commercial development. Paragraph 31 states that the preparation and review of all policies should be underpinned by relevant and up-to-date evidence. This should be proportionate and take into account relevant market signals.

Building a Strong, Competitive Economy

3.7 Paragraph 81 of the NPPF indicates that planning policies and decisions should help create the conditions in which businesses can invest, expand, and adapt. Significant weight should be placed on the need to support economic growth and productivity, taking into account both local business needs and wider opportunities for development.

Ensuring the Vitality of Town Centres

3.8 Chapter 7 is titled 'Ensuring the vitality of town centres' which highlights the national objective to protect and enhance town centre vitality. Furthermore, paragraph 86 specifically relates to planning for town centres.

3.9 It states that:

'Planning policies should:

1. **define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;**
2. **define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;**
3. **retain and enhance existing markets and, where appropriate, re-introduce or create new ones;**
4. **allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;**
5. **where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and**
6. **recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.**

3.10 The requirement to plan to meet needs across a minimum ten-year period is a fairly new requirement, with earlier versions of the NPPF requiring town centre needs to be met in full across the entire plan period.

3.11 Paragraph 90 of the NPPF states that it is appropriate to identify local thresholds for the scale of edge of centre and out of centre retail and leisure development that should be the subject of an impact assessment. Any such threshold policy applies only to the impact test. All planning applications for main town centre uses that are not in an existing centre and not in accordance with an up-to-date development plan will generally be the subject of the sequential test.

Promoting Healthy and Safe Communities

3.12 Paragraph 92 seeks to support the social, recreational, and cultural facilities and services communities need. The guidance states that planning policies and decisions should:

a) Promote social interaction, including opportunities for meetings between people who might not otherwise come into contact with each other – for example through mixed-use developments, strong neighbourhood centres, street layouts that allow for easy pedestrian and cycle connections within and between neighbourhoods, and active street frontages;

b) Are safe and accessible, so that crime and disorder, and the fear of crime, do not undermine the quality of life or community cohesion – for example through the use of well-designed, clear and legible pedestrian and cycle routes, and high quality public space, which encourage the active and continual use of public areas; and

c) Enable and support healthy lives, through both promoting good health and preventing ill-health, especially where this would address identified local health and well-being needs and reduce health inequalities between the most and least deprived communities – for example through the provision of safe and accessible green infrastructure, sports facilities, local shops, access to healthier food, allotments and layouts that encourage walking and cycling.

Ensuring the Vitality of Town Centres Planning Practice Guidance

3.13 The Town Centres and Retail Planning Practice Guidance ('the Town Centres PPG') was published in July 2019 and thereafter updated in September 2020. It provides additional direction in respect of how retail and town centre planning policy should be applied in respect of plan-making and decision-taking. The Town Centres PPG affirms the

Government's aspiration to support town centres in order to generate employment, promote beneficial competition and create attractive, diverse places where people want to live, work and visit.

3.14 Paragraph 004 of the Town Centres PPG indicates that a local planning authority's strategy for their town centres should include:

- **The realistic role, function and hierarchy of town centres over the plan period. Given the uncertainty in forecasting long-term retail trends and consumer behaviour, this assessment may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed.**
- **The vision for the future of each town centre, including the most appropriate mix of uses to enhance overall vitality and viability.**
- **The ability of the town centre to accommodate the scale of assessed need for main town centre uses, and associated need for expansion, consolidation, restructuring or to enable new development or the redevelopment of under-utilised space.**
- **How existing land can be used more effectively – for example, the scope to group particular uses such as retail, restaurant and leisure activities into hubs or for converting airspace above shops.**
- **Opportunities for improvements to the accessibility and wider quality of town centre locations, including improvements to transport links in and around town centres, and enhancement of the public realm.**
- **What complementary strategies are necessary or appropriate to enhance the town centre and help deliver the vision for its future, and how these can be planned and delivered. For example, this may include consideration of how parking charges and enforcement can be made proportionate.**
- **The role that different stakeholders can play in delivering the vision. If appropriate, it can help establish the level of cross-boundary/strategic working or information sharing required between both public and private sector groups.**
- **Appropriate policies to address environmental issues facing town centres, including opportunities to conserve and enhance the historic environment.**

3.15 This Study seeks to provide a high-level authority-wide retail and leisure strategy, which will provide an overall context to the determination of planning applications for such uses and will support the Council's future development plan policy. The Study will also help underpin future town centre-specific strategies or masterplans.

3.16 Paragraph 006 of the Town Centres PPG identifies a series of key indicators of relevance in assessing the health of a centre over time. The indicators allow the role, performance, and function of centres to be monitored and are considered in greater detail at Section 4 of this report (which specifically addresses the vitality and viability of the defined town centres).

Use Classes Order

3.17 Significant changes to the Use Classes Order have been enacted through the Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020, which came into force on 1 September 2020.

3.18 The amendments include the revocation of Parts A and D, and the introduction of three new Use Classes, these being Classes E, F1 and F2. The Government's objective is that the changes will support the revival of the high street and allow for greater flexibility in changing uses within town centres without the need for planning permission.

3.19 In addition to the three new Use Classes, the changes also result in some changes in respect of uses classified as *sui generis*. In practical terms, the changes comprise:

- **Use Class E** – Commercial, business and service uses include: shops or retail; cafes or restaurants; financial services; professional services; any service appropriate to provide in a commercial, business or service locality; indoor sports, recreation or fitness; medical or health services; crèche, day nursery or day centre;

and, offices.

- **Use Class F1** – Learning and non-residential institutions include any non-residential use for the: provision of education; display of works of art; museum; public library or public reading room; public hall or exhibition hall; for or in connection with public worship or religious instruction; or, as a law court.
- **Use Class F2** – Local community uses include: a shop selling mostly essential goods, including food, no larger than 280 sq.m and where there is no other such facility within 1,000 metres radius of the shop's location. A hall or meeting place for the local community, an area or place for outdoor sport or recreation and an indoor or outdoor swimming pool or skating rink.
- **Sui Generis** – Use within this Class now include a public house, wine bar or drinking establishment; a drinking establishment with expanded food provision; a hot food takeaway for the sale of hot food where consumption of that food is mostly undertaken off the premises; live music venue; cinema; concert hall; bingo hall; or, dance hall.

3.20 The introduction of Class E is significant and places a wide range of uses including retail, food, financial services, gyms, healthcare, nurseries, offices, and light industry into a single use class. Unless restrictive planning conditions extinguish the provisions of Class E, the ability to change the commercial use of premises without planning permission allows centres to evolve in a flexible manner. Further analysis in respect of Class E Uses located outside of defined centres is contained within the Tameside Employment Land Study produced by BE Group, which forms part of the joint commission with this Study.

3.21 However, the provisions of the Use Classes Order are not linked to any spatial considerations. As such, the expanded Use Class E applies equally to both town centres and out of centre locations, and there may be unintended consequences in providing for additional flexibility across Class E outside of town centres. Accordingly, it may be necessary for the Council to apply restrictive conditions to certain forms of development to restrict the authorised use to that which has been justified in the application submission. This will help ensure that unacceptable impacts do not arise from future Class E development, which can occur in out of centre locations including employment areas.

Town Centre Use Permitted Development Rights

3.22 An amendment was made to the General Permitted Development (England) Order 2015 (the 'GPDO') in March 2021. This allows for the change of use from Class E properties to residential from August 2021 (extending a right that had previously been restricted to office uses). This permitted development right is subject to maximum size requirements, the property having been in use as Class E for two years, and the property having been vacant for three months. In addition to this, 'prior approval' for the change of use must be sought from the planning authority. Restrictions on this right apply in conservation areas and for nurseries and health centres, as well as in areas that are covered by an Article 4 direction.

Local Planning Policy Context

Adopted Development Plan

3.23 Tameside's current adopted development plan included saved policies of the Tameside Unitary Development Plan (UDP) 2004-2011 which was adopted in November 2004, Places for Everyone which was adopted in 2024 and the Greater Manchester Joint Waste and Minerals Development Plans (adopted in 2012 and 2013 respectively).

3.24 Homes, Spaces Places is currently being prepared and will replace all the remaining parts of the UDP.

Tameside Unitary Development Plan (UDP) 2004-2011

3.25 With regard to supporting the town centre and retail centres, the UDP recognises the important role of centres and aims to support their roles in regeneration, conserving borough's townscape heritage and retaining and promoting local identity in the built environment. It recognises their role as focal points for retailing, leisure, entertainment, administrative and commercial and cultural activities in the borough (para 1.7); focusing on locations within or on the edge of town centres for leisure and key sites within town's for employment growth (para 1.1). We provide a brief summary below on the currently adopted UDP policies.

Retail and Town Centres

3.26 Policy S1 states that the Council will identify and implement improvement and investment schemes to support and develop the role of the Borough’s centres. These include Ashton-under-Lyne as the sub-regional shopping centre, Hyde as a large district centre, Denton, Droylsden and Stalybridge as district centres, and Mossley and Hattersley as small district centres, each with their own identity. Improvements will:

- enhance the environmental quality and appearance of centres;
- support their role in providing office and other employment;
- improve accessibility by public and private transport and for pedestrians;
- make centres safer by designing out crime; and
- provide high-quality townscape, sensitive to people’s needs and respecting local character.

3.27 Policy S2 states that the Council will permit new retail developments within the Borough’s town centres (as defined on the proposals map). Where necessary, the Council will identify suitable sites for such development and promote their availability through measures such as design briefs and land assembly.

3.28 Policy S3 confirms that large-scale retail developments outside the Borough’s defined town centres will only be permitted where:

- there is a proven need for the proposed development;
- the development complies with the sequential approach, with first preference for town centre locations (where suitable and viable sites are available), followed by edge-of-centre, district and local centres, and then out-of-centre sites accessible by a choice of transport modes;
- the development would not result in an unacceptable loss of vitality and viability in any nearby town centre;
- the development would not cause an unacceptable increase in congestion on the surrounding highway network; and
- the site is accessible by public transport from a wide area and would not significantly extend journey patterns.

3.29 Where these criteria are satisfactorily addressed, the Council will first seek to meet identified needs at existing out-of-centre locations.

3.30 Policy S4 states that in the primary shopping areas of town centres, the Council will not permit changes of use from retail to non-retail where this would create an imbalance or dominant grouping of non-retail uses. A continuity of shop fronts is required within the primary shopping areas.

3.31 The policy further states that outside these areas, a diversity of uses will be supported where they contribute to the town centre’s overall appeal, minimise empty properties, and improve appearance. In Ashton town centre, particular consideration will be given to diversifying the leisure offer and avoiding street frontages dominated by the night-time economy that have no daytime attraction.

3.32 Policy S5 confirms that in local shopping centres and parades, and for individual neighbourhood shops, changes of use from retail to other uses will be permitted where:

- continued retail use does not appear viable;
- alternative uses would reduce vacancy and improve the local environment; and
- the day-to-day needs of the local community can still be met by other nearby facilities.

3.33 Policy S6 supports new neighbourhood foodstores, local shops and other small-scale outlets serving local needs where suitable sites or buildings are available, provided that:

- they will not adversely affect the vitality and viability of established district or local centres;
- they will not lead to a loss of amenity in surrounding residential areas; and
- they will not result in traffic problems on adjacent highways.

3.34 Policy S7 states that proposals for food and drink uses or amusement centres will only be permitted where they:

- do not harm the amenity of surrounding residential or sensitive areas;
- do not create a danger to road users; and
- do not, cumulatively, lead to an unacceptable change in the character of an area.

3.35 Policy S8 confirms that leisure proposals attracting large numbers of visitors will be permitted in the Borough's town centres. Such developments outside town centres must demonstrate need and apply the sequential approach, with preference given first to in-centre, then edge-of-centre, district/local centres, and finally out-of-centre locations accessible by a range of transport modes.

3.36 Other new, replacement, improved or extended facilities for indoor sport, recreation, leisure or tourism will be supported provided they do not harm residential amenity or cause highway issues. The Council will place particular emphasis on:

- maintaining and improving recreational opportunities at local/neighbourhood level;
- increasing provision in areas that are deficient or subject to housing growth; and
- ensuring provision meets identified needs in the District Sport and Recreation Strategy.

3.37 Policy S9 requires that the layout, design, appearance and operation of acceptable retail and leisure developments are of high quality and meet the following criteria:

- provide suitable parking, servicing and highway access, including for pedestrians, cyclists, disabled users and public transport, without unacceptable network impacts;
- use building design and materials that relate to local features and complement or enhance character;
- include landscaping and screening, retaining existing features where practical, to minimise visual impacts of plant, storage and servicing;
- avoid unacceptable impacts on neighbouring properties from noise, fumes, lighting, litter, traffic or other disturbance, and protect residential amenity, including hours of operation; and
- minimise opportunities for crime and anti-social behaviour.

3.38 Policy S10 confirms that refurbishment of existing out-of-centre retail locations will be permitted where there is no demonstrable conflict with the criteria outlined in Policy S3.

Places for Everyone (PfE) 2024

3.39 The Places for Everyone (PfE) Plan is the long-term strategic spatial plan of the nine Greater Manchester districts (Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Tameside, Trafford, and Wigan), adopted on March 21, 2024, which sets out the framework for jobs, new homes, and sustainable growth up to 2039.

3.40 The relevant policies as it pertains to retail uses are summarised below.

Policy JP-P 4 New Retail and Leisure Uses in Town Centres

3.41 The policy maintains and enhances the established retail and leisure hierarchy across Greater Manchester. Within this hierarchy, Ashton-under-Lyne is identified as the main town centre for Tameside. This designation confirms Ashton's role as the Borough's primary focus for new retail and leisure development.

3.42 Proposals for such uses should therefore be directed to Ashton-under-Lyne in the first instance, in line with the sequential approach set out in national and local policy, to support the vitality and viability of the town centre and ensure it continues to function as a key destination within the wider Greater Manchester centre hierarchy.

3.43 Paragraph 9.21 states that:

'The boundaries of the centres and detail of other centres at lower levels of the hierarchy are defined in district local plans. Appropriate large-scale retail and leisure development will be accommodated within the centres in the upper levels of the hierarchy. The need for the expansion of any existing centres, or the provision of new centres, will be identified in district local plans.'

Policy JP-Strat12: Main Town Centres

3.44 Policy JP-Strat12 provides an overview of the role of main town centres within Greater Manchester, and states that:

'The role of the main town centres as local economic drivers will continue to be developed, providing the primary focus for office, retail, leisure and cultural activity for their surrounding areas. Development here will offer a significant opportunity to reduce levels of poverty and deliver inclusive growth.

Opportunities to further increase the population catchments of these centres will be taken, including significantly increasing the resident population of the main town centres by providing a mix of type and size of dwellings supported by the necessary infrastructure and amenities including new and improved public spaces and green infrastructure. This will be achieved alongside, rather than displacing, the range of non-residential uses in the centres. Housing growth along the key public transport corridors into the main town centres will also be promoted, further increasing the population catchments of those centres.

The role of the main town centres as major public transport hubs will be developed and supported by a network of active travel routes, enabling residents to have improved access to opportunities across Greater Manchester as well as within the centres themselves.

Development will be carefully managed to ensure that the local distinctiveness of each main town centre is retained and enhanced. Opportunities will also be taken to protect and enhance natural and historic assets in the town centres.'

4. Healthcheck Assessments and Land Use

Introduction

4.1 Paragraph 86 of the 2021 NPPF indicates that planning policies should promote the long-term vitality and viability of town centres by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries. The same paragraph also states that town centres should accommodate a suitable mix of uses (including housing) and provide for development that reflects a centre's distinctive character.

4.2 Paragraph 006 of the Town Centres PPG identifies a range of indicators that should be assessed over time in reviewing the health of a town centre. The indicators include the following:

- diversity of uses;
- proportion of vacant street level property;
- retailer representation and intentions to change representation;
- pedestrian flows;
- accessibility;
- perceptions of safety and occurrence of crime;
- the state of town centre environmental quality;
- the balance between independent and national multiple retailers; and
- the extent to which there is an evening and night-time economy offer.

4.3 New healthcheck assessments has been undertaken for the town centres within Tameside. The detailed healthcheck assessment is provided at Appendix 3 and we provide a summary of the key conclusions below.

4.4 The assessments is based on site visits undertaken in July 2025. The assessment should be taken as a 'snapshot' of the performance of the centre at a moment in time.

Ashton Town Centre

4.5 Ashton is the principal retail and leisure destination within Tameside, being the largest of the Borough's six defined centres. Overall there are 445 retail, leisure and service units located within the centre as defined by Experian/Goad, accounting for 89,024 sq.m gross of commercial floorspace.

Table 4.1: Composition of Ashton Town Centre

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	21,612	24.3%	29.2%	108	24.3%	26.3%
Convenience	19,979	22.4%	15.6%	37	8.3%	9.3%
Financial Service	4,302	4.8%	6.2%	33	7.4%	8.3%
Leisure Service	14,493	16.3%	26.7%	82	18.4%	25.8%
Retail Service	7,803	8.8%	7.4%	88	19.8%	16.0%
Vacant	20,836	23.4%	14.3%	97	21.8%	14.1%
Total	**89,024**	**100.0%**	**100.0%**	**445**	**100.0%**	**100.0%**

Source: Composition of centre derived from Nexus Planning survey of June 2025; UK Average from Experian Goad report of May 2025.

4.6 In keeping with its role as the principal shopping centre, Ashton is a focus for large-format national multiple retailers, especially in the comparison sector. These are concentrated within the Arcades and Ladysmith Shopping Centres and Ashton Retail Park. The size of the town centre allows for a wide degree of consumer choice, although representation does skew towards the discount or value end of the market. Ikea lies just outside the town centre, as defined by Goad, but plays a key role in attracting trade and footfall from a wide catchment located across the Study Area and beyond.

4.7 Ashton's convenience offer meets the day-to-day needs of its local residents. Asda and Lidl supermarkets provide the key convenience anchors, and these are supplemented by both smaller national multiples such as Iceland, Heron Foods, and Holland & Barrett; together with a reasonable range of smaller independent stores including bakeries, delicatessens and convenience stores. Ashton Market plays an important role both in attracting visitors to the town centre and in strengthening and diversifying its retail offer. At the time of our site visit, the Market Hall and Market Square were undergoing major renovation works (as discussed in more detail below).

4.8 The leisure provision in the town centre falls below UK averages both in terms of the number of units and floorspace, although there is a reasonable variety of operators present which includes amusement centres, bars and restaurants, cafes, pubs, and takeaways. The evening economy could be more developed for a centre of Ashton's size, but there are restaurants scattered throughout and a small concentration of pubs on Wellington Road. The only large-format leisure operator present in the town centre is the Buzz Bingo unit at Ashton Retail Park. Notably, however, Ashton Moss Leisure Park is situated in an out-of-centre location to the west and provides for larger format and national multiple cinema, bowling, restaurant and pub uses. The Leisure Park and surrounding area are also served by a large Village hotel, which provides overnight stays for a wide catchment (including Manchester) due to its proximity to the Metrolink stop and M60 motorway junction.

4.9 Over the past decade, Ashton has enjoyed significant public and private investment resulting in major upgrades to its Bus Station and the ongoing works to renovate its Market Hall and Indoor Market. As a consequence, the town centre benefits from excellent accessibility from Manchester city centre and other destinations across Greater Manchester.

4.10 Several streets in the centre are pedestrianised, including Warrington Street, Market Avenue, Staveleigh Way and Bow Street, which form the busiest pedestrian circuit and link the Arcades, Market Hall and Market Square. The forthcoming public realm improvements around Market Square will create an attractive shopping and leisure environment that further encourages footfall in this central area.

4.11 Masterplans for Ashton-under-Lyne and St Petersfield have been adopted with the aim of building on the successes of recent years to bring new investment, activity, footfall and spend to the town centre.

4.12 Key challenges for Ashton include:

- The high proportion of vacant units and floorspace compared to national averages. While the ongoing significant regeneration works are anticipated to have a number of positive impacts and spin-off benefits which will enhance the vitality of the town centre, it will be important to support measures that ensure current vacancies can be repurposed and reoccupied in the short-term.
- The evening economy is somewhat limited with few late-opening leisure operators. Ashton would therefore benefit from the introduction of additional evening leisure uses, particularly family-friendly food and drink options and events, to ensure that all parts of the town centre feel vital and safe after daylight hours.

- There are opportunities to substantially improve the environmental quality and connectivity of some secondary streets, with narrow pavements, poor surfacing, and inactive frontages contributing to a sense of neglect for instance around Fleet Street. Wayfinding could also be enhanced in places, particularly between the town centre and the railway station.

Hyde Town Centre

4.13 Hyde is the second largest of Tameside's defined centres, providing for 303 retail, leisure and service units amounting to 58,772 sq.m gross. The town centre is focussed around Market Street and Clarendon Square Shopping Centre, with the latter providing for a number of national multiple retailers in the comparison sector and an Indoor Market. The town centre's brick and mortar retailers are complemented by Hyde's Outdoor Market, which comprises 48 stalls and regularly holds specialist events.

Table 4.2: Composition of Hyde Town Centre

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	15,165	25.8%	28.7%	81	26.7%	26.1%
Convenience	20,090	34.2%	15.3%	32	10.6%	9.3%
Financial Service	2,483	4.2%	6.1%	18	5.9%	7.9%
Leisure Service	8,841	15.0%	27.7%	58	19.1%	26.5%
Retail Service	5,198	8.8%	7.2%	59	19.5%	15.8%
Vacant	6,995	11.9%	14.5%	55	18.2%	14.1%
Total	**58,772**	**100.0%**	**100.0%**	**303**	**100.0%**	**100.0%**

Source: Composition of centre derived from Nexus Planning survey of June 2025; UK Average from Experian Goad report of May 2025

4.14 Hyde performs well in fulfilling the retail needs of local residents. The centre contains a number of national multiple comparison operators including Boots, Peacocks, and Poundstretcher, which are concentrated within Clarendon Square and around Market Place. The town centre has a relatively high proportion of independent non-food traders and these sell a wide range of goods including antiques, clothing, furniture, and household items. The Indoor and Outdoor Markets add to this variety and concentrates footfall on a central focal point.

4.15 Large Morrisons and Asda superstores and a Food Warehouse supermarket at the peripheries of the town centre provide for the vast majority of residents' day-to-day convenience needs. Independent convenience provision is also fairly strong, and again supplemented by the Market traders, which focus on traditional and specialist food products.

4.16 As with Ashton, Hyde's proportions of leisure units and floorspace fall below UK averages. That said, the town centre does contain a reasonably good variety of food and drink operators, including some national multiples such as Starbucks, Costa and Subway. There is a small cluster of pubs around Market Place.

4.17 Hyde town centre benefits from its own train station and bus linkages to destinations across Tameside and Greater Manchester, although the Metrolink network does not extend here. Hyde's linear layout and generally flat topography make it easily navigable for visitors travelling on foot. The shopping environment in Clarendon Square and in the pedestrianised part of the Market Place is well-maintained and generally pleasant. However, Market Street and the secondary shopping streets do contain a number of takeaway units which are shuttered during the day, which result in stretches of unattractive and inactive frontages.

4.18 Key challenges for Hyde town centre are as follows:

- While the floorspace vacancy rate is relatively low, the unit vacancy rate is above the national average. This suggests that Hyde suffers from an oversupply of small-scale premises that were previously in retail use. This issue is most prevalent along Market Street, although there are empty units scattered throughout the town centre including within the Shopping Centre.
- The clusters of inactive street frontages arising from the high unit vacancy rate and shuttered takeaways, especially along Market Street and in the secondary streets, detract somewhat from the environmental quality of parts of the centre.
- The evening economy could be further developed through the introduction of a more diverse range of late-opening uses, especially restaurants, and/or the creation of a focal point to encourage food and drink operators to be mutually reinforcing. This could be a beneficial way to repurpose some of the town's vacant former retail floorspace.
- While footfall has still not quite recovered to pre-pandemic levels, Hyde has had some success in boosting visitor counts in recent years through pop-up markets and events, including the Hyde Central event in September 2025, the summer-time Artisan Market, and the Classic Car Show that takes place in Civic Square. Increased focus on these events, together with better use of the Town Hall and adjacent Market Square in line with the Hyde Masterplan, could help to attract new visitors and cement Hyde's place as a regionally significant cultural destination.

Denton District Centre

4.19 Denton district centre, as defined by Goad, contains 172 units amounting to 32,260 sq.m of commercial floorspace. The district centre is roughly cruciform in nature, being focussed around Hyde Road, which runs west to east; and Ashton Road/Stockport Road, which runs north to south. There is a large Morrisons supermarket located in the south-east of the centre.

4.20 Denton is highly accessible by car, located close to the M67 and M60 and served by the A57/Hyde Road. The town centre also benefits from excellent bus connectivity, with frequent services to and from Manchester and other destinations across Tameside such as Ashton. Denton also benefits from its own train station to the west of the town centre but within walking distance. However, departures are limited to just one service per week, running on Saturdays in each direction to connect with Stockport and Stalybridge.

Table 4.3: Composition of Denton District Centre

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	5,199	16.1%	28.7%	28	16.3%	26.1%
Convenience	10,271	31.8%	15.3%	15	8.7%	9.3%
Financial Service	1,030	3.2%	6.1%	12	7.0%	7.9%
Leisure Service	10,269	31.8%	27.7%	57	33.1%	26.5%
Retail Service	3,852	11.9%	7.2%	45	26.2%	15.8%
Vacant	1,639	5.1%	14.5%	15	8.7%	14.1%
Total	**32,260**	**100.0%**	**100.0%**	**172**	**100.0%**	**100.0%**

Source: Composition of centre derived from Nexus Planning survey of June 2025; UK Average from Experian Goad report of May 2025

4.21 Comparison provision in Denton largely comprises independent traders, who operate from a variety of sizes and formats of units. The offer is reasonably good, considering that the proportion of units in this use is lower than the national average, and includes shops selling arts and crafts, cards, carpets, chemist goods, flowers, household goods and pet products. There is, however, very limited representation in the clothing and footwear sector outside of charity shops.

4.22 Morrisons and Lidl supermarkets are the key large-format convenience anchors and provide for some comparison goods as well as the majority of convenience essentials. These are supplemented by a number of smaller food retailers, although the offer lacks diversity and mostly comprises convenience stores and vape shops. It is clear that Denton functions in part as a convenience shopping destination that plays an important role in providing for the daily needs of local residents.

4.23 Leisure is the most prevalent use in the district centre, with the proportions of both units and floorspace being well above national averages. Active Tameside's flagship Tameside Wellness Centre is located in the north-east of Denton and offers health and wellbeing facilities and activities such as soft play, bowling and a spa. There is additional leisure provision in the form of gym, hotel and soft play facilities on Windmill Lane, though these are located outside the defined town centre boundary.

4.24 Denton town centre also benefits from a strong range of food and drink operators, many of which contribute to its evening economy. The vast majority of the centre's leisure occupiers are independents, although there is an element of national multiple representation from operators such as Domino's, Subway and William Hill.

4.25 Overall, Denton has low levels of vacancy and a strong presence of convenience, leisure, and service uses, highlighting its function as a destination that meets many of the day-to-day needs of its local residents.

4.26 Key challenges for Denton include:

- Pedestrian and cycle linkages and wayfinding could be improved both around the centre and between the traditional high street and Crown Point to the north.
- Denton's evening economy provision is extensive relative to other centres in Tameside, but weighted towards pubs and takeaways with few family-friendly or cultural venues. Greater diversification of the late-opening uses could help to create a centre that feels safe for everyone in the evenings.

Droylsden District Centre

4.27 Droylsden district centre is one of Tameside's smallest defined centres, with its Experian/Goad area comprising 120 units and 24,522 sq.m of commercial floorspace. The centre benefits from good accessibility, including tram connections via its own Metrolink stop. The town centre lies along the East Manchester line, and therefore has good transport connections to Manchester City Centre, the Etihad football stadiums and Co-op Live, and local destinations such as Ashton town centre.

4.28 Market Street forms the main shopping and leisure street, and Greenside Shopping Centre in the north-west of the centre provides for large-format retail warehouse style units. A Tesco store of approximately 3,000 sq.m gross is located to the west of these units.

Table 4.4: Composition of Droylsden District Centre

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	5,078	20.7%	28.7%	16	13.3%	26.1%
Convenience	4,221	17.2%	15.3%	10	8.3%	9.3%
Financial Service	509	2.1%	6.1%	5	4.2%	7.9%
Leisure Service	3,821	15.6%	27.7%	30	25.0%	26.5%
Retail Service	1,611	6.6%	7.2%	23	19.2%	15.8%
Vacant	9,282	37.9%	14.5%	36	30.0%	14.1%
Total	**24,522**	**100.0%**	**100.0%**	**120**	**100.0%**	**100.0%**

Source: Composition of centre derived from Nexus Planning survey of June 2025; UK Average from Experian Goad report of May 2025

4.29 Comparison retail in Droylsden has struggled in recent years due to the well-documented challenges faced by the UK market as a whole. These issues have particularly impacted national multiple non-food operators and this trend is reflected in the high levels of vacancy within the Greenside Shopping Centre, which would have previously contained uses of this nature. However, there are some large-format comparison brands which continue to trade from the Shopping Centre, these being B&M, Poundland and Home Bargains. The remainder of Droylsden's non-food retail offer largely comprises small-format independents.

4.30 Tesco and Iceland are the main convenience operators, and these retailers also provide for some comparison shopping needs. There are also some smaller convenience stores scattered along Market Street.

4.31 Although the proportion of leisure units is below the UK average, the number of units in this use is roughly in line with the national average. This reflects the fact that the majority of Droyslden's leisure operators trade from commercial stock that is small in scale. The leisure offer is reasonably good for a district centre of this size, comprising a range of bars, cafes, restaurants and takeaways that bring some footfall and activity to Droylsden in the evenings. Droylsden Football Club is located in the north of the centre.

4.32 The Droylsden Marina offers leisure opportunities and moorings at the start of 9 miles of lock-free canal connecting up with Portland Basin in Ashton. While this location creates opportunities for canal-side walking and cycling, improvements to the wayfinding and pedestrian connections into the town centre would be needed in order to take maximum advantage.

4.33 Vacancy rates are a key challenge in Droylsden. Both the proportions of vacant floorspace and units are more than double the national average, with the level of unoccupied floorspace being particularly pronounced due to the high number of empty large-format units at the Greenside Shopping Centre. However, this site benefits from planning permission for its redevelopment, with its owners (New Era) working to realise a masterplan that will result in a mix of residential and reconfigured retail uses at this location.

4.34 Key challenges for Droylsden include:

- The town centre suffers from very high vacancy levels compared to local and national averages and comparison uses are also under-represented, which is partly a reflection of the vulnerability of Greenside Shopping Centre in the face of the challenges affecting the wider UK retail market in recent years (including the move to online shopping and the Covid-19 pandemic). The Shopping Centre and adjacent Concord Suite are soon to be redeveloped, with the introduction of an element of residential use. This scheme is in addition to a number of other forthcoming residential developments outlined in the Council's Droylsden Masterplan adopted in October 2024, including new housing close to the Marina. The introduction of additional footfall, activity and spending should help to support the future vitality and viability of the town centre.

- The quality of the town centre environment would, in places, benefit from enhancement. The ongoing Greenside Shopping Centre and Concord Suite redevelopment will help to revitalise this part of the town centre, and the Masterplan also includes plans to upgrade the wider public realm in Droylsden through improved connectivity and the revitalisation and greening of public spaces at key sites such as the Hollinwood Canal Park.

Stalybridge District Centre

4.35 Stalybridge, as defined by Experian Goad, comprises 168 units and 28,269 sq.m of floorspace in retail, service and leisure uses. Market Street and Melbourne Street form the main shopping and leisure frontages, and these are connected via road and pedestrian footpaths to a Tesco superstore which lies to the east across the Huddersfield Narrow Canal.

Table 4.5: Composition of Stalybridge District Centre

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	4,603	16.3%	28.7%	40	23.8%	26.1%
Convenience	9,135	32.3%	15.3%	15	8.9%	9.3%
Financial Service	768	2.7%	6.1%	7	4.2%	7.9%
Leisure Service	7,885	27.9%	27.7%	47	28.0%	26.5%
Retail Service	2,801	9.9%	7.2%	34	20.2%	15.8%
Vacant	3,076	10.9%	14.5%	25	14.9%	14.1%
Total	**28,269**	**100.0%**	**100.0%**	**168**	**100.0%**	**100.0%**

Source: Composition of centre derived from Nexus Planning survey of June 2025; UK Average from Experian Goad report of May 2025

4.36 As with most of Tameside's centres, the retail offer is focussed on the day-to-day needs of residents. The balance, particularly in the comparison sector, leans towards independent rather than national multiple operators and reflects the size and format of much of the district centre's commercial stock. The non-food offer is reasonably varied and supplemented by the range of comparison goods on offer at the peripheral supermarkets.

4.37 These supermarkets comprise the Tesco superstore, which plays a key anchor role, and a moderately sized Aldi store in the east. They are complemented by a number of independent food operators, some of very high quality, offering a range of specialist goods including a butcher, greengrocer, and delicatessens.

4.38 Stalybridge was once known for its vibrant nightlife which inspired the nickname 'Staly Vegas'. While the centre's evening economy has declined since this highpoint, in part due to issues of antisocial behaviour it generated, there remain a good number of pubs and takeaways particularly around Market Street in the north of the centre. In more recent years, however, Stalybridge has gained success as a local food and drink destination, with its reputation being enhanced by its popular Street Fest (street food) Festival. The current offer includes a number of good quality cafes and restaurants which reflect the positive developments in the district centre's leisure economy.

4.39 Stalybridge's vacancy rates are below the national average in terms of floorspace, and roughly in line in terms of units. There is a cluster of vacancies around Corporation Street in the central part of Stalybridge, but a number of these units were under alteration on the day of our fieldwork visit.

4.40 In recent years, Stalybridge has benefitted from investment in the heritage environment of the town centre, including public realm improvements on Market Street and works to the Civic Hall, together with a successful programme of civic activities and events.

4.41 A number of development opportunities are currently being brought forward, including a new multi-storey car park on Waterloo Road and new residential developments. Moreover, planned works to the Astley Cheetham Library and Art gallery aim to support the cultural quarter of the town.

4.42 In addition, the Stalybridge West proposals include a new footbridge across the River Tame which aims to improve connectivity and act as a vital active travel link between the station and the town centre.

- Key challenges for Stalybridge include: building on and sustaining the success of recent and current investments, including encouraging the town centre's growing reputation as a destination for quality food and drink, as well as cultural and civic activities; and
- increasing footfall, which has still not quite recovered to pre-pandemic levels, although we note the increased dwell times in recent years and the ongoing works to enhance active travel and connectivity in and around the town centre.

Mossley Local Centre

4.43 Mossley is Tameside's smallest defined centre, both in terms of units (54) and the quantum of commercial floorspace (6,154 sq.m). Our healthcheck focusses on the area known locally as Top Mossley. Further commentary in respect of the context of both parts of Mossley is provided in the recommendations part of this Study.

Table 4.6: Composition of Mossley Local Centre

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	552	9.0%	28.7%	7	13.0	26.1%
Convenience	1,232	20.0%	15.3%	5	9.3	9.3%
Financial Service	181	2.9%	6.1%	3	5.6	7.9%
Leisure Service	1,355	22.0%	27.7%	13	24.1	26.5%
Retail Service	585	9.5%	7.2%	12	22.2	15.8%
Vacant	2,249	36.5%	14.5%	14	25.9	14.1%
Total	**6,154**	**100.0%**	**100.0%**	**54**	**100.0%**	**100.0%**

Source: Composition of centre derived from Nexus Planning survey of June 2025; UK Average from Experian Goad report of May 2025

4.44 Mossley plays an important retail and service role for its residents, many of whom benefit from the local centre's rail connectivity with Manchester. The retail offer reflects this function, and provides for a good range of daily essentials. The leisure offer is fairly well-developed for a centre of this size, with a number of pubs and restaurants that cater to local trade.

4.45 Mossley also has a civic function through its own Parish Council (Mossley Town Council) and is the location of several key facilities including George Lawton Hall, a popular theatre; Mossley Heritage Centre; a weekly market including a Farmers' Market; a football club; and Industrial Heritage Trail; a community centre; and the Vale performance venue.

4.46 The local centre is anchored by its Co-op store, which is supported by a range of independents serving a localised catchment that benefits from connectivity with Manchester city centre and other destinations across Greater Manchester.

4.47 While it enjoys consistently high footfall and good environmental quality, Mossley does suffer from higher-than-average vacancy levels.

4.48 Nonetheless, we consider that Mossley local centre continues to perform well in its role in providing for the everyday shopping and service needs of its local community.

4.49 Key challenges for Mossley include:

- addressing the higher-than-average vacancy rates through the diversification, repurposing and re-use of its unoccupied commercial floorspace;
- some of the local centre's shopfronts could benefit from improvements and better maintenance; and
- the sloping nature of the local topography can make pedestrian accessibility challenging.

5. Population and Expenditure

Study Area and Household Survey

5.1 A survey of 1,700 households was undertaken by NEMS Market Research in order to ascertain where residents go to undertake a range of shopping and leisure activities.

5.2 The below Table 5.1 identifies the postcode sectors which define each of the zones. A plan defining the geographic extent of the Study Area and the below zones is provided at Appendix 1.

Table 5.1: Study Area Zones by Postcode Sector

Survey Zone	Postcode Sectors
1	OL7 0, OL6 6, OL6 7
2	OL6 8, OL6 9, OL7 9
3	OL5 0, OL5 9
4	SK15 1, SK15 2, SK15 3
5	SK16 4, SK16 5
6	M34 5, M43 6, M43 7
7	SK14 3, SK14 6, SK14 8
8	SK14 1, SK14 2, SK14 4, SK14 5
9	M34 2, M34 3, M34 6, M34 7
10	M40 1, M35 0, M11 1, M11 4, M18 8
11	M35 9, OL8 2, OL8 3, OL4 5
12	OL4 4, OL3 6, OL3 7
13	SK13 0, SK13 1, SK13 2, SK13 5, SK13 6, SK13 7, SK13 8
14	SK6 1, SK6 2, SK6 4, SK5 8
15	SK5 6, SK5 7, M18 7

5.3 The above zones were used as the basis for the NEMS household survey, which underpin the quantitative retail capacity assessment which follows at Section 7 of the report and the quantitative leisure capacity assessment at Section 8.

5.4 To identify the expenditure claimed by retail destinations (and the capacity which is potentially available to support additional retail and leisure development), the first step is to estimate the population and future convenience and comparison goods expenditure associated with the Study Area. We provide a similar summary in respect of the food and beverage spending later in this report.

Study Area Population

5.5 The population within each postcode sector and each zone at 2025 has been calculated using Experian Micromarketer G3 data (2024 estimate, which was issued in August 2025). We have confirmed with Council Officers that Experian's population projections are broadly consistent with the level of growth which is being planned for across the authority area in practice.

5.6 Table 5.2 below sets out Experian's population projections for each zone in the Study Area for reporting years 2025, 2030, 2035, 2040 and 2042.[10]

Table 5.2: Estimated Study Area Population by Survey Zone

Zone	2025	2030	2035	2040	2043
1	16,517	17,017	17,578	18,240	18,532
2	33,635	34,218	34,870	35,497	35,760
3	11,905	12,091	12,266	12,517	12,592
4	29,033	29,543	30,057	30,661	30,915
5	19,948	20,273	20,613	20,988	21,154
6	39,180	39,820	40,443	41,150	41,462
7	15,742	15,994	16,268	16,538	16,642
8	35,775	36,543	37,349	38,299	38,706
9	34,599	34,943	35,171	35,418	35,485
10	47,575	48,277	49,280	50,188	50,506
11	43,455	44,255	45,070	45,940	46,350
12	16,383	16,550	16,640	16,730	16,711
13	33,740	34,448	35,103	35,849	36,161
14	31,320	31,779	32,305	32,817	33,128
15	38,261	39,028	39,970	41,064	41,510
Total	**447,068**	**454,779**	**462,983**	**471,896**	**475,614**

Source: Table 1 of Appendix 4

5.7 Based on Experian's population projections, we estimate that the Study Area population will increase from 447,068 persons at 2025 to 475,614 persons at 2042. This equates to an increase of 28,546 persons (or 6.4% over the 18-year period).

Retail Expenditure

5.8 In order to calculate per capita convenience and comparison goods expenditure, we have utilised Experian Micromarketer G3 data, which provides detailed information on local consumer expenditure that takes into consideration the socio-economic characteristics of the local population. The base year for the Experian expenditure data is 2023. Our methodology takes account of the fact that some special forms of trading expenditure[11] is not available to support retail floorspace, and then allows for increases in per capita expenditure growth on an annual basis.

5.9 Figure 5 of Appendix 3 of ERPBN22 provides estimates in respect of the proportion of convenience and comparison goods expenditure that will be committed through special forms of trading both now and in the future. We have 'stripped out' any survey responses which relate to expenditure committed via special forms of trading and have instead made an allowance derived from Experian's recommendations (which we consider to be the most appropriate means by which to account for such expenditure).

[10] The reporting years relate to five year intervals across the forthcoming plan period (working back from 2040), with an additional reporting year of 2043.
[11] Identified as comprising sales via the internet, mail order, stalls and markets, door-to-door and telephone sales (i.e. all non-store sales).

5.10 We set out Experian's expenditure growth estimates within the below Table 5.3.

5.11 In considering special forms of trading, many products which are ordered online are actually sourced from a store's shelves or stockroom in practice (this is particularly the case with convenience goods). As such, expenditure committed in this manner acts to sustain shops and can be considered 'available' to support floorspace within the Study Area. Accordingly, in order not to overstate the influence of special forms of trading on retailers, our methodology utilises Experian's 'adjusted' allowance for special forms of trading (which is provided at Figure 5 of ERPBN22). This allowance indicates that 5.0% of convenience goods expenditure and 23.1% of comparison goods expenditure is 'lost' to shops at base year 2023 through special forms of trading purchases.

5.12 Having made an allowance for special forms of trading, we then take account of projected changes in expenditure in accordance with the recommendations provided by Figure 6 of Appendix 3 of ERPBN22. Experian provides overall growth rates and 'adjusted' rates, which account for any additional increases in expenditure lost to special forms of trading. The latest growth rates suggest that growth in comparison goods expenditure should pick up in the next few years as confidence in the economy returns, with this following a number of turbulent years following the start of the Covid-19 pandemic in 2020. The applicable annual per capita growth rates are set out below at Table 5.3.

Table 5.3: Experian Retail Planner Briefing Note 22 Convenience and Comparison Goods Annual Per Capita Growth Rates

Year	Convenience Goods	Convenience Goods 'Adjusted SFT'	Comparison Goods	Comparison Goods 'Adjusted SFT'
2023	-2.8	-3.3	-1.7	-2.2
2024	-2.4	-1.9	-2.0	-1.7
2025	-1.3	-0.9	-0.7	0.4
2026	-1.0	-0.7	0.7	0.9
2027	-1.1	-0.6	1.0	1.3
2028	-0.9	-0.4	1.8	2.0
2029	-0.8	-0.4	2.0	2.2
2030	-0.8	-0.4	2.0	2.2
2031	-0.8	-0.4	1.9	2.2
2032	-0.8	-0.3	1.9	2.2
2033	-0.8	-0.3	1.9	2.2
2034	-0.8	-0.3	1.9	2.1
2035	-0.7	-0.3	1.9	2.1
2036	-0.7	-0.3	1.8	2.1
2037	-0.7	-0.3	1.8	2.1
2038	-0.7	-0.3	1.8	2.1
2039	-0.7	-0.3	1.8	2.1
2040	-0.7	-0.3	1.8	2.0

Source: Figure 7 of Appendix 3, Experian Retail Planner Briefing Note 22 (March 2025)

5.13 For convenience goods, Experian does not forecast any per capita expenditure growth across the entire period to 2040. The position in respect of comparison goods expenditure is more positive.

5.14 This Study utilises the most up to date Experian expenditure data and growth forecasts. However, longer term growth forecasts (beyond the next ten years) should be treated with caution given the inherent uncertainties associated with predicting the performance of the economy over time (particularly in the current economic, health and political climates). As such, assessments of this nature should be reviewed on a regular basis to ensure that forecasts over the medium and longer term reflect changing circumstances.

5.15 In this regard, we note that paragraph 86 of the NPPF requires local planning authorities to allocate sites to meet likely town centre needs **'…looking at least ten years ahead'**, which differs from the previous requirement to meet needs across the entire plan period. This change is reflective of turbulent economic conditions and the pace of change within the retail sector in recent years. By applying Experian's recommendations in respect of special forms of trading and expenditure growth, we can produce expenditure estimates for each survey zone and the overall Study Area at 2025, 2030, 2035, 2040 and 2042.

Convenience Goods Expenditure

5.16 Taking into account the Study Area resident population and the available per capita convenience goods expenditure, we estimate that £1,156.1m[12] of convenience goods expenditure originates within the Study Area at 2025. The below Table 5.4 indicates that available Study Area convenience goods expenditure is forecast to remain consistent at £1,155.2m at 2042, although there will be a drop to £1,146.9m at 2030.

Table 5.4: Total Available Study Area Convenience Goods Expenditure

2025 (£m)	2030 (£m)	2035 (£m)	2040 (£m)	2042 (£m)
1156.1	1146.9	1148.8	1153.2	1155.2

Note: In 2023 prices

5.17 Table 5.5 indicates that this represents a relatively static level of convenience expenditure available across the Study Area between 2025 and 2043.

Table 5.5: Growth in Available Study Area Convenience Goods Expenditure

Growth 2025-2030 (£m)	Growth 2025-2035(£m)	Growth 2025-2040 (£m)	Growth 2025-2043 (£m)
-9.3	-7.4	-2.9	-0.9

Note: In 2023 prices

5.18 We have assumed that 75% of available convenience goods expenditure would take the form of main food shopping and that 25% would take the form of top-up shopping (which relates to smaller purchases often made using a basket rather than a shopping trolley).[13]

5.19 By applying this ratio, we estimate that main food shopping trips account for £867.1m of Study Area convenience goods expenditure at 2025, and top-up shopping trips account for £289.0m.

Comparison Goods Expenditure

5.20 For comparison goods, Table 5.6 sets out our estimate that the resident population of the Study Area will generate £1,340.9m of comparison goods expenditure at 2025. Available comparison goods expenditure is then forecast to increase to £1,991.7m at 2042.

[12] In 2023 prices, as is every subsequent monetary reference.
[13] This is a standard split applied in undertaking this exercise.

Table 5.6: Total Available Study Area Comparison Goods Expenditure

2025 (£m)	2030 (£m)	2035 (£m)	2040 (£m)	2042 (£m)
1,340.9	1,485.2	1,682.0	1,899.7	1,991.7

Note: In 2023 prices

5.21 The identified increase in comparison goods expenditure growth is substantial, but it represents a level of annual growth that is more circumspect than that which has been achieved in the past. This is due to both a reduction in the overall level of growth when compared to that achieved in the early part of this millennium, and as a result of further forecast increases in expenditure committed via special forms of trading (most obviously, internet shopping).

5.22 As the below Table 5.7 identifies, our assessment estimates that there will be an increase of £650.8m (equating to 48.5%) in respect of Study Area comparison goods expenditure between 2025 and 2042.

Table 5.7: Growth in Available Study Area Comparison Goods Expenditure

Growth 2025-2030 (£m)	Growth 2025-2035 (£m)	Growth 2025-2040 (£m)	Growth 2025-2042 (£m)
144.3	341.0	558.8	650.8

Note: In 2023 prices

5.23 We sub-divide comparison goods expenditure into eight categories, these being: 'DIY', 'Electrical' and 'Furniture' (collectively referred to as bulky goods); and 'Clothing and Footwear', 'Books, CDs and DVDs', 'Health, Beauty and Chemist Goods', 'Small Household Goods', and 'Toys, Games, Bicycles and Recreational Goods' (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zonal basis. Experian's estimates are reflected in the detailed expenditure tables set out at Table 7b of Appendix 4 of this report.

5.24 In considering expenditure growth, it should be noted that not all growth arising within the Study Area is available to support additional floorspace in the Tameside authority area. Instead, account needs to be taken of:

- the market share of expenditure secured by retailers within the Tameside authority area (and the fact that many needs are successfully met outside the Borough);
- the claim made by existing retailers on expenditure growth (the future efficiency of retail floorspace); and
- the expenditure that will be claimed by committed retail developments.

5.25 These issues are addressed in the assessment of retail capacity provided in Section 7 of this report.

6. Market Research – Household Surveys

Market Share Analysis: Household Survey Results

6.1 The NEMS household survey identifies where residents travel to undertake a range of shopping and leisure activities. The summary of results provided in this section focuses on the market share of shopping trips secured by retail venues for various types of shopping. In July 2025, a survey of 1,700 households was undertaken by NEMS within the defined Study Area to ascertain where residents go to undertake a range of shopping and leisure activities.

6.2 In reviewing the Study Area, it is important to recognise that the vast majority of convenience goods expenditure generated within a given area is generally claimed by local foodstores. This is because shoppers look to source convenience goods close to home. Comparison goods shopping is more likely to result in longer trips to source goods at higher order destinations. As such, it is to be expected that a substantial proportion of comparison goods shopping trips 'leak' outside of the Study Area to shopping venues offering greater choice.

6.3 The household survey is reproduced as part of Appendix 2 of this Study. In retail terms, the principal purpose of the survey is to establish:

- patterns of convenience goods spending, based on the location of:
  - the shops or shops respondents last visited and visited 'the time before last' to undertake their main food shop; and
  - the shop or shops respondents last visited and visited 'the time before last' to undertake their main top-up food shop.

- patterns of comparison goods spending, based on the local of the respondent's last shopping trip to purchase the following types of comparison goods:
  - clothing and footwear;
  - books, CDs, DVDs and stationery;
  - small household goods, such as home furnishings, clocks, jewellery, glass and china;
  - toys, games, bicycles and recreational goods;
  - chemist goods, including health and beauty items;
  - electrical goods, such as televisions, washing machines and computers;
  - DIY and gardening goods; and
  - furniture, carpets and floor coverings.

6.4 The analysis which follows considers market share for the above sub-sectors. Our assessment is based on the market share of expenditure to particular 'bricks and mortar' retail destinations. For comparison goods, the zonal market share secured by each retail destination for each of the above eight sub-sectors is taken directly from the corresponding household survey question responses.

6.5 For convenience goods, the methodology differs. We have found that retail assessments of this nature can often overstate the turnover of discount foodstores and understate the turnover of larger format stores operated by the 'big four'. This is because apportioning 'main food' convenience goods expenditure in accordance with a household survey fails to account for the fact that goods are generally cheaper at discount foodstores. Such foodstores are also typically of a lesser scale and may not sell all products (for example, they may have a lesser range in respect of ingredients and in respect of ready meals). The consequence of this is that trips to a discount foodstore may often result in a lesser level of expenditure than trips to a large food superstore.

6.6 For convenience goods, our household survey asks respondents the shop they last visited and visited 'the time before last' to undertake their main food shop.

Retail Goods Market Share Analysis

Convenience Goods Market Share

6.7 Our analysis begins by reviewing the retention of convenience goods expenditure within each of the 15 Study Area zones (i.e. the proportion of expenditure originating within a given zone which is claimed by retailers located within that same zone).

6.8 This enables an understanding of whether residents are having to travel to meet their convenience goods shopping requirements, or if they are typically able to meet their needs in proximity to where they live. It is accepted that some respondents will live towards the boundary of their respective zones and some trips will therefore be able to be undertaken to nearby zones in a sustainable manner.

6.9 Table 6.1 indicates that, in terms of convenience goods shopping, the highest main food convenience goods retention rates are within Zones 1, 4, 8, 10 and 13, where over 70% of corresponding residents' expenditure on main food shopping is being spent at destinations also located in the same respective zones.

Table 6.1: Zonal Convenience Goods Retention Rates Across the Study Area at 2025

Zone	Main Food Shopping Zonal Retention Rate 2025 (%)	Top-Up Food Shopping Zonal Retention Rate 2025 (%)
1 – Ashton-under-Lyne	79.8%	84.5%
2 – Ashton-under-Lyne	9.3%	30.9%
3 – Mossley	5.6%	54.3%
4 - Stalybridge	72.3%	69.7%
5 - Dukinfield	15.9%	47.7%
6 - Droylsden	21.2%	44.4%
7 – Mottram in Longdendale	26.8%	23.2%
8 - Hyde	73.8%	71.3%
9 - Denton	57.2%	54.6%
10 – OAA - Failsworth	81.5%	65.0%
11 – OAA - Failsworth	1.9%	4.3%
12 – OAA - Uppermill	32.5%	56.9%
13 – OAA - Glossop	97.2%	86.7%
14 – OAA - Bredbury	50.2%	38.9%
15 – OAA – Gorton and Reddish	30.0%	42.6%

Source: Table 4 of Appendix 4 of this Study for 2025 market shares

6.10 Accordingly, we find that the broad zonal retention rates identified appear to appropriately reflect the geography of current provision. There may well be scope to improve local retention rates within those zones which broadly cover Tameside (Zone 1 to 9) subject to provision coming forward in appropriate locations in the future. However, looking at residents in those zones which experience lower main food retention rates, they are typically looking to adjacent zones to meet their needs, thereby still benefiting from sustainable shopping patterns. One such example is within Zone 5 (Dukinfield), where residents are principally choosing destinations in the adjacent Zone 1 (Ashton) to meet their main food shopping needs.

6.11 The below Table 6.2 provides a different assessment of shopping patterns, this time setting out the proportion of zonal convenience goods expenditure which is claimed by operators located within the authority area. As such, this Table shows us the proportion of residents choosing destinations within the authority area as a whole to meet their needs.

6.12 Table 6.2 identifies that the highest proportion of expenditure attracted to destinations within the authority area for both main food convenience shopping is within Zones 1, 2, 4, 5 and 8 where over 90% of main food shopping trips are directed to Tameside authority's convenience destinations.

6.13 The very strong market share identified within these zones in particular indicates that Tameside's foodstores are able to meet most main food shopping needs and that there is little reason to travel outside the area to undertake grocery shopping.

6.14 Concentrating on those zones which broadly cover the Tameside authority area (Zones 1 to 9), the lowest figures are found in Zone 6, which covers Droylsden. For these residents, the foodstores within Zone 10, including the Aldi in Gorton and to a lesser extent the Morrisons in Openshaw, are drawing expenditure away from Tameside operators. This may indicate a lack of consumer choice within Droylsden itself, a matter which we pick up in more detail later in the Study.

Table 6.2: Tameside Convenience Goods Market Share by Zone at 2025

Zone	Main Food Shopping Tameside Market Share 2025 (%)	Top-Up Food Shopping Trips Tameside Market Share 2025 (%)
1 – Ashton-under-Lyne	98.0%	96.7%
2 – Ashton-under-Lyne	97.0%	97.0%
3 – Mossley	78.2%	83.2%
4 - Stalybridge	97.4%	99.1%
5 - Dukinfield	100.0%	99.5%
6 - Droylsden	62.2%	75.5%
7 – Mottram in Longdendale	88.4%	83.3%
8 - Hyde	91.9%	88.0%
9 - Denton	81.1%	82.7%
10 – OAA - Failsworth	10.1%	16.0%
11 – OAA - Failsworth	19.2%	17.3%
12 – OAA - Uppermill	21.1%	8.1%
13 – OAA - Glossop	2.6%	6.3%
14 – OAA - Bredbury	12.4%	12.5%
15 – OAA – Gorton and Reddish	20.3%	16.0%
Total Study Area	51.9%	51.3%

Source: Table 4 of Appendix 4 of this Study for 2025 market shares

Comparison Goods Market Share

6.15 The below Table 6.4 identifies comparison goods shopping patterns, relating to the proportion of zonal comparison goods expenditure which is claimed by operators located within the authority area.

6.16 In practice, Tameside's operators claim more than six out of every ten pounds originating within Zones 1 to 8, with the highest market share being from residents within Zones 1 to 3. The lowest proportion of expenditure spent at Tameside's destinations is recorded in those Zones located outside of the authority area, which is to be expected given the principal comparison destinations in proximity. In terms of those zones which cover the Tameside authority area, the lowest comparison market share of Tameside facilities is from Zone 9 residents, which covers Denton. For these residents, a principal attractor outside of Tameside is the Lime Square Retail Park in Openshaw.

6.17 We have also sought to compare the 2025 figures with those identified in the 2018 Study. We can see from Table 6.4 below that for each zone other than Zone 9, the proportion of comparison expenditure attracted to Tameside facilities has increased across the seven year period.

Table 6.4: Tameside Comparison Goods Market Share by Zone at 2025

Zone	Comparison Goods Tameside Market Share 2025 (%)	Comparison Goods Tameside Market Share 2018 (%)
1 – Ashton-under-Lyne	89.3%	64.7%
2 – Ashton-under-Lyne	83.9%	66.7%
3 – Mossley	82.4%	52.8%
4 - Stalybridge	66.4%	51.7%
5 - Dukinfield	71.8%	61.1%
6 - Droylsden	78.5%	52.4%
7 – Mottram in Longdendale	70.8%	53.8%
8 - Hyde	71.4%	46.2%
9 - Denton	56.0%	62.3%
10 – OAA - Failsworth	24.7%	22.9%
11 – OAA - Failsworth	18.8%	15.6%
12 – OAA - Uppermill	19.4%	17.4%
13 – OAA - Glossop	19.1%	15.1%
14 – OAA - Bredbury	14.0%	12.9%
15 – OAA – Gorton and Reddish	13.4%	12.9%
Authority Area	**47.5%**	

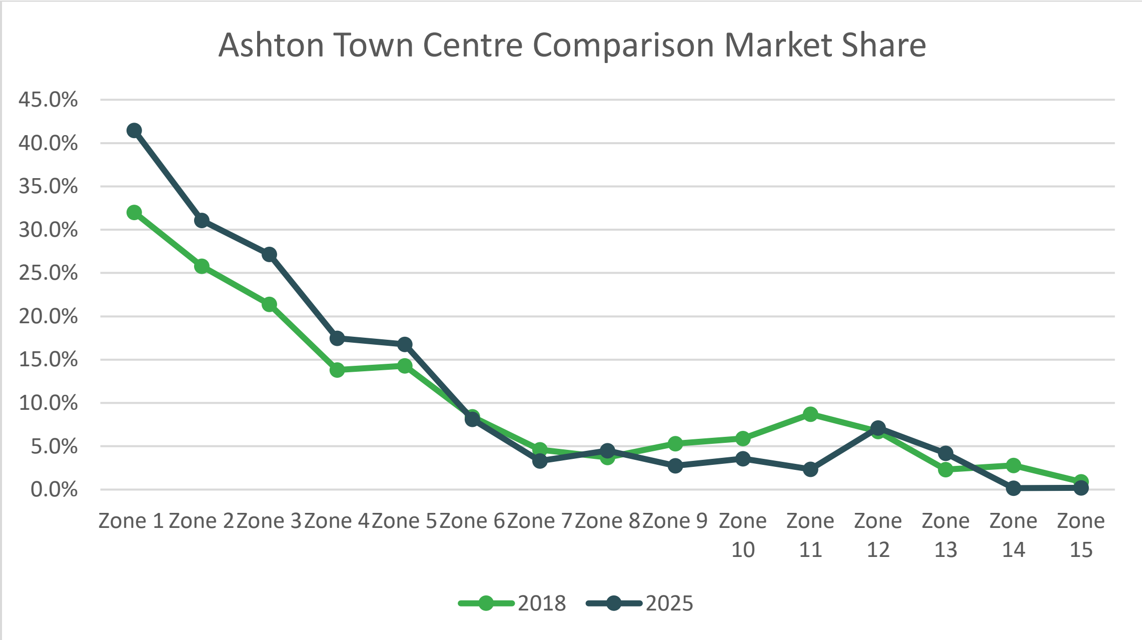
Source: Table 4 of Appendix 4 of this Study for 2024 market shares

6.18 Although the overarching findings of Table 6.4 above are positive insofar as Tameside's retail facilities are managing to retain relatively high levels of comparison expenditure, particularly from Zones 1 to 9, some of this expenditure is of course being spent at edge and out of centre retail facilities, including Snipe Retail Park and Crownpoint Shopping Park.

6.19 Focusing on this matter, Figure 6.1 below shows the change in comparison expenditure attracted to Ashton town centre between 2018 and 2025.

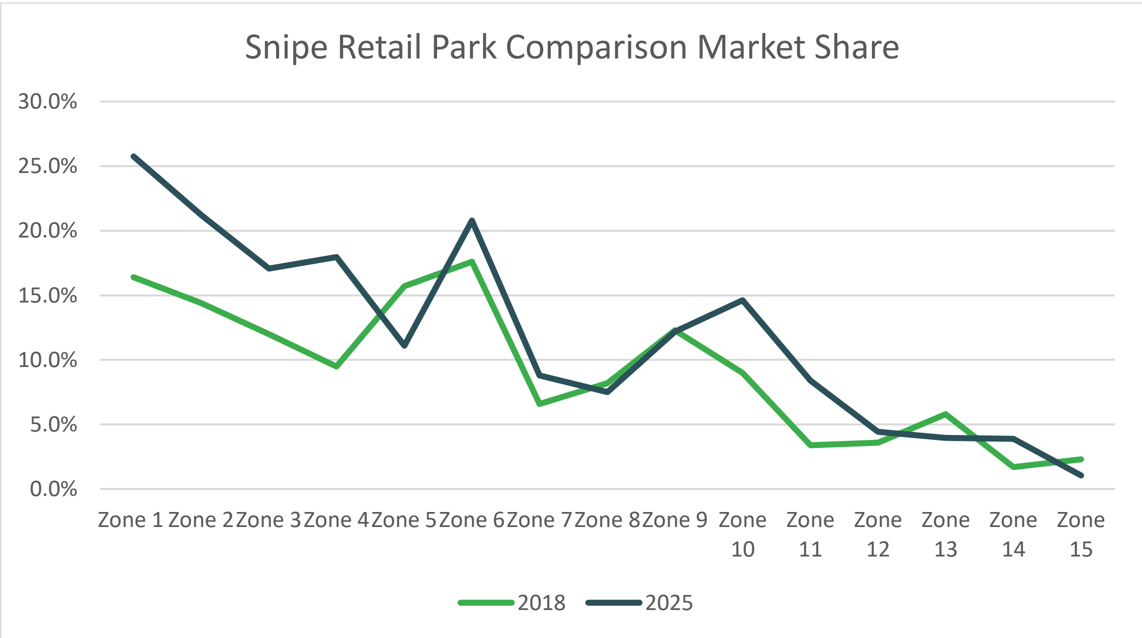
6.20 We can see that for Zones 1 to 6, the proportion of comparison expenditure attracted to destinations within the town centre from residents in those respective zones has increased or remained constant. This is a positive indicator that Ashton is continuing to perform an important function in respect of comparison shopping.

Figure 6.1: Proportion of Comparison Expenditure attracted to Ashton-under-Lyne Town Centre



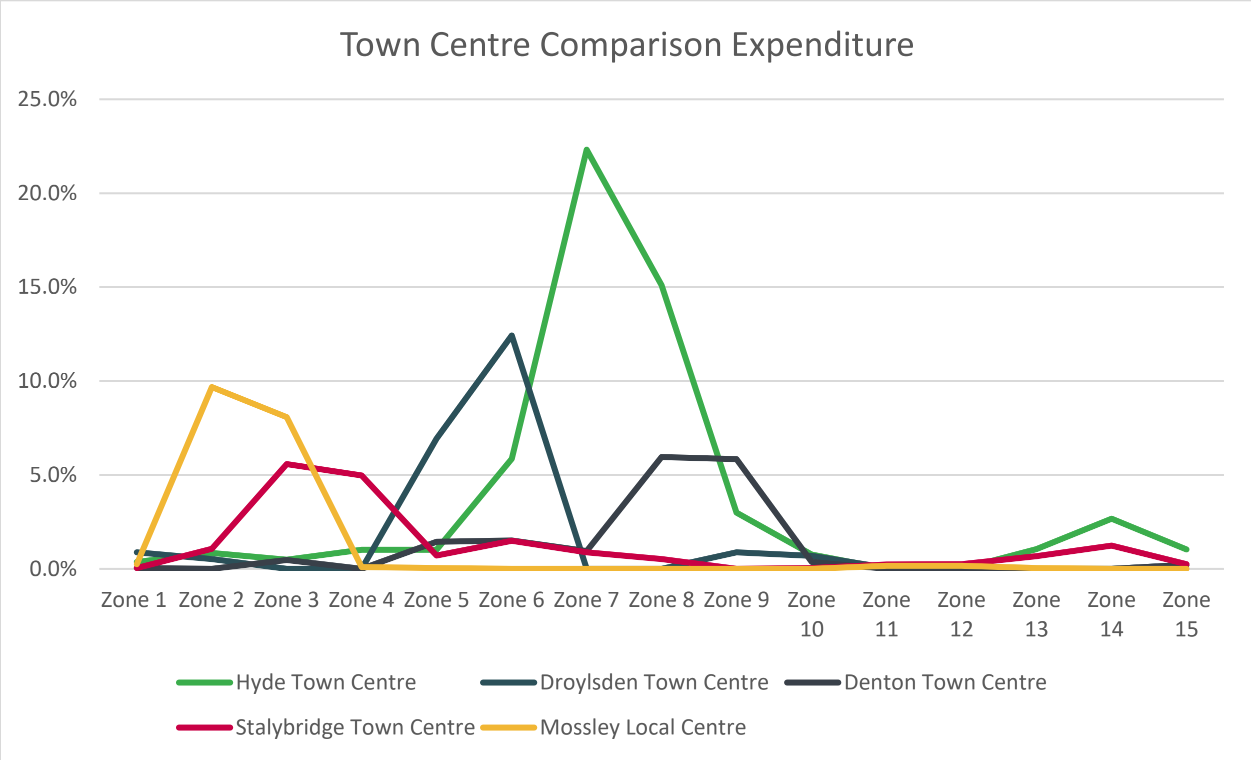
6.21 We can then do the same for Snipe Retail Park, as shown in Figure 6.2 below. Figure 6.2 indicates that the proportion of comparison expenditure attracted to Snipe Retail Park has increased for each Zone except Zone 15, which indicates that there is now a greater propensity of expenditure being spent at the retail park compared to seven years ago.

Figure 6.2: Proportion of Comparison Expenditure attracted to Snipe Retail Park



6.22 We also provide below a graph which shows the comparison market share attracted to the remaining town centres across the 15 zones.

Figure 6.3: Tameside Town Centre Comparison Market Share on a Zonal Basis



Market Share Summary and Identification of Expenditure Claimed by Tameside Retailers

6.23 We identify the convenience goods, comparison goods, and overall market share of Study Area expenditure claimed by retailers located in Tameside in the below Table 6.6.

6.24 Tameside's convenience goods market share of 53.1% is only marginally higher than its comparison goods market share of 47.5%. This demonstrates that the authority area has a broadly equivalent convenience and comparison offer.

Table 6.6: Convenience and Comparison Goods Expenditure Retention and Leakage

Type of Expenditure	2025 Residents' Expenditure (£m)	2025 Market Share (%)
Study Area Convenience Goods Expenditure	£613.9m	53.1%
Study Area Comparison Goods Expenditure	£636.5m	47.5%
Total Study Area Expenditure	**£1,250.4m**	**50.0%**

Source: Table 25 of Appendix 4
Note: Both presented in a consistent 2023 Prices

6.25 In conclusion, the household survey demonstrates that overall, Tameside's convenience goods retailers are able to appropriately serve residents of the authority area and those who live in a wider catchment area. Tameside's convenience goods market share within Zones 1 and 6 in particular are very high, which confirms that there is no general requirement to travel outside of the area when undertaking grocery shopping.

6.26 In respect of comparison goods, Tameside's retailers both within the town centres and at the out of centre facilities provide a good range of operators and attract relatively high levels of expenditure from the key central zones of the Study Area.

6.27 In our view, the identified survey results reflect the geography of the Study Area and the relative attraction of other nearby retail venues. Accordingly, where expenditure 'leaks' to destinations outside of Tameside this is still generally reflective of logical and sustainable travel patterns.

7. Assessment of Retail Capacity

7.1 Our retail capacity tables set out our step-by-step approach to estimating the expenditure surplus which is available to support additional retail floorspace and are provided at Appendix 4. A summary of our methodology, together with our findings, is provided below.

General Approach to Estimating Quantitative Capacity

7.2 Retail capacity modelling follows the basic principle that:

Available Expenditure minus Expected Turnover of Existing and Committed Floorspace equals Expenditure Surplus or Deficit.

7.3 An identified quantitative expenditure surplus indicates that there is capacity to support additional retail floorspace. We summarise the key considerations relating to each component of the equation below.

Methodology

7.4 We turn first to a description of the methodology we have employed in assessing quantitative need in both the comparison and convenience goods sectors in the period up to 2042. It is important to recognise, however, that the effects of expenditure growth over time become exponential. Thus, in looking to the period beyond 2035, the Council should adopt a plan, monitor and manage approach, so as to ensure that the forecast floorspace requirements are kept in line with changes in expenditure and changing methods of retailing.

7.5 There is no detailed guidance as to how to assess the quantitative need for retail development in the NPPF, or in the PPG. As a consequence, we have applied an eight step approach which has been tested at Examination.

7.6 The eight broad steps to calculating the quantitative need are as follows:

i) The first step is to establish the appropriate overall retail catchment area for the hierarchy of centres in Tameside, which is shown at Appendix 1. This catchment area covers the whole of the administrative area of Tameside, together with parts of the surrounding administrative areas.

ii) The second step is to assess the existing level of population and the existing volume of retail expenditure of those who reside within the overall catchment area.

iii) The third step is to establish where the retail expenditure of residents of the overall catchment area is currently spent, through the use of an empirical telephone survey of households and thereby establish the proportion of the retail expenditure of catchment area residents which is currently retained by town centres, retail parks and freestanding stores located within the overall catchment area – that is the aggregate retention rate within the district.

iv) The fourth step is to apply forecasts of population change and per capita expenditure change, so as to establish the overall level of projected growth in expenditure for residents of the overall catchment area, and an assessment of growth in retained expenditure, based, initially, on a constant retention scenario.

v) The fifth step is to make an allowance for growth in inflows of expenditure into the catchment area from those who reside outside in the catchment area. This can be achieved through the analysis of retail studies of adjacent authority areas and STEAM data provided by the Council.

vi) The sixth step is to make an allowance for under-trading, or over-trading in the base year, but only if this is justified on the basis of the clear empirical evidence.

vii) The growth in retained expenditure (step iv), is added to the growth in inflows (step v), and an allowance for under / over-trading (step vi), so as to derive an initial expenditure surplus. Thus, the seventh step is to make allowance for 'claims' on the initial expenditure surplus, as a result of:

- Floorspace Efficiency Change for Existing Retailers (growth over time in turnover per sq. m sales area).
- Growth Over Time in Special Forms Of Trading (SFT), which we derive from the final two columns of Figure 5 of Experian's Retail Planner Briefing Note 22 of March 2025.
- Planning Commitments, for which information has been provided by Tameside Council and neighbouring authorities

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

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

7.7 Our methodology in calculating comparison goods capacity necessarily departs from that used in considering convenience goods needs. This is because it is difficult to accurately estimate a benchmark turnover for comparison goods floorspace due to the large number of operators and the variation in the trading performance of floorspace, depending on its location, character, and the nature of the catchment.

7.8 As a consequence, we adopt the position for comparison goods floorspace that it is trading 'at equilibrium' at base year 2025 (i.e. our survey-derived turnover estimate effectively acts as benchmark). This is a standard industry approach.

Future Quantitative Convenience Goods Capacity

7.9 In identifying the requirement for additional convenience goods floorspace, the estimated turnover of the existing collective provision (with reference to the shopping patterns established by the household survey) is compared to its benchmark turnover (calculated with reference to company average sales densities and the net convenience goods sales areas of individual stores). The identified benchmark turnover changes across future reporting years to account for Experian's forecasts in respect of the future sales efficiency of convenience goods floorspace).

7.10 As Table 7.1 demonstrates, convenience goods floorspace across the authority area has a survey-derived turnover of £613.9m and an expected benchmark turnover of £594.7m. As a consequence, once inflow is taken into account, a convenience expenditure surplus of £37.6m is identified at 2025, which increases to £32.5m at 2030. By 2042, we estimate a surplus in expenditure amounting to £43.6m.

Table 7.1: Quantitative Capacity for Additional Convenience Goods Floorspace in the Tameside Authority Area

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Inflow (£m)	Surplus Expenditure (£m)
2025	594.7	613.9	18.4	37.6
2030	594.7	609.0	18.3	32.5
2035	592.4	610.0	18.3	35.9
2040	589.4	612.3	18.4	41.3
2042	588.2	613.4	18.4	43.6

Source: Table 6a of Appendix 4
Notes: Assumes constant market share (44.9%) of Study Area expenditure claimed by facilities within Tameside authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 4b of Experian Retail Planner Briefing Note 22; in 2023 prices.

7.11 The principal convenience commitment identified within the authority area is the new Aldi store currently being constructed at Hattersley to the south of the existing Tesco store. In addition, there is also the extant commercial floorspace associated with the Godley Green Garden Village urban extension, which includes the provision of 'village centres' to provide for the local residents. We have therefore taken account of both major commitments within the convenience capacity assessment.

7.12 Table 7.2 identifies a monetary surplus throughout the plan period. In practice, our assessment suggests that there will be effectively a quantitative undersupply of floorspace (equating to between 1,400 sq.m and 1,800 sq.m of convenience goods floorspace at 2025). This remains broadly consistent throughout the plan period.

Table 7.2: Quantitative Capacity for Convenience Goods Floorspace in the Tameside Authority Area After Commitments

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2025	37.6	19.9	17.7	1,400	1,800
2030	32.5	19.9	12.6	1,000	1,300
2035	35.9	19.8	16.1	1,300	1,600
2040	41.3	19.7	21.6	1,700	2,200
2042	43.6	19.7	23.9	1,900	2,400

Source: Table 6d of Appendix 4
Notes: Assumes constant market share (44.9%) of Study Area expenditure claimed by facilities within Tameside authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 4a of Experian Retail Planner Briefing Note 22; in 2023 prices

Future Quantitative Comparison Goods Capacity

7.13 For comparison goods, we assume that floorspace is 'in equilibrium' at the start of an assessment (i.e. its turnover is in line with expectations, and that the sector has evolved to meet local/regional needs).

7.14 As identified by the below Table 7.5, our assessment estimates that the comparison goods turnover of the authority area at 2025 is £636.6m, or £668.5m after account is taken of inflow.

7.15 Experian anticipates that improvements in the sales efficiency of existing comparison goods floorspace will outstrip per capita comparison goods expenditure growth in the very short term. As such, a limited surplus expenditure of £5.1m is identified at 2035, which arises due to an increase in the population. We anticipate that the identified expenditure surplus will increase to £15.7m at 2042.

Table 7.5: Quantitative Capacity for Comparison Goods Floorspace in the Tameside Authority Area

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Inflow (£m)	Surplus Expenditure (£m)
2025	668.5	636.6	31.8	0.0
2030	743.8	705.1	35.3	-3.4
2035	833.4	798.6	39.9	5.1
2040	933.8	901.9	45.1	13.3
2043	977.2	945.6	47.3	15.7

Source: Table 26a of Appendix 4
Notes: Assumes constant market share (47.5%) of Study Area expenditure claimed by facilities in the authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 4b of Experian Retail Planner Briefing Note 22; in 2023 prices

7.16 In terms of comparison commitments, the principal extant consent within the authority area is the commercial floorspace proposed as part of the Godley Green extension, which includes the provision of retail floorspace to meet local needs. We have also included the comparison floorspace associated with the extant Aldi foodstore progressing in Hattersley.

7.17 The expenditure surplus identified in Table 7.6 below is therefore wholly available to support new entrants into the market. Table 7.6 converts this surplus into a comparison goods floorspace requirement across the authority area of between 300 sq.m and 600 sq.m by 2040, rising to between 500 sq.m and 900 sq.m by 2042.

Table 7.6: Quantitative Capacity for Comparison Goods Floorspace in the Tameside Authority Area

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2025	0.0	7.5	-7.5	-1,200	-2,100
2030	-3.4	8.3	-11.8	-1,800	-3,000
2035	5.1	9.3	-4.2	-600	-1,000
2040	13.3	10.4	2.8	300	600
2043	15.7	10.9	4.8	500	900

Source: Table 26d of Appendix 4
Notes: Assumes constant market share (47.5%) of Study Area expenditure claimed by facilities in the authority area; allows for changes in benchmark turnover sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 22; minimum floorspace requirement based on an assumed sales density of £6,000 per sq.m at 2025; maximum floorspace requirement based on an assumed sales density of £3,500 per sq.m at 2025; in 2023 prices

Convenience and Comparison Qualitative Requirements

7.18 In examining the performance of specific stores, it is evident that Aldi's and Lidl's discount supermarkets are performing particularly strongly and that the performance of food superstores is more variable. In this regard it should be noted that, whilst household survey respondents have in the past perhaps been slightly reluctant to acknowledge that they undertake their main food shop at a discounter, this no longer appears to be the case. In addition, our methodology apportions convenience goods expenditure to foodstore destinations according to their identified market share. The methodology does not take into consideration that similar items are generally cheaper in Aldi and Lidl than in one of the (former) 'big four' operators' stores[14]. As such, the performance of discount operators is probably overstated and the performance of the 'big four' operators is probably understated.

[14] Top 10 UK Food, Grocery & Supermarket Retailers | Retail Economics

7.19 The moderate performance of some existing food superstores is not particularly surprising, given that across the country shoppers are frequently foregoing the previously dominant 'big four' foodstore operators in favour of discounters.

7.20 On the whole, it is clear that foodstores within Zone 1, which comprises Ashton-under-Lyne town centre and surrounding areas, are overtrading, with the principal well-performing stores being the Aldi, Lidl and Asda foodstores. The wider offer within Ashton is also considered to be good with further discount operators such as Heron Foods, Home Bargains and Iceland all recorded as performing very well. On this basis, it is considered that there may be a qualitative requirement to improve the convenience offer within the town should appropriate sites come forward within or on the edge of the town centre.

7.21 Looking further afield, the Aldi store in Stalybridge is also recorded as significantly overtrading, although the Tesco Superstore on Trinity Street is recorded as performing below its expected benchmark average. In light of this, there may be scope to improve the discount foodstore offer within the centre should appropriate opportunities come forward, but it will be imperative that any proposal does not jeopardise the future performance of the town centre stores.

7.22 In this regard, both Aldi and Lidl have substantially improved their share of the national grocery market in recent years. Notwithstanding this, the very strong performance of the Aldi and Lidl stores in particular, suggests that the market could support more discount foodstore provision. In this regard, we note that Lidl specifically have further requirements for new stores across Tameside, and therefore additional proposals for such development could come forward in the short term.

7.23 In considering future proposals, it is important to recognise that the findings of this Study have identified a small quantitative need for additional convenience goods floorspace across the plan period throughout the authority area, which would be absorbed by the introduction of one single new foodstore. We do not recommend allocating any sites for additional convenience foodstores given the limited capacity and provision of existing foodstores across the authority area and in particular, within the defined centres.

7.24 Instead, any additional proposed food supermarkets should be considered on their merits in accordance with relevant policy tests. Most particularly, planning applications which seek to provide additional food retail provision should be considered having regard to potential sequential alternative sites, and with reference to the magnitude of impacts arising at any defined centre. The potential qualitative benefits associated with any improvement in customer choice can also be afforded weight in the decision-making process.

7.25 In terms of the spatial distribution of convenience goods facilities, we believe that existing large-scale main food shopping facilities are generally sited in a sustainable manner across the authority area and there are no obvious 'gaps' in terms of provision which need to be planned for.

7.26 Turning to the qualitative requirements of comparison retailing, it is clear that Ashton-under-Lyne town centre does and will continue to be the principal comparison destination across the Study Area. However the principal comparison shopping destinations within the Study Area include Snipe Retail Park, Crown Point Shopping Park (see commentary in Section 9 below in respect of the recommendations around Crown Point Shopping Park in the context of the Denton town centre boundary) and some of the larger format convenience foodstores. There is therefore a clear dominance of the out of centre facilities, which will continue to have the potential to draw trade from the defined centres, and particularly those which provide for a more diverse comparison offer including selling clothing and footwear.

7.27 As such, continuing to encourage comparison retailing into the defined centres and particularly Ashton, Hyde and Denton, will be key to encouraging footfall and expenditure and policies which seek to protect the defined centres from out of centre development are key to realising this.

7.28 In relation to decision taking, we would emphasise that, regardless of the level of identified quantitative capacity, careful consideration should be given to new applications for retail development in existing designated centres with the potential to bolster the draw of such centres and encourage growth in line with the Council's aspirations and the centre's position within the retail hierarchy.

7.29 We would also stress that, in accordance with national planning policy and guidance, applications for retail developments above the locally set threshold (which we go on to consider below) and outside of the designated primary shopping area boundaries would need to be considered in accordance with the sequential approach and retail impact assessment methodology.

8. Assessment of Leisure Capacity

8.1 Our approach in considering leisure capacity is in two parts.

8.2 For food and beverage floorspace, we adopt a similar approach as to that set out in respect of retail floorspace in the preceding Section 6 of this report. For large format commercial uses, we adopt a 'benchmarking' approach where we consider the typical population required to support different types of facilities.

8.3 The benchmarking exercise reflects the fact that large format commercial uses are relatively limited in number and residents may be prepared to travel to watch a film or to go ten pin bowling. The current Study Area market share may not be instructive in respect of identifying future large format leisure requirements and therefore our preference is to undertake a benchmarking exercise.

Participation Rates

8.4 We begin by looking at the participation rates of each principal leisure activity across the 15 zones of the Study Area.

8.5 The household survey enables us to see which leisure activities residents of Tameside typically participate in and which are the most popular across the 15 zones. Table 8.2 below provides the participation rates on a zonal basis.

Table 8.1: Participation Rates by Zone

Leisure Activity	T'tal	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Restaurant	55.3%	42.1%	57.9%	57.4%	62.3%	42.1%	55.5%	40.1%	61.0%	45.6%	56.2%	52.3%	71.3%	65.7%	57.3%	54.1%
Pub / bars / nightclubs / social club	38.6%	31.5%	35.0%	43.7%	48.2%	40.1%	40.5%	24.5%	34.2%	32.5%	38.8%	21.4%	59.4%	50.2%	40.5%	46.9%
Theatres / concert halls / museums / art galleries / music venue / arenas and other cultural facilities	32.9%	17.5%	30.3%	44.1%	20.7%	10.7%	44.5%	23.6%	41.8%	29.5%	30.8%	36.7%	47.3%	23.7%	40.3%	40.0%
Cinema	32.1%	29.6%	43.1%	24.7%	34.3%	40.7%	31.1%	28.0%	30.9%	26.7%	22.8%	26.2%	28.5%	37.6%	53.0%	25.2%
Indoor sports or health and fitness activity	17.6%	19.0%	12.5%	15.4%	13.8%	10.5%	27.5%	15.4%	15.0%	19.7%	13.8%	15.7%	33.3%	15.8%	18.9%	21.3%
Ten pin bowling	9.3%	7.3%	14.0%	11.4%	5.6%	2.6%	14.1%	7.1%	10.3%	3.3%	12.2%	14.3%	7.9%	6.8%	2.8%	11.1%
Other competitive social activities such as crazy / indoor golf, escape rooms, pool / snooker etc.	7.4%	5.5%	11.1%	4.5%	2.4%	4.6%	7.5%	4.5%	7.5%	8.4%	10.8%	7.1%	19.5%	4.4%	8.4%	4.3%
Bingo	4.0%	5.3%	4.9%	7.9%	6.6%	2.8%	8.4%	2.3%	2.3%	3.3%	1.7%	8.0%	0.5%	2.2%	3.9%	0.0%
Casino	1.0%	0.0%	0.0%	0.4%	0.0%	0.0%	2.8%	3.5%	2.3%	0.3%	0.6%	0.0%	5.9%	0.3%	1.5%	0.0%

8.6 Table 8.2 is clear that the most popular leisure activity across all of the 15 zones is visiting restaurants, followed by 'pubs/bars/nightclubs/social clubs'. In addition, visiting the cinema, theatres and other cultural venues are also popular leisure activities.

8.7 We can therefore see that providing facilities for a number of these leisure activities is important for the residents of Tameside, and therefore gaining an understanding of the future needs of the types of leisure uses is a valuable exercise.

Food and Beverage Requirements

Leisure Expenditure Growth

8.8 To calculate per capita food and beverage expenditure, we have again utilised Experian Micromarketer G3 data. The base year for this expenditure data is also 2022. Experian provides separate per capita expenditure estimates on a zonal basis for 'restaurant and café meals per person' and 'alcoholic drinks (away from home) per person'.

8.9 There is no need to make allowance for special forms of trading expenditure (given that all food and beverage expenditure identified by Experian relates to eating and drinking in bars, pubs, cafes, and restaurants).

8.10 ERPBN21 provides annual leisure expenditure growth forecasts which we set out at the below Table 8.2. These growth rates are used to estimate increases in per capita food and beverage expenditure across the plan period to 2040.

Table 8.2: Experian Retail Planner Briefing Note 22 Leisure Expenditure Annual Per Capita Growth Rates

Year	Leisure Per Capita Annual Growth
2023	-2.9%
2024	-1.6%
2025	0.0%
2027-31	0.6%
2032-40	0.7%

Source: Figure 1a of Appendix 3 of Experian Retail Planner Briefing Note 22 (March 2025)

8.11 We again recognise that growth in expenditure forecasts in the longer-term should be treated with caution given the difficulties in predicting economic performance over such an extensive timeframe.

8.12 Accepting this caveat, we are able to use Experian's recommendations in respect of annual expenditure growth to calculate expenditure across the food and beverage sectors at 2025, 2029, 2034, 2039 and 2042.

Restaurant and Café Floorspace Requirements

8.13 Based on the assumed Study Area resident population and the available per capita restaurant and café expenditure, we estimate that £318.5m of such expenditure originates within the Study Area at 2025.

8.14 The below Table 8.3 indicates that available Study Area restaurant and café expenditure is forecast to increase to £377.4m at 2042.

Table 8.3: Total Available Study Area Restaurant and Café Expenditure

2025 (£m)	2030 (£m)	2035 (£m)	2040 (£m)	2042 (£m)
318.5	332.8	350.2	369.4	377.4

Source: Table 2 of Appendix 5
Note: In 2023 prices

8.15 Table 8.4 indicates that this represents an increase of £58.9m (or 18.5%) across the Study Area between 2025 and 2042.

Table 8.4: Growth in Available Study Area Restaurant and Café Expenditure

Growth 2025-42 (£m)
58.9

Source: Table 2 of Appendix 5
Note: In 2023 prices

8.16 Our methodology accounts for the fact that existing operators will look to increase their turnover going forward to remain viable. On this basis, we identify an expenditure surplus of £5.8m at 2030. Due to subsequent expenditure and population increases, this surplus increases to £12.7m at 2035.

8.17 As with retail capacity, this monetary surplus can be converted into a floorspace requirement. The average sales density of UK floorspace was around £8,584 per sq.m at 2025.[15]

8.18 Based on this sales density (and allowing for future increases in the sales efficiency of leisure floorspace going forward), we estimate that 700 sq.m of additional café and restaurant floorspace could be supported at 2030, increasing to 1,500 sq.m at 2035 (the ten year period as advocated by the NPPF).

Table 8.5: Quantitative Capacity for Restaurant and Café Floorspace in the Authority Area

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Exp. With 5% Inflow (£m)	Surplus Expenditure (£m)	Floorspace Requirement (sq.m)
2025	139.3	132.3	139.3	0.0	0
2030	139.7	138.2	145.5	5.8	700
2035	140.4	145.5	153.1	12.7	1,500
2040	141.1	153.5	161.5	20.4	2,400
2042	141.4	156.8	165.1	23.7	2,700

Source: Table 5a and Table 5b of Appendix 5
Notes: Assumes constant market share (41.5%) of Study Area expenditure claimed by facilities in the authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 2 of Experian Retail Planner Briefing Note 22 - Leisure; in 2023 prices

Licensed Premises Floorspace Requirements

8.19 Based on the assumed Study Area resident population and the available per capita alcoholic drinks expenditure, we estimate that £146.0m of alcoholic beverage expenditure originates within the Study Area at 2025.

8.20 The below Table 8.6 indicates that available Study Area restaurant and café expenditure is forecast to increase to £173.0m at 2042.

Table 8.6: Total Available Study Area Licensed Premises Expenditure

2025 (£m)	2030 (£m)	2035 (£m)	2040 (£m)	2042 (£m)
146.0	152.5	160.5	169.3	173.0

Source: Table 7 of Appendix 5
Note: In 2023 prices

8.21 Table 8.7 indicates that this represents an increase of £27.0m (or 18.5%) across the Study Area between 2025 and 2042.

[15] As identified by Figure 2 of Experian Retail Planner Briefing Note 22 – Leisure.

Table 8.7: Growth in Available Study Area Licensed Premises Expenditure

Growth 2025-42 (£m)
27.0

Source: Table 7 of Appendix 5
Note: In 2023 prices

8.22 Our complete licensed premises quantitative assessment model is provided at Appendix 5 of this Study. Table 10 of Appendix 5 identifies that £57.4m (equating to 39.3%) of Study Area alcoholic drink expenditure is directed to licensed premises in the authority area at 2025. Our methodology accounts for the fact that existing operators will look to increase their turnover going forward to remain viable. On this basis, we identify an expenditure surplus of £2.5m at 2030. Due to subsequent expenditure and population increases, the identified surplus increases to £5.5m at 2035.

8.23 Once again, this monetary surplus can be converted into a floorspace requirement. Based on the average UK leisure sales density of £8,584 sq.m at 2024 (and allowing for future increases in the sales efficiency of leisure floorspace going forward), we estimate that 300 sq.m of additional licensed premises floorspace could be supported at 2030, increasing to 600 sq.m at 2035.

Table 8.8: Quantitative Capacity for Licensed Premises in the Authority Area

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Exp. With 5% Inflow (£m)	Surplus Expenditure (£m)	Floorspace Requirement (sq.m)
2025	60.5	57.4	60.5	0.0	0
2030	60.6	60.0	63.2	2.5	300
2035	60.9	63.2	66.5	5.5	600
2040	61.2	66.6	70.1	8.9	1,000
2042	61.4	68.1	71.6	10.3	1,200

Source: Table 10a and Table 10b of Appendix 5
Notes: Assumes constant market share (39.3%) of Study Area expenditure claimed by facilities in the authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 2 of Experian Retail Planner Briefing Note 22 - Leisure; in 2023 prices

8.24 In terms of all food and beverage floorspace capacity identified above, we note that the Council's and other stakeholder's aspirations for the future regeneration of the principal centres within Tameside will include the provision of additional leisure floorspace. This will not only provide for a more diverse offer for residents and visitors, but also help to encourage dwell time throughout the day and into the evening, particularly for centres which otherwise typically go very quiet at night. This in turn will also help to encourage town centre living and improve safety perceptions through the encouragement of activity.

8.25 We therefore recommend that town centre policies continue to encourage a diverse range of uses within the defined centres to include leisure uses, to help to attract footfall and expenditure and help to protect the future vitality and viability of these centres.

Commercial Leisure: Bingo, Cinemas, Ten Pin Bowling and Casinos

8.26 Our approach in identifying the potential for large format to the assessment of commercial leisure needs departs from the above monetary capacity assessment. This is because the commercial leisure sector is different to the retail and food and beverage sectors; large-scale leisure uses are relatively limited in number and customers often expect to travel at least some distance in order to access them. As such, we believe it is sensible to consider the general appropriateness of provision on a Study Area basis, with reference to the typical number of persons required to support particular uses.

8.27 Our assessment considers the typical population required to support bingo halls, casinos, cinema screens and ten pin bowling alleys, and is based around three key stages.

1. We firstly calculate the expected Study Area and local authority populations for the relevant reporting years.
2. We then calculate the number of persons required to support a bingo hall, casino, cinema screen and bowling alley nationally, across the UK.
3. We then apply the respective ratio to the Study Area population and to the population of the Tameside authority area to gauge the benchmark level of provision, based on the position evident across the UK.

8.28 We supplement our assessment with an overview of current patterns of commercial leisure trips throughout the Study Area (as identified by the NEMS household survey) to help identify any qualitative deficiencies in provision.

8.29 We recognise that some of these facilities are not as important as they perhaps once were in underpinning the local leisure economy. However, all four uses generally occupy large format premises and, as such, if a requirement were to be identified then there are potential land use implications.

Bingo

8.30 Gala (now Buzz Bingo) and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose-built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. However, the significant increase in on-line gambling has, and will continue to affect this sector.

8.31 The Gambling Commission indicates the number of bingo premises fell by over 15% between 2014 to 2020, due in part to the increase in on-line bingo. The Gambling Commission latest figures indicates the UK currently has 582 bingo halls, equating to approximately one facility per 93,000 adults.

8.32 The below Table 8.9 confirms bingo hall capacity within Tameside over the period to 2042.

Table 8.9: Bingo Hall Capacity in the Authority Area

Year	Study Area Population	Typical Population Required to Support Hall	Percentage of Population in Tameside Authority Area	Potential Number of Halls Supported in the Authority Area	Existing Provision	Outstanding Potential Capacity in the Authority Area
2025	447,068	93,000	52.9%	2.5	2	0.5
2030	454,779	93,000	52.9%	2.6	2	0.6
2035	462,983	93,000	52.9%	2.6	2	0.6
2040	471,896	93,000	52.9%	2.7	2	0.7
2042	475,614	93,000	52.9%	2.7	2	0.7

Note: Typical population to support bingo hall calculated with reference to the Mintel Casinos and Bingo UK 2019 report and to the ONS 2023 population forecasts for the UK

8.33 The bingo sector has been significantly affected by the ban on smoking in enclosed workplaces which came into force in 2007 following the enactment of the Health Act 2006. Subsequent to the Act being enforced, new bingo hall openings have been rare, and we consider it highly unlikely that there will be any proposals to provide additional facilities in the authority area in the foreseeable future. The provision available in the authority area at the Buzz Bingo in Ashton and the Cosmo Bingo Club in Stalybridge provides for the population sufficiently and therefore we do not recommend that the Council plans for the growth of the sector in the local plan.

Cinemas

8.34 The UK Cinema Association website estimates that there are 4,637 cinema screens in the UK[16], which equates to one screen for every 14,801 persons or thereabouts.

8.35 There is one principal cinema operator within the Tameside authority area, being the Cineworld as Ashton Moss Leisure Park located in Zone 1 of the Study Area. The Cineworld has 12 screens, including 4DX, IMAX and IMAX 3D facilities.

8.36 As Table 8.10 indicates below, the provision within Tameside is lower than the identified capacity. Residents have good access to additional provision within neighbouring authority areas and as the household survey results indicate, residents are choosing cinema operators within Greater Manchester to meet their needs. It is therefore considered that generally, trips to such cinemas are therefore considered to be generally reflective of sustainable travel patterns and many Study Area residents' relative proximity to existing cinemas.

8.37 However, there is an identified capacity for a small-scale cinema within the capacity assessment, which could be taken up by a more boutique style operator within the defined centres. In this regard, we do note that one of the options for Ashton town centre is to create a new leisure complex in the upper floors of the Arcades, which could include a cinema operator. We recommend that a flexible approach is applied in respect of future aspirations and that should it be that the commercial market indicates additional cinema screens could be viably accommodated, such a scheme should be explored further.

Table 8.10: Cinema Screen Requirement in Authority Area

Year	Study Area Population	Typical Population Required to Support Cinema Screen	Percentage of Population in Tameside Authority Area	Potential Number of Cinema Screens Supported by Authority Area	Existing Provision (No. of Screens)	Outstanding Potential Capacity in the Authority Area
2025	447,068	14,984	52.9%	15.8	14	1.8
2030	454,779	14,984	52.9%	16.1	14	2.1
2035	462,983	14,984	52.9%	16.3	14	2.3
2040	471,896	14,984	52.9%	16.7	14	2.7
2042	475,614	14,984	52.9%	16.9	14	2.8

Note: Typical population to support a cinema screen calculated with reference to data provided by the UK Cinema Association website and to the ONS 2023 population forecasts for the UK

Ten Pin Bowling

8.38 The national average for the provision of ten pin bowling lanes is one lane per 12,000 people.

[16] At 2022.

8.39 In this context, there is one formal bowling alley facility within the authority area, being the CineBowl at Town Meadows Way, which has eight lanes.

8.40 As Table 8.11 below indicates, the authority area provides for two formal bowling facilities, at Hollywood Bowl in Ashton Moss (26 lanes) and at the Tameside Wellness Centre (10 lanes). On this basis, Tameside is very well provided for in terms of the number of tenpin bowling alleys.

8.41 Whilst very few new ten-pin bowling alleys were built in the early part of this century, the market has picked up in recent years. However, the upturn in the sector has been driven by smaller facilities which are generally supplemented by a strong food and beverage offer and are located within larger urban centres. We do not envisage that there will be a strong demand for additional facilities, but that there may be an opportunity to encourage a boutique-style facility within one of the principal town centres.

Table 8.11: Ten Pin Bowling Lane Requirement in the Authority Area

Year	Study Area Population	Typical Population Required to Support Bowling Lane	Percentage of Population in Tameside Authority Area	Potential Number of Bowling Lanes Supported by the Authority Area	Existing Provision (No. of Bowling Lanes)	Outstanding Potential Capacity in the Authority Area
2025	447,068	12,000	52.9%	19.7	36	-16.3
2030	454,779	12,000	52.9%	20.1	36	-15.9
2035	462,983	12,000	52.9%	20.4	36	-15.6
2040	471,896	12,000	52.9%	20.8	36	-15.2
2042	475,614	12,000	52.9%	21.0	36	-15.0

Note: Typical population to support ten pin bowling alley calculated with reference to the Mintel Ten Pin Bowling UK 2017 report and to the ONS 2023 population forecasts for the UK

Casinos

8.42 Mintel's Casinos and Bingo UK 2018 report identifies that there are 145 casinos across the UK, which equates to a casino for every 471,600 persons or thereabouts.

8.43 Accordingly, we estimate that the authority area could support around 0.5 casinos at 2025, a figure which would not change throughout the Study period. Once the existing provision is taken into account, there is no requirement for the Council to plan for a new facility within the new local plan.

Table 8.12: Casino Requirement in the Authority Area

Year	Study Area Population	Typical Population Required to Support a Casino	Percentage or Population in Tameside Authority Area	Potential Number of Casinos Supported by the Authority Area	Potential Number of Casinos Supported in the Authority Area	Outstanding Potential Capacity in the Authority Area
2025	447,068	469,063	52.9%	0.5	1	-0.5
2030	454,779	469,063	52.9%	0.5	1	-0.5
2035	462,983	469,063	52.9%	0.5	1	-0.5
2040	471,896	469,063	52.9%	0.5	1	-0.5
2042	475,614	469,063	52.9%	0.5	1	-0.5

Note: Typical population to support casino calculated with reference to the Mintel Casinos and Bingo UK 2018 report and to the ONS 2023 population forecasts for the UK, England and Wales, Scotland and Northern Ireland

Health and Fitness Centres

8.44 Despite the current uncertainties associated with available household income, the most recent research shows that the UK health and fitness industry is stronger than it has ever been as measured by number of gyms, membership and market value. The State of the Fitness Industry Report 2024, produced by the Leisure Database Company, finds overall, the UK health and fitness industry is performing strongly, with data indicating that member numbers, market value and penetration all surpassing pre-pandemic levels and reaching all-time highs. The report identifies that as of 2024, the number of gym members increased to 10.7m from 10.3m in 2023.

8.45 Gyms and health and fitness facilities of course make an important contribution to the health of the local authority's population across the complete spectrum of ages. The range of operators and brands within the health and fitness sector are now relatively broad, with a number of budget brands topping the market in terms of number of clubs open and who have experienced the most significant growth in recent years. Indeed, Puregym is hoping to add an additional 60-70 gyms to their portfolio by the end of 2025[17].

8.46 Looking across the authority area, there appears to be a good choice of health and fitness facilities, with a number of national multiples, independents and community run gyms and fitness facilities.

8.47 The Table 8.13 below provides the details of the top health and fitness facilities within the authority area.

Table 8.13: Health and Fitness Clubs by Zone (Over 3% of Responses)

Leisure Activity	T'tal	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Active Copley, Huddersfield Road, Millbrook, Stalybridge, SK15 3RR	7.9%	24.7%	33.5%	46.3%	57.5%	21.9%	0.0%	5.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%
Tameside Wellness Centre, Lance Corporal Andrew Breeze Way, Denton, Manchester, M34 3RD	7.2%	7.0%	0.0%	2.3%	2.1%	14.9%	1.1%	0.0%	5.4%	24.2%	0.0%	0.0%	0.0%	0.0%	0.0%	33.4%
Village Gym, Pamir Drive, Ashton-under-Lyne, OL7 0LY	4.3%	19.9%	0.0%	0.0%	0.0%	0.0%	13.5%	0.0%	0.0%	0.0%	14.9%	0.0%	1.5%	0.0%	0.0%	2.0%
Denton Town Centre	4.1%	5.8%	14.7%	0.0%	2.1%	0.0%	5.0%	15.5%	0.0%	20.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Pure Gym, Oldham Street, Denton, Manchester, M34 3SJ	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	28.1%	2.1%	0.0%	0.0%	0.0%	11.3%	0.0%
Kingfisher Health Club, Broadstone Road, Reddish, Stockport, SK5 6DD	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	31.3%
Active Medlock,	3.4%	0.0%	2.4%	0.0%	0.0%	0.0%	17.0%	0.0%	0.0%	0.0%	9.5%	0.0%	0.0%	0.0%	0.0%	0.0%

[17] https://www.puregym.com/blog/uk-fitness-report-gym-statistics/

Leisure Activity	T'tal	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Gardenfold Way, Droylsden, Manchester, M43 7XU																
Ashton-under-Lyne Town Centre	2.9%	1.3%	25.9%	0.0%	0.0%	0.0%	0.0%	0.0%	24.9%	0.0%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%
MyActive, High Street East, Glossop, SK13 8PN	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	40.0%	0.0%	0.0%
Village Gym, Captain Clarke Road, Dukinfield, Hyde, SK14 4QG	2.7%	16.2%	0.0%	0.0%	16.7%	5.3%	0.0%	0.0%	16.7%	1.4%	0.0%	0.0%	0.0%	0.0%	1.4%	0.0%
Glossop Town Centre	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	28.7%	0.0%	0.0%
Saddleworth Pool & Leisure Centre, Station Road, Uppermill, Oldham, OL3 6HQ	2.1%	0.0%	0.0%	20.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	22.1%	0.0%	0.0%	0.0%
The Gym Group, Lime Square Shopping Centre, Ashton Old Road, Openshaw, Manchester, M11 1DA	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	14.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Life Leisure, Hole House Fold, Romiley, Stockport, SK6 4BB	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	24.9%	0.0%
Hyde Town Centre	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	16.4%	13.4%	0.0%	0.0%	0.0%	0.0%	0.0%	11.3%	0.0%

8.48 In terms of capacity, the results of the household survey indicate that a total of 17.6% of the population regularly participate in indoor sports or health fitness activities. The results also indicate that facilities within the authority area retain approximately 52.8% of trips.

8.49 The authority area population is estimated to increase by 14,952 people by 2042. Assuming that a similar gym/health club participation level would apply to the new population as has been identified for the Study Area (i.e., 17.6%) this would equate 2,632 potential new gym members over the plan period. Based on average membership levels for major gym operators (2,897 members) and budget gym operators (3,452 members), the anticipated uplift in the population in the authority over the period to 2042 could potentially support one additional gym.

8.50 Bringing forward new gym and health and fitness facilities will be dependent on market demand from operators seeking space in local authority areas. Proposals for new health and fitness facilities should be directed to defined centres in the first instance, in accordance with national policy. We do not however recommend the allocation of specific sites for such uses within the local plan, and that demand will very much be market-led.

Other Commercial Leisure

8.51 There has been a growth in recent years in other more specialist commercial leisure attractions, including facilities such as trampoline parks, indoor soft play centres, ninja courses and a range of competitive social destinations. The latter is a fast-paced sector and is still continuing to grow, with new formats becoming present in the market. Such uses include urban golf, bar and game formats, which include games such as axe-throwing, shuffleboard, table tennis and so on, virtual reality gaming and escape rooms. All of these commercial leisure uses fall within the defined town centre use bracket, and typically require large floorplates.

8.52 Calculating a quantitative need for such uses is not possible, particularly given the evolving market and relative infancy of such uses. However, we are able to review the existing offer and consider whether there may be a qualitative requirement to increase the offer across the authority area.

8.53 Overall, the Tameside authority area is not particularly well catered for in terms of wider commercial leisure uses, and instead, residents will be looking to surrounding higher-order centres, particularly Manchester City Centre and the Trafford Centre, to meet their commercial leisure needs in this context.

8.54 Although the market for such commercial leisure uses is still evolving, and alternative operators may still continue to require new premises across the authority area, these should be assessed on a case-by-case basis, ensuring that such uses are directed towards defined centres in the first instance. This is particularly important given the wider benefits such uses can have in terms of encouraging longer dwell-times and increasing footfall and associated expenditure within centres.

8.55 However, it is noted that opportunities for larger format leisure uses within the defined centres in the Tameside authority area will be limited due to the average size of the units being small scale and there being limited opportunity to expand the offer in the centres.

8.56 The Town Centres Practice Guidance states at paragraph 012 that the use of the sequential test should recognise that certain town centre uses have particular market and locational requirements, which meant that they may only be accommodated in specific locations. It goes on to state that robust justification will be needed where this is the case. Whilst the guidance does not circumnavigate the need for a robust assessment, it does provide scope for proposals to be situated in alternative non-town centre locations should there be no sequentially preferable locations in centre.

9. Summary, Conclusions and Policy Recommendations

Context

9.1 The principal purpose of the Study is to understand future retail and leisure needs, and to provide policy recommendations to assist the Council in its preparation of the forthcoming Local Plan.

9.2 The Local Plan will set out the Council's strategy in respect of delivering new future growth in respect of a range of new developments, including housing, jobs, and main town centre uses. To ensure that commercial uses are delivered in sustainable locations, the Local Plan will provide up to date policies in respect of town centre boundaries, the hierarchy of defined centres, and local impact thresholds of relevance to retail and leisure developments.

9.3 This concluding section of our report summarises the key findings of the Study and addresses planning policy requirements of relevance to retail, leisure, and town centres.

Key Findings: Retail

Quantitative and Qualitative Capacity

9.4 As identified at Section 7, we identify a limited surplus quantitative need for additional convenience goods floorspace across the authority area across the plan period. The capacity identified would be absorbed by the introduction of one new foodstore serving main food shopping trips in the local authority area.

9.5 In terms of the comparison capacity, the Study does also estimate a limited capacity across the plan period. However, the capacity assessment estimates that by 2035 (the ten year period advocated by the NPPF), there will not be any capacity and that instead, the capacity is identified in the longer-term and should therefore be treated with caution given the inherent difficulties of predicting how the commercial market will be faring in 15 to 20 years time.

9.6 The capacity findings are based on an assumption that the market share attracted to existing facilities within the authority area remains consistent across the plan period.

Table 9.1: Quantitative Capacity for Convenience Goods and Comparison Goods Floorspace in the Tameside Authority Area

Year	Convenience Goods Floorspace Requirement		Comparison Goods Floorspace Requirement	
	Minimum (sq.m)	Maximum (sq.m)	Minimum (sq.m)	Maximum (sq.m)
2025	1,400	1,800	-1,200	-2,100
2030	1,000	1,300	-1,800	-3,000
2035	1,300	1,600	-600	-1,000
2040	1,700	2,200	300	600
2042	1,900	2,400	500	900

Source: Table 6d and 26d of Appendix 4
Note: In 2023 prices

Key Findings: Commercial Leisure

9.7 Our assessment of future leisure needs is in two parts.

9.8 In terms of food and beverage floorspace, we have undertaken a quantitative assessment which identifies available expenditure and takes account of the need for existing businesses to increase their turnover to remain viable.

9.9 Our assessment has identified that at 2035 there is a requirement for 1,500 sq.m of restaurant and café floorspace and for 600 sq.m of licensed premises floorspace (this equating to a total of 2,100 sq.m of food and beverage floorspace).

9.10 We anticipate that this floorspace will comprise of relatively small-scale cafés, restaurants and bars which would generally be accommodated within the principal centres and which will likely come forward as part of the town centre regeneration initiatives coming forward.

Table 9.4: Quantitative Capacity for Restaurant and Café Floorspace and Licensed Premises Floorspace in the Authority Area

Year	Restaurant and Café Floorspace Requirement (sq.m)	Licensed Premises Floorspace Requirement (sq.m)	Total Food and Beverage Floorspace Requirement (sq.m)
2025	0	0	0
2030	700	300	1,000
2035	1,500	600	2,100
2040	2,400	1,000	3,400
2042	2,700	1,200	3,900

Source: Tables 5a, 5b, 10a and 10b of Appendix 5
Note: Assumes constant market share of Study Area expenditure claimed by facilities in the authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 2 of Experian Retail Planner Briefing Note 22 - Leisure; in 2023 prices

9.11 In terms of all food and beverage floorspace capacity identified above, we note that the Council's and other stakeholder's aspirations for the future regeneration of the principal centres within Tameside will include the provision of additional leisure floorspace. This will not only provide for a more diverse offer for residents and visitors, but also help to encourage dwell time throughout the day and into the evening, particularly for centres which otherwise typically go very quiet at night. This in turn will also help to encourage town centre living and improve safety perceptions through the encouragement of activity.

9.12 We therefore recommend that town centre policies continue to encourage a diverse range of uses within the defined centres to include leisure uses, to help to attract footfall and expenditure and help to protect the future vitality and viability of these centres.

9.13 The Study has identified quantitative capacity which equates to a requirement across the authority area at 2042 for:

- 0.7 bingo halls;
- 2.8 cinema screen;
- -15.0 ten pin bowling lanes;
- -0.5 casinos; and

- 1 new health and fitness club.

9.14 The cinema screen requirements are of a modest scale and we note that there may be an opportunity to bring forward a small-scale cinema as part of the Arcade redevelopment plans within Ashton town centre.

9.15 Other than the above, we do not anticipate there to be operator demand to bring forward larger format leisure uses in the authority area over the plan period to 2042.

Future Retail and Centres Strategy

9.16 The provision of main food shopping destinations within and around defined centres is a key strength of centres across the authority area and the benefit of retaining this should be given substantial weight when considering future convenience goods retail proposals.

9.17 In terms of service sectors, financial and business transactions have increasingly moved online and 'bricks and mortar' financial service provision has significantly reduced as a consequence. This trend will not be reversed. It will be important to ensure that premises previously put to such use are repurposed and brought back into active use. By way of example, former bank and building society premises can often be made into attractive bars and restaurants which are able to enhance a centre's wider offer (including the evening economy).

9.18 Whilst the economic picture is currently challenging for hospitality operators, we consider that further potential exists to expand the leisure sector offer within the authority's principal centres across the medium to longer term and the assessment undertaken to support this Study confirms that there is a capacity for additional food and beverage floorspace across the authority area. This ties in with the current aspirations to diversify the defined centres within the authority area, and the Masterplan schemes which further encourage this.

9.19 It is highly unlikely that there will be substantial comparison goods retail development coming forward within the local authority area across the plan period. In practice, some such in-centre retailers may close. This could open up town centre space for convenience retailers, and for the growth of the leisure and retail service sectors.

9.20 In particular, food and drink operators are a critical component of a modern town centre, and the future success of these operators is inextricably linked to the centres' overall vitality. Improved local leisure provision will mean a reduced need to travel further afield to eat, drink and socialise. This reduces carbon emissions and accords with sustainable development principles (particularly as a rounded retail and service offer should encourage linked trips and reduce travel).

Meeting Retail Needs

9.21 The findings of this Study have identified a small quantitative need for additional convenience goods floorspace across the plan period in the authority area, which in practice would be absorbed by the introduction of one single new foodstore. We do not recommend allocating any sites for additional convenience foodstores given the limited capacity and provision of existing foodstores across the authority area and in particular, within the defined centres.

9.22 While the out-of-centre retail parks contribute to meeting some of the comparison goods needs of the Borough's residents, we consider that there is no requirement to develop any further facilities outside of defined centres.

9.23 It will therefore be important to continue to encourage non-bulky comparison retailing, in particular, within the town centres in order to protect and enhance its role as a shopping destination that meets the day-to-day needs of its local residents.

9.24 However, we do not recommend that the Council allocates any sites within the defined centres to accommodate additional floorspace within the local plan and that instead, planning policy should be focused on ensuring that new retail and leisure developments are directed to the defined centres in the first instance.

9.25 In particular, we do not anticipate a need to build out any further comparison goods floorspace over the plan period and recommend that any planning applications which support such a use are carefully considered in respect of their compliance with the sequential and impact town centre policy tests.

Meeting Commercial Leisure Needs

9.26 As Section 8 demonstrates, other than for a small format cinema, we do not identify any capacity for large format leisure floorspace within the authority area. We do, however, identify a floorspace capacity for restaurants, cafés and other licenced premises but this is not at a level which we consider should be reflected in policy.

9.27 In this regard, the quantum of floorspace identified is less than the total quantum of vacant floorspace identified across the authority area's principal centres. Accordingly, we recommend that this floorspace requirement is directed towards the defined centres in order to secure the re-use and repurposing of vacant floorspace and the continued encouragement of commercial leisure floorspace as part of the wider town centre regeneration initiatives as set out above.

9.28 Commercial leisure continues to be an important element of the overarching offer of centres and is one of the key attractors which draws in footfall both during the daytime and evening.

9.29 Therefore, a recognition that such uses play an important role in helping to support the future vitality and viability of centres should be included in planning policy.

Planning Policy Recommendations

General Policy Approach

9.30 Paragraph 018 of the Town Centres PPG indicates that proposals for edge and out-of-centre retail and leisure developments should be considered with reference to the health of centres that would be impacted by development. Policy JP-Strat12 of Places for Everyone Joint Development Plan also seeks to protect the role of main town centres as local economic drivers, and ensuring that they are the focus for office, retail, leisure and cultural activity. In addition, Policy JP-P4 seeks to guide large-scale retail and leisure development to the main town centres in the hierarchy, which includes Ashton-under-Lyne.

9.31 Paragraph 018 of the Town Centres PPG states that:

'A judgement as to whether the likely adverse impacts are significant can only be reached in light of local circumstances. For example, in areas where there are high levels of vacancy and limited retailer demand, even very modest trade diversion from a new development may lead to a significant adverse impact.'

9.32 In this context, it will be important for the emerging plan to clearly set out the importance of the sequential and impact tests and explain the local circumstances which frame how they will be applied in practice. The sequential and impact tests will need to be applied in a robust manner in order to provide for the re-use of vacant units and to support centres which retain a strong retail function as well as a diverse range of other uses. Whilst non-retail uses will be an important component of the mix of land uses in principal centres moving forward, there is still a requirement to accommodate new retailers and secure additional retail floorspace within defined centres wherever possible in accordance with the requirements of the NPPF.

9.33 It will be important for the forthcoming plan to clearly identify that Ashton town centre and the other defined centres within the borough should remain a focus for both convenience and comparison goods retail and that such uses remain important in driving footfall. It is important that this offer is maintained given local residents' needs. Such protection over the existing and proposed defined centres can be achieved through the appropriate application of the sequential and impact policy tests.

9.34 Notwithstanding this, as is demonstrated at Section 2, it is evident that fundamental changes in the retail sector – largely resulting from the shift to online retail, which has been accelerated by the Covid-19 pandemic – have had a permanent impact on land use on the high street. As such it is critical that defined centres continue to diversify in order to provide access to jobs, leisure, culture, services, and social connection.

9.35 In the context of the current offer of defined centres, and national planning policy requirements, we recommend that emerging plan policies are sufficiently flexible so as to allow for an appropriate range of town centre uses beyond retail, and reflect the need to repurpose historic, sometimes outdated retail stock in order to accommodate new residential, leisure and community uses. To this end, we note that paragraph 86 of the 2021 NPPF states that planning policies should:

'…recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.'

9.36 The emerging plan should also consider the effects of the expanded Use Class E and the consequences of the additional flexibility which Class E provides for outside of town centres. The authority may wish to consider applying restrictive conditions to planning permission for Class E development which is delivered outside of town centres to restrict the authorised use to that which has been justified in the application submission. This will help ensure that unacceptable impacts do not arise within town centre as a consequence of future Class E development.

9.37 The overarching policy approach should therefore be based upon the following key pillars which provides a positive strategy to the defined centres and whilst continuing to acknowledge that the new Local Plan intends to plan for meeting retail 'needs' alongside other main town centre land uses:

a. New / replacement floorspace will naturally be encouraged by the Council's positive planning strategy for existing defined centres and specifically around transport hubs and those areas of growth within the Ashton Mayoral Development Zone where new population will create additional footfall. Even without specific site / area allocations, the new Local Plan is able to provide for a positive policy environment to provide new retail land uses within defined centres.

b. Planned centres including Godley Green, will be providing new retail floorspace to meet some of the identified 'needs'. A key element of providing for retail needs, alongside other main town centre land uses, is via planned new centres.

c. New retail provision will also be provided through the development management process. It will remain the case that proposals for new retail floorspace / retail uses will come forward outside of the plan-led system and, instead, be dealt with via the development management process. Whilst such proposals will face detailed scrutiny, they will, if permitted, go some way to meeting the needs of the retail sector and the local community.

9.38 With the above context in mind, we now turn to our assessment of specific policy options for the out of centre provision across the authority area. In this regard, national planning policy is clear that protection should be given to defined centres in order to ensure residents have a good mix of amenities available. It is acknowledged that the out of centre floorspace in the authority area has an important role to play in serving residents of Tameside borough in terms of providing retail and leisure facilities but also has a much wider role and wider draw from an extensive catchment. The current offer at the out of centre destinations do not provide for a 'traditional' town centre and do not provide for the range of uses typically required to meet the definition of a defined centre. The role of the out of centre floorspace should therefore be recognised in the local plan, but a clear differentiation between the out of centre provision and defined centres within the borough should be continued in the updated planning policy.

9.39 The NPPF and associated Town Centres NPPG provides a useful tool upon which to appropriately differentiate defined centres and out of centre development. Indeed, Annex 2 of the NPPF states that: '…existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres'. The NPPG also states that a wide range of uses, including residential, healthcare, educational development, employment and offices can all help to support the vitality and viability of a centre.

9.40 On this basis, the qualitative benefits of the existing defined centres within the borough are their provision of smaller units to meet the needs of a wide range of operators, including independents across a range of commercial sectors. The out of centre provision is qualitatively different insofar as it provides larger scale units to predominantly meet the needs of national multiple retail and leisure operators, but do not, in the most part, provide space which is comparable to that which is provided for within the defined centres. Ensuring that this difference in the offer is retained within the borough is imperative to securing the future vitality and viability of centres.

9.41 Given the above, whilst a recognition of the out of centre destinations within the local plan can be provided, this should not allow for future applicants to avoid the requirement to demonstrate compliance with planning policy.

Hierarchy

9.42 Policy approach HSP C1 sets out the proposed hierarchy and designation of centres within the authority area. The focus of the policy is around the seven defined centres (including Hattersley) and sets out the hierarchy as follows:

- Main town centre - Ashton-under-Lyne
- Town Centres - Denton and Hyde
- District Centres - Stalybridge, Droylsden and Hattersley
- Local Centre – Mossley (Top and Lower)

9.43 Policy approach HSP C3 also proposes to support local shopping parades, which contain four or more adjacent or closely associated shop units. The policy approach also seeks to protect the loss of retail units within these parades.

9.44 Paragraph 90 of the NPPF indicates that local planning authorities should define a network and hierarchy of town centres. However, very little detail is provided in this regard and, notably, neither the NPPF nor the Town Centres PPG differentiate between different types of town centre and the role each serves.

9.45 The most recent definitions provided by the Government were provided by Planning Policy Statement 4: Planning for Sustainable Economic Growth ('PPS4'), which was published in December 2009 (and was superseded by publication of the original iteration of the NPPF in March 2012). Whilst PPS4 should be considered on this basis (i.e. it is not up to date practice guidance), in the absence of any other definitions, it is of some relevance to the consideration of a retail centres hierarchy.

9.46 Annex B of PPS4 identifies that:

'City centres are 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. Planning for the future of such areas can be achieved successfully through the use of area action plans, with masterplans or development briefs for particular sites. In London the 'international' and 'metropolitan' centres identified in the Mayor's Spatial Development Strategy typically perform the role of city centres.

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. In London the 'major' and many of the 'district' centres identified in the Mayor's Spatial Development Strategy typically perform the role of town centres.

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.

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. In rural areas, large villages may perform the role of a local centre.

Small parades of shops of purely neighbourhood significance are not regarded as centres for the purposes of this policy statement.'

9.47 Having visited the centres and considered the future development aspirations and overarching future plans taking account of the commercial market, we agree in general, with the proposed hierarchy as set out in the policy approach HSP C1. In addition, the inclusion of local neighbourhood parades as set out at policy approach HSP C3 is also supported. Although these will not be defined centres for the purposes of the local plan, their recognition is important insofar as ensuring that residents have access to small-scale commercial units across the authority area.

9.48 In this regard, we have given consideration in particular to the offer of the three town centres and considered whether we agree with Ashton being designated in a tier of its own, along with whether we Hyde and Denton as town centres, and finally if we agree with the designation of Hattersley as a district centre alongside Stalybridge and Droylsden and Mossley as a local centre.

9.49 Overall, we consider:

- It is clear that Ashton-under-Lyne is the principal centre in Tameside and provides for the highest quantum of retail and leisure floorspace overall, but also attracts the highest level of comparison expenditure in particular.
- Both Denton and Hyde provide for a range of retail, leisure and service uses but to a lesser level than that which is provided for in Ashton. Denton's sphere of influence (although not in the defined town centre boundary) is impacted on by the presence of Crown Point Shopping Park, but given its separation from the

wider centre and the potential propensity for linked-trips between the two particularly given its large expanse of car parking, we do not consider this shifts Denton's position in the hierarchy.

- Stalybridge and Droylsden are qualitatively different and provide for a different offer to meet the specific needs of their catchment areas. However, given the offer of the centres, we do agree that they both sit comfortably within the district centre tier.
- We have considered the positioning of Hattersley within the hierarchy and how the aspirations for the area have altered over time. It is clear that the intentions for Hattersley were to provide for a wider range of main town centre uses to meet the needs of the catchment. However, the latest extant consent (which is now under construction) will bring forward a foodstore, a drive-thru, alongside eight employment units. The picture has therefore changed for Hattersley, but we do not consider this negates the need to define a centre at Hattersley to include the current retail, leisure and community uses. Given the scale of existing and extant consent, this would fall within the district centre tier, and therefore retaining it within this group of centres is considered appropriate.
- In terms of Mossley local centre, we note that the area as currently defined as the local centre is known locally as Top Mossley, and that a distinctly separate area known as Bottom Mossley, focused around the towns train station also includes a range of commercial uses including the Post Office and associated convenience store, a pharmacy, public house and range of small commercial units. In light of the range and concentration of uses at Lower Mossley, we recommend that these uses are also included in the area defined as Mossley local centre, and that the centre remains as a local centre in the hierarchy.

Boundaries

9.50 The policy approach HSP C2 proposes to define Primary Shopping Areas within the six defined centres (excluding Hattersley). In doing so, the policy sets out that within the Primary Shopping Areas, the Council is carefully considering the appropriate range and balance of uses.

9.51 Paragraph 90 of the NPPF requires local plans to 'define the extent of town centres and primary shopping areas'.

9.52 National planning policy no longer explicitly prescribes the designation of primary and secondary frontages. The Government has confirmed that the removal of this requirement reflects the general need to be flexible in planning for the future of town centres due to the rapid changes taking place in the retail and leisure industries. Whilst the removal of the requirement does not preclude local planning authorities from identifying primary and secondary shopping frontages where supported by local circumstances, we do not believe that this is merited in this instance. There is a clear need to repurpose and reoccupy centres across both authority areas in the manner that Use Class E generally provides for. In this context, the separate designation of both primary and secondary frontages would serve no useful purpose. Instead, where appropriate, we recommend a single defined 'primary shopping area'.

9.53 Annex 2 of the NPPF indicates that a primary shopping area is the **'Defined area where retail development is concentrated'**.

9.54 Annex 2 also identifies that a town centre is the:

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

9.55 Annex 2 further defines main town centres uses as:

'Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment and 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, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).'

9.56 In this context, it is important to note that, although there is the opportunity to define separate primary shopping area and town centre boundaries, there is no general requirement to do so unless the specific characteristics of the subject centre support such an approach. Government policy specifically encourages the diversification of centres.

9.57 Furthermore, it is also important to recognise the purpose of defining both a primary shopping area and town centre boundary. In planning policy terms, distinguishing between the primary shopping area and town centre boundary is of principal merit in terms of identifying the area of relevance in applying the sequential and impact tests to retail development. The particular relevance of the primary shopping area to retail planning proposals is confirmed by Annex 2 of the NPPF. As such, if there are no separately defined primary shopping areas and town centre boundaries, then the town centre boundary effectively acts as both.

9.58 In terms of the recommended changes to the boundaries of the defined centres, we provide a summary below, with the plans provided at Appendix 6.

Table 9.5: Summary of Proposed Changes to Boundaries

Centre	Boundary Recommendations
Ashton-under-Lyne	**Town Centre Boundary:** The proposed town centre boundary has been refined to take account of the area within which the main town centre uses are concentrated in the town centre. In this regard, areas on the periphery of the currently defined town centre boundary have evolved over time to include non-main town centre uses, and principally residential uses. In this regard, we have recommended that to the north, the boundary is tightened to exclude some peripheral land that does not contribute to the function of the town centre. To the west and south, minor adjustments have been made to better align the boundary with active commercial uses and exclude adjacent residential areas. Importantly, St Petersfield has been retained within the boundary given its predominant office use and the benefits this provides to the wider offer of the town centre. Overall, the revised boundary provides a more accurate reflection of the established extent of town centre activity. **Primary Shopping Area:** A new primary shopping area has been defined, focusing on Ashton Market Square, the Arcades Shopping Centre, and the Ladysmith Shopping Centre. This represents the heart of retail activity in the centre and is clearly distinguished from the wider town centre, which accommodates a broader mix of uses.
Hyde	**Town Centre Boundary:** The proposed town centre boundary has been tightened to better reflect the area within which the main town centre uses are concentrated.

Centre	Boundary Recommendations
	In particular, peripheral areas, including large sections of surrounding residential development to the west, have been excluded. The revised boundary is more focused on the active commercial and retail core, while still encompassing key leisure, service, and community uses that contribute to the town centre's function. **Primary Shopping Area:** A new primary shopping area has been defined within the town centre. This is concentrated around the Clarendon Square Shopping Centre, Market Place, and adjoining retail frontages, capturing the area with the greatest concentration of retail activity. The designation creates a clear distinction between Hyde's retail heart and the wider town centre, which accommodates a broader mix of uses.
Denton	Within Denton, we do not propose to define separate town centre and primary shopping area boundaries, and instead have one single boundary which better reflects the overarching diversity of the centre. In this regard, we are not of the view that the centre includes an area within which retail uses are concentrated and that retail uses can be found throughout the centre. In light of the above, we have recommended a town centre boundary which better reflects the area within which main town centre uses are concentrated. As such, to the north, the boundary no longer extends as far into surrounding residential areas, instead being drawn more closely around the active commercial frontages and Crown Point Shopping Park. To the west, land around the railway has been excluded, removing peripheral areas with little connection to town centre activity. To the south and east, the boundary now more clearly follows the extent of the shopping centre and High Street, ensuring residential streets beyond are excluded.
Stalybridge	Within Stalybridge, we do not propose to define separate town centre and primary shopping area boundaries, and instead have one single boundary which better reflects the overarching diversity of the centre. In this regard, we are not of the view that the centre includes an area within which retail uses are concentrated and that retail uses can be found throughout the centre. The existing boundary has been tightened in some areas and expanded in others to better reflect the current extent of main town centre uses. To the west, the boundary no longer includes some peripheral land near the railway and has been redrawn more closely around the main commercial core. To the east, the boundary now includes the Tesco and retail park area off Acres Lane, recognising its role as a key anchor and generator of footfall. To the south, the boundary has been refined to follow High Street more closely, excluding some residential and non-town centre uses.
Droylsden	Within Droylsden, we do not propose to define separate town centre and primary shopping area boundaries, and instead have one single boundary which better reflects the

Centre	Boundary Recommendations
	overarching diversity of the centre. In this regard, we are not of the view that the centre includes an area within which retail uses are concentrated and that retail uses can be found throughout the centre. The proposed boundary has been significantly reduced compared with the existing one, drawing it tightly around the area where main town centre uses are concentrated. Large areas of surrounding residential development have been excluded, with the boundary now more tightly drawn around the areas of retail, leisure, and service uses, and their adjacent car parking provision.
Hattersley	As explained in our recommendations in relation to emerging HSP Policy C1, there is a need to define a district centre at Hattersley to include the current retail, leisure and community uses and to reflect the scale of the extant consent for retail, drive-through coffee shop and employment units. The proposed boundary encompasses the existing Tesco store and the Hub (which provides for a community centre, a library, a youth club, a police post and a café, together with office accommodation). It also reflects the forthcoming Aldi, Costa and B2/B8 units consented under planning permission reference 23/01063/FUL.
Mossley	Within Mossley, we do not propose to define separate town centre and primary shopping area boundaries, and instead have one single boundary which better reflects the overarching diversity of the centre. In this regard, we are not of the view that the centre includes an area within which retail uses are concentrated and that retail uses can be found throughout the centre. In addition to the above, the proposed boundary has been reduced in scale compared with the existing one. In particular, to the west, the boundary is now focused more tightly around the Co-op store and adjoining shops on Manchester Road, excluding surrounding residential streets. To the east, the boundary no longer includes the nearby residential blocks, instead concentrating on the active commercial frontage. In addition, we are also recommending that the area known as 'Bottom Mossley' on Manchester Road is also incorporated into the wider local centre designation of Mossley local centre. The additional units on Manchester Road, although set apart from the larger part of the centre along Arundel Street (and surrounding roads) do form an important part of the overarching commercial offer of Mossley and should therefore be defined as such. Our recommended boundaries for both parts of Mossley local centre are included at Appendix 6.

Thresholds

9.59 The policy approach HSP C4 currently sets out a suggested approach based on the findings of the 2018 Study. This is a tiered approach for the centres, the premise of which we agree with. However we do have alternative recommendations in respect of the impact testing thresholds to be applied to the hierarchy and set out our thoughts below.

9.60 Paragraph 90 of the 2021 NPPF states that it is appropriate to identify thresholds for the scale of edge of centre and out of centre retail and leisure development that should be the subject of an impact assessment. Any such threshold policy applies only to the impact test (all planning applications for main town centre uses that are not in an existing centre and not in accordance with an up-to-date development plan will generally be the subject of the sequential test).

9.61 The purpose of applying an impact threshold within the development plan which deviates from the national threshold of 2,500 sq.m, is to allow the Council to retain appropriate control in respect of the potential for development to impact on the future health of defined centres within the authority area. By applying a lower threshold, applications for developments which could potentially have a harmful effect on the overall vitality and viability of a defined centre, will need to be supported by a proportionate impact assessment which sets out the potential trade diversion impact assumptions.

9.62 Paragraph 16 of the Town Centres PPG provides specific guidance in relation to floorspace thresholds and states:

'The impact test only applies to proposals exceeding 2,500 square metres gross of floorspace unless a different locally appropriate threshold is set by the local planning authority. In setting a locally appropriate threshold 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**
- **impact on any other planned investment.'**

9.63 Using the above guidance, we set out the justification to support our view that a lower threshold should be applied across the hierarchy of centres within the authority area. To note, the current adopted policy does not provide a locally set threshold for impact assessments.

9.64 In considering the setting of a local impact threshold, it is important to consider the type of development (relating to convenience and comparison goods retail uses, and leisure uses) which would, in practice, provide space for key operators who could act to 'anchor' a centre. Should one of these anchor units or operators leave a centre, there will likely be the potential for a significant adverse impact to arise.

9.65 As such, where there is genuine potential for an application proposal to divert a material level of expenditure away from a defined centre, or potentially remove a key tenant from that centre, there will likely be a requirement to consider the impacts arising from the proposal in detail.

9.66 In respect of lower order centres, the introduction of even a small convenience store nearby (of the type operated by Sainsbury's Local or Tesco Express) may have the potential to impact on the ongoing viability of key operators. Small convenience stores operated by national multiple grocers can generate a relatively substantial turnover. If this is diverted from existing retailers in defined centres, the impact on the overall vitality and viability through the loss of spend and footfall, could be of a significant adverse magnitude.

9.67 Therefore, in implementing a local threshold policy, it is considered more appropriate to apply a range of thresholds in accordance with the type of centre the proposed development is proximate to. The thresholds should not only apply to new floorspace, but also to changes of use and variations of condition to remove or amend restrictions on how units operate or trade in practice.

9.68 We provide a summary of our findings in respect of the six centres (excluding Hattersley) below, which has then helped to formulate our recommended impact thresholds for the hierarchy of centres in Tameside:

- In Ashton-under-Lyne town centre, approximately 7.0% of all units have a greater floorspace than 500 sq.m and 14.1% of all units have a greater floorspace than 300 sq.m, which includes the larger format convenience stores. The proportion of vacant units in the town centre equates to 21.8%, and the average retail unit size is 207 sq.m. In total, retail uses (convenience and comparison operators) account for 32.6% of the total stock of retail floorspace.
- Hyde town centre has a slightly lower average unit size than Ashton at 202 sq.m, but this is not considered to be considerable. Approximately 6.0% of all units have a greater floorspace than 500 sq.m and 12.7% of all units have a greater floorspace than 300 sq.m. At the time of our survey, the proportion of vacant units in the town centre equated to 18.2%. In total, retail uses (convenience and comparison operators) account for 37.3% of the total stock of retail floorspace.
- In Denton town centre, approximately 6.7% of all units have a greater floorspace than 500 sq.m and 9.6% of all units have a greater floorspace than 300 sq.m. The vacancy rate equates to 8.7% of all retail units in the town centre, and the average unit size is 197 sq.m. In total, retail uses (convenience and comparison operators) account for 33.1% of the total stock of retail floorspace.
- In Stalybridge district centre, approximately 3.9% of all units have a greater floorspace than 500 sq.m and 9.4% of all units have a greater floorspace than 300 sq.m. The vacancy rate equates to 14.9% of all retail units in the town centre, and the average unit size is 177 sq.m. In total, retail uses (convenience and comparison operators) account for 32.7% of the total stock of retail floorspace.
- In Droylsden district centre, approximately 9.8% of all units have a greater floorspace than 500 sq.m and 15.9% of all units have a greater floorspace than 300 sq.m. The vacancy rate equates to 30.0% of all retail units in the town centre, and the average unit size is 208 sq.m. In total, retail uses (convenience and comparison operators) account for 21.7% of the total stock of retail floorspace.
- In Mossley local centre, the average unit size is considerably lower at 90 sq.m, and approximately 5% of units measure above 300 sq.m (with 4% above 500 sq.m). The vacancy rate in the local centre is also high at 25.9% of all units.

9.69 In terms of policy recommendations relating to the impact policy threshold, this relates to the defined centre, which for the purposes of retail development comprises the primary shopping area, and for all other main town centre uses comprises the wider town centre boundary

Recommended Approach

9.70 In this context, our initial recommendation is that the impact threshold of relevance to the town centres is set at 500 sq.m for both retail and leisure proposals. This threshold would effectively be the default to be applied authority-wide.

9.71 The above recommendation is also reflective of the town centre vacancy rates and the potential for out of centre retail developments to become even stronger in the future at the expense of centres' vitality and viability.

9.72 In this regard, existing schemes such as Snipe Retail Park (20,438 sq.m) and Ashton Retail Park (3,148 sq.m) all provide for substantial levels of retail and leisure floorspace at edge and out of centre locations across the authority area. The units within the out of centre retail parks range from 200 sq.m up to around 3,000 sq.m, with the ability to be sub-divided and provide space for operators which would typically locate in town centres.

9.73 The existing out of centre commercial destinations all offer a range of comparison goods, which traditionally would have been sold from town centres. As such, the recommendation is reflective of the need to safeguard against the out of centre retail destinations becoming even stronger at the expense of the health of defined centres.

9.74 The district centres are generally anchored by one or two national multiple convenience stores. These operators underpin the function of these centres, drawing in custom and encouraging linked trips to the other parts of the centre. Should the viability of such stores be impacted, there is a real risk of the role of the wider centre being undermined. There are relatively few units substantially larger than 300 sq.m in any of the district centres and the level of retail floorspace is considerably less than within the town centres. As such, to lose an occupier of this magnitude could have a significant adverse impact on the centre as a whole. Accordingly, in the local context, 300 sq.m constitutes a significant unit for the district centres.

9.75 The above recommendation is also reflective of the district centre vacancy rates and the potential for out of centre retail developments to become even stronger in the future at the expense of centres' vitality and viability. The existing out of centre commercial destinations all offer a range of comparison goods, which traditionally would have been sold from centres.

9.76 The proposed thresholds at local centre level are considered to reflect the relatively small size of some of the centres at the lower end of the retail hierarchy and their consequent potential susceptibility to alternative 'out-of-centre' provision. In practice, it is envisaged that a proposal of just greater than 200 sq.m adjacent to a local centre would generally require an impact assessment of proportionate length (i.e. for development of such a scale, impact may on occasion be able to be dealt with as part of the covering letter accompanying the application).

9.77 Where an application proposal is above the respective stated impact threshold, we would recommend that the applicant discusses and agrees the scope of the retail impact assessment with the relevant Council prior to submission. The lower threshold of 200 sq.m for local centres is considered appropriate due to potential for convenience stores of even a relatively small nature to substantially impact upon the performance of existing operators, due to the potential higher sales densities of such proposals. This would ensure that particular protection of these smaller centres is considered appropriately.

9.78 For the purpose of drafting future planning policy, it is important to qualify the area to which each local impact threshold will apply. We recommend that the threshold of relevance to the town and district centres (i.e. 300 sq.m) and local centres (i.e. 200 sq.m) would be applicable within 800 metres of the boundary of the relevant centre. The distance of 800 metres is broadly commensurate with the potential walk-in catchments of smaller centres and is identified by Guidelines for Providing for Journeys on Foot (The Institution of Highways & Transportation, 2000) as being the 'preferred maximum' acceptable walking distance to a centre.

9.79 For clarity, we consider it to be appropriate for the higher threshold of 500 sq.m to apply across Tameside when the centre-specific thresholds do not apply (i.e. beyond 800 metres of these centres), due to the lesser likelihood of significant adverse impacts arising from retail and leisure development. This general 500 sq.m threshold would therefore apply to proposals outside of the 800 metre boundary of the defined centres due to the lesser likelihood of the proposals having an impact.

9.80 It is important to emphasise that, whilst the locally set threshold would require the submission of an impact assessment for all edge-of-centre and out-of-centre developments exceeding the thresholds, national guidance states that the impact test should be undertaken in a proportionate and locally appropriate way, commensurate to the scale of development proposed. The level of detail would typically be agreed with planning officers during the pre-application process in order to avoid overly onerous requirements that may otherwise restrict and delay development opportunities from coming forward.

9.81 Based on the above, we are of the view that an impact assessment will be necessary to accompany proposals for retail and leisure uses (including those relating to mezzanine floorspace and the variation of restrictive conditions) which are not located within a defined centre where:

- the proposal provides a gross floorspace in excess of 500 sq.m gross; or
- the proposal is located within 800 metres of either;
  - a district centre and is in excess of 300 sq.m gross; or,
  - a local centre and is in excess of 200 sq.m gross.

9.82 In our experience, it will only generally be development of a scale greater than these thresholds which could lead to a 'significant adverse' impact, which could merit the refusal of an application for town centre uses in accordance with the provisions of paragraph 91 of the NPPF.

9.83 The setting of a 'tiered' threshold is consistently accepted by Inspectors at Local Plan Examination and, in our view, acts to appropriately ensure that only those proposals which could genuinely result in an unacceptable impact are the subject of an impact assessment.

Other Main Town Centre Uses

9.84 National planning policy and its associated guidance acknowledges that there will be certain main town centre uses which have particular market and locational requirements which mean that they may only be accommodated in specific locations (see paragraph 012 of the Town Centres NPPG). This does not mean that proposals for main town centre uses do not need to accord with the impact and sequential policy tests, but that there is a recognition that an assessment may need to take account of the specific business model requirements of the proposed development.

9.85 In the retail sector, the need to accommodate ‘specialist’ uses such as bulky goods operators is well-established and often controlled via restrictive planning conditions which limit the range of goods which can be sold from the location in question in order to safeguard the vitality and viability of defined centres within the same catchment.

9.86 In addition, there has been a growth in recent years in other more specialist commercial leisure attractions, including facilities such as trampoline parks, indoor soft play centres, ninja courses and a range of competitive social destinations. The latter is a fast-paced sector and is still continuing to grow and evolve, with new formats becoming present in the market. Such uses include urban golf, bar and game formats, which include games such as axe-throwing, shuffleboard, table tennis and so on, virtual reality gaming and escape rooms. All of these commercial leisure uses fall within the defined town centre use bracket, and typically require large floorplates.

9.87 The position within Tameside reflects:

- the fact that such facilities tend to need large format, often former warehouse or large retail facilities to be able to provide the required space both horizontally and vertically to house the operation; and
- the proximity of Manchester city centre and other competitors with a much higher concentration of such facilities.

9.88 Although the market for such commercial leisure uses is still evolving, and alternative operators may still continue to require new premises across the authority area, these should be assessed on a case-by-case basis, ensuring that such uses are directed towards defined centres in the first instance. This is particularly important given the wider benefits such uses can have in terms of encouraging longer dwell-times and increasing footfall and associated expenditure within centres.

9.89 In this regard, there will be circumstances where development for main town centre uses is proposed in out of centre locations, including predominantly employment areas and other existing out of centre commercial destinations. In such instances, proposals should be supported by an appropriate assessment which demonstrates compliance with the relevant retail policy tests, but which sets out clearly the intended catchment area, the specific business model requirements and the associated justification as to why it could not be accommodated within a defined centre. Such examples may include small-scale food and beverage uses which serve the working catchment in an employment area, or where the retail element of a business is directly related to the wider use on the site and therefore locating it elsewhere would not serve its intended purpose or catchment.

9.90 In such cases, the same policy tests apply but robust justification could help to support the proposal and assist in demonstrating full compliance with the retail policy tests.

Takeaway Uses

9.91 National planning policy recognises the role of planning in promoting healthy communities, including how the environment can impact on health and influence healthy lifestyle choices. Rising obesity rates are a nationally recognised problem. Obesity reduces life expectancy, and increases the risk of serious diseases like cancer, heart disease and diabetes. While the causes of obesity are complex, diet and environment are proven to be huge factors.

9.92 Policy JP-P6 of Places for Everyone sets out the strategic policy framework to help tackle health inequality in new developments. The Policy states that as far as practicable, new development will be required to maximise its positive contribution to health and wellbeing and support healthy lifestyles.

9.93 Public Health England (PHE) and the Local Government Association have provided a briefing on regulating the growth of hot food takeaway outlets. It acknowledges the complexity of the ways in which the environment promotes obesity and explains that actions can be taken by local authorities to reduce the extent of obesity promotion locally. It identifies that controlling the proliferation of hot food takeaway outlets has a role to play. It is acknowledged that a causal link between hot food takeaway outlets and obesity cannot be established but identifies that there is evidence of associations between obesity and the availability of fast food.

9.94 As well as health impacts, the new guidance recognises that hot food takeaways play a big role in town centres and other key areas across the authority area.

9.95 We understand that the proliferation of hot food takeaways is a concern across Tameside and although it is noted that such uses have their benefit in providing activity into the evening, there are potential wider negative impacts through closed shutters during the day, anti-social behaviour and other health matters. An important element of any future planning policy is the differentiation between hot food takeaways and other food and beverage uses which function differently, provide alternative offers and often have different opening hours. The clear difference between the two is also the different use classes that hot food takeaways and other leisure uses fall within.

9.96 Achieving an appropriate balance of uses within a centre should continue to be a priority for the local authority, and ensuring that centres provide a good mix of both daytime and evening economies and create safe and attractive environments for residents and visitors alike. Should the proportion of takeaways significantly increase within centres, then this balance of mix of uses and provision of amenities to meet the catchments' needs could decrease considerably, and residents could look elsewhere to meet their day-to-day retail, service and leisure needs. As such, future proposals to increase this provision should be monitored carefully.

9.97 Given the above, we are of the view that the following control within local planning policy is provided, and the specific criteria provided ensures that the Council retains control over any potential future planning applications for hot food takeaways within defined centres. In particular, we recommend that:

(1) In the defined centres, hot food takeaways will not be permitted where they would result in:

a) more than 10% of the ground-floor commercial premises in a block being used for hot food takeaways; and/or

b) more than two adjacent hot food takeaway.

(2) Outside of the centres listed in (1), hot food takeaways will not be permitted:

a) in wards where the most recent National Child Measurement Programme data classifies 10% or more of Reception pupils or more of 15% of Year 6 pupils as obese (including severely obese); and/or

b) in within Local Super Output Areas (LSOA) which fall within the 30% most deprived areas in England i.e. Index of Multiple Deprivation Deciles 1, 2 and 3; and/or

c) within 800m of a school entrance, unless opening hours are restricted during school opening times, lunchtimes, and school closing times.

9.98 We recommend that the criteria ensures that the Council can assess each application on its own merits, taking account of the current offer and health of the relevant centre and the demographics of the catchment area (including obesity levels), and the impacts of allowing an additional takeaway use.

9.99 The policy should also identify possible amenity impacts on an area which will be taken into consideration when assessing a takeaway proposal, including:

- The impact of noise and general disturbance, fumes, smells, litter and late-night activity, including those impacts arising from the use of external areas;
- The impact on highway safety;
- The availability of refuse storage and disposal facilities; and
- The appearance of any associated extensions, flues and installations.

Appendix 1 – Study Area

Appendix 2 - Household Survey Results

Appendix 3 – Town Centre Healthchecks

Appendix 4 – Quantitative Retail Tables

Appendix 5 – Quantitative Leisure Tables

Appendix 6 – Proposed Boundaries

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