



Tameside Retail Study

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WYG PLANNING AND DESIGN

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1.0 INTRODUCTION

Objectives of the Study

- 1.01 WYG Planning & Design (WYG) was commissioned by Tameside Council in August 2009 to undertake an update of the Tameside Retail Study undertaken by WYG and completed in February 2006.
- 1.02 The key focus of the study was to provide an up-to-date assessment of the future capacity for retail development in the Borough in accordance with national planning policy. This update is particularly important given the downturn in the UK economy since the completion of the previous study, which has had a notable impact on the retail sector. Furthermore, the study sought to identify any significant changes between 2006 and 2009 and therefore help to inform the preparation of future retail planning policy and strategies.
- 1.03 In order to provide a comprehensive update to the 2006 Study, new empirical research has been undertaken as part of the update comprising a telephone survey of 1,000 households in Tameside and the surrounding area in order to ascertain general patterns of shopping activity within the sub-region. In order to provide comparisons with previous studies the same catchment was used compared to the 2001 Study and 2006 Study.



2.0 CURRENT AND EMERGING RETAIL TRENDS

Introduction

- 2.01 The retail property landscape across the UK has changed significantly over the past 50 years, from post-war redevelopment in town centres, through to the emergence of the retail warehouse parks and out-of-town regional shopping malls.
- 2.02 During this time, the retail and leisure sectors have both experienced considerable growth. Spending on retail goods has increased significantly over the past decade, particularly spending on comparison (or non-food) goods. This expenditure growth is attributable to a number of factors, including greater disposable income, cheaper prices and new technology.
- 2.03 The retail market is continually changing as a result of shifts in demographics, increasingly restrictive planning policies and due to technological advancements, such as e-tailing. These changes have had a subsequent impact on the format of retail and leisure floorspace. Research undertaken by the British Council of Shopping Centres ('Future of Retail Property', 2006/7) indicated that retail development is increasingly being directed towards town centres, with the proportion of new retail space being developed in centres in England rising from 14% in 1994 to 35% over the period 1999 to 2005. This increase exemplifies the Government's 'town centres first' policy approach.

Current Retail Picture

- 2.04 Research undertaken by CBRE (Midsummer Retail Report, June 2008) provided information on recent trends together with forecasts for the future of retailing in the UK. The research identified that although the UK has seen impressive economic growth in recent times, the prospects for 2009 and beyond are much weaker for the retail sector and the UK economy as a whole. The impact of the 'credit crunch' on the UK retail market has been swift and consumer confidence, along with footfall across the country's high streets and shopping centres, has been hit.
- 2.05 A number of retailers have fallen into administration and, with large scale closures and new development flooding the market and Zone A rental levels are generally falling. The research undertaken by CBRE stated that, due to the challenging trading conditions, there are currently no



retailers looking to expand rapidly and that incentives offered in order to make retail units more attractive will continue to rise in shopping centre and mid-market locations.

- 2.06 Whilst it is anticipated that the current slow down in the economy will not last significantly beyond 2010, it is notable that Oxford Economics, which identifies the latest retail consumer expenditure in the UK, has recently significantly revised its forecast growth rates for comparison goods expenditure. Its forecast annual per capita comparison growth rate to 2014 has been reduced from +5.0%¹ to +1.6%², after assessing the implications of the 'credit crunch'. This represents a significant reduction in the forecast growth of comparison goods expenditure from that experienced in recent years.
- 2.07 In line with the above expectations, it has been widely reported that a number of high street retailers suffered poor trading figures during the latter part of 2008 and through 2009, resulting in many operators selling heavily reduced goods. Despite heavy discounting over the 2008 festive period and the reduction in VAT from 17.5% to 15.0% until January 2010, a number of retailers fell into administration around the end of 2008 and the early part of 2009, including Woolworths, Adams and Zavvi. Further losses to the high street are expected during 2010 and 2011.
- 2.08 Despite the difficulties set out above and the general decline in the comparison goods sector, specific types of goods continue to perform well. The market for recreational goods (including DVDs, CDs, toys, computers and books) has performed well in recent years, with healthy growth attributed to supermarket sales together with the growing popularity of online shopping, which continues to see an increase in sales year-on-year.
- 2.09 Convenience goods expenditure, although suffering a downturn and a slight negative per capita forecast growth rate, is not predicted to be the subject of as great a decrease in percentage points terms as comparison goods expenditure. Oxford Economics' most recent forecast suggests an

¹ Average annual per capita comparison goods growth rate between 2005 and 2012 provided by Oxford Economics in MapInfo Information Brief 07/02, published September 2007

² Average annual per capita comparison goods growth rate between 2008 and 2014 provided by Oxford Economics in MapInfo Information Brief 09/02, published September 2009



annual per capita convenience growth rate to 2014 of 0.5%³, compared to a previous forecast of +1.5%⁴.

- 2.10 Perhaps as a consequence of these conditions, discount convenience retailers such as Aldi have seen a notable increase in sales during 2008 and are looking to expand their portfolio in 2010. Similarly, Iceland has also seen an increased performance and has recently purchased a number of former Woolworths stores as it seeks to expand. Conversely, Marks & Spencer has not performed as well resulting in the closure of 27 of its Simply Food stores throughout the UK, although it is still committed to opening a number of new stores elsewhere.

Trends in Comparison Goods Shopping

- 2.11 Whilst it is anticipated that growth in retail spending over the next ten years will not mirror that of the last decade, there will continue to be some growth in comparison goods expenditure. Consequently, there is increasing impetus from retailers to achieve more efficient use of floorspace, particularly given the recent poor performance of many national multiples, many of which have been affected by the significant increase in e-tailing. As a consequence of their recent performance, retailers are more reluctant to commit to new development than they have been in previous decades. Instead, they are more selective and are holding out for accommodation that is appropriate both in terms of location and the type of premises provided. Indeed, retailers are seeking to occupy larger units in order to achieve more efficient use of floorspace and attract shoppers from a wider area. These larger floorplates enable retailers to provide a greater range of goods.
- 2.12 International market conditions and price deflation in some key sectors means that many high street names are becoming increasingly vulnerable to takeovers. Similarly, due to increased competition there have been a number of high profile losses from the high street, including Littlewoods, Music Zone, Woolworths, MFI and The Pier.
- 2.13 There will continue to be demand for larger, modern retail units in the future, although increased sensitivity over future viability will mean a cautious approach to new investment for many key

³ Average annual per capita convenience goods growth rate between 2009 and 2012 provided by Oxford Economics in its Revised Retail Spending Outlook, published March 2009

⁴ Average annual per capita convenience goods growth rate between 2008 and 2014 provided by Oxford Economics in MapInfo Information Brief 09/02, published September 2009



national retailers. Marginal locations within centres will increasingly be rejected. Many national retailers, who would have previously considered smaller/lower order centres in order to increase their market share, are now assessing the performance and their future strategies given the ongoing downturn in the economy. Consequently, many investment decisions will be influenced by the scale of commitment from other retailers; developers will increasingly need to promote large town centre redevelopment schemes if they are to attract high quality retailers.

Trends in Food Retailing

2.14 In the aftermath of the growth in the number of edge and out-of-centre large format supermarkets during the 1990s, development of such facilities is now more limited due to stricter planning laws, following the publication of PPS6 (and now PPS4), and a lack of suitable sites. As a result, the national multiples in the food retailing sector are finding a range of other measures to improve their market share. These include:

- Offering a wider product range, such as financial and insurance products, petrol and non-food goods;
- Developing a wider range of outlets, for example small-format convenience stores in town centres (e.g. Sainsbury's Local, Tesco Express), smaller supermarkets mostly in town centres (e.g. Tesco Metro), superstores (e.g. Tesco) and hypermarkets (e.g. Tesco Extra, Asda Supercentres);
- Extended opening hours;
- Offering cheap products and no-frills service;
- Providing an attractive and powerful brand image; and
- Offering a home delivery service.

2.15 Verdict (2009)⁵ estimated that the food and grocery market was worth £124.1bn in 2008. Verdict identified that in 2008 food and grocery specialists defied wider retail market gloom, increasing their combined sales by 5%.

2.16 Verdict identified that the 'credit crunch' and subsequent recession, allied with a bout of inflation have had a profound impact on consumer behaviour and the wider dynamics of grocery retailing.

⁵ Verdict – UK Grocery Retailers, April 2009



Price, or specifically value, is now identified as the key issue for consumers and more and more shoppers are looking at value for money. Consequently, supermarket operators have responded with new products at lower prices. The focus has shifted towards lower price point products. For example Tesco has launched its discount range (Tesco Value).

- 2.17 Given the recent success of the food and grocery market, during 2008 retailers' total space increased by 1.3%, delivering an additional net 1.5m sq ft of new floorspace (Verdict 2009). The 'Big Four' (Asda, Morrisons, Tesco and Sainsbury's) have been highly active in both new store openings and extensions, particularly from Morrisons and Sainsbury's. In addition, Verdict also identified that Waitrose, Iceland and hard discounters, such as Aldi and Lidl, have been particularly busy in developing more retail floorspace. Hard discounters such as Aldi and Lidl appear to have benefitted from the recessions, opening new stores and increasing their market share, including a proportion of more affluent ABC1 shoppers (Verdict 2009).
- 2.18 Verdict highlight that growth, for Tesco and Asda in particular, was focused on the non-food market. However, this sector has been hit hard during 2008. Despite this, the non-food sector remains crucial to the growth of leading supermarket operators. Verdict anticipate that new space, format development and multichannel growth will help supermarket operators continue to drive non-food sales – albeit at a slower pace than in the last couple of years.
- 2.19 In terms of the trading performance of leading supermarket operators, Morrisons saw a significant improvement during 2008, as too did Asda. In contrast although Verdict identified that Tesco increased its market share by 0.5 percentage points, over the past couple of years it has seen a strong resurgence among its competitors and its non-food growth has been impeded by the economic downturn.
- 2.20 Similarly, M&S Food is identified by Verdict to be under pressure. The retailer's upmarket food positioning has exposed it greatly to weakening consumer sentiment. M&S has seen its like-for-like food sales fall into reverse over the past year and in January 2009 the retailer announced that 27 underperforming Simply Food outlets were to close.

Out of Centre

- 2.21 Colliers CRE note that demand for out-of-centre representation is relatively static, with some retailers including TK Maxx, Asda Living and Tesco Home Plus actively seeking to expand their out-



of-centre floorspace and others, including Focus, B&Q and Currys either disposing of stores or downsizing their operations.

- 2.22 In terms of proposals in the development pipeline, the majority of consents for out-of-centre retail floorspace are for bulky goods stores. However, there has been a decline in out-of-centre proposals in the development pipeline during 2007/8. Despite this, Colliers CRE predict that the development of out-of-centre floorspace development will increase compared to 2007, albeit by a modest amount.

Shopping Centre Development

- 2.23 Research undertaken by Colliers CRE recognises that within town centres, supply outstrips demand. This is particularly prevalent in terms of lettings within shopping centres. As a result, Colliers CRE expect future shopping centre schemes to be pre-let by only 70% to 80%. This compares to a number of similar schemes being 100% pre-let in previous years. This is symptomatic of a reluctance of retailers to commit to schemes. This presents challenges for schemes due to open in the next few years, and it is anticipated that the timeframe for developing many shopping centre schemes will be pushed back.
- 2.24 The research also identified that retailers are reluctant to commit to schemes before they are constructed due to difficult trading positions and a large amount of supply. Retailers are able to 'cherry-pick' the best schemes to which they commit, and the largest anchor stores in particular, including Debenhams, House of Fraser and Marks and Spencer, are able to negotiate very favourable letting terms.
- 2.25 Town centre shopping centre schemes that will be successful in the future are considered to be those which benefit from good design and good location. Car parking facilities are also a distinct advantage. It is this type of development that will be able to compete with out-of-centre shopping facilities, which whilst more convenient for many consumers are considered not to offer an attractive shopping experience.
- 2.26 Although a number of major town centre schemes are still in the pipeline, the lack of funding available to developers due to the global 'credit crunch' has resulted in a number of schemes falling away such as the comprehensive redevelopment in Stockport Town Centre or the delay in other schemes elsewhere.



Growth in E-tailing ('E-commerce')

- 2.27 Many consumers who previously shopped in town centres and at retail parks are now using the internet for some of their purchases. This trend is set to continue, although the exact impact that e-commerce will have on the high street has yet to be fully established. However, the rise in the UK in recent years of e-commerce has impacted upon retailers, developers and investors alike. As access to the internet/online shopping continues to grow through digital televisions and mobile phones, proportionally less money is anticipated to be spent in the high street or at retail parks.
- 2.28 The growth in use of the internet as a sales medium has been enabled by increasing access to the internet by households. The proportion of households with access to the internet is expected to increase further over the coming years. This has supported the strong growth recorded, together with improved consumer confidence in the security of online payment, and heavy demand for expensive electrical products available online.
- 2.29 A recent report by the BBC identified that more than a third (36.3%) of UK consumers now purchases goods over the internet. Moreover, the average spend per customer is increasing. The online electrical goods sector represents the largest amount of expenditure, followed by online food shopping.
- 2.30 More recent research conducted by the Interactive Media in Retail Group and analysts Capgemini indicates that internet shopping accounted for 15p of every £1 of retail spending during 2007. This equates to some £46.6 billion of expenditure. This is likely to have increased during 2008 and is set to increase into 2009 and 2010. However, this compares to the British Retail Consortium's data identifying that online sales accounted for 6% of retail spending during 2007. Despite these differing results, it is acknowledged by most research bodies that internet spend has increased in recent years.
- 2.31 The forecast for online sales suggests that this sector could more than double over the next five years. Furthermore, online sales are expected to account for an increasing share of all retail goods sales, with a market share predicted to increase to less than 10% by 2011. Against this, forecasts by Experian (Retail Planner Briefing Note 6.1 – January 2009) indicate that whilst growth in this sector will be rapid, it will tail-off and stabilise not far beyond 12%.



- 2.32 With regard to supermarket operators, Verdict (2009) identified that with the exception of Morrisons (which does not trade online) the other major retailers have seen their online business grow over 2008 as online shopping penetration has continued to increase and as the likes of Asda and Sainsbury's have improved their geographical coverage and capacity. This growth in online purchases in convenience goods identified by Verdict compares to MapInfo (Expenditure Explanatory Volume – 2008 Release) identifying no increase in the level of annual spend via Special Forms of Trading (e.g. online purchase) since 2005.
- 2.33 The success of internet shopping is having an impact upon traditional high streets, in light of increased competition and lower prices. Consequently, there is a possibility that online retailing will put some pressure on retail rental growth over the next five to ten years, but is unlikely to impact on capital values. Research by BCSC identifies that 'large' and 'very large' shopping centres (of over 40,000 sq m) are deemed almost immune from the impact of online shopping as they offer the complete 'day out'. Although as the size of the shopping centres decreases, it is more likely that there will be greater adverse effects. Within small shopping centres (sized between 5,000 – 20,000 sq m) it is likely that the growth of online shopping could reduce turnover notwithstanding any growth in disposable income.
- 2.34 Furthermore, there is some evidence to suggest that the increase in e-commerce is impacting not just on high street sales, but also on the inclination of retailers to expand their 'bricks and mortar' outlets (BCSC, 2006). Despite this, retailers are optimistic, as they envisage a continued demand for physical stores and, for most, store sizes are likely to remain the same. Significantly, more retailers ranked physical stores first, ahead of all other current channels of retail distribution, and this is a pattern that they envisaged continuing. Retailers see e-tailing as another channel of distribution (BCSC, 2006).
- 2.35 As a consequence of the likely increase in e-tailing, retailers will increasingly have to adapt their stores to create more experience led environments. However, the increase in 'virtual' floorspace could result in a decrease in the level of innovation and number of new concepts and formats in the high street and in shopping centres.
- 2.36 Despite all these different assumptions with regard to the future effect of online shopping, it is considered that e-tailing will not replace the shopping experience as shopping is a social activity. Online shopping is very much seen as a complementary tool to support retail sales from physical



destinations (BCSC, 2006). For successful retailers, online selling provides an additional route to the market. Online retailers benefit from demand generated through physical channels whilst high-street outlets can benefit from reaching a wider customer base through the internet.

- 2.37 In response to increased competition from the internet, high street retailers have improved their online services. The future for online retailing will mean that retailers without a website will lose out to competitors who have one. Crucially, retailers which combine a strong high-street offer with a well-represented and closely related e-tailing offer will have a positive outlook.



3.0 PLANNING POLICY CONTEXT

Introduction

3.01 Given that this study seeks to provide important evidence that will assist in the future development of the Local Development Framework (LDF) process, it is important to review key policy advice and explore how current national planning policy may impact upon the development of policies locally.

Planning Policy Statement 4: Planning for Sustainable Economic Growth

3.02 On the 29th December 2009, the Government published the much anticipated PPS 4 - Planning for Sustainable Economic Growth, which provides essential guidance to assist in achieving the Governments over-arching objective of sustainable economic growth. The document seeks to support growth that can be sustained within environmental limits, but also enhances environmental and social welfare and avoids greater extremes in future economic cycles.

3.03 In order to achieve sustainable economic growth, the document sets out a number of key objectives for Planning which can be summarised as follows:

- To build prosperous communities by improving economic performance;
- To promote regeneration and tackle deprivation;
- To deliver more sustainable patterns of development and reduce the need to travel;
- To promote the vitality and viability of established towns and other centres; and
- To raise the quality of life and environment in rural areas

3.04 As well as providing guidance on the need to gather evidence and to monitor and manage this evidence over time, the document is essentially sub-divided into two sections, with the first section focussing on plan and making policies, and the second section on development management policies (or development control as we know it). In addition to PPS4 which is a much more simplified document compared to the various statements and guidance that it replaces, there is a lengthy good practice guide which focuses on key retail policy tests including need, impact and the sequential approach. The good practice guide must be read in conjunction with the relevant sections of PPS4 that deal with Retail Planning matters and Town Centres.



3.05 In terms of planning for economic development, the new guidance seeks to ensure that the regional planning bodies and the Local Planning Authorities include the following within their development plan:

- A clear economic vision and strategy for their area;
- Support for existing business sectors, but with sufficient flexibility to respond to changes in economic circumstances;
- Planning for the location, promotion, and expansion of clusters or networks of high technology industries;
- Ensure the most efficient and effective use of land;
- Prioritising previously developed land;
- Identify, protect and promote key distribution networks;
- Co-locate developments which generate substantial transport movements where possible using rail and water transport;
- Plan for the delivery of sustainable transport and other infrastructure required to support planned economic growth;
- Disaggregate minimum job targets to each Local Authority;
- Safeguard land from other uses to meet the needs of future economic development;
- Encourage new uses for vacant and derelict buildings;
- Bring forward sufficient sites to meet the need required through the use of CPO powers, Area Action Plans, simplified planning zones, and local development orders; and
- Facilitate new working practices such as live/work

3.06 In terms of planning for established centres, the statement reiterates much of the guidance set out in the previous PPS6, but introduces the requirement for flexible policies for established centres which are able to respond to changing economic circumstances. Furthermore, the statement requires Local Planning Authorities to consider setting floorspace thresholds for the scale of edge-of-centre and out-of-centre development which would be subject to an Impact Assessment as set out in Policy EC16.1 of the statement.

3.07 Furthermore, the guidance seeks to encourage Local Planning Authorities to pro-actively plan to promote competitive Town Centre environments and enhance consumer choice. The statement suggests that this could be achieved through:



- Supporting a diverse range of uses which appeal to a wide range of social groups;
- Plan for a strong retail mix which meets the requirements of the local catchment area;
- Support shops, services, and other important small scale economic uses in local centres and villages;
- Identify sites in the centre or failing that, edge-of-centre, capable of accommodating large format developments;
- Retain and enhance existing markets and, where appropriate, re-introduce or create new ones; and
- Take measures to conserve and, where appropriate, enhance the established character and diversity of centres

3.08 As part of the plan making process, PPS4 confirms that Local Planning Authorities should assess the need for future economic development, including retail and Town Centre uses, and then identify an appropriate range of sites to accommodate the identified need. In identifying sites to accommodate future need, the guidance reiterates that the sequential approach to site selection should be applied. In applying this sequential approach, the first priority is for sites within existing centres, which are likely to become available within the plan period, followed by edge-of-centre locations with preference given to sites which are or will be well connected to the centre. Only then should out-of-centre sites be considered, again with preference given to those sites which are or will be well served by a choice of means of transport and are closest to the centre and have a higher likelihood of forming links. In addition, the guidance also confirms that sites which best serve the needs of deprived areas should be given preference when considered against alternatives with similar location characteristics.

3.09 Having identified the necessary sites to accommodate the need required, the impact of the development of these sites should then be assessed, particularly for developments over 2,500 sq m, or any locally set threshold.

3.10 PPS4 also provides guidance on plan making policies for rural areas ensuring that:

- Economic development in the open countryside is strictly controlled;
- Local service centres are identified as the priority for new development;
- Support the conversion and re-use of buildings in the countryside;



- Set out permissible scale of replacement buildings in circumstances where replacement buildings would not be acceptable;
- Seek to remedy any identified deficiency in local shopping;
- Set out criteria to be applied to Planning Applications for farm diversification;
- Where appropriate support equine enterprises;
- Support the provision and expansion of tourist and visitor facilities in appropriate locations;
- Wherever possible, locate tourist and visitor facilities in existing or replacement buildings;
- Support extensions to existing tourist accommodation where the scale is appropriate;
- Ensure that new or expanded holiday and touring caravan sites are not prominent in the landscape and visual intrusion is minimised; and
- Recognise that in areas designated for their natural or cultural heritage qualities, there will be some scope for tourist and leisure related developments

3.11 In seeking to determine Planning Applications for economic developments, PPS4 states that Local Planning Authorities should adopt a positive and constructive approach towards Planning Applications and that applications that secure sustainable economic growth should be treated favourably. In seeking to assess Planning Applications for economic development, PPS4 states that such applications should be assessed against the following impact considerations:

- Whether the proposal has been planned over the lifetime of the development to limit carbon dioxide emissions;
- The accessibility of the proposal by a choice of means of transport;
- Whether the proposal secures a high quality and inclusive design;
- The impact on economic and physical regeneration in the area; and
- The impact on local employment

3.12 Where Planning Applications for economic development are not in accordance with an up to date development plan, PPS4 recommends that Local Planning Authorities should weigh market and other economic information alongside environmental and social information, take full account of any long-term benefits as well as the costs, and consider whether those proposals help meet the wider objectives of the development plan.

3.13 In dealing with applications for main Town Centre uses, the most significant change in respect of the previous guidance set out in PPS6, is the removal of the needs test. Whilst this could be seen as



a significant shift in policy, it must be noted that the guidance still requires the production of an Impact Assessment which would include an assessment of the impact on the trade/turnover on the centre and the wider area, and how this relates to future consumer expenditure capacity in the catchment area defined. Therefore, although on the one hand the guidance suggests that the well established test of need should be removed, there will still be a requirement to examine the turnover of the proposed development and how this would impact upon the trading performance of existing facilities within the defined catchment, which in some cases is a very similar exercise.

- 3.14 Although the need test has been removed, there is still a requirement for the applicant to satisfy the sequential approach as well as demonstrate that there will be no adverse impact created by the proposed development. Where no significant adverse impact has been identified, Local Planning Authorities when determining such applications should also take account of the positive and negative impacts of the proposal, as well as the likely cumulative effect of recent permissions, developments under construction, and completed developments. Here the guidance stresses that judgements about the extent and significance of any impact should be informed by the development plan.



4.0 ORIGINAL MARKET RESEARCH

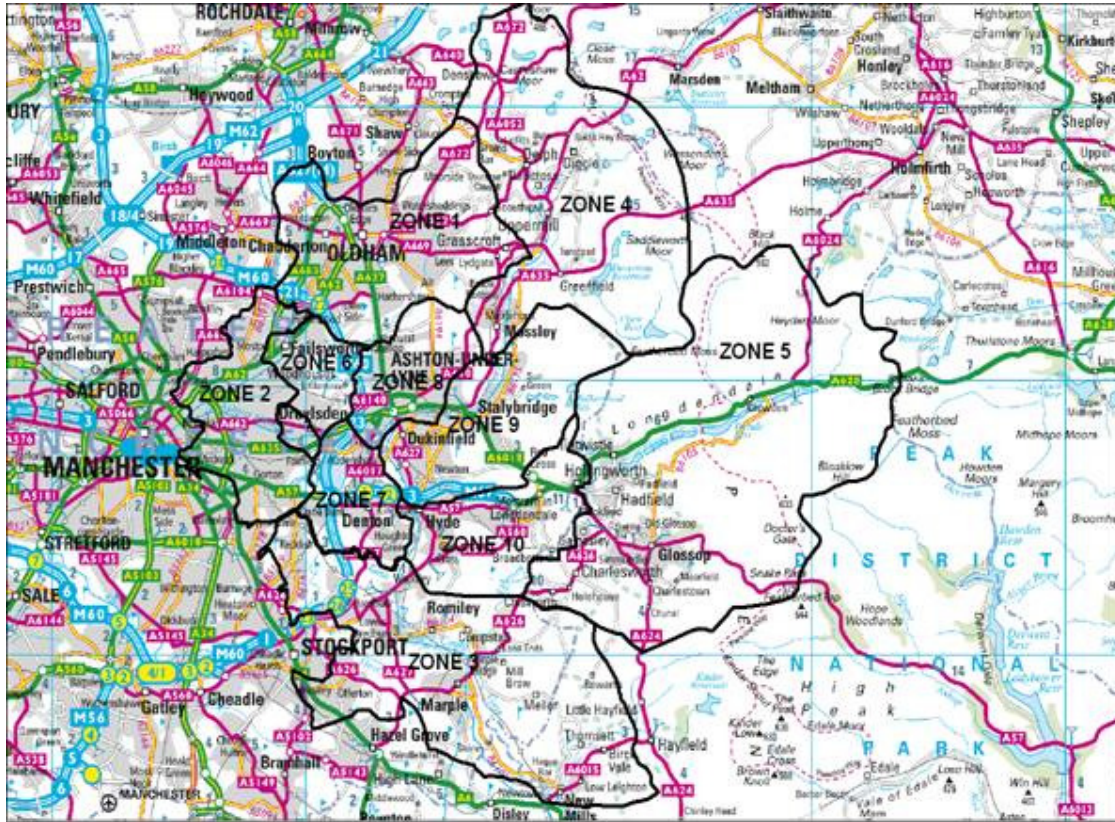
Introduction

- 4.01 Although WYG acknowledges that there are limitations to survey research, particularly in relation to the samples that can be achieved, the results provide important broad indicators as to consumer preference in relation to where people live and shop. Original market research enables analysis of a particular area, which helps to evaluate the actual draw of major centres and how they impact upon the market share of smaller centres. The use of specifically commissioned survey research is fundamental to identifying the likely capacity for future retail floorspace within the Borough.
- 4.02 A key element of this Study was to obtain a detailed understanding of shopping and leisure patterns within and just beyond Tameside Borough and identify the potential catchment of existing centres within it. WYG commissioned specialist market researchers (NEMS Market Research Limited) to undertake empirical research, which comprised the following:
- Household Telephone Survey

Household Telephone Survey

- 4.03 In August 2009 a survey of 1,000 households was undertaken within a defined Study Area, which comprised Tameside Borough and which also extended into the neighbouring authorities of High Peak, Manchester, Oldham and Stockport. Figure 4.1 illustrates the extent of the defined Study Area. A more detailed plan indicating the extent of the Study Area in relation to local authority boundaries is contained at [Appendix 1](#).

Figure 4.1: Plan indicating the Extent of the Tameside Study Area



4.04 The Study Area was broken down into ten zones based on postcode sectors. The extent of the Study Area was based predominantly on the existing local authority area but extended to include areas beyond the local authority area in order to identify the full extent of existing facilities within the Borough from a broader area. This was based on WYG's experience of shopping patterns within the wider area and the scale and proximity of existing provision within Tameside Borough together with competing nearby provision. Moreover, the extent of the defined Study Area reflects that identified in 2001 and 2005 in order to allow direct comparison to be made with regard to shopping patterns within the Borough and the wider area.



4.05 Within the defined Study Area zones 7, 8, 9 and 10 are identified to broadly represent Tameside Borough. The ten survey zones are as follows:

1. Oldham: (OL1 1, OL1 2, OL1 3, OL1 4, OL4 1, OL4 2, OL4 3, OL4 4, OL4 5, OL8 1, OL8 2, OL8 3, OL8 4, OL9 0, OL9 6, OL9 7, OL9 8 and OL9 9);
2. Manchester East (M11 1, M11 2, M11 3, M11 4, M12 5, M12 6, M18 7, M18 8, M40 0, M40 1, M40 2, M40 3, M40 5, M40 7, M40 8 and M40 9);
3. Stockport (SK2 5, SK2 6, SK2 7, SK5 6, SK5 7, SK5 8, SK6 1, SK6 2, SK6 3, SK6 4, SK6 5, SK6 6, SK6 7, SK22 1, SK22 3, and SK22 4);
4. Uppermill (OL3 5, OL3 6, OL3 7, OL5 0 and OL5 9);
5. Glossop (SK13 0, SK13 1, SK13 2, SK13 5, SK13 6, SK13 7 and SK13 8);
6. Droylsden/Failsworth (M35 0, M35 9, M43 6 and M43 7);
7. Denton (M34 2, M34 3, M34 5, M34 6 and M34 7);
8. Ashton-under-Lyne (OL6 6, OL6 7, OL6 8, OL6 9, OL7 0 and OL7 9);
9. Stalybridge (SK14 4, SK15 1, SK15 2, SK15 3, SK16 4 and SK16 5); and
10. Hyde (SK14 1, SK14 2, SK14 3, SK14 5, SK14 6 and SK14 8).

4.06 A copy of the questionnaire and full tabulation of the Tameside Household Survey are contained at **Appendix 2.**



5.0 ASSESSMENT OF VITALITY AND VIABILITY OF EXISTING CENTRES

Assessing the 'Vitality and Viability' of Existing Centres

- 5.01 Planning Policy Statement 4 'Planning for Sustainable Economic Growth' (PPS4) (2009) emphasises the importance of maintaining a 'healthy' town centre as it helps foster civic pride and local identity and can contribute towards the aim of sustainable development. It also states that by monitoring town centres on a regular basis, signs of decline can be identified early. **Appendix 3** provides detailed analysis of the vitality and viability of the centres of Ashton-under-Lyne, Denton, Droylsden, Hyde and Stalybridge, in accordance with guidance contained in PPS4.
- 5.02 Indicators of vitality and viability, set out in Annex D of PPS4, are used as a basis for the assessment of the 'health' of existing centres. These indicators are as follows:
- **Diversity of main town centre uses (by number, type and amount of floorspace):** an Experian Goad land use plan is used to assess the diversity of uses in the main centres;
 - **The amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations:** WYG includes all retail floorspace in the Tameside Borough administrative area (where available) in the assessment;
 - **The potential capacity for growth or change of centres in the network:** WYG has considered the opportunity for the main centres within the Borough to expand, including considering the scope for more intensive development on previously developed land;
 - **Commercial operator representation and intentions to change representation:** derived from the land-use surveys, town centre business surveys and FOCUS reports from outstanding retailer demand (**Appendix 4**);
 - **Shopping rents: the average Zone A rents paid in centres:** derived from available published data;
 - **Proportion of vacant street level property:** derived from land-use surveys;
 - **Commercial yields on non-domestic property (i.e. the capital value in relation to the expected market rental):** derived from available published data;
 - **Land values and the length of time key sites have remained undeveloped:** based on data on changes in land value and how long key town centre and edge-of-centre sites have remained undeveloped;
 - **Pedestrian flows:** from on-site observations;



- **Accessibility:** from WYG's assessment and shopper and business surveys;
- **Customers' and residents' views and behaviour:** derived from the various surveys;
- **Perception of safety and occurrence of crime:** from various surveys and 'on-the-ground' observations; and
- **State of the city / town centre environmental quality:** from 'on-the-ground' observations and survey results.

5.03 Based on our analysis, set out below is a SWOT analysis and summary of the five main centres within the Borough.

Ashton-under-Lyne Town Centre

5.04 Ashton-under-Lyne is identified as a Town Centre within Tameside Borough (as identified by the Tameside Unitary Development Plan (2004)). It is the largest retail centre within the Borough comprising some 427 commercial units and 92,070 sq m of floorspace (as defined by Experian Goad, July 2009). Retailing is focused on the Arcades Shopping Centre, the Ladysmith Shopping Centre, Market Place and Warrington Street.

5.05 Ashton-under-Lyne is seen by local residents as an important convenience goods destination within the Borough. However, large-format convenience stores within Ashton-under-Lyne are located in out-of-centre locations, including the Asda store on Cavendish Street (which falls within the town centre as defined by Experian Goad) and the Sainsbury's store at Lord Sheldon Way and Aldi store on Wellington Road. Within the town centre, convenience goods provision includes the Iceland store on Bow Street and the Lidl store on Stamford Street. In addition, there are also a range of smaller convenience stores and independent retailers elsewhere in the town centre (including an indoor and outdoor market).

5.06 Based on the Experian Goad definition of the town centre, the proportion of units falling within the convenience goods sector (7.5%) is slightly below the national average (8.5%). However, the proportion of floorspace (23.1%) is well above the national average (14.3%). This is due primarily to the fact that the Asda store on Cavendish Street is located within Experian Goad's definition of the town centre.

5.07 In terms of the comparison goods sector, the proportion of units (35.8%) is above the national average (34.6%). However, the proportion of floorspace (35.5%) is slightly below the national



average (37.9%). The comparison goods retail offer in Ashton-under-Lyne includes a number of national multiples including Marks & Spencer, Boots, Next, Body Shop, WH Smith, New Look and JD Sports. In addition to the range of national retailers, Ashton-under-Lyne Town Centre has a strong independent sector, focused on Stamford Street and Market Avenue, which provides a distinctive, independent and specialist retail offer. The town centre also contains an indoor and an outdoor market.

- 5.08 In addition to its main retail offer, Ashton-under-Lyne Town Centre provides a reasonable proliferation of services, particularly within the financial and business sector (e.g. banks, building societies, etc.). However, in terms of retail services and leisure services, the centre is under provided for both with regard to the proportion of units and floorspace, compared to the national average. The town centre's non-retail offer lacks a number of major commercial leisure facilities. Indeed, major commercial leisure facilities (including cinema, ten-pin bowling, etc.) are located out-of-centre at Ashton Moss.
- 5.09 Vacancies (both the proportion of units and floorspace) within the town centre are above the national average. The majority of vacancies within the town centre are located on Stamford Street, which detract from the overall attraction of the shopping area of the town centre, albeit away from the core shopping area. Furthermore, given the ongoing downturn in the economy and its impact on the retail sector, there is a possibility for further vacancies in prominent locations within Ashton-under-Lyne Town Centre.
- 5.10 In terms of the overall performance of the town centre, the number of retailers seeking representation in Ashton-under-Lyne is lower than in recent years, which reflects the picture nationally.
- 5.11 Overall, Ashton-under-Lyne Town Centre appears to be performing relatively well, although it lacks a number of the higher order retailers who would be expected to locate in a sub-regional centre. The town centre has an adequate level of convenience provision, although large format provision (i.e. Asda and Sainsbury's) is located out-of-centre. There is a wide comparison goods offer and the centre is anchored by the Marks & Spencer store. However, there is a need for more commercial leisure services within the town centre and the proportion of vacancies is fairly high. Moreover, there is a need to improve the retail offer of Ashton-under-Lyne Town Centre to reflect its sub-regional status.



Table 5.1: SWOT Analysis of Ashton-under-Lyne Town Centre

Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ Strong convenience destination, albeit focused away from the core shopping area ▪ Strong comparison goods offer ▪ Strong financial and business services sector ▪ Local market ▪ Good accessibility ▪ Large premises ▪ National multiples ▪ Fairly good environmental quality ▪ Increasing retail ranking 	<ul style="list-style-type: none"> ▪ Weak retail service offer ▪ Weak leisure service offer ▪ Declining retailer requirements ▪ High proportion of vacancies ▪ Increasing rents ▪ Increasing yields ▪ Lack of commercial leisure operators ▪ Lack of higher order retailers
Opportunities	Threats
<ul style="list-style-type: none"> ▪ Enhance linkages between Asda and other businesses ▪ Attract a commercial leisure operator to help improve the leisure offer ▪ Greater promotion of the centre ▪ Ashton Northern By-pass could lead to development opportunities ▪ Enhance pedestrian link between train station and retail core 	<ul style="list-style-type: none"> ▪ Limited opportunities for expansion ▪ Improvement at competing centres including Oldham ▪ Continued growth of online shopping ▪ Downturn of economy may lead to increased vacancies in the town centre

Household Survey Results

- A quarter (25%) of respondents never visit Ashton-under-Lyne.
- Of those that never visit Ashton-under-Lyne, the main reasons identified were: too far away from home or work (24%); prefer alternative destinations (16%); and just don't like it (6%).
- Of those who do visit Ashton-under-Lyne, the main reasons identified were: choice and range of shops (44%); visiting the market (27%); and the fact that it is different/makes a change (15%).
- Of those who do visit Ashton-under-Lyne, 54% indicated that they visit less than once a month, and 21% visit once a week or more.
- When respondents were asked if there were any measures that would encourage them to visit Ashton-under-Lyne more often, the most popular responses were: cheaper parking; more parking; and an increased choice and range of shops.

Hyde District Centre

5.12 Hyde is identified as a District Centre by the Tameside Unitary Development Plan (2004). It is located to the south east of the Borough and comprises some 313 commercial units and 61,260 sq



m of floorspace (as defined by Experian Goad, July 2009). Retailing is focused at the Clarendon Square Shopping Centre and on Market Street.

- 5.13 Hyde District Centre is approximately two thirds the size of Ashton-under-Lyne Town Centre. It is also viewed by local residents as a major convenience goods destination within the Borough providing for both main food shopping and day-to-day needs. Major provision is provided by the Asda store on Water Street and the Morrisons store on Mottram Road, which together dominate convenience goods shopping patterns within Hyde. Further convenience provision is provided by an indoor market and a number of small independent convenience goods retailers. As with Ashton-under-Lyne, the proportion of units in Hyde in use for the sale of convenience goods (7.7%) is slightly below the national average (8.8%). However, the proportion of floorspace (31.9%) is well above the national average (14.3%). This is to be expected given the limited size of Hyde District Centre.
- 5.14 The comparison goods sector is fairly well represented and is reflective of the size and current role of Hyde District Centre. The proportion of units in this use (35.5%) is broadly comparable with the national average (34.6%). However, the proportion of floorspace (33.9%) is below the national average (37.9%). Hyde contains five of the 'Top 20 Retailers' (as identified by Focus), these being Argos, Boots, Lloyds, Superdrug and Wilkinson. However, the centre lacks representation from fashion retailers.
- 5.15 In addition to its main retail offer, Hyde District Centre also contains a number of services, although Hyde is under-represented by leisure service outlets (both the proportion of outlets and floorspace). Similarly, the district centre is also under-represented in terms of the proportion of retail service outlets (5.7%) compared to the national average (7.0%). With regard to the proportion of financial and business service units (8.5%) are below the national average (8.7%). However, when it comes to retail service floorspace, Hyde is better represented with some 13.7% of outlets falling within this sector, which is marginally higher than the national average of (13.0%).
- 5.16 The level of vacancies (both the proportion of units and floorspace) within the centre is above the national average. Many existing vacancies are located in the central part of the district centre, which detract from the overall attraction of the core shopping area.



5.17 In terms of the overall performance of the town centre, the number of retailers seeking representation in Hyde is slightly lower than in recent years, which reflects the picture nationally. Furthermore, increasing commercial yields (in the period to July 2008) suggest that the district centre maybe under-performing. Whilst the data is not available for the past year or so, it is likely that commercial yields and rental levels will be even less favourable, although this will be reflected in centres throughout the UK.

5.18 Overall, Hyde District Centre clearly serves an important role in meeting the convenience goods needs of the local and wider community and also meets some local comparison goods needs. Hyde is lacking a major commercial leisure operator, which would help diversify the retail offer.

Table 5.2: SWOT Analysis of Hyde District Centre

Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ Strong convenience destination ▪ Anchored by the Asda and Morrisons stores ▪ Fairly strong comparison goods offer ▪ Fairly strong retail service provision ▪ Fairly strong financial and business service provision ▪ Improving retailer ranking ▪ Good accessibility ▪ Good environmental quality ▪ Indoor market 	<ul style="list-style-type: none"> ▪ Weak leisure services offer ▪ High proportion of vacancies ▪ Declining retailer requirements ▪ Increasing yields ▪ Limited evening economy ▪ Lack of a commercial leisure operator ▪ Poor comparison clothing offer
Opportunities	Threats
<ul style="list-style-type: none"> ▪ Attract a commercial leisure operator to help improve evening economy ▪ Greater promotion of the centre ▪ Diversification of the retail offer ▪ Re-investment in the shopping core ▪ Improve pedestrian environment of market ▪ Improve pedestrian links to train station 	<ul style="list-style-type: none"> ▪ Limited opportunities for expansion ▪ Improvement at other competing centres such as Ashton-under-Lyne and Crown Point North ▪ Continued growth of online shopping ▪ Downturn of economy may lead to increased vacancies in the town centre ▪ Over dominance of Asda and Morrisons stores resulting in a lack of independent convenience providers

Household Survey Results

- The majority of respondents (60%) never visit Hyde.
- Of those that never visit Hyde, the main reasons identified were: too far away from home or work (31%); prefer alternative destinations (12%); and just don't like it (4%).



- Of those who do visit Hyde, the main reasons identified were: choice and range of shops (40%); visiting the market (16%); and to visit a specific shop (15%).
- Of those who do visit Hyde, 47% visit less than once a month and 23% visit once a week or more.
- When respondents were asked if there were any measures that would encourage you to visit Hyde more often, of those respondents who specified a measure, the most popular responses were: increased choice and range of shops; increased public transport; and more advertising/awareness of what is there.

Denton District Centre

- 5.19 Denton is located to the south west of the Borough. Commercial floorspace within Denton (as defined by Experian Goad) is approximately half the size of Hyde and of a similar size to Stalybridge. The centre comprises 154 commercial units and some 29,480 sq m of floorspace (as defined by Experian Goad, July 2009). Historically, the main focus of retail and commercial activity comprises Hyde Road, Manchester Road and Stockport Road. However, significant further retail floorspace has relatively recently been created at Crown Point North Shopping Park to the north of the traditional centre. This provided modern large-format retail floorspace (more than 20,000 sq m gross), which accommodates a number of national retailers including Bhs, H&M, Mothercare, New Look, Tesco Homeplus and TK Maxx.
- 5.20 Over a third (33.6%) of floorspace in Denton falls within the convenience goods sector, which is well-above the national average of 14.3%. However, the proportion of convenience goods units (6.5%) is below the national average (8.8%) suggesting that there are a small number of large stores. Furthermore, if the nearby Crown Point North Shopping Park is included, the proportion of units and floorspace falling within the convenience goods sector reduces to 6.0% and 20.0% respectively. The convenience goods sector is dominated by the Morrisons store on Saxon Street. Further convenience provision is provided by the Lidl store on Manchester Road, and also a number of independents traders. In addition, further convenience goods provision is provided by the out-of-centre Sainsbury's store on Oldham Street.
- 5.21 The traditional core centre of Denton is under-represented in the comparison goods sector. Both the proportion of units (22.7%) and floorspace (17.0%) are below the UK average (34.6% and 37.9% respectively). As such, the district centre does not contain any of the 'Top 20 Retailers' (as identified by Focus). However, if the nearby Crown Point Retail Park is included, which contains a



number of retailers present on this list (Boots, Marks & Spencer, BHS and New Look), the proportion of comparison units and floorspace increases significantly to 32.6% and 48.2% respectively.

- 5.22 In addition to its retail offer, Denton also contains important local services, such as hairdressers, restaurants, bookmakers, etc. Overall, the service sector comprises 88 units and occupies 11,600 sq m of floorspace. The proportion of service outlets (57.1%) and the proportion of service floorspace (39.4%) are above the national average (45.8% and 38.7% respectively).
- 5.23 As with Ashton-under-Lyne and Hyde, vacancies (both the proportion of units and floorspace) within the district centre are above the national average. Nine of these vacancies are located on Manchester Road, with six on Ashton Road and five on Market Street. Two further vacancies are also located within Crown Point North Shopping Park.
- 5.24 Overall, Denton serves an important role in meeting some of the day-to-day needs of the local population (particularly for food and grocery shopping). However, there are a high proportion of vacancies within the historical retail centre, and Denton is weak on major leisure service operators.

Table 5.3: SWOT Analysis of Denton District Centre

Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ Strong convenience destination ▪ Anchored by the Morrisons store ▪ Crown Point North Shopping Park provides a number of national multiple retailers and a strong comparison goods destination ▪ Strong service offer overall ▪ Increased retailer ranking ▪ Good accessibility 	<ul style="list-style-type: none"> ▪ Weak comparison goods offer within the traditional centre due to the Crown Point North development ▪ Large number of vacancies within the traditional core area ▪ Limited evening economy ▪ Lack of fashion retailers within the traditional core ▪ Poor environmental quality
Opportunities	Threats
<ul style="list-style-type: none"> ▪ Enhanced linkages between Morrisons and other businesses and existing core ▪ Improve/enhance existing district centre floorspace ▪ Greater promotion and identity of the centre 	<ul style="list-style-type: none"> ▪ Improvement at competing centres such as Ashton-under-Lyne and Stockport ▪ Continued growth of online shopping ▪ Downturn of economy may lead to increased vacancies in the town centre, particularly independent retailers

Household Survey Results

- Over half of respondents (53%) never visit Denton.



- Of those that never visit Denton, the main reasons identified were: too far away from home or work (27%); prefer alternative destinations (11%); and lack of familiarity (5%).
- Of those who do visit Denton, the main reasons identified were: choice and range of shops (51%); Crown Point Shopping Park, Denton (25%); and to visit a specific shop (18%).
- Of those who do visit Denton, 58% visit less than once a month, 15% visit less than once a fortnight and another 15% visit once a week or more.
- When respondents were asked if there were any measures that would encourage them to visit Denton more often, the most popular responses were: increased choice and range of shops; better/easier road access; and increased public transport.

Stalybridge District Centre

- 5.25 Stalybridge is located towards the north east of the Borough. It is of a similar size to Denton (if Crown Point North Shopping Park is excluded) and comprises 179 commercial units and some 29,410 sq m of floorspace (as identified by Experian Goad, August 2009). The main focus of retail and commercial activity is Grosvenor Street, Market Street and Melbourne Street.
- 5.26 Almost a third (29.4%) of the floorspace in Stalybridge falls within the convenience goods sector, which includes the Tesco store on Trinity Street and the Aldi store on Leech Street. The proportion of convenience goods units (7.3%) is slightly below the national average (8.8%). However, the level of floorspace given over to this sector (29.4%) is well-above the national average (14.3%). Again, a strong convenience goods sector within a centre the size of Stalybridge is to be expected.
- 5.27 The comparison goods sector in Stalybridge District Centre is relatively weak. The proportion of comparison units (24.0%) and floorspace (17.0%) is well below the national average (34.6% and 37.9% respectively). The sector is dominated by independent retailers and there are very few national multiples present.
- 5.28 In terms of services, Stalybridge is well provided for. Overall, the service sector comprises 86 units and occupies 12,820 sq m of floorspace. The proportion of service units (48.0%) is above the national average (45.8%). Likewise, the proportion of service floorspace is greater than the national average (43.5%, compared to a national average of 38.7%). Leisure services include bars and wine bars, clubs, fast-food and takeaways and public houses. Stalybridge is particularly well-provided for in terms of leisure services, with both the proportion of outlets and floorspace being



above the national average. In particular, the centre is well known for having a thriving evening economy.

5.29 Vacancies (both the proportion of units and floorspace) within the town centre are above the national average. Stalybridge contains a number of small vacant units, which may identify why they are not currently in use. There are nine vacant units on Grosvenor Street, with another nine on Melbourne Street and six on Market Street.

5.30 Overall, Stalybridge serves a role as a convenience shopping destination as well as a thriving leisure destination. This means that the centre is used by the local population and visitors alike. However, it does contain a large number of vacancies and diversifying the range of services would benefit the centre.

Table 5.4: SWOT Analysis of Stalybridge District Centre

Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ Strong convenience goods destination ▪ Anchored by the Tesco store ▪ Strong service sector – particularly leisure services ▪ Strong evening economy ▪ Improving retailer ranking ▪ Low number of comparison multiples ▪ Fairly good accessibility 	<ul style="list-style-type: none"> ▪ Weak comparison goods offer ▪ Large number of vacant units ▪ Declining retailer requirements ▪ Poor environmental quality – although improved by Huddersfield Canal and River Tame
Opportunities	Threats
<ul style="list-style-type: none"> ▪ Enhance linkages between Tesco and other businesses ▪ Potential for retail development around railway station – Stalybridge West ▪ Potential for further retail development ▪ Greater promotion of the centre ▪ Enhanced image/environment ▪ Diversify service offer ▪ Attract the 'higher end' market ▪ Introduction of competing foodstore 	<ul style="list-style-type: none"> ▪ Improvement at competing centres ▪ Continued growth of online shopping ▪ Downturn of economy may lead to increased vacancies in the town centre, particularly independent retailers ▪ Over dominance of Tesco store ▪ Some visitors may be deterred by the lively night-time economy

Household Survey Results

- Over three quarters of respondents (76%) never visit Stalybridge.
- Of those that never visit Stalybridge, the main reasons identified were: too far away from home or work (27%); prefer alternative destinations (10%); and choice and range of shops (7%).



- Of those who do visit Stalybridge, the main reasons identified were: to visit a specific shop (23%); choice of leisure facilities (20%); and choice and range of shops (19%).
- Of those who do visit Stalybridge, 56% visit less than once a month, 27% and 22% visit once a week or more.
- When respondents were asked if there were any measures that would encourage them to visit Stalybridge more often, the most popular responses were: increased choice and range of shops; improved quality of shops; and more advertising/awareness of what is there.

Droylsden District Centre

- 5.31 Droylsden is located to the north west of the Borough. It is the smallest centre surveyed as part of this study, comprising 124 commercial units and some 24,990 sq m of floorspace (as defined by Experian Goad, July 2009). The main focus of retail and commercial activity is the Droylsden Centre Shopping Arcade, Market Street and the retail park to the north. There are also secondary retail frontages along Fairfield Street and Moorside Street.
- 5.32 Droylsden is well-provided for in terms of convenience provision and is dominated by the Tesco store on Manchester Road and to a lesser extent, the Somerfield store at Droylsden Centre Shopping Arcade. Accordingly, the proportion of convenience goods units (12.1%) is above the national average (8.8%), as is the level of floorspace given over to this sector (26.1% compared to a national average of 14.3%).
- 5.33 Whilst the proportion of comparison units (25.8%) is below the national average (34.6%), the proportion of comparison floorspace (38.5%) is slightly above the national average (37.9%). As such, Droylsden is adequately represented in this sector in terms of comparison floorspace. Although Droylsden has representation from key attractors such as Boots, Superdrug and Wilkinson, the comparison goods offer is predominantly provided by independent retailers.
- 5.34 The service sector in Droylsden comprises 60 units and occupies 6,740 sq m of floorspace. The proportion of service outlets (48.4%) is above the national average (45.8%). However, the proportion of service floorspace (27.0%) is significantly below the national average (38.7%). The centre lacks a major commercial leisure operator.
- 5.35 The proportion of vacant units within the town centre is above the national average, although the proportion of vacant floorspace falls below the national average. As with Stalybridge, many of the



vacancies are small in size, which may explain why they are not in use. On Manchester Road and Market Street, where there are clusters of vacancies, the units may need to be redeveloped to adhere to the needs of modern retailers. Market Street (eight units) and Queens Walk (five units) contain the highest amount of vacancies in the centre.

5.36 Droysden is a fairly small centre which meets the needs of its local catchment. It is dominated by the Tesco store and is a strong convenience destination. Droysden has a mixed comparison and service offer, but generally meets the day-to-day needs of its population. It contains lots of small vacant units, although this may be addressed through redevelopment or potentially combining the units in order to create more commercially viable retail floorspace.

Table 5.5: SWOT Analysis of Droysden District Centre

Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ Strong convenience goods destination ▪ Anchored by the Tesco store ▪ Mainly independent retailers ▪ Improving retailer ranking ▪ Static level of retailer requirements – strong bearing in mind the current economic climate ▪ Good accessibility 	<ul style="list-style-type: none"> ▪ Large proportion of vacancies ▪ Limited parking ▪ Limited evening economy
Opportunities	Threats
<ul style="list-style-type: none"> ▪ Enhance linkages between Tesco and other businesses ▪ Greater promotion of the centre ▪ Enhanced image/environment in secondary areas ▪ Introduction of competing foodstore 	<ul style="list-style-type: none"> ▪ Improvement at competing centres, e.g. Denton, Stalybridge, Ashton-under-Lyne and new district centre at Openshaw ▪ Continued growth of online shopping ▪ Downturn of economy may lead to increased vacancies in the town centre, particularly independent retailers ▪ Over dominance of Tesco store

Household Survey Results

- The majority of respondents (82%) never visit Droysden.
- Of those that never visit Droysden, the main reasons identified were: too far away from home or work (24%); prefer alternative destinations (11%); and lack of familiarity (4%).
- Of those who do visit Droysden, the main reasons identified were: choice and range of shops (37%); to visit a specific shop (18%); and choice of services (17%).
- Of those who do visit Droysden, 43% visit less than once a month and 30% visit once a week or more.



- When respondents were asked if there were any measures that would encourage them to visit Droylsden more often, the most popular responses were: increased choice and range of shops; better/easier road access; and improved quality of shops.



6.0 CURRENT AND PAST SHOPPING PATTERNS

Introduction

6.01 A key element of the study was to obtain a detailed understanding of the potential catchment of existing centres within the Borough. A detailed breakdown of the market shares achieved by each centre/store is contained at **Appendix 5**. This section is concerned with the market share of existing centres/facilities based on shopping trips rather than the amount of expenditure generated. The analysis of shopping patterns within each of the zones allows for detailed assessments to be undertaken for the various goods identified (e.g. clothing, electrical goods, toys, etc.). This can often assist with the identification of any qualitative deficiencies in provision. This analysis of shopping patterns rather than expenditure allows for equal weight to be given to each category, factoring out the significant differences in annual spend by local residents for the goods identified.

Food Shopping Patterns

Main Food Shopping Patterns

6.02 Within the Study Area, existing convenience goods facilities within the Borough retain approximately 41% of main food shopping trips undertaken. The relative market share of existing facilities in the Borough by zone is set out in **Table 6.1**.

Table 6.1: Main Food Market Share – 2001, 2005 and 2009

Survey Zone	2001	2005	2009
1. Oldham	3%	6%	9%
2. Manchester East	20%	21%	11%
3. Stockport	3%	18%	21%
4. Uppermill	40%	54%	63%
5. Glossop	14%	15%	19%
6. Droylsden	42%	51%	31%
7. Denton	89%	88%	99%
8. Ashton-under-Lyne	96%	95%	96%
9. Stalybridge	98%	97%	99%
10. Hyde	82%	82%	89%
TOTAL	48%	52%	41%

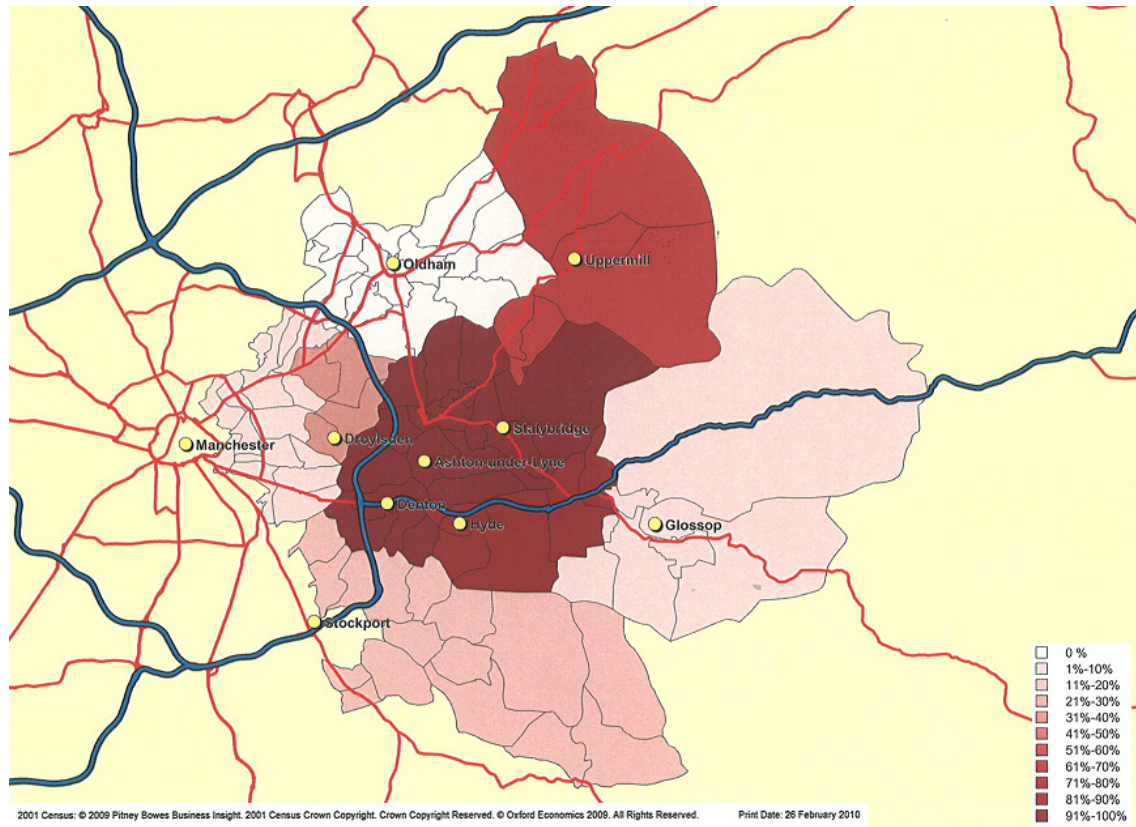
Source: NEMS Tameside Household Survey (August 2009)
Excludes 'varies/no pattern'

6.03 As **Table 6.1** illustrates, the highest market share achieved by convenience goods facilities within the Borough is in the zones focused on Zone 7 ('Denton'), Zone 8 ('Ashton-under-Lyne'), Zone 9 ('Stalybridge') and Zone 10 ('Hyde'). Within each of these four zones at least 89% of main food shopping trips undertaken are attracted to existing facilities within the Borough.



- 6.04 Elsewhere within the Study Area, almost two thirds (63%) of main food shopping trips undertaken within Zone 4 ('Uppermill') are attracted to existing facilities within the Borough. Understandably, existing facilities achieve much lower market shares elsewhere within the Study Area. Within Zone 3 ('Stockport'), existing facilities in Tameside attract just over a fifth (21%) of main food shopping trips undertaken within the zone. Similarly, within Zone 5 ('Glossop'), just under a fifth (19%) of main food shopping trips are attracted to facilities in the Borough, within Zone 2 ('Manchester East') and Zone 1 ('Oldham') the market share is even lower at 11% and 9% respectively. These lower market shares are to be expected given that these zones primarily fall outside the administrative boundary of Tameside. Notably, within Zone 6 ('Droylsden'), the household survey suggests that only 31% of the main food shopping trips undertaken within this zone are directed to facilities within the Borough. This compares to an identified market share of 51% in 2005. This decline in market share is likely to be due to the opening of the Tesco Extra store in Failsworth (which falls within this zone) that opened in July 2007. This is a very large foodstore, which sells a wide variety of goods. The improved convenience goods offer within the neighbouring authorities is likely to have contributed to the overall decline in market share achieved by all convenience goods facilities within the Borough from the wider Study Area (reducing from 52% in 2005 to 41% currently).
- 6.05 Figure 6.2 illustrates the levels of penetration achieved by all facilities within the Borough from within the defined Study Area.

Figure 6.2: Penetration Levels Achieved by Existing Facilities in the Borough – Main Food Shopping



6.06 **Table 6.2** provides a breakdown of the main food shopping market shares achieved by all facilities within Tameside Borough and compares the market shares to that achieved by facilities in the neighbouring authorities.



Table 6.2: Main Food Market Share Analysis – 2001, 2005 and 2009

	Core Catchment			Outer Catchment		
	2001	2005	2009	2001	2005	2009
Tameside	90.1%	88.2%	96.3%	20.2%	27.1%	18.8%
Oldham	1.9%	0.5%	0.3%	31.2%	28.5%	38.2%
Manchester	0.2%	3.4%	0.7%	9.5%	12.6%	14.1%
Stockport	1.7%	0.5%	0.7%	14.7%	11.4%	18.9%
High Peak	3.4%	3.4%	0.3%	10.7%	14.7%	6.5%

Source: NEMS Tameside Household Survey (August 2009)
 Excludes 'varies/no pattern'
 Core Catchment includes Zones 7 to 10 (inclusive)
 Outer Catchment comprises Zones 1 to 6

- 6.07 **Table 6.2** illustrates that within the core catchment, facilities in Tameside have seen a rise in market share (of more than eight percentage points) and the level of main food shopping trips undertaken within the core catchment directed to facilities outside the Borough has reduced.
- 6.08 In terms of the outer catchment, **Table 6.2** indicates that the market share achieved by facilities in Tameside has decreased since 2005, from 27% to 19% currently. Similarly, facilities within High Peak Borough have also seen a decrease in market share since 2005 (by 56%).
- 6.09 In comparison, facilities in Oldham, Manchester and Stockport have all seen a rise in main food market share of 34%, 12% and 66%. The notable improvement in the market share achieved by facilities within the neighbouring authorities of Oldham and Stockport is not surprising given the opening of the Tesco Extra store in Failsworth (summer 2007) and the Tesco Extra in Stockport (November 2004).
- 6.10 In terms of specific foodstores within the Borough, the Household Survey identifies the most popular store for main food shopping to be the Asda store in Ashton-under-Lyne, followed by the Asda store in Hyde, the Morrisons store in Dukinfield, the Morrisons store in Hyde and the Tesco store in Stalybridge.
- 6.11 Outside the Borough, the most popular destinations for main food shopping for residents within the Study Area include the Morrisons and Tesco stores in Oldham and the Asda store at Sportscity.



6.12 **Table 6.3** provides a breakdown of the market share achieved by major stores within and just beyond the Study Area by zone.

Table 6.3: Market Share Achieved by Key Foodstores in the Study Area – 2005 and 2009

Store	Zone (%)																				Overall		
	1		2		3		4		5		6		7		8		9		10		'05	'09	
	'05	'09	'05	'09	'05	'09	'05	'09	'05	'09	'05	'09	'05	'09	'05	'09	'05	'09	'05	'09	'05	'09	
Within Tameside																							
Asda, Ashton	2	4	2	1	0	0	14	18	2	2	9	1	7	12	40	51	7	14	2	8	9	8	
Asda, Hyde	0	0	1	0	12	10	1	0	6	6	0	0	20	18	0	0	3	7	21	28	6	6	
Morrison, Denton	0	0	5	1	0	1	0	0	1	2	1	0	32	24	0	3	0	0	5	0	4	3	
Morrison, Dukinfield	0	0	1	1	0	0	9	21	2	0	1	1	0	3	0	9	34	37	6	4	6	6	
Morrison, Hyde	1	0	1	0	3	4	1	0	3	4	0	0	2	3	0	1	6	3	26	40	4	4	
Sainsbury's, Ashton	2	1	0	2	0	0	1	5	0	2	0	3	0	4	18	17	1	3	1	0	2	3	
Sainsbury's, Denton	0	0	3	2	3	3	1	0	0	0	0	0	25	26	0	0	1	0	6	4	4	3	
Tesco, Droylsden	0	0	7	3	0	0	1	0	0	0	29	24	1	3	1	0	1	1	0	0	4	2	
Tesco, Stalybridge	0	1	0	0	0	0	16	16	0	4	0	0	0	3	7	3	35	29	5	2	6	4	
Sub-Total	5	6	20	10	18	18	44	60	14	20	40	29	85	96	66	84	88	94	72	86	45	39	
Outside Tameside																							
Within Manchester																							
Asda, SportsCity	0	0	27	25	0	2	3	0	0	0	15	10	1	0	4	1	1	0	0	0	5	5	
Within Oldham																							
Asda, Chadderton	22	16	2	0	0	0	4	0	0	0	2	0	0	0	0	0	0	0	0	3	4		
Morrison, Chadderton	17	15	5	12	0	0	0	0	0	0	8	7	0	0	0	1	0	0	0	0	3	6	
Sainsbury's, Oldham	10	8	0	1	0	0	7	3	0	0	0	0	0	0	1	0	0	0	0	0	2	2	
Tesco, Oldham	29	25	0	0	0	0	11	16	0	0	0	0	0	0	0	0	0	0	0	0	4	6	
Within Stockport																							
Asda, Stockport	0	0	0	0	17	9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	2	
Sainsbury's, Stockport	0	0	0	0	6	8	0	0	0	2	0	0	0	0	0	0	0	0	0	0	1	2	
Tesco, Stockport	1	0	0	0	12	7	1	0	0	0	1	0	3	0	0	0	0	0	3	2	2	1	
Within High Peak																							
Tesco, Glossop	0	0	2	0	0	1	0	0	75	45	0	0	0	0	0	0	0	0	0	12	2	9	3

Source: NEMS Tameside Household Survey (June 2009) & Tameside Retail Study (2005)
Excludes 'varies/no pattern'

6.13 When travelling to their main food shopping destination, the Household Survey identifies that some 82% of respondents within the Study Area travel by car (either as a driver or passenger). This underlines the popularity of the private motor car for main food shopping. The level of car use varies within each zone within the Study Area, ranging from between 71% of respondents within the Droylsden Zone (where car ownership is the second lowest in the Study Area) compared to 88% travelling by car within the Glossop and Denton zones.

6.14 In terms of the main centres within the Borough, **Table 6.4** provides a breakdown of the market shares achieved within the Borough (includes out-of-centre provision).

Table 6.4: Market Shares Achieved by Main Centres – Main Food Shopping

Centre	Market Share
Ashton-under-Lyne	12.6%
Denton	5.7%
Droylsden	2.4%
Hyde	9.7%
Stalybridge	4.3%
<i>(Figures do not include Morrisons, Dukinfield)</i>	



6.15 **Table 6.4** highlights the relative popularity of Ashton-under-Lyne Town Centre as a main food shopping destination when compared to the other main centres in the Borough. The attraction of Ashton-under-Lyne is not surprising given the provision of Asda and Sainsbury’s store within Ashton-under-Lyne, together with a range of smaller and independent stores and the market. The findings of the Household Survey identifies that Ashton-under-Lyne Town Centre attracts almost 13% of main food shopping trips undertaken within the Study Area. The second highest market share is achieved by Hyde (10%), which includes an Asda store and a Morrisons store, followed by Denton (6%), which includes a Sainsbury’s store and a Morrisons store.

Top-up Food Shopping

6.16 In terms of whether people undertake ‘top-up’ shopping trips between their main food shop (such as regular shopping trips for goods such as milk, bread, etc.), the Household Survey identifies that 54% of respondents within the Study Area confirmed that they did undertake such trips.

6.17 In terms of ‘top-up’ shopping, facilities in Tameside Borough attract approximately 37% of ‘top-up’ shopping trips undertaken within the Study Area. Accordingly, facilities within the Borough achieve a higher market share for main food shopping (41%) than for ‘top-up’ shopping. This market share for top-up food shopping is lower than that identified in 2001 (53%) and 2005 (55%).

6.18 **Table 6.5** below provides a breakdown of the ‘top-up’ shopping market share achieved by facilities within Tameside Borough by zone.

Table 6.5: ‘Top-up’ Food Market Share – 2001, 2005 and 2009

Survey Zone	2001	2005	2009
1. Oldham	6%	8%	6%
2. Manchester East	12%	11%	7%
3. Stockport	4%	11%	7%
4. Uppermill	19%	60%	76%
5. Glossop	5%	2%	15%
6. Droylsden	45%	67%	56%
7. Denton	80%	79%	93%
8. Ashton-under-Lyne	98%	93%	94%
9. Stalybridge	100%	100%	96%
10. Hyde	90%	85%	85%
TOTAL	53%	55%	37%

Source: NEMS Tameside Household Survey (August 2009)
Excludes ‘varies/no pattern’

6.19 **Table 6.6** indicates the ‘top-up’ shopping market shares achieved by facilities in the Borough together with the market shares achieved within the adjoining authorities by zone.



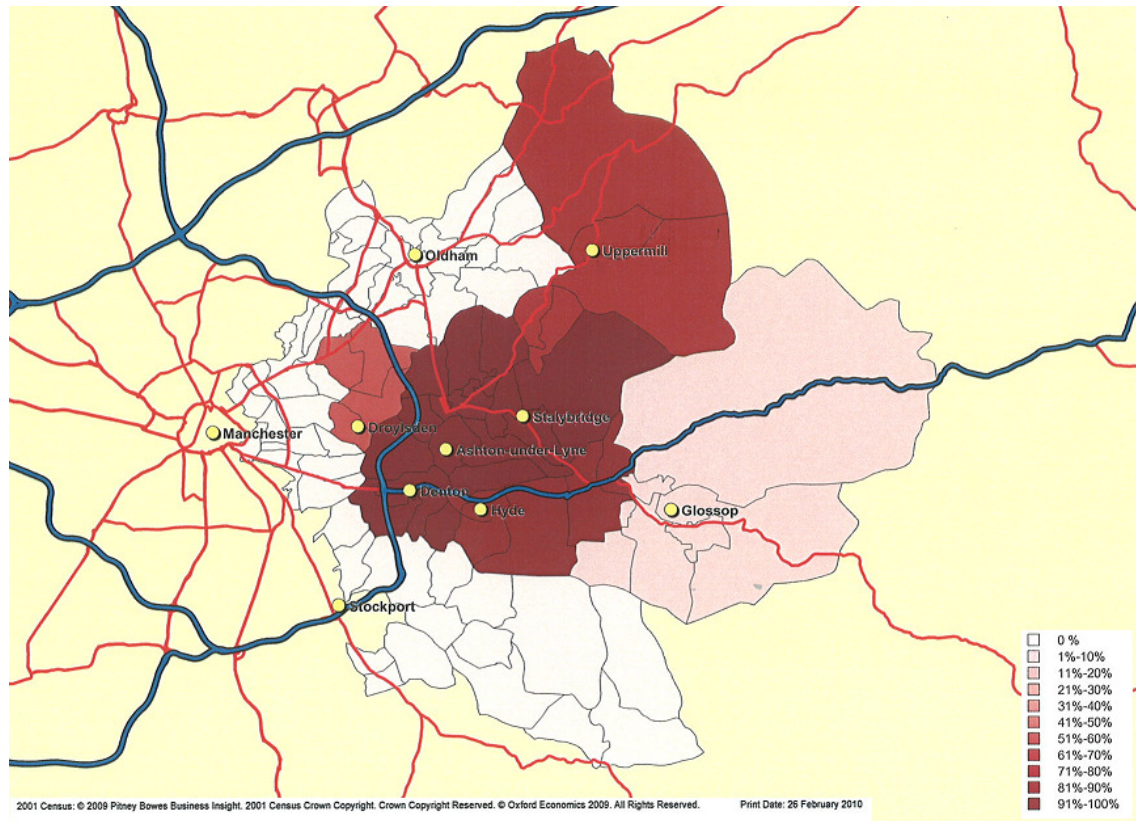
Table 6.6: 'Top-up' Food Market Share Analysis – 2001, 2005 and 2009

	Core Catchment			Outer Catchment		
	2001	2005	2009	2001	2005	2009
Tameside	92.0%	90.0%	92.5%	15.1%	27.0%	15.1%
Oldham	1.0%	0.4%	0.6%	37.2%	27.4%	35.1%
Manchester	1.8%	5.9%	1.4%	14.3%	11.7%	13.1%
Stockport	3.6%	1.7%	3.1%	16.1%	15.6%	25.8%
High Peak	1.0%	1.3%	0.0%	14.8%	16.3%	6.6%

Source: NEMS Tameside Household Survey (August 2009)
Excludes 'varies/no pattern'

- 6.20 **Table 6.6** illustrates that within the core catchment of Tameside, facilities in the Borough have seen a marginal rise in market share since 2005.
- 6.21 In terms of the outer catchment, **Table 6.6** highlights that the market share achieved by facilities within the Borough has decreased since 2005, from 27% to 15%, a decrease of some 44%. In fact, the market share is reflective of the level achieved in 2001 (also 15%). In comparison, the market shares achieved by facilities in all the adjoining authorities have increased since 2005, with the exception of High Peak, which has seen a decrease of some 60%. As with main food shopping patterns, it is likely that the improved retail offer nearby, such as the new Tesco Extra store in Failsworth, has had an impact on shopping patterns within the outer catchment area (and to a lesser extent within the core catchment, particularly within Zone 6 ('Droylsden')).
- 6.22 Figure 6.3 illustrates the penetration levels of existing facilities within the Borough for 'top-up' shopping within the Study Area.

Figure 6.3: Penetration Levels Achieved by Existing Facilities in the Borough – ‘Top-up’ Food Shopping



6.23 In terms of the main centres within the Borough, **Table 6.7** provides a breakdown of the market shares achieved within the Borough.

Table 6.7: Market Shares Achieved by Main Centres – Top-up Food Shopping

Centre	Market Share
Ashton-under-Lyne	12.3%
Denton	3.8%
Droylsden	3.8%
Hyde	6.2%
Stalybridge	4.6%

(Figures do not include Morrisons, Dukinfield)

6.24 **Table 6.7** shows that Ashton-under-Lyne is the most popular destination for ‘top-up’ shopping within the Borough, followed by Hyde and Stalybridge.



Non Food Shopping Patterns

6.25 The Household Survey also assessed shopping patterns for a wide variety of non-food (or comparison) goods. Whilst the survey results provide useful indicators of shopping habits within the Study Area, the findings of the results should be treated with a 'note of caution' given that some respondents may respond that they shop within a defined centre (e.g. Ashton-under-Lyne Town Centre), but in fact visit nearby out-of-centre facilities, such as Snipe Retail Park near Ashton-under-Lyne Town Centre. This has the effect of overstating the attraction of defined centres and underplaying the impact out-of-centre facilities have for certain types of goods, particularly given the strength of out-of-centre facilities as a retail destination. Accordingly, in assessing the current role and future need for additional retail floorspace in the Borough (outlined in Section 8 of this report) an adjustment has been made to take into account the likely underrepresentation of out-of-centre retailing. However, set out below is an analysis of shopping patterns based on the findings of the Household Survey.

Non Bulky Goods Shopping

Clothing & Footwear

6.26 In terms of shopping for clothing and footwear, facilities in Tameside Borough attract 31% of shopping trips for clothing and footwear undertaken within the Study Area.

Table 6.8: Tameside Borough Clothing & Footwear Market Share – 2001, 2005 and 2009

Survey Zone	2001	2005	2009
1. Oldham	6%	3%	10%
2. Manchester East	8%	13%	12%
3. Stockport	4%	6%	14%
4. Uppermill	24%	33%	43%
5. Glossop	16%	25%	24%
6. Droylsden	18%	33%	31%
7. Denton	33%	53%	66%
8. Ashton-under-Lyne	67%	66%	67%
9. Stalybridge	60%	59%	64%
10. Hyde	44%	40%	58%
TOTAL	30%	33%	31%

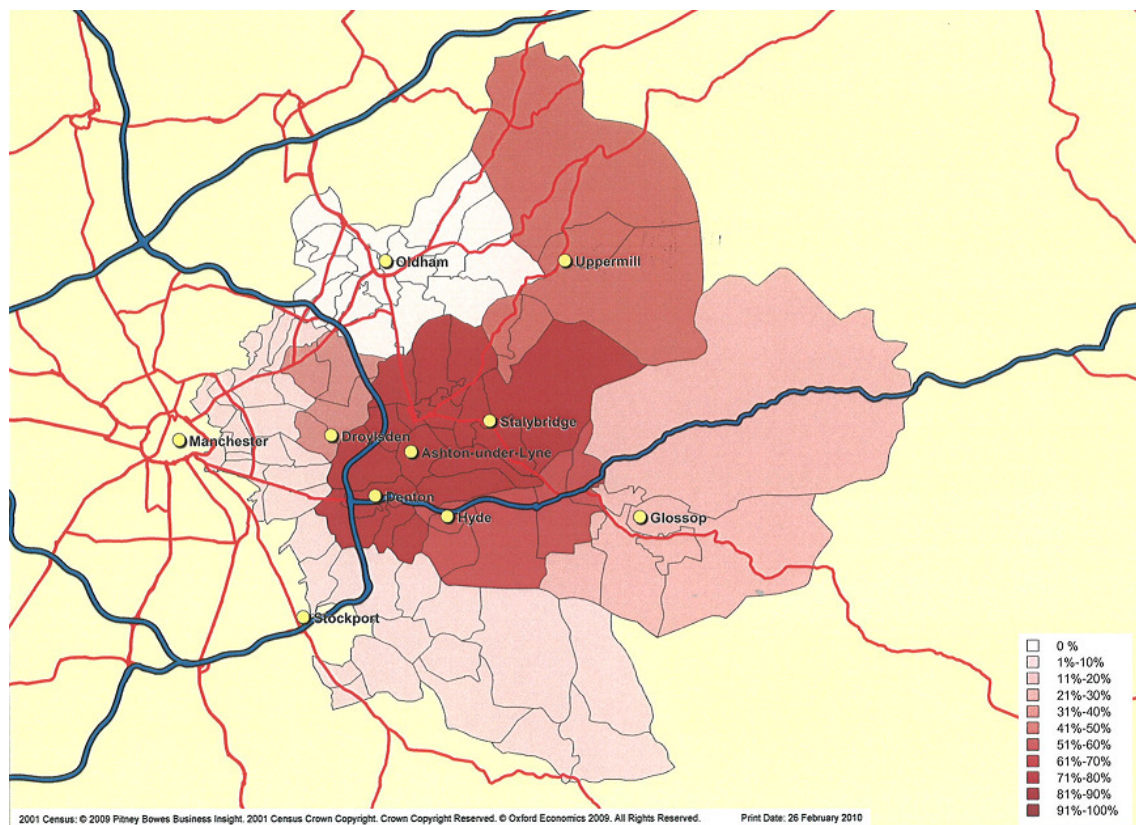
Source: NEMS Tameside Household Survey (August 2009)
Excludes 'varies/no pattern' and 'online' shopping

6.27 **Table 6.8** illustrates that the highest level of retention is achieved within the Ashton-under-Lyne Zone (67%) followed by the Denton Zone (66%). However, it is evident that the majority of shopping trips undertaken within the Study Area for each zone are directed to facilities outside the Borough. This is not surprising given the strength and proximity of Manchester City Centre (regional centre) and The Trafford Centre as destinations for clothing and footwear. The market share has

increased within seven of the identified zones since 2005. The market share of the Oldham Zone has increased by some 233% since 2005. Indeed, the Crown Point North Shopping Park in Denton (which has further improved since 2005) has had an impact on the market share achieved by facilities in the Borough. In particular, the market share of facilities in the Denton Zone has increased from 53% in 2005 to 66% in 2009. This equates to a 100% increase of the market share in 2001, which indicates that the facilities in Crown Point North Shopping Park have established their position in the Borough.

6.28 Figure 6.4 highlights the penetration levels of existing facilities within the Borough for clothing and footwear shopping trips.

Figure 6.4: Penetration Levels Achieved by Existing Facilities in Tameside Borough – Clothing & Footwear



6.29 **Table 6.9** provides a breakdown of the market shares achieved by facilities in the adjoining local authority areas.



Table 6.9: 'Clothing & Footwear' Market Share Analysis – 2001, 2005 and 2009

	Core Catchment			Outer Catchment		
	2001	2005	2009	2001	2005	2009
Tameside	51.7%	54.2%	64.2%	10.9%	18.8%	16.7%
Oldham	2.5%	2.2%	5.2%	23.4%	17.0%	22.8%
Manchester	21.7%	19.2%	14.8%	33.7%	32.3%	25.5%
Stockport	15.9%	14.6%	8.1%	18.7%	16.3%	21.0%
High Peak	0.7%	0.4%	0.4%	3.5%	3.3%	2.0%

Source: NEMS Tameside Household Survey (August 2009)
Excludes 'varies/no pattern'

6.30 **Table 6.9** indicates that the market share achieved by facilities in Tameside has increased in the core catchment since 2005 (from 54% to 64%), but decreased in the outer catchment (from 19% to 17%). Within the core catchment, almost two thirds (64%) of clothing and footwear shopping trips undertaken in these zones are directed to facilities within the Borough. It is evident that improved provision within Tameside (namely Crown Point North Shopping Park) has reduced the level of non-food shopping trips being undertaken to facilities outside the Borough. Indeed, it is evident that within the core catchment, the market share achieved by facilities within Manchester and Stockport has fallen since 2005 (by 23% and 45% respectively). The market share of facilities in High Peak has remained constant since 2005, however the market share of facilities in Oldham has increased notably since 2005, albeit from a relatively low base.

6.31 With regard to the outer catchment identified, it is evident that the market share of existing facilities in Tameside has decreased since 2005, from 19% to 17% of all clothing and footwear shopping trips undertaken. In contrast, the market shares achieved by Oldham and Stockport have risen by 34% and 29% respectively. Surprisingly, the market share achieved by Manchester has fallen since 2005 (39%).

6.32 It is notable that the competition from major shopping destinations such as Oldham, Manchester and Stockport continue to have an impact on shopping patterns within both the core and outer catchments. Given the strength of competing destinations (including the regional centre in Manchester) for clothing and footwear, it is not surprising that a high proportion of shopping trips for these types of goods are directed to facilities outside the Borough. Despite the proximity of competing provision, it is significant to note that almost two-thirds (64%) of clothing and footwear shopping trips undertaken within the core catchment are retained in the Borough. Such a market



share is considered strong. Indeed, the recently completed Oldham Retail & Leisure Study (WYG, June 2009) identified that facilities within Oldham Borough attracted 55% of clothing and footwear shopping trips undertaken within the survey zones that broadly represent the local authority area of Oldham.

6.33 In terms of the main centres within the Borough, **Table 6.10** provides a breakdown of the market shares achieved within the Borough (excludes out-of-centre provision unless stated).

Table 6.10: Market Shares Achieved by Main Centres – Clothing & Footwear

Centre	Market Share
Ashton-under-Lyne	11.4%
Denton	12.2% (including Crown Point North)
Droylsden	0.7%
Hyde	3.5%
Stalybridge	0.5%

6.34 **Table 6.10** highlights Denton (12%) as retaining the highest market share in the Borough. This is followed by Ashton-under-Lyne (11%) and Hyde (4%).

Bulky Goods Shopping

6.35 In addition to assessing shopping patterns for convenience goods and non-bulky comparison goods, it is also possible from the Household Survey to assess shopping patterns for 'bulky goods' within the three broad categories of 'Electrical', 'Furniture' and 'DIY Goods'.

Electrical Goods

6.36 For electrical goods, the Household Survey identifies that 33% of shopping trips undertaken in the Study Area are directed to facilities within the Borough.



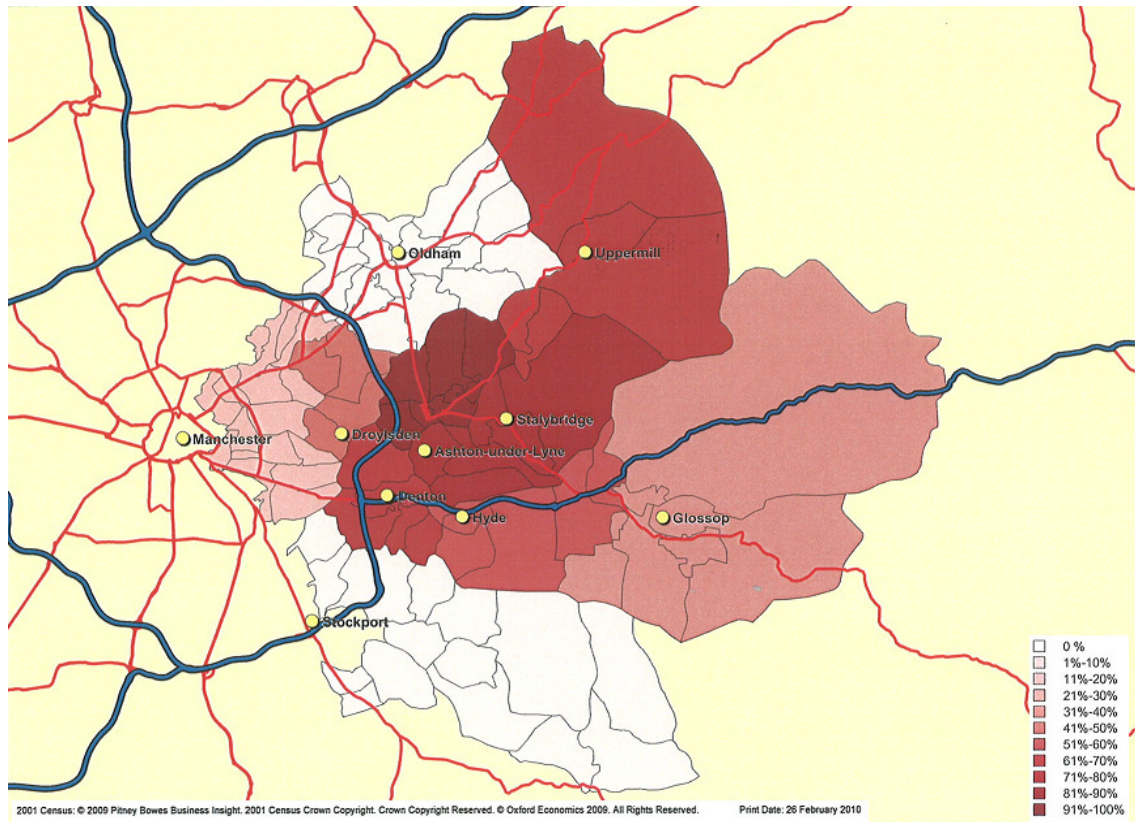
Table 6.11 Tameside Borough Electrical Goods Market Share – 2001, 2005 and 2009

Survey Zone	2001	2005	2009
Oldham	5%	4%	7%
Manchester East	18%	37%	21%
Stockport	5%	4%	5%
Uppermill	41%	34%	69%
Glossop	36%	26%	31%
Droylsden	42%	59%	50%
Denton	53%	54%	64%
Ashton-under-Lyne	91%	87%	84%
Stalybridge	88%	90%	77%
Hyde	62%	48%	54%
TOTAL	47%	44%	33%

Source: NEMS Tameside Household Survey (August 2009)
Excludes 'varies/no pattern'

- 6.37 **Table 6.11** illustrates that facilities in the Borough achieve relatively low market shares (approximately a third of shopping trips undertaken). Although existing facilities in the Borough achieve high market shares within the Ashton-under-Lyne and Stalybridge zones (84% and 77% respectively), it is notable that since 2005 the market share of facilities within the Borough from the Ashton-under-Lyne Zone has fallen by three percentage points. Similarly, the market share of facilities within the Borough from the Stalybridge Zone has fallen since 2005, from 90% to 77%. Likewise, the market share achieved within the Manchester East and Droylsden zones has also fallen since 2005.
- 6.38 In contrast, the market share achieved within the Oldham, Stockport, Uppermill, Glossop, Denton and Hyde zones have all seen an increase in market share since 2005. Indeed, within the Uppermill Zone the market share has more than doubled.
- 6.39 **Figure 6.5** illustrates the penetration levels achieved by facilities in the Borough on a zone-by-zone basis.

Figure 6.5: Penetration Level Achieved by Existing Facilities in Tameside Borough – Electrical Goods



6.40 In terms of the core and outer core catchments identified for Tameside, **Table 6.12** indicates that the market share achieved by facilities in Tameside has increased in the core catchment (from 69% in 2005 to 71% in 2009). Although the market share of facilities in Tameside within the core catchment has increased, the market share (71%) remains lower than that identified in 2001 (74%). In contrast, the market share within the outer catchment has decreased (from 27% to 19%). Whilst it is evident that facilities in Tameside are the most popular within the core catchment, within the outer catchment, facilities in Oldham and Stockport are the most popular.



Table 6.12: Electrical Goods Market Share Analysis – 2001, 2005 and 2009

	Core Catchment			Outer Catchment		
	2001	2005	2009	2001	2005	2009
Tameside	74.3%	69.3%	71.0%	21.6%	27.1%	19.3%
Oldham	1.6%	2.2%	2.0%	29.8%	23.4%	26.9%
Manchester	4.5%	4.7%	1.8%	18.3%	12.8%	10.5%
Stockport	14.1%	16.3%	11.9%	17.6%	17.8%	24.7%
High Peak	1.2%	1.6%	0.5%	6.4%	4.6%	1.4%

Source: NEMS Tameside Household Survey (August 2009)
Excludes 'varies/no pattern'

6.41 In terms of the main centres within the Borough, **Table 6.13** provides a breakdown of the market shares achieved within the Borough (excludes out-of-centre provision unless specified and makes no allowance for adjusting the market shares based on the likely underestimate or over estimate of existing out-of-centre provision as set out in Section 8 of this study).

Table 6.13: Market Shares Achieved by Main Centres – Electrical Goods

Centre	Market Share
Ashton-under-Lyne	5.2%
(Snipe Retail Park)	19.5%
Denton	1.3%
Droylsden	0.8%
Hyde	2.7%
Stalybridge	0.7%

6.42 **Table 6.13** highlights that few electrical goods are bought within the town centres within the Borough. However, Ashton-under-Lyne retains the highest market share (5%), followed by Hyde (3%) and Denton (1%). Outside the five main centres, it is not surprising to find that the out-of-centre Snipe Retail Park is the most popular destination for electrical goods shopping attracting a market share of more than 19% within the Study Area. Indeed, Snipe Retail Park includes Currys and Comet, PC World, Argos and Staples.

Furniture Goods

6.43 For Furniture Goods, the Household Survey identifies that facilities within the Borough attract more than two-thirds (36%) of shopping trips undertaken in the Study Area. **Table 6.14** provides a breakdown of the market share achieved by all facilities within the Borough.



Table 6.14: Tameside Borough Furniture Goods Market Share – 2001, 2005 and 2009

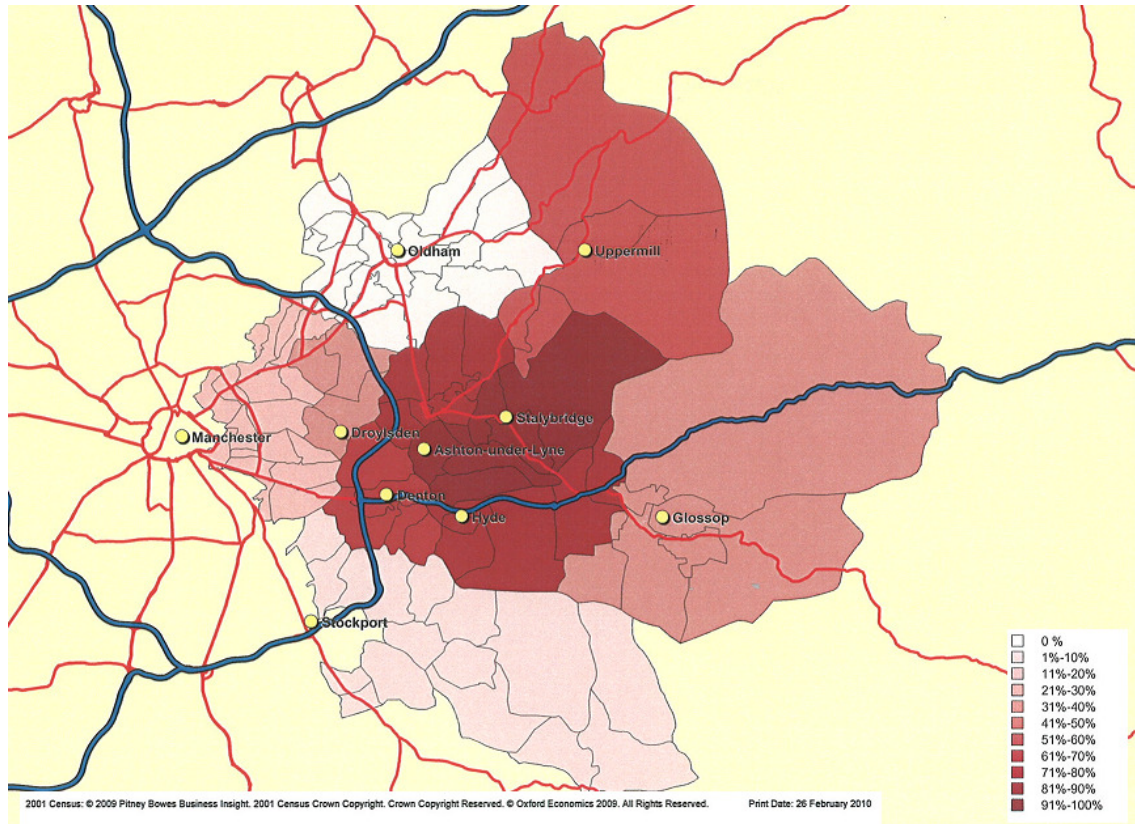
Survey Zone	2001	2005	2009
1. Oldham	5%	4%	10%
2. Manchester East	22%	36%	26%
3. Stockport	5%	7%	12%
4. Uppermill	29%	30%	54%
5. Glossop	33%	37%	34%
6. Droylsden	39%	48%	38%
7. Denton	47%	59%	65%
8. Ashton-under-Lyne	74%	60%	76%
9. Stalybridge	72%	69%	83%
10. Hyde	64%	47%	71%
TOTAL	41%	41%	36%

Source: NEMS Tameside Household Survey (August 2009)
Excludes 'varies/no pattern'

6.44 Again, existing facilities within the Borough are identified as having relatively low market shares within five of the zones within the Study Area. In contrast, the Stalybridge Zone (83%) and the Ashton-under-Lyne Zone (76%) achieve fairly high market shares within this category. The market shares within seven of the ten zones have increased since 2005, most notably within the Uppermill Zone, from 30% in 2005 to 54% by 2009, representing an increase of some 80%. In comparison, the Manchester East, Glossop and Droylsden zones have all seen a fall in market share since 2005. This increase in market share within a number of survey zones is likely to be due (in part) to the new IKEA at the edge-of Ashton-under-Lyne, which has been developed since 2005. Indeed, within the Ashton-under-Lyne Zone the market share has increased from 60% in 2005 to 76% in 2009, which is comparable to that achieved in 2001 (74%).

6.45 **Figure 6.6** illustrates the penetration levels achieved by existing facilities in the Borough on a zone-by-zone basis.

Figure 6.6: Penetration Level Achieved by Existing Facilities in Tameside Borough – Furniture Goods



6.46 In terms of the market shares achieved by Tameside and adjoining authorities of Oldham, Manchester, Stockport and High Peak within the core and outer catchments, **Table 6.15** indicates that there has been a fall in market share achieved by facilities in Tameside within the core catchment. This follows on from the fall in market share between 2001 and 2005. The market share achieved by facilities in Oldham has decreased significantly (by 74%) within the core catchment. In fact, only High Peak has seen an increase in market share between 2005 and 2009 (albeit by 200%). Therefore, the household survey appears to suggest that less shopping trips within the catchment are being made to facilities in Oldham in 2009 than in 2005. It remains evident that in the core catchment, facilities in Tameside are the most popular destination for furniture goods shopping.

6.47 With regard to the outer catchment identified, facilities in Tameside have seen a decrease in market share since 2005, from 28% to 21% (representing a decrease of 25%). The 2009 figure (21%) is very similar to the market share achieved in 2001 (20%). In comparison, facilities in Oldham and



Stockport have both witnessed an increase in market share from 2005 to 2009 (45% and 41%, respectively). Although, facilities in Manchester (23%) and High Peak (26%) have both witnessed a fall in market share since 2005.

Table 6.15: Furniture Goods Market Share Analysis – 2001, 2005 and 2009

	Core Catchment			Outer Catchment		
	2001	2005	2009	2001	2005	2009
Tameside	64.1%	58.2%	54.7%	20.3%	27.8%	21.0%
Oldham	5.3%	14.5%	3.8%	28.6%	25.2%	36.5%
Manchester	12.6%	5.5%	3.8%	21.7%	12.5%	9.6%
Stockport	11.6%	10.9%	8.6%	17.9%	14.8%	20.9%
High Peak	0.7%	0.4%	1.2%	4.3%	4.3%	3.2%

Source: NEMS Tameside Household Survey (August 2009)
Excludes 'varies/no pattern'

6.48 In terms of the main centres within the Borough, **Table 6.16** provides a breakdown of the market shares achieved within the Borough (excludes out-of-centre provision unless specified and makes no allowance for adjusting the market shares based on the likely underestimate of existing out-of-centre provision as set out in Section 8 of this study).

Table 6.16: Market Shares Achieved by Main Centres – Furniture Goods

Centre	Market Share
Ashton-under-Lyne	6.8%
<i>Snipe Retail Park</i>	<i>12.0%</i>
IKEA	3.3%
Denton	2.6%
Droylsden	1.0%
Hyde	5.0%
Stalybridge	2.3%

6.49 **Table 6.16** highlights that Ashton-under-Lyne Town Centre retains the highest market share for furniture goods in the Borough (7%), followed by Hyde (5%) and Denton (3%). Although as would be expected, much of existing furniture goods provision within the Borough is located outside existing centres, as is the case with the new IKEA store. In this respect, Snipe Retail Park (12%) and IKEA (3%) achieve high market shares within the Study Area.



DIY Goods

6.50 With regard to DIY shopping, the Household Survey identifies that existing facilities in the Borough attract some 47% of shopping trips undertaken within the Study Area. **Table 6.17** illustrates that within the Ashton-under-Lyne Zone, all shopping trips are attracted to facilities within the Borough. The Stalybridge, Denton and Hyde Zones also achieve very high market shares in this category (98%, 90% and 89% respectively). It is notable that the market shares within these three zones have increased slightly since 2005. The existing B&Q store at Snipe Retail Park in Ashton-under-Lyne is identified to be the most popular destination in the Borough – attracting almost a third (31%) of shopping trips currently directed to facilities in the Borough.

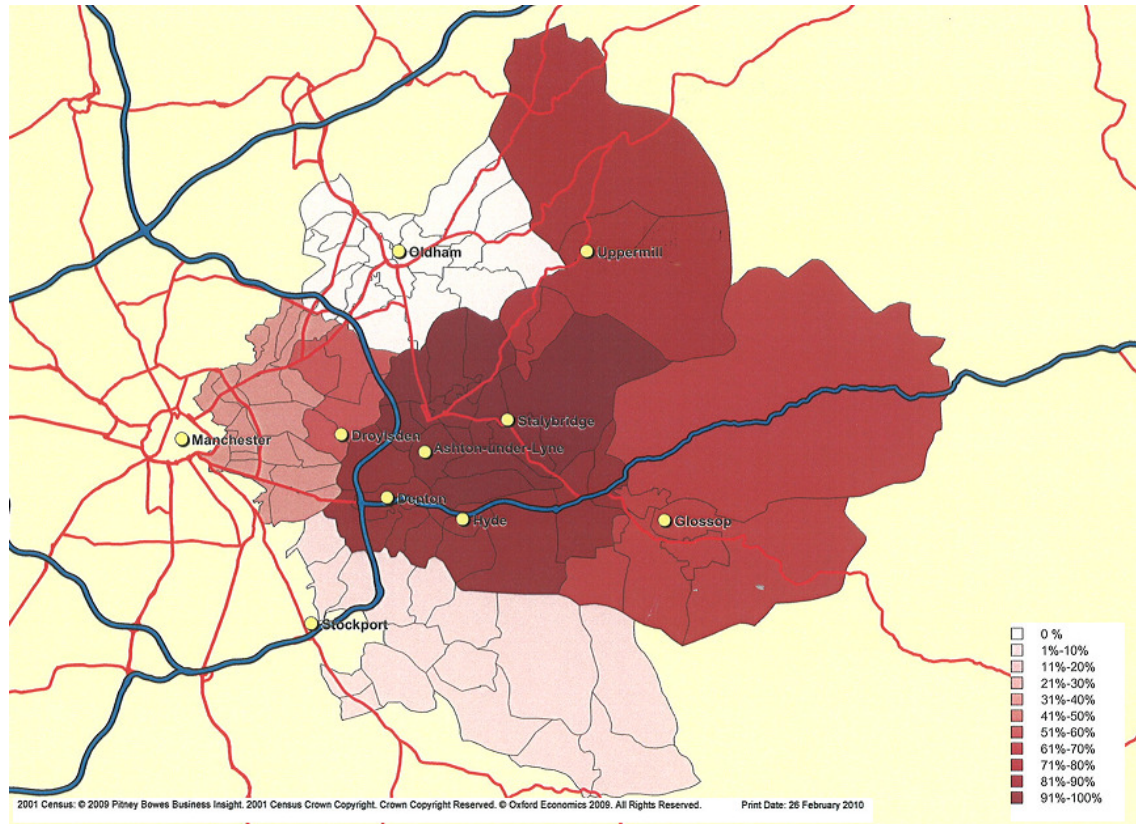
Table 6.17: Tameside Borough DIY Goods Market Share – 2001, 2005 and 2009

Survey Zone	2001	2005	2009
1. Oldham	5%	3%	6%
2. Manchester East	45%	52%	37%
3. Stockport	11%	10%	14%
4. Uppermill	45%	44%	73%
5. Glossop	61%	64%	61%
6. Droylsden	57%	66%	54%
7. Denton	77%	80%	90%
8. Ashton-under-Lyne	99%	95%	100%
9. Stalybridge	99%	95%	98%
10. Hyde	84%	83%	89%
TOTAL	61%	59%	47%

Source: NEMS Tameside Household Survey (August 2009)
Excludes 'varies/no pattern' and 'online' shopping

6.51 **Figure 6.7** indicates the extent of the catchment area achieved by facilities within the Borough within the Study Area.

Figure 6.7: Penetration Level Achieved by Existing Facilities in Tameside Borough – DIY Goods



6.52 **Table 6.17** illustrates that within the core catchment, existing facilities within Tameside have seen an increase in the market share achieved for DIY goods shopping, with less trade being drawn to facilities in Oldham, Manchester, Stockport and High Peak. Thus, it remains evident that the vast majority of DIY shopping trips in the core catchment continue to be directed to facilities in the Borough. Indeed, the household survey suggests that, within the core catchment, less than 6% of shopping trips are made to facilities outside the Borough.

6.53 In terms of the outer catchment, **Table 6.18** indicates that the market share achieved by facilities in Tameside have reduced since 2005, from 39% to 28%, representing a reduction of 30%, although the market share of 2009 remains higher than achieved in 2001 (18%).



Table 6.18: DIY Goods Market Share Analysis – 2001, 2005 and 2009

	Core Catchment			Outer Catchment		
	2001	2005	2009	2001	2005	2009
Tameside	89.5%	87.8%	94.8%	17.5%	39.3%	27.6%
Oldham	1.0%	1.8%	1.0%	28.4%	28.4%	36.5%
Manchester	1.8%	1.2%	0.5%	11.7%	5.2%	5.6%
Stockport	5.4%	6.4%	2.3%	18.0%	19.5%	24.1%
High Peak	1.8%	0.9%	0.5%	4.6%	5.2%	3.4%

Source: NEMS Tameside Household Survey (August 2009)
Excludes 'varies/no pattern'

6.54 In terms of the main centres within the Borough, **Table 6.19** provides a breakdown of the market shares achieved within the Borough (excludes out-of-centre provision unless specified and makes no allowance for adjusting the market shares based on the likely underestimate of existing out-of-centre provision as set out in Section 8 of this study).

Table 6.19: Market Shares Achieved by Main Centres – DIY Goods

Centre	Market Share
Ashton-under-Lyne	3.4%
<i>Snipe Retail Park (including B&Q)</i>	<i>34.0%</i>
Denton	0.1%
Droylsden	0.3%
Hyde	1.0%
Stalybridge	0.3%

6.55 **Table 6.19** highlights that few DIY goods are bought in established centres in Tameside. However, Ashton-under-Lyne retains the highest market share (3%), followed by Hyde (1%), Droylsden (<1%) and Stalybridge (<1%). In contrast out-of-centre facilities are identified to achieve high market shares; most notably Snipe Retail Park (which includes a B&Q Warehouse) is identified to achieve a market share of 34%, which is ten times larger than that achieved by facilities within Ashton-under-Lyne Town Centre.

Linked Trips

6.56 The Household Survey also asked specific questions relating to whether linked trips were made between their main food shopping destination and other centres/facilities for any other activity as part of the same trip. The Household Survey identifies that some 77% of respondents within the Study Area did not combine their main food shopping trip with another activity. This high



proportion of respondents not undertaking linked trips is higher than experienced by WYG in other surveys.

6.57 Of those that do undertake linked trips, 10% stated that they combined their main food shopping with non-food shopping, 7% with visiting other services (such as banks, etc.) and 6% with a leisure activity. Of those respondents within the Study Area that do undertake non-food shopping as part of a linked trip, just less than half (46%) of these linked trips are to facilities within the Borough. In this respect, Ashton-under-Lyne Town Centre was identified to be the most popular destination for this activity (16%), followed by Hyde (13%), Denton (4%) and Stalybridge (4%). The number of linked trips undertaken on a zone-by-zone basis is illustrated at [Table 6.15](#).

Table 6.15: Market Share of Internet/Mail Order for Comparison Goods Shopping– 2009

Survey Zone	% of Respondents who undertake Linked Trips	Main Activities undertaken as part of Linked Trip	Main Destinations (%)
1. Oldham	21.5	Non-food Shopping (10.3%) Leisure Activity (4.0%)	Oldham (56.8%) Ashton-under-Lyne (11.4%) Chadderton (6.8%)
2. Manchester East	19.6	Non-food Shopping (10.5%) Other Food Shopping (2.8%)	Harpurhey (18.5%) Ashton-under-Lyne (11.1%) Clayton (11.1%)
3. Stockport	26.7	Non-food Shopping (11.9%) Using Local Services (5.1%)	Stockport (39.5%) Hyde (18.6%) Marple (14.0%)
4. Uppermill	18.9	Non-food Shopping (10.8%) Leisure Activity (2.7%)	Ashton-under-Lyne (40.0%) Oldham (20.0%) Dukinfield (20.0%)
5. Glossop	31.4	Non-food Shopping (11.8%) Using Local Services (9.8%)	Glossop (73.3%) Ashton-under-Lyne (6.7%) Hyde (6.7%)
6. Droylsden	18.8	Leisure Activity (7.2%) Non-food Shopping (4.3%)	Failsforth (30.8%) Droylsden (23.1%) Ashton-under-Lyne (15.4%)
7. Denton	23.0	Non-food Shopping (10.8%) Using Local Services (5.4%)	Denton (26.7%) Hyde (26.7%) Ashton-under-Lyne (13.3%)
8. Ashton-under-Lyne	24.6	Varies (7.2%) Non-food Shopping (5.8%)	Ashton-under-Lyne (64.7%) Sainsbury's, Ashton-under-Lyne (11.8%) Denton (5.9%)
9. Stalybridge	24.7	Non-food Shopping (10.1%) Leisure Activity (7.9%)	Stalybridge (40.9%) Hyde (27.3%) Ashton-under-Lyne (22.7%)
10. Hyde	24.0	Non-food Shopping (14.0%) Varies (4.0%)	Hyde (60.0%) Ashton-under-Lyne (10.0%) Denton (10.0%)
TOTAL	23.3	Non-food Shopping (10.0%) Using Local Services (6.8%) Leisure Activity (5.5%)	Stalybridge (40.9%) Hyde (27.9%) Droylsden (23.1%)

Source: NEMS Tameside Household Survey (August 2009)



6.58 **Table 6.16** provides a breakdown of the market shares achieved by facilities in Tameside within a variety of retail sectors within both the core and outer catchments.

Table 6.16: Market Shares Achieved by Facilities in Tameside and Adjoining Authorities

	Tameside		Oldham		Stockport		Manchester		High Peak	
	Core	Outer	Core	Outer	Core	Outer	Core	Outer	Core	Outer
Food										
2005	91%	27%	0%	28%	2%	15%	4%	12%	3%	15%
2009	94%	17%	1%	37%	2%	22%	1%	14%	0%	7%
% Change	+3%	-10%	+1%	+9%	0%	+7%	-3%	+2%	-3%	-8%
Non-Bulky										
2005	54%	19%	2%	17%	15%	16%	19%	32%	0%	3%
2009	64%	17%	5%	23%	8%	21%	15%	26%	0%	2%
% Change	+10%	-2%	+3%	+6%	-7%	+5%	-4%	-6%	0%	-1%
Bulky										
2005	72%	31%	5%	25%	11%	17%	2%	10%	1%	5%
2009	74%	23%	2%	33%	8%	23%	2%	9%	1%	3%
% Change	+2%	-8%	-3%	+8%	-3%	+6%	0%	-1%	0%	-2%

Source: NEMS Tameside Household Survey (August 2009)
Excludes 'varies/no pattern'

6.59 **Table 6.16** indicates that generally the market shares achieved by facilities in Tameside within the core catchment within the three identified categories of retailing have generally increased marginally since 2005 'clawing back' trade from competing facilities in the adjoining authority areas. In comparison, within the outer catchment, the market shares achieved by facilities have declined marginally since 2005. This is to be expected given that competing provision (such as Oldham, Manchester and Stockport) is located in close proximity to residents within the outer catchment.



7.0 POPULATION AND EXPENDITURE

Introduction

- 7.01 This section of the report assesses the current population and expenditure generated (both convenience and comparison goods) within the defined Study Area.

Study Area Population

- 7.02 The population within each postal code sector has been calculated using MapInfo AnySite Report data (2007 estimate). The baseline population has then been projected forward based on population projections identified by MapInfo, which have been derived from mid-year ONS based population estimates for each survey zone.
- 7.03 On this basis, the adopted Study Area is identified to contain a resident population of approximately 638,662 people in 2009, which is set to increase to 655,732 people by 2014, to 674,315 people by 2019, to 693,505 people by 2024 and to 705,320 people by 2027. This represents an increase in population within the Study Area of 66,658 people (or 10.4%) between 2009 and 2027.
- 7.04 Population figures (derived from MapInfo) are provided for each of the ten survey zones. For the purposes of this study, population and expenditure has been calculated at five-year intervals in accordance with PPS4 (i.e. 2014, 2019 and 2024) through to 2027. **Table 7.1** provides a detailed breakdown of the forecast population change within each survey zone through to 2027.

Table 7.1: Population by Survey Zone (2009 – 2027)

Survey Zone	2009	2014	2019	2024	2027
1. Oldham	142,630	145,490	148,791	152,167	154,229
2. Manchester East	93,539	98,050	101,628	105,337	107,627
3. Stockport	116,157	117,885	120,482	123,136	124,757
4. Uppermill	25,255	26,337	27,624	29,974	29,815
5. Glossop	34,129	35,482	36,947	38,472	39,418
6. Droylsden	44,334	44,912	45,591	46,280	46,699
7. Denton	46,504	46,960	47,428	47,901	48,187
8. Ashton-under-Lyne	44,467	45,635	46,980	48,365	49,215
9. Stalybridge	58,519	60,879	63,805	66,872	68,782
10. Hyde	33,123	34,102	35,039	36,002	36,592
TOTAL	638,662	655,732	674,315	693,505	705,320

Source: MapInfo AnySite Data (2007)



Retail Expenditure

- 7.05 In order to calculate convenience and comparison expenditure per person, WYG has again utilised MapInfo AnySite Report data, which provides detailed information on local consumer expenditure that takes into account the socio-economic characteristics of the local population. MapInfo is a widely accepted source of expenditure and population information and is the same source that informed the 2005 Tameside Retail Study.
- 7.06 Forecasts have been derived from MapInfo Brief 09/02, which was published in September 2009. Importantly, the latest expenditure forecasts take into account the current downturn in the UK economy, which has had an impact on the retail sector. For the purposes of this study the following forecasts have been applied:

	Convenience	Comparison
2008	-0.7%	+4.6%
2009	-0.8%	-2.7%
2010	-0.8%	-2.7%
2011 to 2014	+1.1% per annum	+3.8%
2015 onwards	+0.7% per annum	+4.5%

- 7.07 The latest forecasts suggest that the current downturn in the economy will continue to impact on future expenditure (at least in the short-term). However, in the longer term it is expected that the forecast levels of growth will increase as the economy recovers to levels reflective to that identified by MapInfo (both actual and forecast) pre-2008. However, WYG considers that the growth in expenditure forecast in the longer term should be treated with caution given the uncertainty in forecasting future growth through to 2027.
- 7.08 Using these forecast growth rates identified by MapInfo, it is possible to produce expenditure estimates for each survey zone in 2009, 2014, 2019, 2024 and 2027. The assessment takes into account both retail expenditure growth and population change.

Convenience Goods Expenditure

- 7.09 It is estimated that in 2009 the resident population within the Study Area generates some £1,093.47m of convenience goods expenditure. This is forecast to increase to £1,369.91m by 2027, which represents an increase of £276.44m (or 25%) between 2009 and 2027.



Main Food and 'Top-up' Shopping

7.10 As part of the Household Survey, respondents were specifically asked questions in relation to the proportion of money they spend on their main food shopping and 'top-up' food shopping. For the purposes of this assessment we have assumed that 75% of convenience goods expenditure is directed to the main food shopping destination (i.e. bulk food shop) and 25% directed to 'top-up' shopping destinations (i.e. regular purchase of products such as milk, bread, etc.).

7.11 By applying these expenditure estimates per person to the identified population of the defined Study Area, convenience goods expenditure on main food shopping is approximately £820.10m in 2009. With regard to 'top-up' food shopping, in 2009 the resident population within the Study Area generates £273.37m of convenience goods expenditure.

Comparison Goods Expenditure

7.12 In 2009 the resident population within the Study Area is identified as generating £1,774.85m of comparison goods expenditure. Given the forecast growth in population and expenditure this is anticipated to increase to £3,922.96m by 2027. This represents an increase of £2,148.10m (or 121%) between 2009 and 2027.

7.13 For the purposes of this study comparison goods expenditure has also been divided into eight sub-categories: 'Furniture', 'DIY' and 'Electrical', which are known as bulky goods; and what is referred to as non-bulky goods: 'Clothing & Footwear', 'Books, CDs, DVDs, etc.', 'Household Goods', 'Toys, Bicycles and Other Recreational Goods' and 'Chemist Goods'. In this respect the proportion of expenditure directed to each sub-category by residents within the Study Area is as follows:

Bulky Goods

'Furniture' – 11.4%

'DIY' – 6.3%

'Electrical' – 11.8%

Sub-Total – 29.4%

Non-bulky Goods

'Clothing & footwear' – 27.0%

'Books, CDs, DVDs, etc.' – 6.0%

'Household Goods' – 10.6%

'Toys, Bicycles and Other Recreational Goods' – 14.7%

'Chemist Goods' – 12.2%

Sub-Total – 70.6%



Tameside's Market Share

- 7.14 Having calculated the likely levels of expenditure that are generated by the resident population within the defined Study Area it is also important to understand what proportion of this expenditure is currently attracted to retail facilities within Tameside (n.b. these market shares may differ slightly to those outlined in Section 4 as they are based on retail expenditure rather than shopping trips).
- 7.15 As previously highlighted, this study has involved the completion of more than 1,000 household telephone interviews within Tameside and the wider area. By analysing the results from the survey it has been possible to understand the likely levels of expenditure that is captured in the Borough. The market shares for the various expenditure categories are highlighted in **Table 7.2** and **Table 7.3**.

Table 7.2: Tameside Borough's Current Market Share (2009) – Convenience

Zone	Market Share (%)		
	Main Convenience	Top-up Convenience	Total [^]
1. Oldham	8.6	5.6	7.8
2. Manchester East	11.2	7.1	10.2
3. Stockport	20.8	7.1	17.3
4. Uppermill	60.6	32.0	53.8
5. Glossop	19.0	14.5	17.9
6. Droylsden	31.0	55.9	37.1
7. Denton	98.6	90.0	96.6
8. Ashton-under-Lyne	95.8	94.0	95.2
9. Stalybridge	98.9	96.2	98.2
10. Hyde	88.6	85.4	87.8
TOTAL	40.8	35.9	39.6

Source: Tameside Household Survey (August 2009)

[^]Based on cumulative market share of main and top-up food shopping
Based on market share of expenditure
At 2007 prices

Table 7.3: Tameside's Current Market Share (2009) - Comparison

Zone	Market Share (%)								
	Clothing & Footwear	Books, CDs, etc.	Household Goods	Toys, etc.	Chemist	Electrical	Furniture	DIY	Total [^]
1. Oldham	10.1	4.8	23.5	9.0	6.9	6.8	10.3	6.4	10.1
2. Manchester East	12.4	7.2	21.7	20.0	11.4	21.3	23.6	36.8	18.0
3. Stockport	13.8	7.4	18.9	4.8	10.7	5.4	12.1	13.5	11.0
4. Uppermill	42.8	21.4	33.4	15.0	48.7	69.1	53.8	61.6	42.7
5. Glossop	24.0	10.0	31.0	9.6	12.6	31.0	34.3	60.6	23.7
6. Droylsden	30.9	18.2	36.9	14.3	48.1	50.0	37.5	54.2	35.0
7. Denton	66.2	57.7	69.0	51.5	92.4	64.3	65.0	89.3	68.2
8. Ashton-under-Lyne	66.7	78.0	77.7	78.6	93.9	83.3	75.7	100.0	78.7
9. Stalybridge	64.5	65.0	61.7	66.7	91.2	76.5	64.4	98.5	66.3
10. Hyde	58.0	54.9	51.7	52.1	77.8	54.3	70.9	89.2	61.7
TOTAL	30.2	24.7	36.1	25.0	36.9	34.0	32.2	46.0	32.0

Source: Tameside Household Survey (August 2009)

[^]Based on cumulative market share of all comparison goods categories
Based on market share of expenditure
At 2007 prices



- 7.16 **Table 7.2** indicates that all destinations within Tameside Borough attract almost 41% of main food shopping expenditure generated by residents within the Study Area. Within zones 7 to 10 inclusive of the defined Study Area (which broadly equate to Tameside local authority area), this market share increases to 96% of convenience goods expenditure. This suggests that within the local area, only very limited main food shopping trips within the Borough are currently directed to facilities elsewhere.
- 7.17 In terms of 'top-up' convenience shopping, existing facilities within the Borough attract less than 36% of expenditure generated in the Study Area. Whilst this increases to almost 92% within zones 7 to 10 inclusive, it is evident that existing facilities within the Borough achieve a lower market share for 'top-up' food shopping than for main food shopping. This may be due to 'top-up' shopping trips being linked with work patterns rather than using the closest convenience goods facility.
- 7.18 Overall, existing facilities within the Borough attract £334.44m of main food convenience expenditure and £98.28m of 'top-up' convenience expenditure generated in the Study Area in 2009. Accordingly, facilities within Tameside retain £432.71m of convenience goods expenditure generated in the Study Area.
- 7.19 Understandably, the market share differs within each of the ten survey zones. Within Zone 7 ('Denton'), Zone 8 ('Ashton-under-Lyne') and Zone 9 ('Stalybridge') more than 95% of convenience goods expenditure is retained by facilities in the Borough. This compares to less than 20% of convenience goods expenditure being attracted to facilities from Zone 1 ('Oldham'), Zone 2 ('Manchester East'), Zone 3 ('Stockport') and Zone 5 ('Glossop').
- 7.20 In terms of individual stores within Tameside, the out-of-centre Asda store on Cavendish Street in Ashton-under-Lyne is identified to be the most popular, achieving a convenience goods turnover of £72.70m derived from the resident population within the Study Area. Other popular stores include the Asda store on Greenfield Street in Hyde (£53.26m), the Morrisons store on Foundry Street in Dukinfield (£53.67m), the Tesco store on Trinity Street in Stalybridge (£45.91m) and the Morrisons store on Mottram Road in Hyde (£36.77m). Outside the Borough, facilities in neighbouring Oldham are identified to be the most popular, particularly within Zone 1 ('Oldham').
- 7.21 With regard to comparison goods shopping, collectively the 'bulky goods' sector is identified to achieve a market share of 35% (or £182.55m). This market share increases to 69% within zones 7



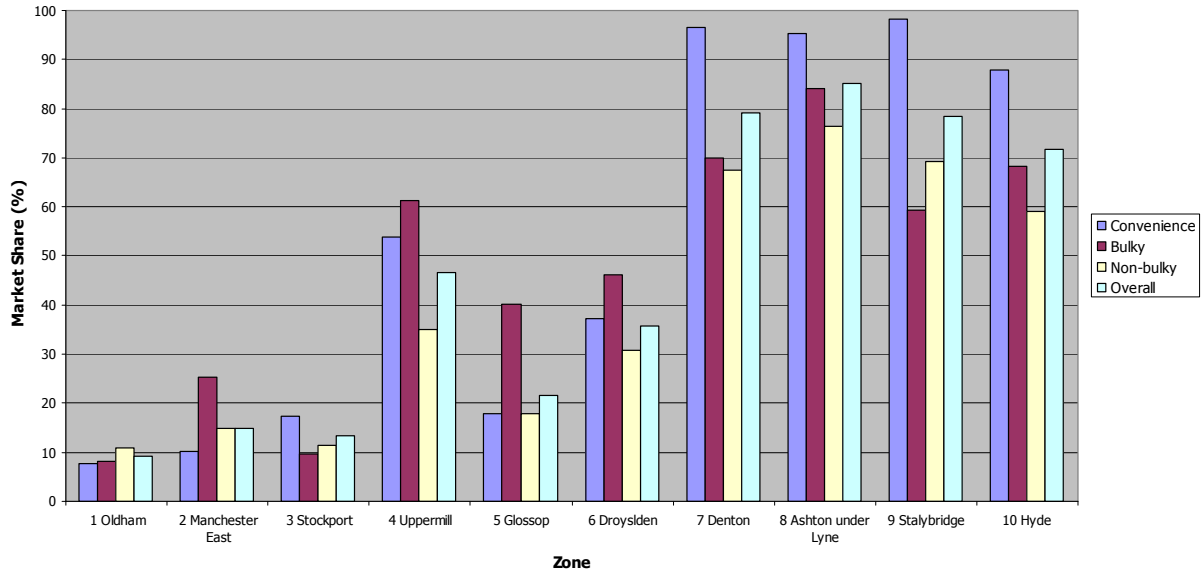
to 10 inclusive. This high market share within zones 7 to 10, which broadly reflects the local authority of Tameside, reflects the relative strength of bulky goods retail provision within the Borough. Within the bulky goods sector facilities in Tameside are identified to attract 32% of expenditure generated for 'Furniture Goods', which compares to a 34% market share for 'Electrical Goods' and a 46% market share for 'DIY Goods'. This increases to 53%, 71% and 95% respectively within the core catchment. These high market shares compare to the Oldham Retail and Leisure Study identifying market shares of 71%, 71% and 84% respectively within broadly the local authority area of the neighbouring Oldham. Whilst survey results should be treated with a 'note of caution' (particularly when comparing two different surveys), the evidence suggests that whilst the retention rate for DIY shopping within Tameside is high (95%) despite the provision of an IKEA store, the retention rate for Furniture Goods is lower than would be expected and when compared to shopping patterns within the neighbouring authority of Oldham.

- 7.22 In respect of non-bulky comparison goods expenditure, existing facilities within Tameside attract 31% (or £384.72m) of expenditure generated in the Study Area, which is lower than that identified for bulky goods (35%). Clearly, the strong influence of the regional centre of Manchester has an impact on shopping patterns within the Study Area. However, within zones 7 to 10, the market share for non-bulky comparison goods increases to almost 69%, which is reflective of that identified for bulky comparison goods.
- 7.23 Collectively (bulky and non-bulky comparison goods), existing facilities within Tameside attract less than a third (32%) of all comparison goods expenditure generated in the Study Area. This increases to 69% within zones 7 to 10 inclusive.
- 7.24 By including convenience goods expenditure, the overall market share of retail facilities in Tameside increases to 35% of all retail expenditure generated in the Study Area (both convenience and comparison goods). This equates to £999.98m of expenditure, comprising £432.71m of convenience goods expenditure and £567.27m of comparison goods expenditure. Within zones 7 to 10, existing facilities within Tameside attract almost 79% of retail expenditure generated within this narrower area.



7.25 Figure 7.1 provides a breakdown of the market share by zone for all expenditure categories.

Figure 7.1: Comparative Market Share by Zone



Source: Tameside Household Survey (August 2009)

Forecast Growth in Expenditure Attracted to Tameside

7.26 With forecast growth in convenience goods expenditure predicted to increase at 0.7% per annum (interpolated) between 2009 and 2027, together with the estimated growth in population, it is estimated that the Borough will experience an increase in convenience goods expenditure of approximately £111m by 2027 by assuming constant market share.

7.27 The significant increase forecast in expenditure on comparison goods (3.9% per annum interpolated) would suggest that at current market shares, existing facilities in the Borough would capture a further £583m of comparison goods expenditure between 2009 and 2027 (allowing for some growth in Special Forms of Trading).

7.28 This analysis is based on 'rolling forward' the current market shares for each category of goods identified in the Study Area. This approach of rolling forward existing market shares is in line with standard practice and does not take into account the desirability or need to 'claw back' leakage



between expenditure directed to centres elsewhere that might be achieved through improvements in retail provision.

7.29 In order for the Borough to capture the significant growth in retail expenditure that is forecast (particularly for comparison goods), it is likely that there will be a need to enhance future retail provision, thereby ensuring that this growth is not lost to competing centres and that the Borough's future market share does not decline.

7.30 If an excess of comparison or convenience goods expenditure manifests itself within the Borough this does not translate directly into a requirement for additional floorspace. It will be necessary to take account of:

- Existing development proposals;
- Expected changes in shopping patterns;
- The current capacity and efficiency of retail floorspace within the established centres;
- Future changes in business productivity and current development commitments; and
- Potential changes in forecast expenditure growth in the future.



8.0 RETAIL CAPACITY AND THE ROLE OF EXISTING CENTRES

8.01 The modelling for the capacity assessment has been undertaken for two different categories of expenditure. Typically these categories reflect the differences in patterns for convenience shopping and comparison shopping. This approach is advocated in PPS4, which states at paragraph EC1.4 that:

'When assessing quantitative need, have regard to relevant market information and economic data, including a realistic assessment of:

- i. existing and forecast population levels**
- ii. forecast expenditure for specific classes of goods to be sold, within the broad categories of comparison and convenience goods and for main leisure sectors and**
- iii. forecast improvements in retail sales density.'**

8.02 For the purposes of this capacity exercise WYG has primarily examined the need for new convenience and comparison floorspace. Indicative capacity assessments are provided for 2014 together with 2019, 2024 and to 2027, but any assessment in the long-term should be viewed with caution. Any identified need or capacity identified beyond 2014 is not justification for new retail floorspace outside of existing centres, as this could prejudice more central sites coming forward that, although not available for retail development at present, may become available between now and 2014 or after 2014.

Capacity Formula

8.03 For all types of capacity assessment, the conceptual approach is identical, although the data sources and assumptions may differ. The key relationship is Expenditure (£m) – allowing for population change and retail growth - /ess Turnover (£m) - allowing for improved 'productivity' - equals Surplus / Deficit (£m).

Expenditure (£m) – the expenditure element of the above equation is calculated by taking the population within the defined catchment and then multiplying this figure by the average annual expenditure levels for various forms of retail spending per annum. The formula is subject to a number of factors, which need to be considered to help provide the most accurate figure for that particular local catchment. These include:



- Growth in population;
- Growth in expenditure per person per annum; and
- Special Forms of Trading (e.g. catalogue shopping / internet).

Turnover (£m) – the turnover figure relates to the annual turnover generated by existing retail facilities within the Study Area. The turnover of existing facilities is calculated using Retail Rankings and Verdict Grocery Retailers – independent analysis that lists the sales density for all major retail multiples.

Surplus / Deficit (£m) – this represents the difference between the expenditure and turnover figures outlined above. Clearly, a surplus figure will represent an ‘under provision’ of retail facilities within the Study Area (which all things being equal would suggest that additional floorspace is required), whereas a deficit would suggest an over provision of retail facilities (and in these circumstances it would prove difficult to justify additional floorspace).

8.04 Although a surplus figure is generated in monetary terms, it is possible to convert this figure into an indication of aggregate floorspace. The level of floorspace will vary dependent on the type of retail/ goods sold. Indeed, electrical retailers such as Currys (which are considered a bulky goods retailer) have a much higher sales density than other bulky goods retailers such as Carpetright and clothing and footwear (non-bulky goods) operators generally have a higher sales density than bulky goods retailers.

Tameside Borough

Quantitative Need

8.05 Based on current market share of all existing facilities within the Borough, which includes town centres, freestanding stores, local shopping parades, etc., our analysis indicates that existing facilities in the Borough achieve a convenience goods turnover of some £441m in 2009. This equates to a market share of **95.7%** (or £298.86m) of expenditure by residents within the core catchment. Elsewhere within the Study Area (zones 1 to 6) existing facilities attract **18.2%** (or £142.78m) of expenditure generated within the wider area.



8.06 **Table 8.1** below indicates the current trading position compared against expected 'benchmark' turnover of existing convenience retail facilities in Tameside on the basis of average sales densities and projects this forward to 2027 on the basis of a constant market share.

Table 8.1: Estimated 'Capacity' for Convenience Goods Facilities – Tameside Borough

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	394.61	441.65	47.04
2014	398.57	469.95	71.38
2019	402.57	500.41	97.84
2024	406.62	532.91	126.29
2027	409.06	553.44	144.38

Notes: ¹ Allows for increased turnover efficiency of +0.2% per annum
² Assumes constant market share at 40.4% within the Study Area
 Assumes that 'local shops' are trading in equilibrium
 At 2007 prices

8.07 **Table 8.1** indicates that collectively existing convenience goods facilities in Tameside appear to be overtrading by approximately £47m in 2009. This overtrading is forecast to increase to more than £71m by 2014 and to more than £144m by 2027 based on current market shares. Consequently, there appears to be an immediate capacity within Tameside Borough as a whole for additional convenience goods floorspace of between 3,830 sq m (net) and 9,315 sq m (net) – dependent upon the end-operator and type of development. Assuming that the overall market share of existing facilities remains the same, the capacity for additional convenience goods floorspace within the Borough could increase to between 11,460 sq m (net) and 27,855 sq m (net) by 2027 – again dependent upon the type of development.

8.08 With regards to comparison goods capacity, our analysis identifies that in 2009 existing facilities within the Borough achieve a comparison goods turnover of approximately £567m. This equates to a market share of **68.9%** (or £345.70m) of total comparison goods expenditure generated by residents in the core catchment (zones 7 to 10 inclusive) and some **17.4%** (or £221.54m) derived from the outer catchment area. **Table 8.2** estimates the likely expenditure that will be available for new comparison goods floorspace within Tameside Borough by 2027 at current market shares.



Table 8.2: Estimated 'Capacity' for Comparison Goods Facilities – Tameside Borough

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	538.82	567.27	28.45
2014	566.31	642.69	76.38
2019	610.07	784.51	174.44
2024	657.22	990.75	333.53
2027	687.24	1,149.89	462.65

Notes: ¹ Allows for increased turnover efficiency of +1.0% per annum between 2009 to 2014 and +1.5% per annum post 2014
² Assumes constant market share at 32.0% within the Study Area
Allows for increase in non-retail sales from 6.6% in 2009 (as identified by the household survey) to 9% by 2014 and to 15% by 2019 where it is assumed to remain static through to 2027
At 2007 prices

8.09 Based on current market shares Tameside Borough is identified to have a capacity for more than £38m of additional comparison goods expenditure in 2009, increasing to more than £76m by 2014 and to more than £462m by 2027. By assuming an average comparison goods sales density of £4,500 per sq m and taking into account increased floorspace efficiency, this capacity could accommodate up to 16,150 sq m (net) of comparison goods floorspace by 2014 and up to 80,605 sq m (net) by 2027, although this is dependent upon the type of retail development that may come forward. However, as outlined above the significant capacity identified through to 2027 should be treated with a note of caution.

Qualitative Need

8.10 The Household Survey suggests that most households undertake two kinds of food shopping – main food (i.e. a bulk food shop) and 'top-up' food shopping (regular purchases for small scale goods such as bread, milk, etc.).

8.11 Tameside Borough is identified to contain eight superstores (defined as comprising more than 2,500 sq m of trading floorspace in Annex B to PPS4). These comprise the out-of-centre Asda and Sainsbury's stores in Ashton-under-Lyne, the Morrisons store in Dukinfield, the Morrisons and Asda stores in Hyde, the Morrisons store and out-of-centre Sainsbury's store in Denton and the Tesco store in Stalybridge. Although falling below the 2,500 sq m threshold identified by PPS4, the Tesco store in Droylsden is also performs an important food shopping role for the local population.

8.12 These larger stores are supported by a number of smaller stores, including representation from Aldi, Lidl, Iceland, M&S and Co-op. In addition, there are a number of smaller convenience stores and independent traders (such as butchers, bakers, grocers, etc.), which sell a variety of convenience goods, but generally serve a 'top-up' shopping role.



- 8.13 Existing convenience goods facilities are identified to attract approximately 40% of convenience goods expenditure generated within the Study Area. This increases to more than 95% of expenditure generated within zones 7 to 10 inclusive of the Study Area, which broadly equates to Tameside local authority area. Consequently, within the Borough relatively limited convenience goods expenditure is identified to be directed to facilities elsewhere.
- 8.14 PPS4 indicates that the degree to which shops are overtrading should be taken into consideration when determining the qualitative for new convenience floorspace. Our analysis (**Table 8.1**) identifies that collectively existing convenience floorspace is trading above expected levels in 2009 (by almost 11%). In addition, although the actual turnovers of individual stores derived from existing stores should be treated with some caution, **Table 8.3** provides a summary of the current market share of the leading supermarket operators within Tameside.

Table 8.3: Market Share of Leading Foodstore Operators within Tameside

Fascia	Market Share (%)
Asda	23.9
Morrisons	21.5
Tesco	13.3
Sainsbury's	10.4
Aldi	2.0
Co-op	0.7
M&S	0.7
Lidl	0.4
Iceland	0.3

Notes: Derived from Tameside Household Survey and WYG analysis

- 8.15 **Table 8.3** illustrates that within Tameside, Asda and Morrisons achieve a strong market share within the Study Area. Collectively these two retailers attract almost half (45%) of convenience goods expenditure that is identified to be directed to facilities in Tameside. However, it is evident that the Borough contains representation from each of the four leading supermarket operators.
- 8.16 With regard to comparison goods, the main focus of comparison floorspace within Tameside is located within Ashton-under-Lyne, Hyde and Denton (most notable at Crown Point North Shopping Park). Collectively these three centres (including nearby edge-of-centre and out-of-centre provision) comprise 103,000 sq m (net) of comparison goods floorspace. Further comparison goods floorspace is provided in Stalybridge and Droylsden.
- 8.17 The Household Survey identifies that the market share achieved for all facilities within Tameside for non-bulky goods shopping (31%) is less than that identified for bulky goods shopping (35%). It is



evident that the influence of nearby centres, such as Manchester and Stockport together with online shopping have a significant impact on shopping patterns within the Study Area. However, within zones 7 to 10 of the defined Study Area, the market share for non-bulky goods increases to 69%, which is reflective of that identified for bulky comparison goods (69%).

- 8.18 Accordingly, within the local area it is notable that less than a third of comparison goods expenditure generated (for both bulky and non-bulky goods) is currently directed to competing facilities elsewhere. Whilst this suggests that relatively low levels of expenditure is being directed elsewhere, it remains evident that there is a qualitative need to improve the quality of the retail offer in the Borough, particularly in Ashton-under-Lyne, which lacks a number of key retail attractors that should be expected in sub-regional centres.

Existing Town Centres

- 8.19 Whilst the previous section of this Study identifies the market share of all facilities within Tameside Borough as a whole, it is important to assess the current role of the main centres in the Borough.
- 8.20 The Tameside Unitary Development Plan (UDP), which was adopted in November 2004 and identifies Ashton-under-Lyne as the Borough's sub-regional shopping centre. This is followed by Hyde, which is identified as a large district centre, Denton, Droylsden and Stalybridge as district centres and Mossley and Hattersley as small district centres (Policy S1). In accordance with national planning guidance UDP policies seek to concentrate retail development within existing centres.

Ashton-under-Lyne

Overview

- 8.21 Ashton-under-Lyne is defined as the only town centre within the adopted UDP and is acknowledged as the sub-regional retail destination in the Borough. Ashton-under-Lyne is situated approximately six miles east of Manchester City Centre. The M60 orbital motorway lies one mile west of the town centre.
- 8.22 The main focus for retailing in the town centre is the Arcades Shopping Centre, which comprises two floors of retailing, and the Ladysmith Shopping Centre, with further retailing located on Warrington



Street and at Market Place, which includes the open air market and indoor market. Secondary retailing is located at Stamford Street, Old Street and Penny Meadow.

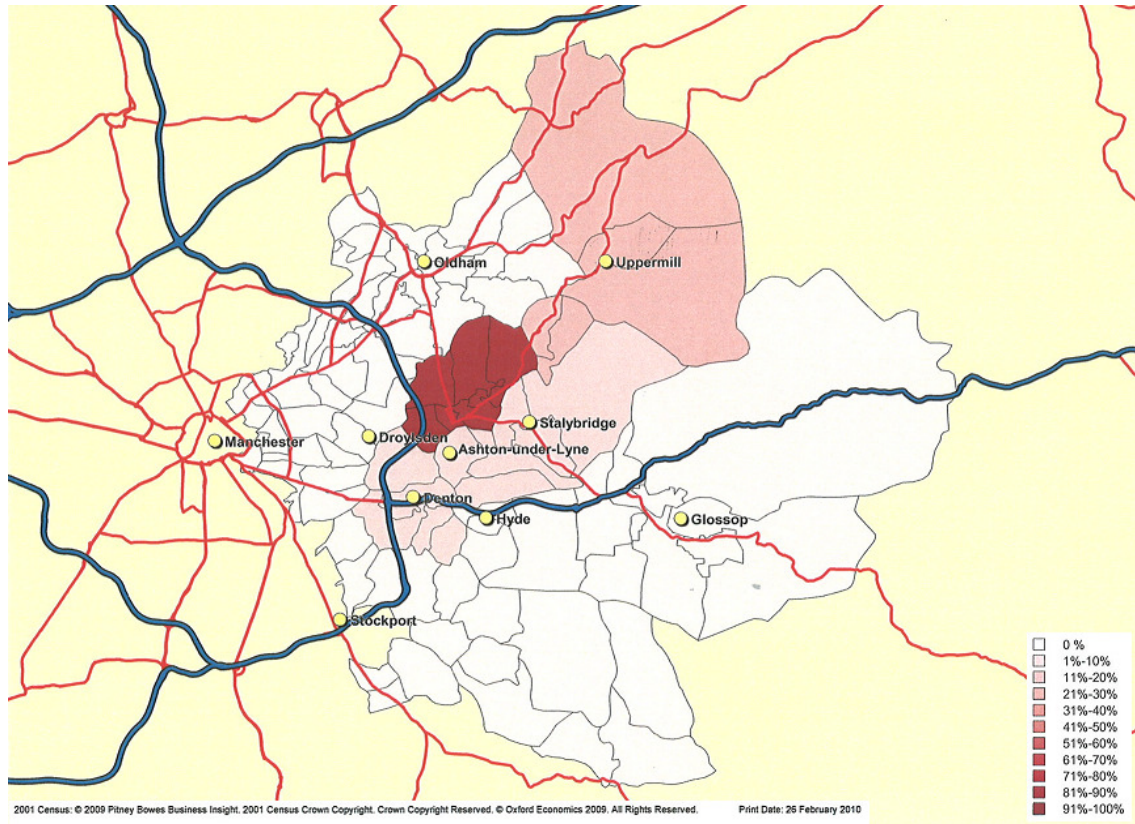
Convenience Goods Shopping

- 8.23 In order to ascertain the likely need for additional convenience goods floorspace within Ashton-under-Lyne, it is important to understand the true nature of existing supply. As highlighted in the retail 'health check' of Ashton-under-Lyne contained at Appendix 3, the town centre contains a range of convenience goods retailers. However, whilst the proportion of convenience goods floorspace within the town centre is above the national average (based on Goad) the proportion of units is identified to be below the national average.
- 8.24 Existing convenience goods provision is dominated by the Asda store on Cavendish Street (10,060 sq m gross), this store falls in out-of-centre location in retail planning terms. Retail provision within the core town centre is dominated by smaller facilities and independent retailers, which offer a more limited convenience goods offer. These include the Iceland store on Bow Street (650 sq m gross), a foodhall within the existing Marks & Spencer store on Warrington Street and Lidl store on Stamford Street (1,560 sq m gross) together with the recently redeveloped market within the town centre.
- 8.25 In addition, to existing facilities within the town centre, further convenience goods provision is provided by the out-of-centre (in retail planning terms) Sainsbury's store at Lord Sheldon Way and Aldi store on Picton Street. Furthermore, located nearby in Dukinfield is an out-of-centre Morrisons store on Foundry Street. Given the close proximity of this store to residents within the Ashton-under-Lyne area, this store also meets some of the convenience goods shopping needs for residents within this part of the Borough.
- 8.26 The Household Survey identifies that facilities in Ashton-under-Lyne attract 12.3% (or £135.23m) of convenience goods expenditure generated in the Study Area. Unsurprisingly, most is identified to be derived from the core catchment, including more than three-quarters (78%) of convenience goods expenditure generated in the Ashton-under-Lyne Zone. This suggests that limited expenditure within the local area is identified to be directed to facilities elsewhere. By including facilities in nearby Dukinfield (including the Morrisons store) together with local facilities in nearby Hurst Cross, the market share of facilities within the core catchment increases to 46.6% and to more than 88% within the Ashton-under-Lyne Zone.



- 8.27 In terms of individual foodstores within Ashton-under-Lyne, the Household Survey results suggest that the out-of-centre Asda store at Cavendish Street is the most popular destination, attracting £78.78m of convenience goods expenditure generated in the Study Area – the highest of all stores within the Borough. Accordingly, this store alone accounts for more than half (57%) of convenience goods expenditure generated directed towards Ashton-under-Lyne by residents within the Study Area. The second most popular store is the out-of-centre Sainsbury’s store at Lord Sheldon Way, which is identified to achieve a convenience goods turnover of £29.21m in 2009. Collectively the two largest stores in Ashton-under-Lyne (the Sainsbury’s and Asda stores) account for more than three-quarters (79%) of convenience goods expenditure directed towards Ashton-under-Lyne by residents within the Study Area.
- 8.28 The findings of the Household Survey indicates that all facilities in Ashton-under-Lyne (both in-centre and out-of-centre facilities) achieve a main food shopping catchment population of approximately 79,910 people within the Study Area in 2009. Figure 8.1 illustrates the extent of Ashton-under-Lyne’s main food shopping catchment within the Study Area.

Figure 8.1: Plan indicating the Extent of the Main Food Shopping Catchment of Ashton-under-Lyne



Market Share Analysis – Main Food Shopping (Ashton-under-Lyne)

Zone	Oldham	Manchester East	Stockport	Uppermill	Glossop	Droylsden	Denton	Ashton	Stalybridge	Hyde
Ashton	7%	4%	1%	24%	4%	6%	18%	80%	19%	9%

8.29 In terms of capacity for additional convenience goods floorspace in Ashton-under-Lyne, [Table 8.4](#) provides a breakdown of the trading performance of existing facilities in Ashton-under-Lyne. The trading performance of existing facilities is based on the survey derived turnover (based on the findings of the Household Survey) and the expected 'benchmark' turnover (based on nationally published trading information from Mintel and Verdict) of existing provision. Whilst survey results are commonly accepted approach in seeking to identify existing shopping patterns, their findings should be treated with a 'note of caution' as they tend to have a bias towards larger stores and understate the role of smaller stores and independent retailers.



Table 8.4: Trading Performance of Current Foodstores in Ashton-under-Lyne

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Convenience – sq m ³	Turnover per sq m – £ ⁴	Benchmark Turnover - £m	Survey Estimate - £m ⁵
Ashton-under-Lyne						
Iceland, Bow Street	650	455	423	5,783	2.45	1.54
Lidl, Oldham Road	1,560	1,092	874	2,939	2.57	2.07
Marks & Spencer, Warrington Street	1,450	1,015	254	11,085	2.82	3.90
Market	6,840	5,472	2,736	3,500	9.58	2.80
Other Town Centre Floorspace	2,150	1,720	1,548	5,000	7.74	10.87
Sub-Total	12,650	9,754	5,835	-	25.16	21.18
<i>Out-of-Centre</i>						
Asda, Cavendish Street	10,060	6,539	3,793	15,372	58.31	78.78
Sainsbury's, Lord Sheldon Way	6,815	4,430	3,323	9,613	31.92	29.21
Aldi, Wellington Road	1,958	1,371	1,001	3,766	3.77	6.06
Sub-Total	18,833	12,340	8,117	-	94.00	114.05
<i>Elsewhere</i>						
Co-op Food Market, Queens Road, Hurst Cross	-	-	929	6,037	5.61	2.18
Morrisons, Foundry Street, Dukinfield	7,494	4,121	3,017	11,050	33.34	56.88
Other Stores in Dukinfield [^]					1.90	1.90
Sub-Total	-	-	3,946	-	40.85	60.96
TOTAL	38,977	26,215	17,898	-	160.01	196.19

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009) or IGD Database (2008)
² – Net floorspace based on WYG judgement
³ – Net convenience floorspace derived from Verdict Grocery Retailers (2009) where available
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
⁵ – Survey derived turnover derived from Tameside Household Survey (2009)
[^] - Facilities in other 'Local Shops' assumed to be trading in equilibrium
 At 2007 prices)

8.30 By comparing the estimated total turnover generated by existing retail facilities based on anticipated 'benchmark' turnover (£160.01m), there would appear to be an undersupply of convenience goods floorspace within Ashton-under-Lyne. Indeed, our analysis of the performance of existing provision within the Ashton-under-Lyne area identifies that the out-of-centre Asda store in Ashton-under-Lyne and nearby Morrisons store in Dukinfield are identified to be overtrading by 35% and 71% respectively.

8.31 Although the survey results suggests that elsewhere some stores are trading below expected levels, overall existing facilities are identified to be trading some £36.18m (or 22.6%) above expected levels in 2009. Given this overtrading, [Table 8.5](#) and [Table 8.6](#) provide a breakdown of the capacity for additional convenience goods floorspace.



Table 8.5: Estimated 'Capacity' for Convenience Goods Facilities

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	160.01	196.19	36.18
2014	161.62	208.22	46.60
2019	163.24	221.72	58.48
2024	164.88	236.12	71.24
2027	165.87	245.21	79.34

Notes: ¹ - Allows for increased turnover efficiency of +0.2% per annum
² - Assumes constant market share at 17.9% within the Study Area
 At 2007 prices

Table 8.6: Quantitative Need for Additional Floorspace in Ashton-under-Lyne – Convenience Goods

Year	£m	Convenience Goods Floorspace Requirement	
		Min ^{1*}	Max ^{2*}
2009	36.18	2,975	7,235
2014	46.60	3,795	9,225
2019	58.48	4,715	11,465
2024	71.24	5,690	13,825
2027	79.34	6,295	15,305

Notes: ¹ - Average sales density assumed to be £12,155/sq m (based on the average sales density of the leading four supermarkets as identified by Verdict 2009)
² - Average sales density assumed to be £5,000/sq m
 * - Allows for increases in turnover efficiency of +0.2% per annum
 At 2007 Prices

8.32 Having regard to the identified undersupply of convenience goods floorspace (based on current market shares) there is a clear capacity for additional convenience goods floorspace within Ashton-under-Lyne. Given the evident overtrading of existing facilities, there is an immediate capacity (i.e. 2009) for a further large-format foodstore within Ashton-under-Lyne comprising approximately 2,975 sq m (net) of convenience goods floorspace.

8.33 **Table 8.6** indicates that over the period to 2014, based on current market share there is a requirement for between 3,795 sq m (net) and 9,225 sq m (net) of additional convenience goods floorspace (dependent upon the end-operator and type of development). The capacity for additional convenience goods floorspace is identified to increase to between 6,295 sq m (net) to 15,305 sq m (net) by 2027. However, capacity in the long-term should be treated with a note of caution. Similarly, any improvement in the convenience goods floorspace elsewhere in the Borough is likely to have an affect on shopping patterns within the Borough and on future capacity.

Comparison Goods Shopping

8.34 As highlighted at Appendix 3, Ashton-under-Lyne Town Centre contains a range of comparison goods floorspace. However, whilst the proportion of comparison goods units within the town centre is above the national average, the proportion of floorspace is identified to below the national average. Despite its position as a sub-regional shopping centre, Ashton-under-Lyne Town Centre

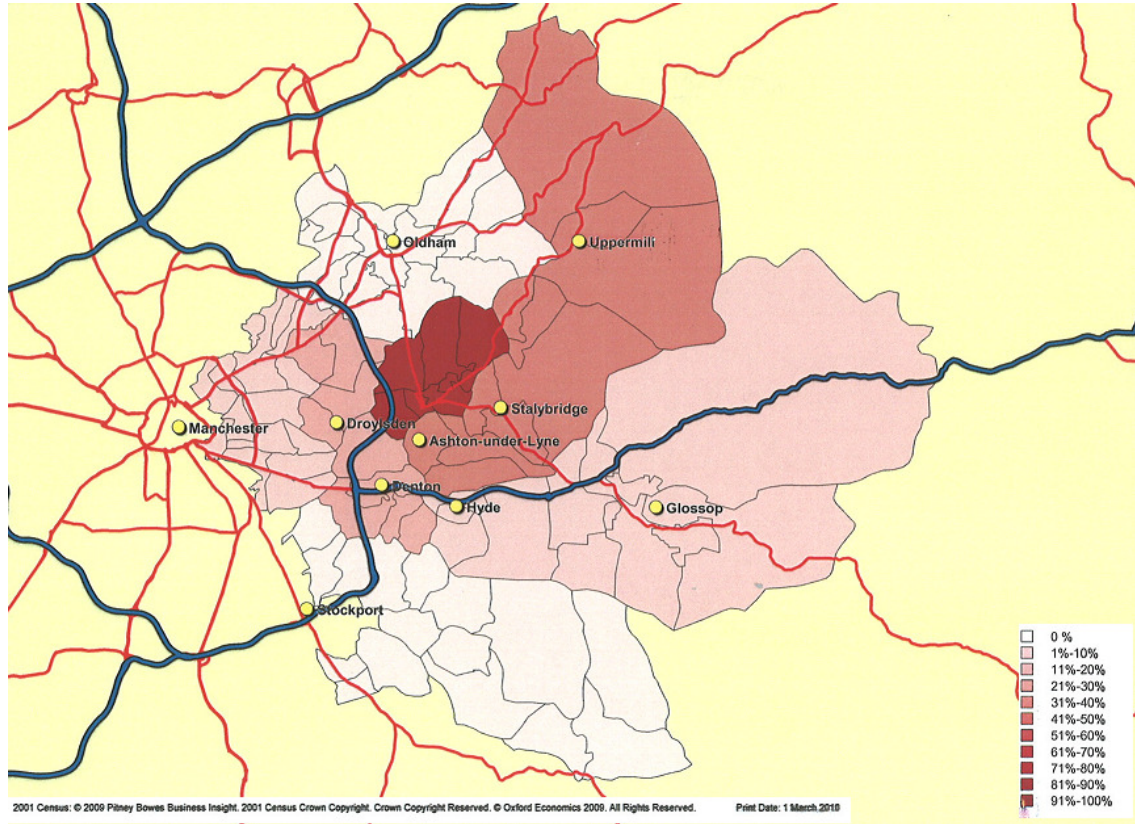


contains relatively few national multiples. Existing national multiples include: Marks & Spencer, Boots, Next, WH Smith, New Look and JD Sports.

8.35 In addition, the town centre offer is supported by edge-of-centre and out-of-centre provision, including the recently developed IKEA store at the former United Utilities site and at Snipe Retail Park (19,982 sq m net), which comprises a mix of bulky and non-bulky retail floorspace, including Currys, Comet, Staples, B&Q, Argos and Next.

8.36 Analysis of the Household Survey results identifies that the current level of trade passing through existing facilities in Ashton-under-Lyne (both in-centre and out-of-centre) is estimated to be £331.47m (£186.94m from the core catchment and £144.53m from the outer catchment). Of this overall turnover, based on the findings of the household survey, facilities at the out-of-centre Snipe Retail Park are identified to attract a comparison goods turnover of £124.05m in the Study Area, which equates to a market share of 7% within the Study Area. Overall, all existing comparison goods facilities within the Borough are identified to achieve a market share of **18.7%** within the Study Area (37.2% in the core catchment and 11.4% in the outer catchment). This market share increases to 71% within the Ashton-under-Lyne zone. Figure 8.2 indicates the extent of Ashton-under-Lyne's catchment (including in-centre, edge-of-centre and out-of-centre facilities) for comparison goods shopping.

Figure 8.2: Plan indicating the Extent Ashton-under-Lyne's Comparison Goods Catchment



Market Share Analysis – Comparison Goods Shopping (Ashton-under-Lyne)

Zone	Oldham	Manchester East	Stockport	Uppermill	Glossop	Droylsden	Denton	Ashton	Stalybridge	Hyde
Ashton	9%	13%	3%	37%	13%	22%	25%	71%	36%	12%

8.37 **Table 8.7** provides an assessment of the survey derived turnover of existing facilities within Ashton-under-Lyne (both in-centre and out-of-centre) and compares it to expected benchmark turnover based on data published by Verdict and Mintel or professional assumptions.



Table 8.7: Trading Performance of Current Comparison Goods Floorspace in Ashton-under-Lyne

Centre/Facility	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Comparison – sq m ³	Turnover per sq m – £ ⁴	Benchmark Turnover - £m	Survey Estimate - £m ⁵
Ashton-under-Lyne						
Ashton Town Centre	32,720	26,176	24,867	5,000	124.34	186.26
Market	6,840	5,472	2,736	3,000	8.21	
Sub-Total	39,560	31,648	27,603	-	132.55	186.26
<i>Out-of-Centre</i>						
Asda, Cavendish Street	10,060	6,539	2,746	8,653	23.76	8.56
Snipe Retail Park	-	19,982	19,982	3,750	74.93	124.05
Ashton Retail Park	-	2,341	2,341	2,750	6.44	0.00
Triangle Park, Ashton Moss	-	688	688	2,750	1.89	0.00
IKEA		10,400	10,400	3,492	36.32	7.86
Sainsbury's, Lord Sheldon Way	6,815	4,430	1,107	7,483	8.28	4.73
Sub-Total	-	44,380	37,264	-	151.62	145.20
<i>Elsewhere</i>						
Morrisons, Foundry Street, Dukinfield	7,494	4,121	1,104	8,987	9.92	2.48
Other Stores in Dukinfield [^]					0.77	0.77
Sub-Total	7,494	4,121	1,104	-	10.69	3.25
TOTAL	-	80,149	65,971	-	294.86	334.71

- Notes:
- ¹ – Gross Floorspace derived from Experian Goad (2009) or IGD Database (2008)
 - ² – Net floorspace based on WYG judgement and IGD Database
 - ³ – Net comparison floorspace derived from Verdict Grocery Retailers (2009) where available
 - ⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
 - ⁵ – Survey derived turnover derived from Tameside Household Survey (2009) At 2007 prices

8.38 Based on comparing the survey derived comparison goods turnover against expected levels, it is evident that collectively existing facilities within Ashton-under-Lyne are trading some 14% (or £39.95m) above expected levels in 2009. The Household Survey results suggest that Ashton-under-Lyne Town Centre is trading some 25% above expected levels. In contrast, the comparison offer within large-format stores, such as the existing Asda store, together with the IKEA store at the edge of the town centre are identified to be trading below expected levels. As previously highlighted, the survey derived turnovers should be treated with a 'note of caution'. Indeed, it is possible that respondents have cited Ashton-under-Lyne Town Centre destination as their last destination for a variety of comparison goods shopping, rather than specific destinations. Therefore, it is likely that the performance of destinations such as Ashton-under-Lyne Town Centre and Snipe Retail Park may have been overstated.

8.39 Accordingly, some adjustment is necessary in assessing the current performance of existing centres. However, this assessment has considered the trading of all floorspace (i.e. both in-centre and out-of-centre floorspace). Notwithstanding this, this assessment is based on the trading performance of existing comparison goods facilities as a whole.



8.40 On this basis, **Table 8.8** estimates the available capacity for additional comparison goods floorspace in Ashton-under-Lyne through to 2027.

Table 8.8: Estimated Available Comparison Goods Expenditure – Ashton-under-Lyne

Year	Benchmark Turnover – £m	Expenditure Available - £m	Surplus Expenditure - £m
2009	294.86	334.71	39.85
2014	309.90	378.79	68.89
2019	333.85	456.55	122.70
2024	359.65	585.16	225.51
2027	376.08	679.15	303.07

Notes: ¹ Allows for increased turnover efficiency of +1.0% per annum between 2009 to 2014 and +1.5% per annum post 2014
² Assumes constant market share 18.9% within the Study Area
 Allows for increase in non-retail sales from 6.6% in 2009 (as identified by the household survey) to 9% by 2014 and to 15% by 2019 where it is assumed to remain static through to 2027
 At 2007 prices

8.41 Based on current market shares, given the suggested overtrading of existing floorspace in Ashton-under-Lyne, there is a demonstrable immediate capacity of almost £40m in 2009. By 2014, this is identified to increase to almost £69m and to more than £303m by 2027. It is important to note that this level of capacity does not take into account outstanding commitments. Furthermore, this level of capacity is based on the current forecast growth in expenditure and population and an assumption of growth in non-retail sales. Accordingly, the Council will need to carefully monitor any changes in the future.

8.42 In floorspace terms, although dependent upon the end operator, **Table 8.9** provides a breakdown of potential floorspace requirements resulting from the identified capacity.

Table 8.9: Quantitative Need for Additional Floorspace in Ashton-under-Lyne – Comparison Goods

Year	Comparison Goods		
	£m	Floorspace Requirement	
		Min ^{1*}	Max ^{2*}
2009	39.85	7,970	13,285
2014	68.89	12,790	21,315
2019	122.70	21,145	35,240
2024	225.51	36,075	60,125
2027	303.07	46,365	77,275

Notes: ¹ - Average sales density assumed to be £5,000/sq m (based on the average sales density of the leading retailers as identified by Mintel Retail Rankings 2009)
² - Average sales density assumed to be £3,000/sq m
 * - Allows for increases in turnover efficiency of +1.5% per annum
 At 2007 Prices

8.43 Although dependent upon the type of comparison goods retail floorspace coming forward, the identified capacity equates to a potential floorspace requirement by 2014 for approximately 12,790



sq m (net) of additional comparison goods floorspace (or 15,990 sq m gross⁶) within Ashton-under-Lyne. This requirement is identified to increase significantly to 46,365 sq m (net) by 2027, which represents a doubling in the existing comparison goods offer in Ashton-under-Lyne Town Centre. In considering future retail capacity within Ashton-under-Lyne and the wider area, it is important to note that given that it is the only sub-regional retail destination within the Borough, Ashton-under-Lyne should be the focus for new retail floorspace in accordance with regional and local planning policy.

Qualitative Need – Convenience Goods

- 8.44 As previously highlighted, the Household Survey suggests that most households undertake two kinds of shopping trips (i.e. main food shopping and 'top-up' food shopping). In this respect, Ashton-under-Lyne contains two superstores (defined as comprising more than 2,500 sq m of trading floorspace in Annex A of PPS4), which is the out-of-centre Asda store on Cavendish Street and the out-of-centre Sainsbury's store on Lord Sheldon Way. The number of superstores increases to three by including the nearby Morrisons store on Foundry Street in Dukinfield. Unsurprisingly, these three stores are the most popular destinations for main food shopping within the Ashton-under-Lyne area.
- 8.45 This convenience goods offer is supported by smaller scale discount retailers such as the Lidl store on Oldham Road and out-of-centre Aldi store on Wellington Road. Further convenience goods provision includes the foodhall within the Marks & Spencer store on Warrington Street, the Iceland store on Bow Street and independent traders, including an indoor/outdoor market, which collectively sell a broad range of convenience goods, albeit primarily as 'top-up' shopping destinations.
- 8.46 Although existing facilities within Ashton-under-Lyne (including facilities in nearby Dukinfield) retain less than a fifth (18%) of total convenience goods expenditure generated in the Study Area, within the core catchment this increases to almost half (46%) within the core catchment, and to more than 88% of convenience goods expenditure generated in the Ashton-under-Lyne Zone. On this basis, the Household Survey results do not appear to suggest that local residents are travelling significant distances to undertake their convenience goods shopping. However, it is notable that the Household Survey suggests that collectively convenience goods floorspace within Ashton-under-Lyne is overtrading. PPS4 identifies overtrading as an indicator of qualitative need for additional

⁶ Assumes that net floorspace is 80% the gross



convenience goods floorspace. In this respect, although local residents currently have a good choice of convenience goods provision, there is a qualitative need (together with a quantitative need) for additional convenience goods floorspace within Ashton-under-Lyne in order to address current overtrading and improve consumer choice and provide competition to the dominant Asda store.

Qualitative Need – Comparison Goods

- 8.47 Although identified as the sub-regional centre in the Adopted UDP, the comparison goods offer in Ashton-under-Lyne Town Centre has suffered from a lack of investment in recent years. Indeed, the Household Survey identifies that for 'Clothing & Footwear' (which is usually strong in sub-regional centres) existing facilities within the town centre attract only 12% of comparison goods expenditure generated in the Study Area, including less than a quarter (24%) of expenditure generated in the core catchment. Furthermore, Ashton-under-Lyne's market share within the core catchment has declined in recent years from more than 29% in 2005 to less than 24% currently. In contrast, the market share for Denton District Centre for 'Clothing & Footwear' shopping has increased from 12% to almost 28% within the core catchment over the same period, due to the strength of Crown Point North Shopping Park as a retail destination. Accordingly, despite their position within the local hierarchy, it is evident that Denton now achieves a higher market share for 'Clothing & Footwear' than the sub-regional centre.
- 8.48 Clearly, this suggests that there is a need to improve and enhance the retail offer of Ashton-under-Lyne in order to restore its role as the main centre in the Borough and reflect its sub-regional status.
- 8.49 With regard to 'bulky goods' (i.e. electrical, furniture, DIY, etc.) the Household Survey identifies that Ashton-under-Lyne achieves a market share within the Study Area of almost 26%. Within the core catchment this market share increases to 47%. This market share is considered relatively strong. However, it is evident that Ashton-under-Lyne's bulky goods market share within the core catchment has declined marginally since 2005 (from 53% to 47%) this is despite the introduction of the new IKEA store at the edge-of the town centre over this period. This decline in market share is in part due to the growing popular of online shopping for these types of goods, which has increased from 5% to 7% over the same period (particularly for electrical goods).
- 8.50 Whilst the bulky goods offer within Ashton-under-Lyne is relatively strong, although focused predominantly at the out-of-centre Snipe Retail Park, (retaining more than 80% of expenditure



generated within the Ashton-under-Lyne Zone) there does appear to be some scope to improve the retail offer in the bulky goods sector.

Summary

- 8.51 Within the Borough Ashton-under-Lyne serves an important convenience and comparison goods shopping role. Indeed, the Household Survey identifies that residents throughout the Study Area visit Ashton-under-Lyne.
- 8.52 However, despite being identified as the sub-regional centre in the Borough, Ashton-under-Lyne's comparison goods market share has declined due to increased competition from both within and outside the Borough. In particular the success of Crown Point North Shopping Park in Denton appears to have had a notable impact on the non-bulky comparison goods role of the town centre.
- 8.53 Therefore, whilst the new market has improved the attraction of the town centre, there is a clear need to improve the comparison goods role of Ashton-under-Lyne if it is to fulfil its role as a sub-regional centre. Our assessment identifies capacity of 16,000 sq m (gross) by 2014 of additional comparison goods floorspace, just to maintain current market share. Furthermore, there is also a specific qualitative need to improve the quality and range of the comparison goods sector of the centre particularly given its sub-regional status. However, it is important that any additional retail development within Ashton-under-Lyne contributes to the vitality and viability of the centre.
- 8.54 With regard to convenience goods, given the strong trading performance of existing provision, our assessment identifies scope for additional convenience goods floorspace in Ashton-under-Lyne just to maintain current market share (at least 6,295 sq m net by 2027). However, improvements elsewhere in the Borough (such as at Hattersley) is likely to reduce the strong trading performance of these stores, particularly the Morrisons and Asda store, given current shopping patterns. Therefore, the level of capacity could reduce in the future. Despite this, there is likely to remain capacity for additional convenience goods floorspace. In this respect, it is important to note that whilst the convenience goods offer of Ashton-under-Lyne is relatively strong, existing provision is focused on out-of-centre locations. Therefore, any future need for additional convenience goods floorspace in Ashton-under-Lyne should be focused at in-centre and edge-of-centre location in order to rebalance existing out-of-centre facilities.



Hyde

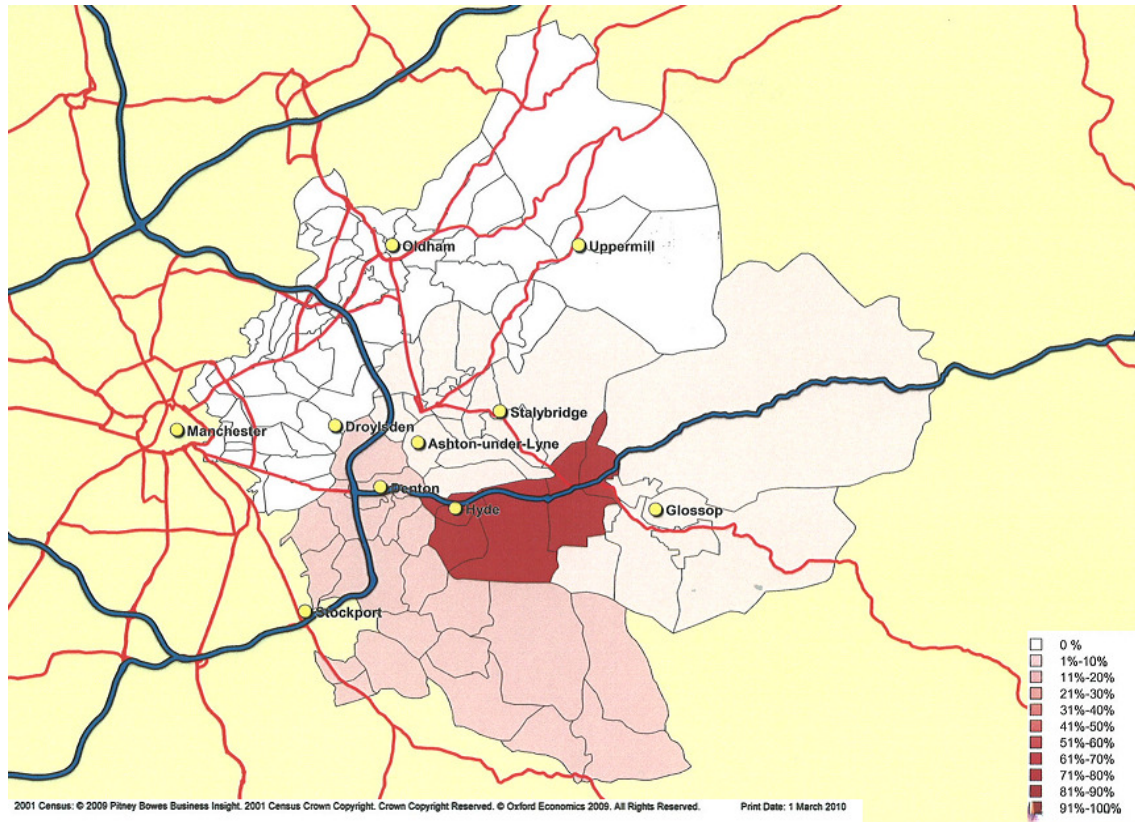
Overview

- 8.55 Hyde is identified as a large District Centre within the UDP and is located within the south of the Borough on the A57 and in close proximity to the M67 Motorway.
- 8.56 The District Centre is focused around the main public space of Clarendon Square. Retailing is focused on Clarendon Square Shopping Centre, which was refurbished in the mid 1990s, together with Market Street.

Convenience Goods Shopping

- 8.57 As highlighted in the retail 'health check' contained at Appendix 3, convenience retailing in Hyde is well provided for, with the proportion of floorspace in use for convenience purposes significantly above the national average. Indeed, Hyde contains two large-format foodstores (the Morrisons store on Mottram Road and Asda store on Water Street), which dominate the convenience goods offer within the centre. Other convenience retailers in the town centre include an Iceland store on Travis Street together with a range of smaller facilities and independent traders, including a market.
- 8.58 The Household Survey identifies that facilities within Hyde attract **9.2%** (or £101.32m) of convenience goods expenditure generated in the Study Area. This market share increases to 20.8% within the core catchment, including 69% of convenience goods expenditure generated in the Hyde Zone. The Household Survey demonstrates that for main food shopping, Hyde has an identified catchment population of approximately 61,320 people in 2009. Figure 8.3 illustrates the extent of Hyde's main food shopping catchment within the Study Area.

Figure 8.3: Plan indicating the Extent of the Main Food Shopping Catchment of Hyde



Market Share Analysis – Main Food Shopping (Hyde)

Zone	Oldham	Manchester East	Stockport	Uppermill	Glossop	Droylsden	Denton	Ashton	Stalybridge	Hyde
Hyde	0%	0%	16%	0%	10%	0%	20%	1%	10%	70%

8.59 In terms of individual foodstores within Hyde, the Household Survey identifies that the existing Morrisons and Asda stores are the most dominant destinations, attracting £38.36m and £56.66m respectively of convenience goods expenditure generated within the Study Area. Collectively, these two stores attract more than 95% of the overall retention of facilities in Hyde, underlying their dominance on convenience goods shopping within the local area. **Table 8.10** provides a breakdown of the trading performance of existing foodstores in Hyde together with facilities at nearby Gee Cross.



Table 8.10: Trading Performance of Current Foodstores in Hyde

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Convenience – sq m ³	Turnover per sq m – £ ⁴	Benchmark Turnover - £m	Survey Estimate - £m ⁵
Hyde						
Asda, Water Street	6,850	4,453	2,583	15,372	39.71	56.66
Morrisons, Mottram Road	8,450	4,647	3,718	11,050	41.08	38.36
Iceland, Travis Street	770	539	501	5,783	2.90	0.31
Market	1,390	1,251	626	3,000	1.88	3.12
Other Town Centre Floorspace	1,950	1,560	1,404	4,000	5.62	
Sub-Total	19,410	12,450	8,832	-	91.19	98.45
<i>Out-of-Centre</i>						
Aldi, Manchester Road	1,623	1,136	829	3,766	3.12	2.86
<i>Elsewhere</i>						
Gee Cross [^]					2.47	2.47
Sub-Total	1,623	1,136	829	-	5.59	5.33
TOTAL	21,033	13,586	9,661	-	96.78	103.78

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009) or IGD Database (2008)
² – Net floorspace based on WYG judgement
³ – Net convenience floorspace derived from Verdict Grocery Retailers (2009) where available
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
⁵ – Survey derived turnover derived from Tameside Household Survey (2009)
[^] - Facilities in other 'Local Shops' assumed to be trading in equilibrium
 At 2007 prices

8.60 Our analysis of Hyde’s current market share indicates that existing facilities within Hyde and at nearby Gee Cross attract approximately £103.78m (or 9.5%) of convenience goods expenditure generated within the defined Study Area. By comparing this estimate with the anticipated ‘benchmark’ turnover of facilities (£96.78m), existing provision is identified to be overtrading by approximately 7% (or £7.00m).

8.61 From examination of the trading performance of existing stores in Hyde, the Household Survey suggests that the Asda store in Water Street is overtrading. However, other convenience goods floorspace within Hyde (including the Morrisons store on Mottram Road) is identified to be trading below expected levels. As previously highlighted the trading performance of individual stores derived from survey evidence should be considered with a ‘note of caution’. Given this, our assessment of capacity is based on assessing the trading performance of all facilities. **Table 8.11** and **Table 8.12** provide a breakdown of the capacity for additional convenience goods floorspace in Hyde.



Table 8.11: Estimated 'Capacity' for Convenience Goods Facilities - Hyde

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	96.78	103.78	7.00
2014	97.75	110.51	12.76
2019	98.73	117.67	18.94
2024	99.72	125.31	25.59
2027	100.32	130.14	29.82

Notes: ¹ - Allows for increased turnover efficiency of +0.2% per annum
² - Assumes constant market share at 9.5% within the Study Area
 At 2007 prices

Table 8.12: Quantitative Need for Additional Floorspace in Hyde – Convenience Goods

Year	Convenience Goods		
	£m	Floorspace Requirement	
		Min ^{1*}	Max ^{2*}
2009	7.00	575	1,400
2014	12.76	1,040	2,525
2019	18.94	1,525	3,715
2024	25.59	2,045	4,965
2027	29.82	2,365	5,755

Notes: ¹ - Average sales density assumed to be £12,155/sq m (based on the average sales density of the leading four supermarkets as identified by Verdict 2009)
² - Average sales density assumed to be £5,000/sq m
 * - Allows for increases in turnover efficiency of +0.2% per annum
 At 2007 Prices

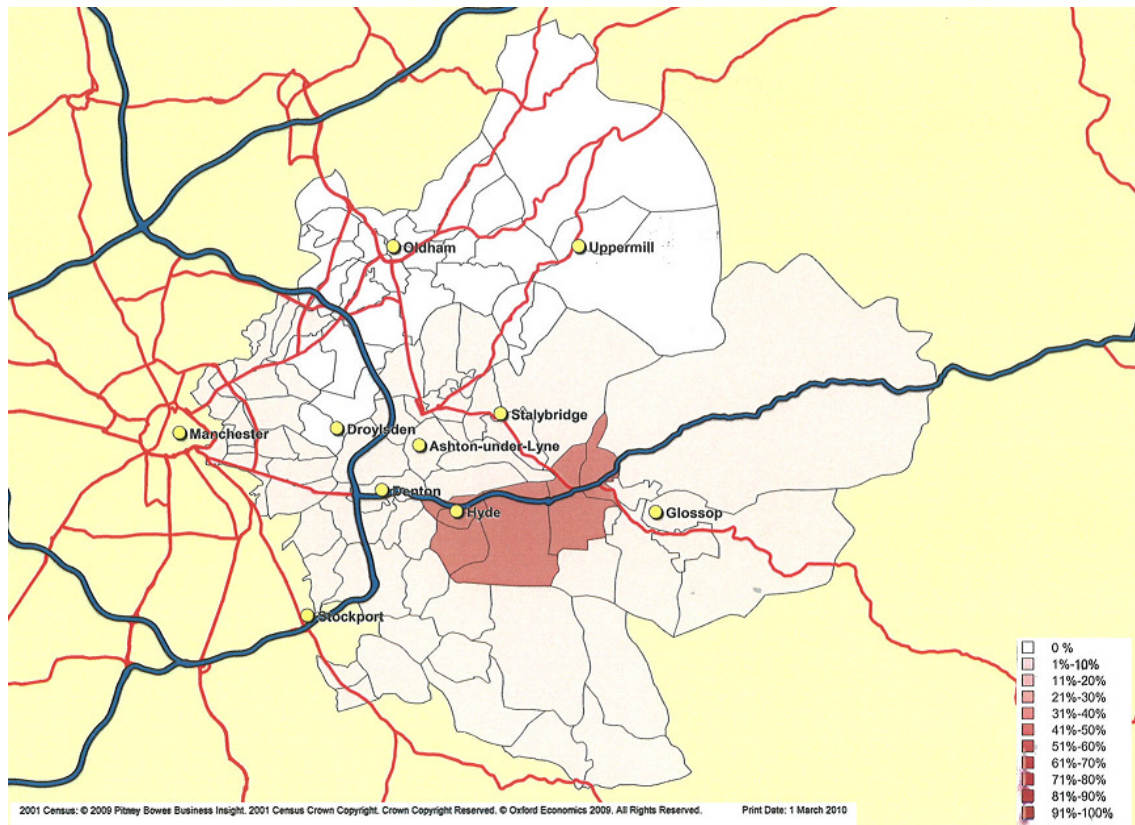
8.62 Given the current overtrading of convenience goods floorspace (based on current market shares) our analysis identifies capacity of approximately £12.76m of additional convenience goods floorspace in Hyde by 2014. By 2027 this capacity increases to almost £30m. This level of capacity could support a small to medium sized foodstore or modest extension of an existing store in the short-term (i.e. 2014). In the longer term (2027), the identified capacity could support a more significant increase in convenience goods floorspace (between 2,365 sq m net and 5,755 sq m net). However, any improvement in the convenience goods floorspace elsewhere in the Borough (such as at nearby Hattersley) will have an impact on shopping patterns within this part of the Borough and on future capacity. Similarly, outstanding commitments, such as the mezzanine within the existing Asda store, will also meet part of the identified capacity.

Comparison Goods Shopping

8.63 As highlighted at Appendix 3, the comparison goods offer in Hyde is not as well represented when compared to the convenience goods sector, although the proportion of units are marginally above the national average. The district centre contains a limited number of national multiple retailers, including: Boots, B&Q, Wilkinson and B&M Bargains. In addition, the centre contains a range of independent traders.

8.64 The Household Survey identifies that existing facilities in Hyde achieve a comparison goods turnover (both bulky and non-bulky) of approximately £79.27m in 2009. This represents a market share of **4.5%** within the Study Area. This market share increases to almost 11% within the core catchment and 36% within the Hyde Zone. Figure 8.4 illustrates the extent of Hyde’s catchment for comparison goods shopping.

Figure 8.4: Plan indicating the Extent of Hyde’s Comparison Goods Catchment



Market Share Analysis – Comparison Goods Shopping (Hyde)

Zone	Oldham	Manchester East	Stockport	Uppermill	Glossop	Droylsden	Denton	Ashton	Stalybridge	Hyde
Hyde	0%	1%	5%	0%	4%	0%	5%	2%	8%	35%

8.65 **Table 8.13** provides an assessment of the survey derived turnover of existing facilities within Hyde and compares this to expected benchmark turnovers.



Table 8.13: Trading Performance of Current Comparison Goods Floorspace in Hyde

Centre/Facility	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Comparison – sq m ³	Turnover per sq m – £ ⁴	Benchmark Turnover - £m	Survey Estimate - £m ⁵
Hyde						
District Centre Floorspace	20,770	16,616	15,785	3,500	55.25	73.48
Market	1,390	1,251	626	2,500	1.57	
Asda, Water Street	6,850	4,453	1,870	8,653	16.18	4.62
Morrisons, Mottram Road	8,450	4,647	929	8,987	8.35	1.17
TOTAL	37,460	26,967	17,237	-	81.35	79.27

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009) or IGD Database (2008)
² – Net floorspace based on WYG judgement and IGD Database
³ – Net comparison floorspace derived from Verdict Grocery Retailers (2009) where available
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
⁵ – Survey derived turnover derived from Tameside Household Survey (2009)
 At 2007 prices

8.66 Based on comparing the survey derived comparison goods turnover against expected levels, it is evident that collectively existing retail floorspace in Hyde is trading below expected levels, by some 3% (or £2.08m) in 2009. **Table 8.14** and **Table 8.15** estimate the available capacity for additional comparison goods floorspace in Hyde through to 2027.

Table 8.14: Estimated 'Capacity' for Comparison Goods Facilities - Hyde

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	81.35	79.27	-2.08
2014	85.50	90.38	4.88
2019	92.11	108.70	16.59
2024	99.23	139.32	40.09
2027	103.76	161.70	57.94

Notes: ¹ Allows for increased turnover efficiency of +1.0% per annum between 2009 to 2014 and +1.5% per annum post 2014
² Assumes constant market share 4.5% within the Study Area
 Allows for increase in non-retail sales from 6.6% in 2009 (as identified by the household survey) to 9% by 2014 and to 15% by 2019 where it is assumed to remain static through to 2027
 At 2007 prices

Table 8.15: Quantitative Need for Additional Floorspace in Hyde – Comparison Goods

Year	£m	Convenience Goods	
		Floorspace Requirement	
		Min ^{1*}	Max ^{2*}
2009	-2.08	Nil	Nil
2014	4.88	905	1,510
2019	16.59	2,860	4,765
2024	40.09	6,415	10,690
2027	57.94	8,865	14,775

Notes: ¹ - Average sales density assumed to be £5,000/sq m (based on the average sales density of the leading retailers as identified by Mintel 2009)
² - Average sales density assumed to be £3,000/sq m
 * - Allows for increases in turnover efficiency of +1.5% per annum
 At 2007 Prices



- 8.67 Given the current undertrading of existing comparison goods floorspace within Hyde, based on current market share there is limited capacity for additional comparison goods floorspace in the short-term (i.e. 2014). **Table 8.14** identifies comparison goods capacity of less than £5m in 2014. In the longer term, the comparison goods capacity is identified to increase to almost £58m by 2027, which represents a significant increase in the comparison goods offer of Hyde.
- 8.68 Although dependent upon the end-operator (e.g. retail warehousing, national multiple, independent, etc.) **Table 8.15** identifies that this capacity equates to a potential floorspace requirement of up to 1,510 sq m (net) of additional comparison goods floorspace by 2014 (or 1,890 sq m gross). This requirement is identified to increase to at least 2,860 sq m (net) by 2019 and to 8,865 sq m (net) by 2027.

Qualitative Need – Convenience Goods

- 8.69 Hyde is identified to contain two superstores (as defined by PPS4), the Morrisons store on Mottram Road and Asda store on Water Street. Understandably, these two stores are the most popular destinations in Hyde. However, it is notable that although the Household Survey suggests that the Asda store is trading above expected levels (by 43%), the Morrisons store is identified to be undertrading (by 7%).
- 8.70 These superstores are supported by a number of smaller stores, including the Aldi and Iceland stores within Hyde. The District Centre also contains a number of further small-format convenience stores and independents, including a market.
- 8.71 Facilities within Hyde attract a fifth (20%) of convenience goods expenditure generated within the core catchment. However, within the Hyde Zone, existing facilities within Hyde and nearby Gee Cross retain 72% of convenience goods expenditure generated in this zone, the vast majority of which is directed to either the Asda store or Morrisons store. Accordingly, the Household Survey suggests that within the local area limited convenience goods expenditure is directed to existing facilities elsewhere. Of the identified expenditure being directed to facilities elsewhere, this is identified to be primarily to other destinations within the Borough (most notably the Asda store in Ashton-under-Lyne and Sainsbury's store in Denton). Outside the Borough the most popular destinations for residents within the Hyde Zone are identified to be facilities in Stockport.



8.72 Existing convenience goods facilities within Hyde are identified to be trading only marginally above expected levels. Furthermore, analysis of the Household Survey suggests that limited convenience goods expenditure generated in local catchment is directed to facilities elsewhere. Consequently, there does not appear to be a strong qualitative need for further convenience goods floorspace in Hyde, at least in the short-term (particularly should improvements elsewhere in the Borough come forward, such as in Hattersley).

Qualitative Need – Comparison Goods

8.73 In the non-bulky goods sector Hyde attracts some 4% of expenditure generated by residents within the Study Area. This low market share is understandable given the extent of the Study Area, the strength and proximity of competing provision and the current non-bulky goods offer in Hyde. However, within the core catchment (zones 7 to 10) the non-bulky market share for Hyde increases to only 10%. Even within the Hyde Zone, less than a third (33%) of expenditure generated by the local resident population is identified to be directed to existing facilities in Hyde. This market share achieved by existing facilities in Hyde from the local area (33%) compares to facilities in Stockport and Ashton-under-Lyne achieving market shares of 15% and 9% respectively from the Hyde Zone. Despite the strength of competing provision, it is notable that for 'Clothing and Footwear', Hyde's market share within the Hyde Zone has increased since 2005, from 13% to 24%.

8.74 Whilst the strength of competing centres is acknowledged, there appears to be a qualitative need to improve and enhance the comparison goods offer of the district centre, particularly given that it is identified as a Large District Centre within the Borough, sitting below Ashton-under-Lyne in the local hierarchy. However, it is important that any development should contribute to improving the vitality of the district centre and reduce the need for local residents to travel to facilities elsewhere.

8.75 In terms of bulky goods retailing, facilities in Hyde achieve a higher market share for bulky goods (6%) than non-bulky comparison goods within the Study Area. This is identified to increase to 13% within the core catchment and to 43% within the Hyde Zone. Consequently, over half (57%) of bulky goods expenditure generated in the local area is directed to competing facilities elsewhere (including online). In terms of the three categories of 'bulky goods' identified, unsurprisingly within the DIY sector, existing facilities attract the highest proportion of expenditure with a market share of 70% within the Hyde Zone. This compares to market shares within the Electrical and Furniture goods sectors of 26% and 45% respectively. Such a high market share within the DIY sector is to be expected given the presence of a B&Q store on Manchester Road. Despite the strength of the



DIY sector in Hyde, the survey analysis suggests that there is scope for further improvement in the bulky goods retail offer in Hyde, although any improvement in the bulky goods offer will be affected by the strong provision nearby, such as in Ashton-under-Lyne and Stockport.

Summary

- 8.76 Hyde is identified to be an important convenience and comparison goods shopping destination. The convenience goods sector is very well represented and despite the overtrading of existing floorspace, there is limited scope for additional convenience floorspace within Hyde, at least in the short-term.
- 8.77 Although the comparison goods sector is not as strong as the convenience goods sector, Hyde does perform an important role in meeting some of the day-to-day shopping needs of the local population. Furthermore, despite the trading performance of the district centre performing below expected levels, there is identified to be capacity for up to 1,325 sq m (net) of additional floorspace by 2014, increasing to 12,980 sq m (net) by 2027.

Denton

Overview

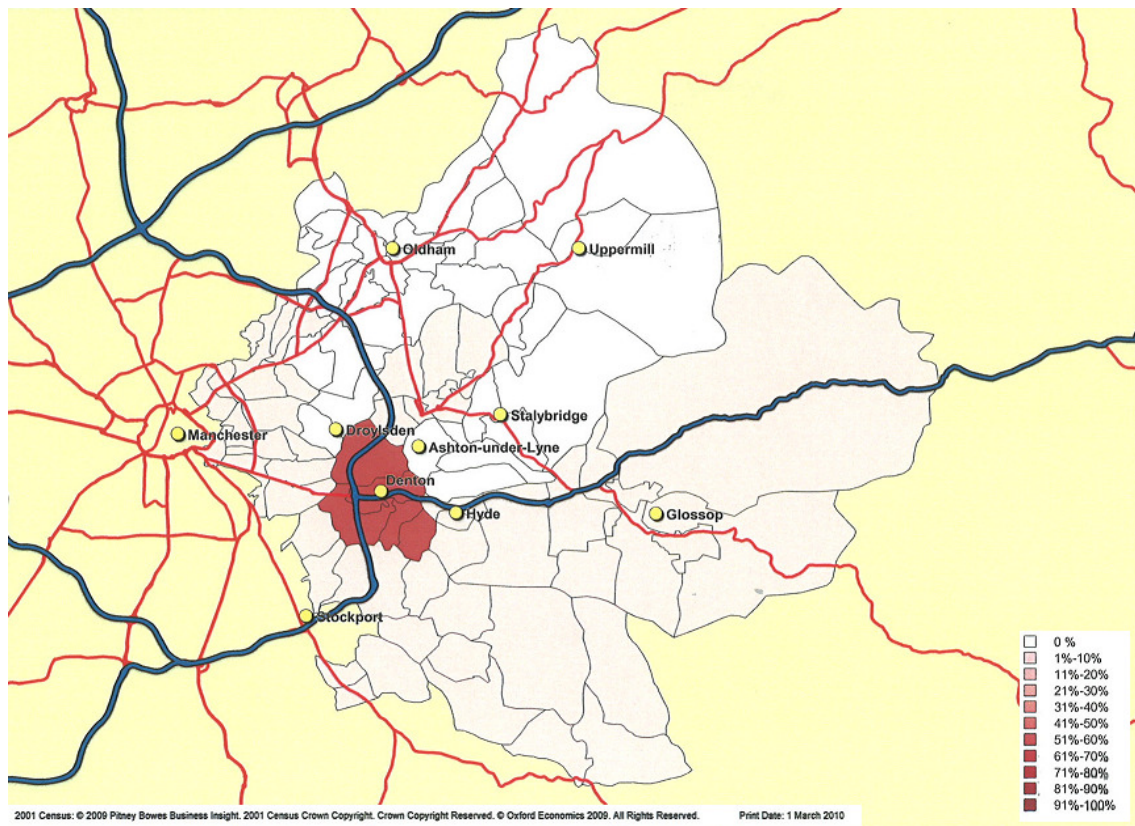
- 8.78 Denton is identified as a district centre within the adopted UDP and is located in the south-west of the Borough in close proximity to both the M67 and M60 motorways. Retailing within the district centre is focused around Stockport Road, running north to south, and Manchester Road and Hyde Road, which run east to west. However, the main focus of retail activity is within the Crown Point North Shopping Park which opened in 2004 to the north of the existing district centre. This shopping park contains a number of national multiples and large modern floorplates that are lacking within the traditional district centre.

Convenience Goods Shopping

- 8.79 The convenience goods sector is dominated by the Morrisons store on Saxon Street and the out-of-centre Sainsbury's store on Oldham Street. Further convenience goods provision is provided by the Lidl store on Manchester Road together with a range of small stores and independent traders.

8.80 The Household Survey identifies that existing facilities in Denton achieve a convenience goods market share within the Study Area of **5.4%** of convenience goods expenditure generated in the Study Area. This equates to a turnover of approximately £59.56m in 2009, the majority of which (95%) is directed towards the existing Morrisons and Sainsbury's stores. The Household Survey identifies that convenience facilities in Denton have a catchment population for main food shopping of approximately 35,960 people within the Study Area. Figure 8.5 illustrates the extent of Denton's main food shopping catchment within the Study Area.

Figure 8.5: Plan indicating the Extent of the Main Food Shopping Catchment of Denton



Market Share Analysis – Main Food Shopping (Denton)

Zone	Oldham	Manchester East	Stockport	Uppermill	Glossop	Droylsden	Denton	Ashton	Stalybridge	Hyde
Denton	0%	4%	4%	0%	2%	0%	53%	3%	0%	4%

8.81 In terms of capacity for additional convenience floorspace within Denton, **Table 8.16** provides a breakdown of the trading performance of existing foodstores.



Table 8.16: Trading Performance of Current Foodstores in Denton

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Convenience – sq m ³	Turnover per sq m – £ ⁴	Benchmark Turnover - £m	Survey Estimate - £m ⁵
Denton						
Morrisons, Saxon Street	6,960	3,838	3,070	11,050	33.92	26.76
Other District Centre Floorspace	860	688	619	3,500	2.17	2.74
Lidl, Manchester Road	2,080	1,456	1,165	2,939	3.42	
Sub-Total	9,900	5,982	4,854	-	39.51	29.50
<i>Out-of-Centre</i>						
Sainsbury's, Oldham Street	6,840	4,090	3,248	9,613	31.22	30.06
TOTAL	16,740	10,072	8,102	-	70.73	59.56

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009) or IGD Database (2008)
² – Net floorspace based on WYG judgement
³ – Net convenience floorspace derived from Verdict Grocery Retailers (2009) where available
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
⁵ – Survey derived turnover derived from Tameside Household Survey (2009)
 ^ - Facilities in other 'Local Shops' assumed to be trading in equilibrium
 At 2007 prices)

8.82 Our analysis of Denton's market share estimates that existing facilities attract £59.56m of convenience goods expenditure generated within the defined Study Area. This compares to an expected benchmark turnover of existing provision of £70.73m. As such our analysis would appear to suggest that there is an oversupply of convenience goods floorspace of more than £11m in 2009. Indeed, the Household Survey suggests that both the Sainsbury's and Morrisons stores are undertrading by 4% and 27% respectively.

8.83 Given this undertrading, **Table 8.17** provides a breakdown of the capacity for additional convenience goods floorspace based on existing market share.

Table 8.17: Estimated 'Capacity' for Convenience Goods Facilities - Denton

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	70.73	59.56	-11.17
2014	71.44	62.82	-8.62
2019	72.16	66.89	-5.27
2024	72.88	71.23	-1.65
2027	73.98	73.98	-

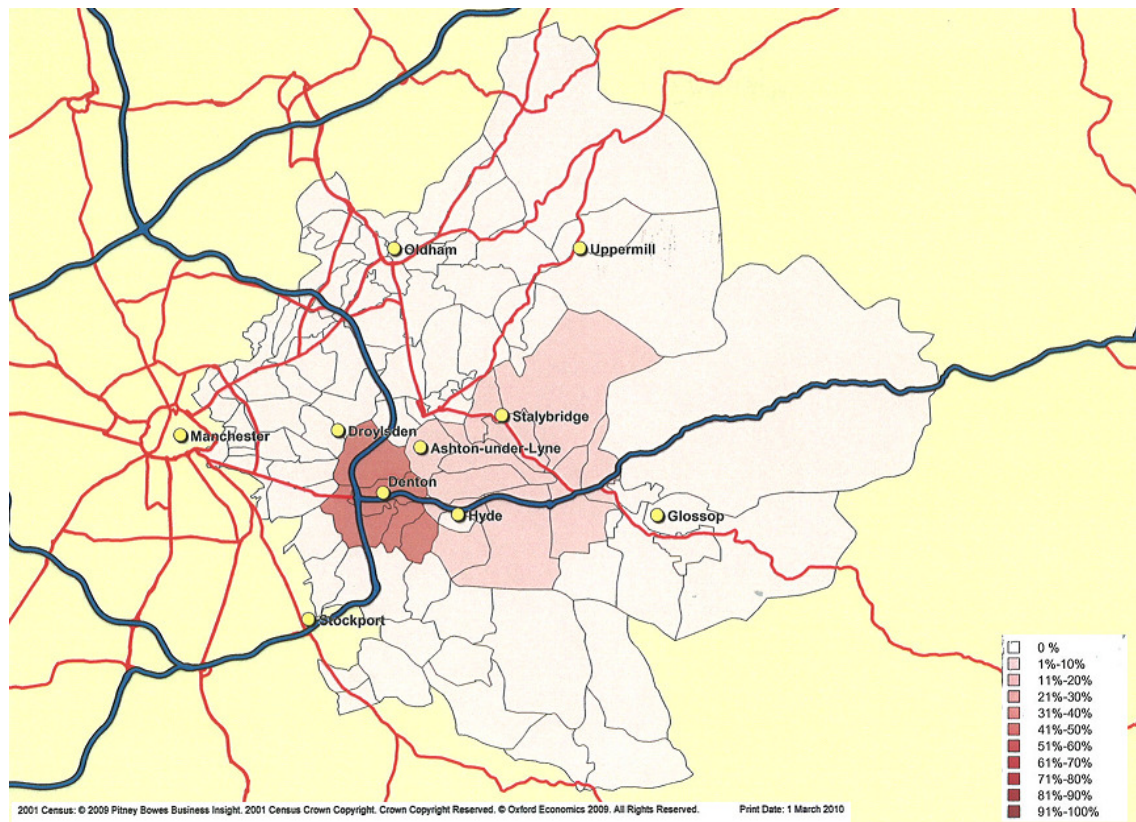
Notes: ¹ - Allows for increased turnover efficiency of +0.2% per annum
² - Assumes constant market share at 5.4% within the Study Area
 At 2007 prices

8.84 Even after allowing for growth in available expenditure, our analysis demonstrates that there is no clear demonstrable quantitative need for additional convenience goods floorspace through to 2027.

Comparison Goods Shopping

- 8.85 The comparison goods offer of Denton is dominated by Crown Point North Shopping Park, which comprises more than 20,000 sq m (gross) of retail floorspace. Elsewhere, the comparison goods offer in Denton (including within the defined district centre) is much more limited and is dominated by small-scale independent retailers.
- 8.86 Due primarily to the strength of Crown Point North Shopping Park, the Household Survey identifies that existing comparison goods facilities in Denton attract **6.4%** (or £113.23m) of total comparison goods expenditure generated in the Study Area. This market share increases to 21% within the core catchment and to 37% within the Denton Zone. Figure 8.6 indicates the extent of Denton's catchment for comparison goods shopping.

Figure 8.6: Plan indicating the Extent Denton's Comparison Goods Catchment



Market Share Analysis – Comparison Goods Shopping (Denton)

Zone	Oldham	Manchester East	Stockport	Uppermill	Glossop	Droylsden	Denton	Ashton	Stalybridge	Hyde
Denton	1%	2%	3%	3%	8%	4%	35%	5%	11%	13%



8.87 **Table 8.18** provides an assessment of the survey derived turnover of existing facilities within Denton and compares it to expected turnover levels.

Table 8.18: Trading Performance of Current Comparison Goods Floorspace in Denton

Centre/Facility	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Comparison – sq m ³	Turnover per sq m – £ ⁴	Benchmark Turnover - £m	Survey Estimate - £m ⁵
Denton						
District Centre Floorspace	5,010	4,008	3,808	3,500	13.33	60.39
Crown Point North Shopping Park	20,556	16,445	15,623	5,000	78.12	50.88
Morrisons, Saxon Street	6,960	3,838	768	8,987	6.90	0.55
Sainsbury's, Oldham Street	6,840	4,090	842	7,483	6.30	1.41
TOTAL	39,366	28,381	21,041	-	104.65	113.23

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009) or IGD Database (2008)
² – Net floorspace based on WYG judgement and IGD Database
³ – Net comparison floorspace derived from Verdict Grocery Retailers (2009) where available
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
⁵ – Survey derived turnover derived from Tameside Household Survey (2009) At 2007 prices

8.88 **Table 8.18** illustrates that existing comparison goods floorspace in Denton is trading above expected levels, by £8.58m (or 8%). Given this overtrading, **Table 8.19** and **Table 8.20** estimate the forecast capacity available to support additional comparison goods floorspace in Denton through to 2027.

Table 8.19: Estimated 'Capacity' for Comparison Goods Facilities - Denton

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	104.65	113.23	8.58
2014	109.99	128.54	18.55
2019	118.49	154.60	36.11
2024	127.65	198.15	70.50
2027	133.48	228.98	95.50

Notes: ¹ Allows for increased turnover efficiency of +1.0% per annum between 2009 to 2014 and +1.5% per annum post 2014
² Assumes constant market share 6.4% within the Study Area
 Allows for increase in non-retail sales from 6.6% in 2009 (as identified by the household survey) to 9% by 2014 and to 15% by 2019 where it is assumed to remain static through to 2027
 At 2007 prices



Table 8.20: Quantitative Need for Additional Floorspace in Denton – Comparison Goods

Year	Comparison Goods		
	£m	Floorspace Requirement	
		Min ^{1*}	Max ^{2*}
2009	8.58	1,715	2,860
2014	18.55	3,445	5,740
2019	36.11	6,225	10,370
2024	70.50	11,280	18,795
2027	95.50	14,610	24,350

Notes: ¹ - Average sales density assumed to be £5,000/sq m (based on the average sales density of leading retailers as identified by Mintel 2009)

² - Average sales density assumed to be £3,000/sq m

* - Allows for increases in turnover efficiency of +1.5% per annum
At 2007 Prices

8.89 Given the growth in comparison goods expenditure generated in the Study Area together with the identified overtrading of existing facilities, **Table 8.19** identifies capacity by 2014 of more than £18m. This is forecast to increase to almost £96m by 2027. In floorspace terms, this capacity equates to a potential floorspace requirement of at least 3,445 sq m (net) by 2014, although dependent upon the end operator. This is forecast to increase to more than 14,610 sq m (net) by 2027 (**Table 8.20**).

8.90 Although this assessment suggests a significant capacity for further comparison goods floorspace in Denton, this is based on existing market shares within the Borough and wider Study Area. As previously highlighted, the success of Crown Point North Shopping Park has impacted on the role of centres elsewhere in the Borough, including Ashton-under-Lyne, which is the sub-regional centre. Accordingly, the Council should seek to attract more expenditure to Ashton-under-Lyne (including from Denton) in line with regional and local planning policy rather than seeking to significantly strengthen further the comparison goods offer of Denton District Centre, which sits below Ashton-under-Lyne in the local hierarchy.

8.91 Should the overall comparison goods market share of Denton decline in the future due to an improvement in its retail offer, the level of capacity identified above (Table 8.20) would reduce. For example, should Denton’s market share within the Study Area reduce from its current level (6.4%) to 5.0% (although this is dependent upon the quality of any improvement in the retail offer in Ashton-under-Lyne) the level of capacity identified by 2027 would reduce from more than £95m to £58m – a reduction of more than £37m. This reduced level of capacity would equate to a reduced comparison goods floorspace requirement in Denton by 2027 of between 8,870 sq m (net) and 14,785 sq m (net).



Qualitative Need – Convenience Goods

- 8.92 Denton contains two large-format foodstores (the Sainsbury's store on Oldham Street and the Morrisons store on Saxon Street). These stores are identified to be undertrading (by 4% and 27% respectively). This undertrading does not suggest a strong qualitative need for further convenience goods floorspace in Denton.
- 8.93 Furthermore, within the Denton Zone, existing facilities attract over half (53%) of the convenience goods expenditure generated. Given the extent of this zone, which extends towards Hyde and Ashton-under-Lyne to the east, current shopping patterns do not suggest that significant trips are being directed to facilities elsewhere. Indeed, of the expenditure generated in the Denton Zone that is directed to facilities elsewhere the vast majority (76%) is directed to facilities in nearby Ashton-under-Lyne or Hyde, which are well positioned to meet the needs of local residents within this zone.

Qualitative Need – Comparison Goods

- 8.94 The strength of Crown Point North Shopping Park as a comparison goods retail destination has had a significant impact on shopping patterns in recent years. Since 2005 Denton's market share for 'Clothing and Footwear' goods has increased from 12% to 28% in 2009 within the core catchment (the highest of all the main centres within the Borough). As previously highlighted, this increase in the attraction of Denton as a comparison goods shopping destination has been at the expense of Ashton-under-Lyne Town Centre.
- 8.95 Given the existing offer, current shopping patterns and Denton's position within the local hierarchy, it is not considered that there is a qualitative need to further improve the non-bulky goods offer in Denton.
- 8.96 With regard to the bulky goods sector, the findings of the Household Survey suggest that less than 7% of expenditure generated in the core catchment is directed to existing facilities in Denton. This only increases to 22% within the Denton Zone. This suggests that there is a qualitative need to improve the bulky goods retail offer within Denton in order to reduce the need for local residents to travel to facilities elsewhere.



Summary

- 8.97 Denton serves an important convenience goods shopping role. Furthermore, the Crown Point North Shopping Park development has significantly increased the attraction of Denton as a comparison goods shopping destination for local residents and the wider Borough.
- 8.98 Whilst the continued success of Crown Point North Shopping Park suggests a need for further comparison retail floorspace through to 2027, as outlined above there is a need for the Council to address the falling market share achieved by the sub-regional centre of Ashton-under-Lyne. Therefore, we consider that the Council should not seek to encourage significantly more retail floorspace (particularly in the non-bulky goods sector). Similarly, our analysis demonstrates that there is no pressing need for further convenience goods floorspace in Denton.

Stalybridge

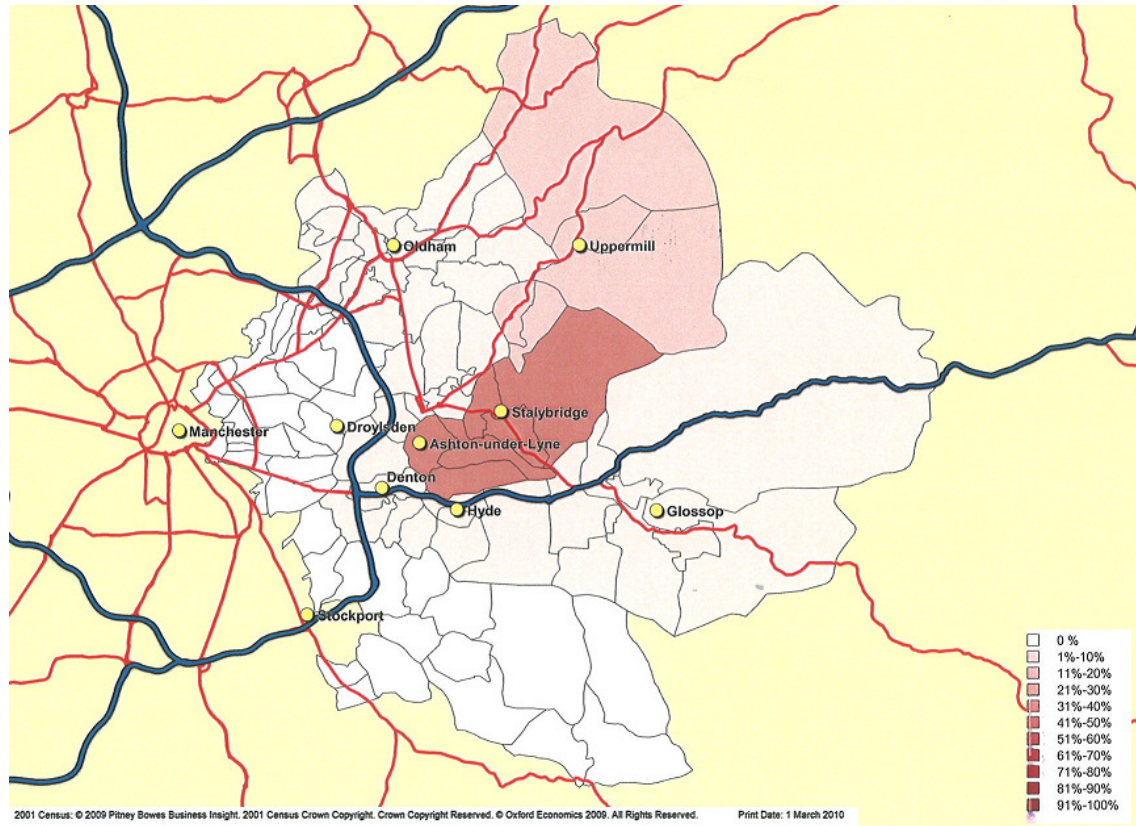
Overview

- 8.99 Stalybridge District Centre is located in the centre of the Borough with retailing focused on Market Street, Melbourne Street and Grosvenor Street. In addition to its retail offer, Stalybridge also has a strong evening economy, with numerous bars and pubs within the centre.

Convenience Goods Shopping

- 8.100 The convenience goods sector is dominated by the Tesco store on Trinity Street (6,100 sq m gross), which accounts for 71% of convenience goods floorspace within the centre. The Tesco store is complemented by an Aldi store on Leech Street together with smaller retailers and independents.
- 8.101 The Household Survey identifies that existing facilities in Stalybridge achieve a convenience goods market share within the Study Area of **4.5%** of convenience goods expenditure generated in the Study Area. This equates to a turnover of approximately £49.15m, the majority of which (93%) is directed towards the existing Tesco store, which is identified to be the fourth most popular store in the Borough.
- 8.102 The Household Survey identifies that convenience facilities in Stalybridge have a catchment population for main food shopping of approximately 27,945 people within the Study Area. Figure 8.7 illustrates the extent of Stalybridge's main food shopping catchment within the Study Area.

Figure 8.7: Plan indicating the Extent of the Main Food Shopping Catchment of Stalybridge



Market Share Analysis – Main Food Shopping (Stalybridge)

Zone	Oldham	Manchester East	Stockport	Uppermill	Glossop	Droylsden	Denton	Ashton	Stalybridge	Hyde
Stalybridge	1%	0%	0%	16%	4%	0%	3%	3%	31%	2%

8.103 In terms of capacity for additional convenience goods floorspace within Stalybridge, [Table 8.21](#) provides a breakdown of the trading performance of existing facilities.



Table 8.21: Trading Performance of Current Foodstores in Stalybridge

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Convenience – sq m ³	Turnover per sq m – £ ⁴	Benchmark Turnover - £m	Survey Estimate - £m ⁵
Stalybridge						
Aldi, Leech Street	1,720	1,204	879	3,766	3.31	2.55
Tesco, Trinity Street	6,100	3,660	2,416	12,586	30.41	46.28
Other District Centre Floorspace	820	656	590	3,500	2.07	0.33
TOTAL	8,640	5,520	3,885	-	35.79	49.16

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009) or IGD Database (2008)
² – Net floorspace based on WYG judgement
³ – Net convenience floorspace derived from Verdict Grocery Retailers (2009) where available
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
⁵ – Survey derived turnover derived from Tameside Household Survey (2009)
 ^ - Facilities in other 'Local Shops' assumed to be trading in equilibrium
 At 2007 prices)

- 8.104 Our analysis of Stalybridge’s market share estimates that existing facilities retain approximately £39.38m of convenience goods expenditure generated within the defined Study Area. This compares to an expected ‘benchmark’ turnover of £35.79m. As such our analysis would suggest that there is an undersupply of convenience goods floorspace in Stalybridge of more than £13m. The findings of the Household Survey suggest that the Tesco store is overtrading by approximately 52% (or £15.87m).
- 8.105 Having regard to this overtrading, it is possible to estimate the likely need for additional convenience goods floorspace within Stalybridge through to 2027 based on current market share (Table 8.22 and Table 8.23).

Table 8.22: Estimated ‘Capacity’ for Convenience Goods Facilities - Stalybridge

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	35.79	49.16	13.37
2014	36.15	52.35	16.20
2019	36.51	55.74	19.23
2024	36.87	59.36	22.49
2027	37.10	61.65	24.55

Notes: ¹ - Allows for increased turnover efficiency of +0.2% per annum
² - Assumes constant market share at 4.5% within the Study Area
 At 2007 prices



Table 8.23: Quantitative Need for Additional Floorspace in Stalybridge

Year	Convenience Goods		
	£m	Floorspace Requirement	
		Min ^{1*}	Max ^{2*}
2009	13.37	1,100	2,675
2014	16.20	1,320	3,205
2019	19.23	1,550	3,770
2024	22.49	1,795	4,365
2027	24.55	1,950	4,735

Notes: ¹ - Average sales density assumed to be £12,155/sq m (based on the average sales density of the leading four supermarkets as identified by Verdict 2009)

² - Average sales density assumed to be £5,000/sq m

* - Allows for increases in turnover efficiency of +0.2% per annum
At 2007 Prices

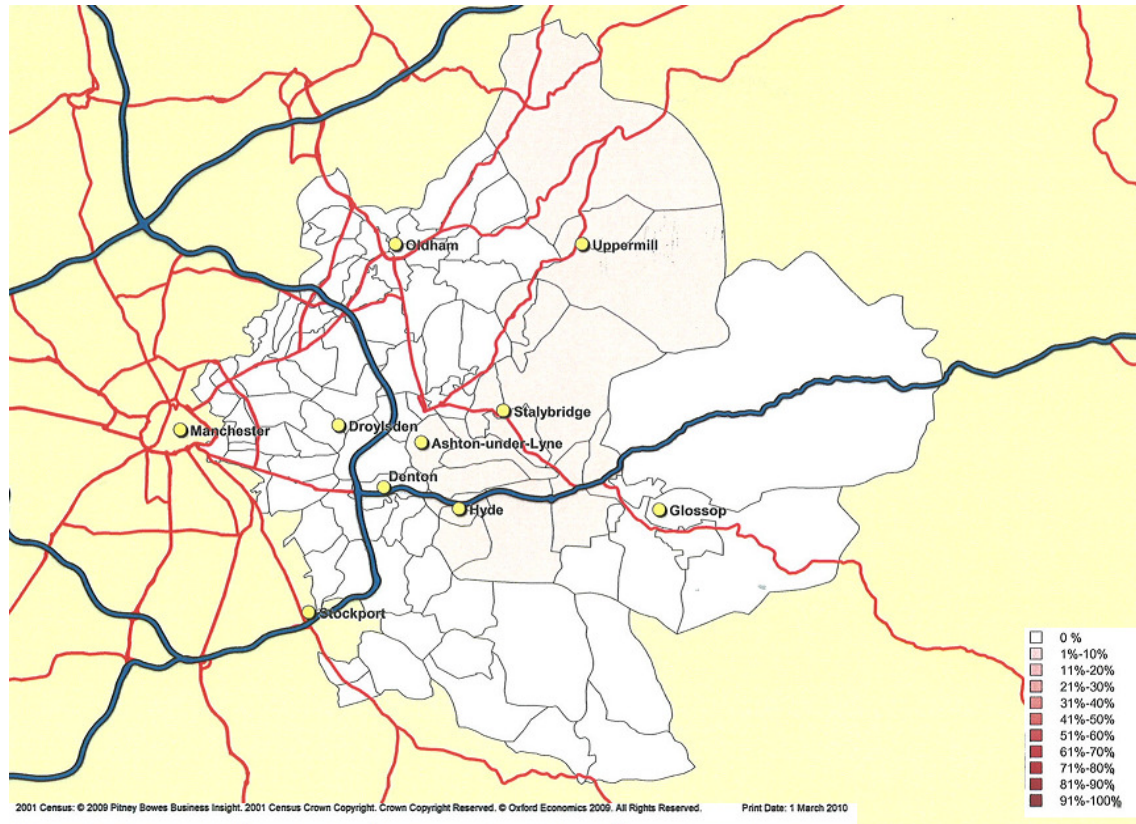
8.106 Although **Table 8.22** identifies significant capacity for further convenience goods floorspace within Stalybridge based on existing market share, it is notable that existing facilities in Stalybridge draw notable trade (some 15% of its overall convenience goods turnover) from the Uppermill Zone, which extends into the neighbouring authority of Oldham. In this respect, it is notable that an extant permission exists for a new foodstore (2,323 sq m gross) at Knoll Mill, Frenches Wharf at Greenfield (located within the Uppermill Zone). Accordingly, this new store will be well positioned to meet some of the day-to-day convenience goods shopping needs of the local population and reduce the need to travel to competing facilities elsewhere, such as to Stalybridge.

8.107 Consequently, the existing market share (and subsequent capacity) for additional convenience goods floorspace in Stalybridge could reduce in the future. Despite this, there is likely to remain a quantitative need for further convenience goods floorspace in Stalybridge.

Comparison Goods Shopping

8.108 The comparison goods offer in Stalybridge is more limited. This is reflected by the findings of the Household Survey, which identified that existing facilities in Stalybridge retain only **1.0%** of total comparison goods expenditure generated in the Study Area. This market share only increases to only 3% within the core catchment and 9% within the Stalybridge Zone. Figure 8.8 indicates the extent of Stalybridge’s catchment for comparison goods shopping.

Figure 8.8: Plan indicating the Extent Stalybridge's Comparison Goods Catchment



Market Share Analysis – Comparison Goods Shopping (Stalybridge)

Zone	Oldham	Manchester East	Stockport	Uppermill	Glossop	Droylsden	Denton	Ashton	Stalybridge	Hyde
Stalybridge	0%	0%	0%	2%	0%	0%	0%	0%	9%	1%

8.109 **Table 8.24** provides an assessment of the survey derived turnover of existing facilities within Stalybridge and compares it to expected turnover levels.



Table 8.24: Trading Performance of Current Comparison Goods Floorspace in Stalybridge

Centre/Facility	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Comparison – sq m ³	Turnover per sq m – £ ⁴	Benchmark Turnover - £m	Survey Estimate - £m ⁵
Stalybridge						
District Centre Floorspace	5,010	4,008	3,808	3,500	13.33	14.90
Tesco, Trinity Street	6,100	3,660	1,244	9,368	11.65	3.72
TOTAL	11,110	7,668	5,052	-	24.98	18.62

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009) or IGD Database (2008)
² – Net floorspace based on WYG judgement and IGD Database
³ – Net comparison floorspace derived from Verdict Grocery Retailers (2009) where available
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
⁵ – Survey derived turnover derived from Tameside Household Survey (2009)
 At 2007 prices

8.110 **Table 8.24** illustrates that existing comparison goods floorspace in Stalybridge is trading below expected levels, by £6.36m (or 25%). Given this undertrading, based on no change in current market share, there is no pressing need for further comparison goods floorspace until 2024, and then the identified capacity is limited (£0.49m). Whilst this is identified to increase to more than £4m by 2027, this would only support a limited increase in the existing comparison goods offer in Stalybridge (up to 1,035 sq m net).

Table 8.25: Estimated 'Capacity' for Comparison Goods Facilities – Stalybridge

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	24.98	18.62	-6.36
2014	26.25	20.08	-6.17
2019	28.28	24.16	-4.12
2024	30.47	30.96	0.49
2027	31.86	35.93	4.07

Notes: ¹ Allows for increased turnover efficiency of +1.0% per annum between 2009 to 2014 and +1.5% per annum post 2014
² Assumes constant market share 1.0% within the Study Area
 Allows for increase in non-retail sales from 6.6% in 2009 (as identified by the household survey) to 9% by 2014 and to 15% by 2019 where it is assumed to remain static through to 2027
 At 2007 prices

Table 8.26: Quantitative Need for Additional Floorspace in Stalybridge – Comparison Goods

Year	Convenience Goods	
	£m	Floorspace Requirement
		Min ^{1*} / Max ^{2*}
2009	-6.36	Nil / Nil
2014	-6.17	Nil / Nil
2019	-4.12	Nil / Nil
2024	0.49	80 / 130
2027	4.07	625 / 1,035

Notes: ¹ - Average sales density assumed to be £5,000/sq m (based on the average sales density of leading retailers as identified by Mintel 2009)
² - Average sales density assumed to be £3,000/sq m
 * - Allows for increases in turnover efficiency of +1.5% per annum
 At 2007 Prices



Qualitative Need – Convenience Goods

- 8.111 Stalybridge contains only one-large format foodstore (Tesco at Trinity Street), which dominates the convenience goods sector and is identified to be overtrading. This limited convenience goods offer is reflected by existing facilities achieving the second lowest convenience goods retention from the Study Area of the five main centres within the Borough - only Droylsden is identified to achieve a lower market share.

- 8.112 Although overtrading is acknowledged by PPS4 as an element of qualitative need, as previously highlighted, there is an extant permission for a new foodstore at Greenfield (within the Uppermill Zone), which is likely to reduce the attraction of facilities in Stalybridge for residents within this zone and address, in part, this overtrading.

- 8.113 Despite the limited choice within Stalybridge, it is evident that less than a third (32%) of convenience goods expenditure generated in the Stalybridge Zone is directed to facilities elsewhere. Of the identified convenience goods expenditure that is directed to facilities, most (63%) is directed to existing facilities in nearby Ashton-under-Lyne. Existing shopping patterns within the Stalybridge area does not suggest that local residents are inconvenienced by the existing retail offer in Stalybridge. However, the introduction of further convenience retailers would improve consumer choice and provide increased competition to the dominant Tesco store.

Qualitative Need – Comparison Goods

- 8.114 The limited comparison goods offer in Stalybridge is reflected in the low market shares achieved by existing facilities within the comparison goods sector. The low market share for comparison goods (only 9% within the Stalybridge zone) underlines the primarily convenience goods shopping offer of Stalybridge. Whilst there may be some potential to enhance the current offer, it is unlikely that the comparison goods market share of Stalybridge will significantly improve given the centre's proximity to the larger centre of Ashton-under-Lyne. Accordingly, any expansion of the retail offer in Stalybridge will be tempered by improved provision elsewhere in the Borough. Therefore, any additional development/redevelopment within Stalybridge should focus on enhancing existing provision, which will contribute to the vitality and viability of the centre rather than creating significant new floorspace.



Summary

- 8.115 Stalybridge serves a limited role in serving the retail needs of the local population. The centre generally serves a convenience goods shopping role (together with a strong evening-economy) with the majority of expenditure directed towards the Tesco store. Despite the limited convenience goods offer in Stalybridge, given the strong performance of existing facilities (most notably the Tesco store) there appears some scope for some additional convenience goods floorspace in Stalybridge.

- 8.116 The comparison goods offer of Stalybridge is much more limited and is identified to be trading below expected levels. Given this, our analysis demonstrates that there is no pressing need for further comparison goods floorspace in Stalybridge, particularly if the retail offer in Ashton-under-Lyne is to be improved as a competitor to reduce the dominance of the existing Tesco store.

Droylsden

Overview

- 8.117 Droylsden is identified as a district centre within the UDP and is located approximately four miles east of Manchester City Centre in the western part of the Borough.

- 8.118 Droylsden is a compact centre with retailing primarily focused around the junction of Manchester Road and Ashton Road. The core shopping area includes the Droylsden Centre Shopping Arcade, which provides a partly covered (or fully covered in certain parts) shopping environment, together the Greenside Lane Retail Park to the north. This retail park comprises large, modern purpose-built units. A Tesco supermarket is located to the south of the centre along Manchester Road and secondary retail provision is focused along Fairfield Street and Moorside Street.

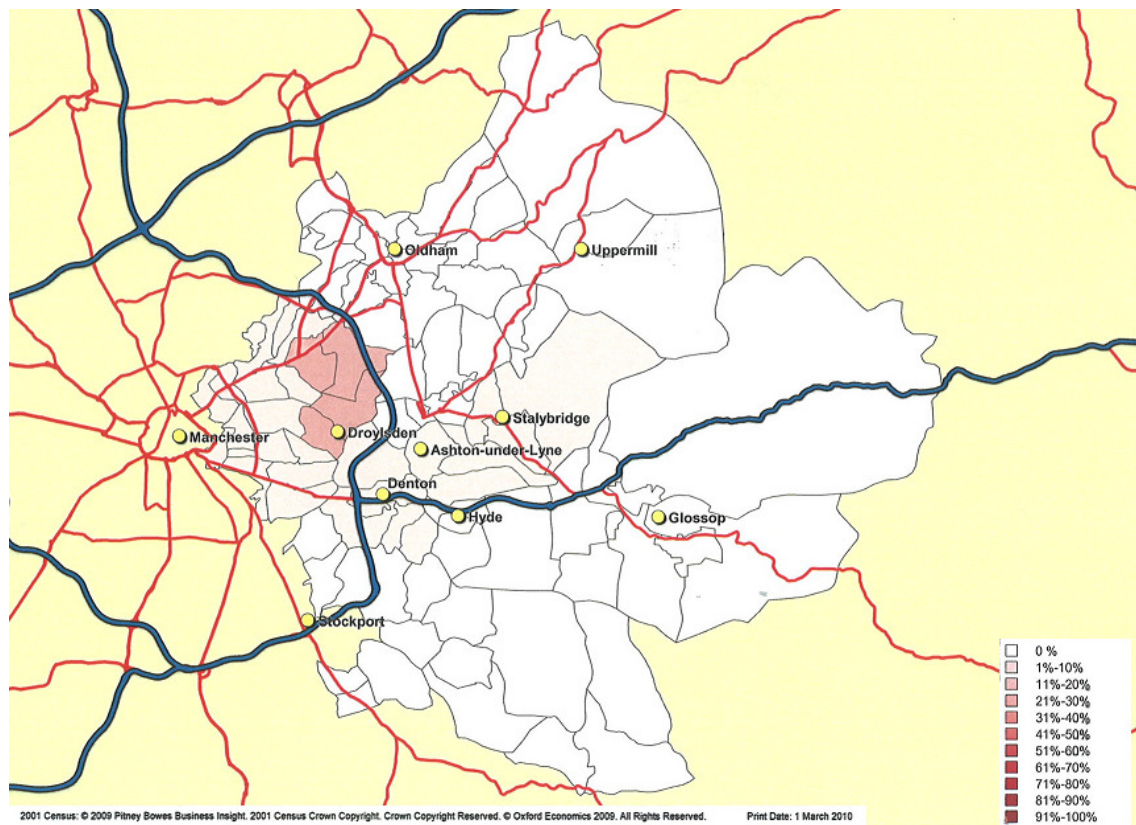
Convenience Goods Shopping

- 8.119 Existing convenience goods provision within Droylsden District Centre is dominated by the Tesco store on Manchester Road. Further provision is provided by the Somerfield store at Greenside Lane Retail Park together with a range of smaller facilities and independents, which predominantly serve a 'top-up' shopping role.

- 8.120 The Household Survey identifies that existing facilities in Droylsden achieve a convenience goods market share within the Study Area of **2.6%** of convenience goods expenditure generated in the

Study Area – the lowest of the five main centres in the Borough. This equates to a turnover of £28.85m, the majority of which (94%) is identified to be directed towards the existing Tesco store. Whilst this market share increases to 27% within the Droylsden Zone, shopping patterns within the local area are clearly influenced by facilities in nearby Failsworth (which is also located in the Droylsden Zone). These facilities (primarily the Tesco Extra store in Failsworth and the Morrisons store on Poplar Street) attract 40% of convenience goods expenditure generated in the Droylsden Zone. The Household Survey identifies that convenience facilities in Droylsden have a catchment population for main food shopping of approximately 15,115 people within the Study Area. Figure 8.9 illustrates the extent of Droylsden’s main food shopping catchment within the Study Area.

Figure 8.9: Plan indicating the Extent of the Main Food Shopping Catchment of Droylsden



Market Share Analysis – Main Food Shopping (Droylsden)

Zone	Oldham	Manchester East	Stockport	Uppermill	Glossop	Droylsden	Denton	Ashton	Stalybridge	Hyde
Droylsden	0%	3%	0%	0%	0%	24%	3%	0%	1%	0%



8.121 In terms of capacity for additional convenience goods floorspace within Droylsden, **Table 8.27** provides a breakdown of the trading performance of existing facilities.

Table 8.27: Trading Performance of Current Foodstores in Droylsden

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Convenience – sq m ³	Turnover per sq m – £ ⁴	Benchmark Turnover - £m	Survey Estimate - £m ⁵
Droylsden						
Tesco, Manchester Road	3,080	1,848	1,220	12,586	15.35	27.14
Other District Centre Floorspace	1,970	1,576	1,418	3,500	4.96	1.71
Somerfield, Greenside Lane RP	1,480	1,036	850	8,090	6.88	
TOTAL	6,530	4,460	3,488	-	27.19	28.85

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009) or IGD Database (2008)
² – Net floorspace based on WYG judgement
³ – Net convenience floorspace derived from Verdict Grocery Retailers (2009) where available
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
⁵ – Survey derived turnover derived from Tameside Household Survey (2009)
 ^ - Facilities in other 'Local Shops' assumed to be trading in equilibrium
 At 2007 prices)

8.122 Our analysis of Droylsden's market share estimates that existing facilities attract approximately £28.85m of convenience goods expenditure generated within the defined Study Area. This compares to an expected 'benchmark' turnover of existing provision of £27.19m. Our analysis suggests that existing facilities are overtrading by 6% (or £1.66m). In particular, the existing Tesco store is identified to be trading some 77% above expected levels. However, as previously highlighted, the actual trading performance of individual stores derived from survey evidence should be treated with a note of caution.

8.123 In terms of capacity for additional convenience goods floorspace, based on existing market share there is identified capacity in the short-term (i.e. 2014) of almost £2m. This is identified to increase to more than £7m by 2027.

Table 8.28: Estimated 'Capacity' for Convenience Goods Facilities – Droylsden

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	27.19	28.85	1.66
2014	27.46	30.24	2.78
2019	27.74	32.20	4.46
2024	28.02	34.30	6.28
2027	28.19	35.62	7.43

Notes: ¹ - Allows for increased turnover efficiency of +0.2% per annum
² - Assumes constant market share at 2.6% within the Study Area
 At 2007 prices



8.124 This level of capacity is sufficient to support up to 550 sq m (net) of additional convenience goods floorspace by 2014 – dependent upon the end-operator. This is identified to increase to up to 1,435 sq m (net) by 2027 (**Table 8.29**).

Table 8.29: Quantitative Need for Additional Floorspace in Droylsden – Convenience Goods

Year	Convenience Goods		
	£m	Floorspace Requirement	
		Min ^{1*}	Max ^{2*}
2009	1.66	135	330
2014	2.78	225	550
2019	4.46	360	875
2024	6.28	500	1,220
2027	7.43	590	1,435

Notes: ¹ - Average sales density assumed to be £12,155/sq m (based on the average sales density of the leading four supermarkets as identified by Verdict 2009)

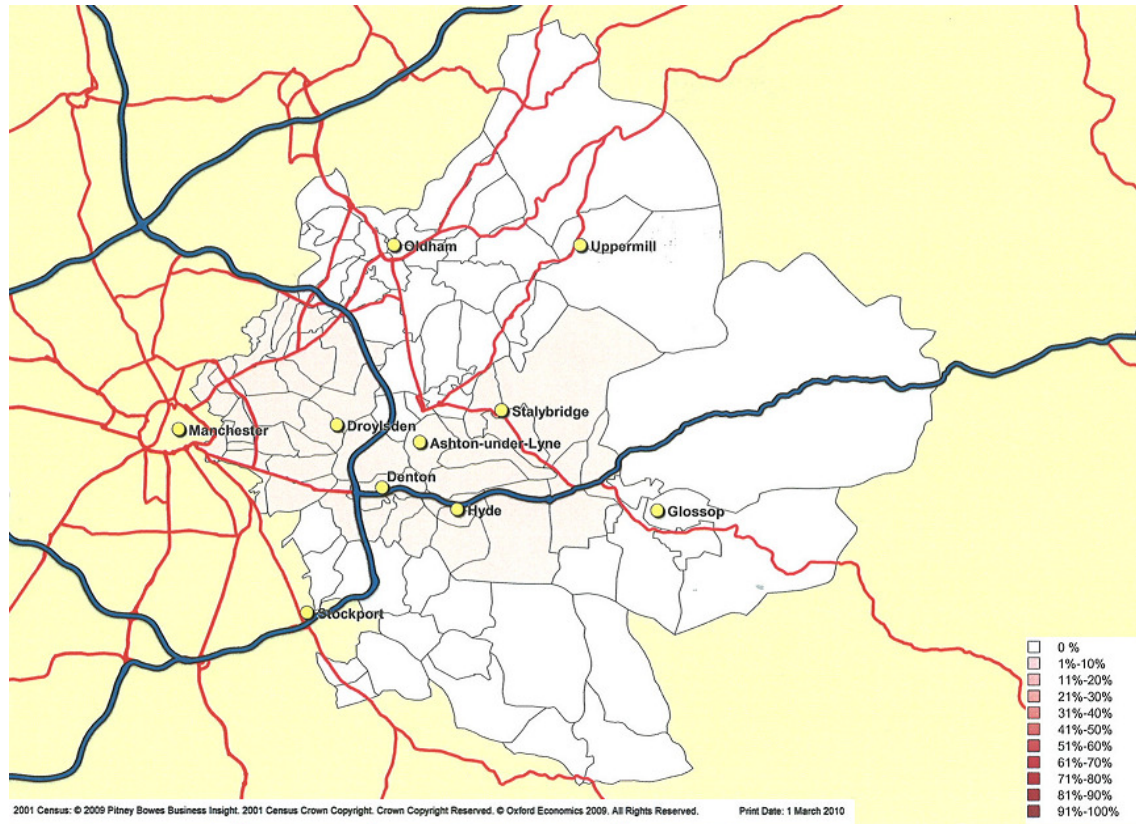
² - Average sales density assumed to be £5,000/sq m

* - Allows for increases in turnover efficiency of +0.2% per annum
At 2007 Prices

Comparison Goods Shopping

8.125 Existing comparison goods retail floorspace within Droylsden District Centre is identified to achieve a turnover of £19.90m in 2009. This represents a market share of only **1.1%** within the defined Study Area. Within the Droylsden Zone the market share increases to almost 9%. These low market shares are reflective of the limited comparison goods offer in Droylsden and the strength of competing provision. Figure 8.10 indicates the extent of Droylsden’s catchment for comparison goods shopping.

Figure 8.10: Plan indicating the Extent Droylsden's Comparison Goods Catchment



Market Share Analysis – Comparison Goods Shopping (Droylsden)

Zone	Oldham	Manchester East	Stockport	Uppermill	Glossop	Droylsden	Denton	Ashton	Stalybridge	Hyde
Droylsden	0%	1%	0%	0%	0%	9%	2%	0%	1%	1%

8.126 Furthermore, in considering the trading performance of existing comparison goods floorspace within Droylsden District Centre, our assessment ([Table 8.30](#)) identifies that existing floorspace is trading below expected levels (by 37%).



Table 8.30: Trading Performance of Current Comparison Goods Floorspace in Droylsden

Centre/Facility	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Comparison – sq m ³	Turnover per sq m – £ ⁴	Benchmark Turnover - £m	Survey Estimate - £m ⁵
Droylsden						
District Centre Floorspace	9,610	7,688	7,304	3,500	25.56	17.57
Tesco, Manchester Road	3,080	1,848	628	9,368	5.88	2.33
TOTAL	9,990	9,536	7,932	-	31.44	19.90

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009) or IGD Database (2008)
² – Net floorspace based on WYG judgement and IGD Database
³ – Net comparison floorspace derived from Verdict Grocery Retailers (2009) where available
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
⁵ – Survey derived turnover derived from Tameside Household Survey (2009)
 At 2007 prices

8.127 Whilst survey derived turnover should be treated with a note of caution, undertrading of existing facilities suggests that there is no clear need for further comparison goods floorspace in Droylsden. Indeed, **Table 8.30** highlights that even after allowing for growth in population and available expenditure, existing comparison goods floorspace in Droylsden is identified to continue to trade below expected levels through to 2027.

Table 8.31: Estimated 'Capacity' for Comparison Goods Facilities - Droylsden

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	31.44	19.90	-11.54
2014	33.04	22.09	-10.95
2019	35.60	26.57	-9.03
2024	38.35	34.06	-4.29
2027	40.10	39.52	-0.58

Notes: ¹ Allows for increased turnover efficiency of +1.0% per annum between 2009 to 2014 and +1.5% per annum post 2014
² Assumes constant market share 1.1% within the Study Area
 Allows for increase in non-retail sales from 6.6% in 2009 (as identified by the household survey) to 9% by 2014 and to 15% by 2019 where it is assumed to remain static through to 2027
 At 2007 prices

Qualitative Need – Convenience Goods

8.128 Droylsden contains only one-large format foodstore (Tesco store at Manchester Road), which dominates the convenience goods sector and is identified to be overtrading. This limited convenience goods offer is reflected by existing facilities achieving the lowest convenience goods retention from the Study Area of the five main centres within the Borough.

8.129 Despite the low market share of existing choice, the current overtrading of existing facilities and the limited choice indicates that there is a qualitative need for further convenience goods provision within Droylsden.



Qualitative Need – Comparison Goods

- 8.130 The limited comparison goods offer in Droylsden is reflected in the low market shares achieved by existing facilities within the comparison goods sector. The low market share for comparison goods (only 9% within the Droylsden Zone) underlines the primarily convenience goods shopping offer of Droylsden. Furthermore, our assessment identifies that existing floorspace is trading below expected levels.
- 8.131 Given this, any improvement in the comparison goods offer is limited. Therefore, any improvement should focus on improving and enhancing the existing retail offer, rather than significantly increasing comparison goods floorspace in Droylsden.

Summary

- 8.132 Droylsden District Centre primarily serves a convenience goods shopping role. Although it also meets some of the comparison goods shopping needs of the local population. Consequently, given the current role and function of Droylsden and its position within the local hierarchy, our assessment identifies that future retail need is focused on the convenience goods sector rather than the comparison goods sector. In this respect, there is scope to improve the convenience goods offer, which will provide improved choice for local residents.

Hattersley

- 8.133 In terms of Hattersley whilst existing retail provision is very limited, given the significant proposals for new retail development in Hattersley (including a new foodstore), as with the 2005 Study, we have updated our assessment of the potential need for future retail facilities within Hattersley as part of the development of a new district centre. This assessment adopts the same broad approach to that previously undertaken but utilises the new survey evidence and the latest data now available.
- 8.134 Given the lack of local retail facilities in Hattersley, it is evident that local residents elsewhere, such as in Hyde and Ashton-under-Lyne attract significant shopping trips from this part of the Borough. Therefore, for the purposes of this assessment we have assumed that Zone 9 and Zone 10 of the wider Study Area as the principal catchment area for any new retail development in Hattersley. Indeed, the extent of a ten-minute drivetime from Hattersley is reflective of these two zones



8.135 **Table 8.32** provides a breakdown of the trading performance of existing convenience goods floorspace within Zone 9 and Zone 10. The approach adopted broadly reflects that undertaken as part of the previous assessment undertaken by WYG (Future Need for Retail Development Linked to the Proposed New District Centre at Hattersley – September 2005), albeit utilised the latest survey evidence.

Table 8.32: Trading Performance of Current Major Foodstores in the Catchment Area

Store	Net Convenience Floorspace (sq m) ¹	Turnover (£ per sq m)	Benchmark Turnover (£m)	% Derived from Study Area ²	Turnover (£m)	Survey Derived Turnover (£m)*
Hyde						
Aldi, Manchester Road	829	3,766	3.12	30	0.94	0.87
Asda, Water Street	2,583	15,372	39.71	38	15.09	21.77
Morrison's, Mottram Road	3,718	11,050	41.08	63	25.88	24.07
Other	2,531	4,000	10.12	65	6.58	3.48
Sub-Total	9,661	-	94.03	-	48.49	50.19
Stalybridge						
Aldi, Leech Street	879	3,766	3.31	72	2.38	1.84
Tesco, Trinity Street	2,416	12,586	30.41	67	20.37	30.89
Other	590	3,500	2.07	100	2.07	0.33
Sub-Total	3,885	-	35.79	-	24.82	33.06
Other						
Morrison's, Foundry Street, Dukinfield	3,017	11,050	33.34	64	21.34	36.67
Local Shops, Dukinfield	-	-	2.27	100	2.27	1.90
Sub-Total	-	-	35.61	-	23.61	38.57
TOTAL	-	-	165.43	-	96.92	121.82

Notes: ¹ – Gross Floorspace derived from Experian Goad (2009) or IGD Database (2008)
² – Derived from Tameside Household Survey (2009)
 * - Survey derived turnover from Zone 9 and Zone 10 only
 Net convenience floorspace derived from Verdict Grocery Retailers (2009) where available
 Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for local shops
 At 2007 prices

8.136 **Table 8.32** indicates that existing convenience goods provision within Zones 9 and 10 have an 'expected' turnover derived from the Study Area of £96.92m. This is based on the evidence gathered from the household survey, which provides evidence of the trade drawn by existing facilities from Zones 9 and 10.

8.137 When this is compared to the actual turnover of existing facilities within the Study Area derived from Zones 9 and 10 only (£121.82m), existing floorspace is trading some £25m (or 26%) above expected levels. This would suggest surplus capacity of £25m in 2009. Based on the forecast growth in convenience goods expenditure, this would increase to £29.00m by 2014, to £31.27m by 2019, to £33.77m by 2024 and to £35.35m by 2027 – based on current market share. Much of the identified capacity is due to the overtrading of major supermarkets within the local area, particularly the Asda store in Hyde and the Morrisons store in Dukinfield. Improved provision within this part of



the Borough (such as in Hattersley) will help to address this overtrading and improve consumer choice.

- 8.138 Furthermore, there is the potential, through the introduction of improved retail provision, to increase the market share currently achieved by existing facilities within Zones 9 and 10. The survey evidence identifies that currently existing facilities achieve a market share of approximately 77% within Zones 9 and 10. Through improved provision, WYG considers that this could improve. In this respect, an increase in market share to 85% within Zones 9 and 10, is considered realistic. Such an increase in market share would result in an increased capacity by 2014 of £41.90m, increasing to £51.03m by 2027.
- 8.139 By applying an average convenience goods sales density for the four leading supermarket operators (as identified by Verdict) the identified capacity could support approximately 3,415 sq m (net) of additional convenience floorspace in 2014. This is forecast to increase to 4,050 sq m (net) by 2027. This net convenience goods capacity could support a foodstore of approximately 8,750 sq m (gross) in 2014⁷.
- 8.140 With regard to comparison goods, residents within Zones 9 and 10 generate some £254.76m of expenditure in 2009. This is anticipated to increase to £298.24m by 2014, to £386.79m by 2019, to £501.68m by 2024 and to £586.44m by 2027. This represents an increase in comparison goods expenditure of £331.68m between 2009 and 2027.
- 8.141 It is evident that there is significant growth in comparison goods expenditure within the Study Area that could support additional retail floorspace within the Study Area. However, it is important to note that not all of the identified growth in comparison goods expenditure is available to support additional floorspace in Hattersley or the wider Study Area. Given the strength and proximity of competing centres such as Ashton-under-Lyne, Manchester and Stockport it is inevitable that some expenditure will be directed to these centres.
- 8.142 The Household Survey results indicate that existing comparison retail facilities within Zones 9 and 10 attract approximately 25% of the identified comparison goods expenditure generated by the local

⁷ Based on assuming a 60%/40% split of the net floorspace for convenience and comparison goods and a gross to net split of 65%/35%



resident population. Therefore, by assuming no increase in market share, it is reasonable to assume that of the growth identified in the Study Area, approximately 25% is available to support further comparison goods retail floorspace. This equates to some £8.62m of expenditure being available to support further retail floorspace, increasing to almost £83m by 2027. However, it is important to note that this growth is available to support additional retail floorspace in Stalybridge and Hyde in addition to any improvement in Hattersley.

- 8.143 Despite this, existing facilities within Zones 9 and 10 attract a relatively low market share for comparison goods (c. 25%). Given this, improved provision within this part of the Borough (including at Hattersley) is likely to increase the overall market share achieved by existing facilities. A modest increase in market share to 30% results in comparison goods growth of more than £10m by 2014, increasing to £100m by 2027. Whilst not all of this growth is available to support additional comparison goods retail floorspace in Hattersley, the analysis does suggest that there is 'capacity' for further comparison goods floorspace in Hattersley through appropriate improvement in its retail offer.
- 8.144 In addition, to the quantitative need for additional floorspace, there are also qualitative benefits associated in providing improved retail provision (namely a foodstore) in Hattersley. These qualitative benefits include providing better consumer choice and competition, improved accessibility and helping to address the overtrading of nearby facilities.

Outstanding Commitments

- 8.145 Whilst our analysis identifies capacity for additional convenience and comparison goods floorspace within the Borough between 2009 and 2027, it is important to take into account outstanding commitments for additional retail floorspace. **Table 8.33** and **Table 8.34** provide a summary of outstanding commitments for additional convenience and comparison goods floorspace within the Borough.



Table 8.33: Outstanding Commitments Tameside – Convenience Goods

Centre/Facility	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Convenience – sq m ³	Turnover per sq m - £ ⁴	Benchmark Turnover - £m
Ashton-under-Lyne					
Arcades Extension	19,799	14,849	1,485	5,000	7.43
Hyde					
Asda mezzanine, Water Street	-	1,048	608	7,686	4.67
Denton					
Sainsbury's Extension, Oldham Street	1,952	1,649	1,237	4,807	5.95
TOTAL	-	17,546	3,330	-	18.05

Notes: ¹ – Gross Floorspace derived from Tameside Council
² – Net floorspace based on WYG judgement
³ – Net convenience floorspace derived from Verdict Grocery Retailers (2009) where available or WYG judgement
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for unnamed operators.
 Assumed that the additional floorspace created by the mezzanine will trade at 50% expected levels as it is intended be operated by existing occupiers
 At 2007 prices

Table 8.34: Outstanding Commitments Tameside – Comparison Goods

Centre/Facility	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Comparison – sq m ³	Turnover per sq m - £ ⁴	Benchmark Turnover - £m
Ashton-under-Lyne					
Arcades Extension	19,799	14,849	13,364	5,000	66.82
Cavendish Street (Goldgem)	1,705	1,279	1,279	3,500	4.48
Lord Sheldon Way (adjacent to existing Sainsbury's) – Triangle Shopping Park	3,430	2,573	2,573	3,500	9.01
Stamford Street Central	538	403	403	3,500	1.41
Land bounded by Dean Street and Oldham Way (adjacent Aldi)	1,728	1,296	1,296	3,500	4.54
Sub-Total	27,200	20,400	18,915	-	86.26
Hyde					
Asda mezzanine, Water Street	-	1,048	440	4,327	1.90
Denton					
Oldham Batteries	15,280	11,460	11,460	3,500	40.11
Sainsbury's Extension, Oldham Street	1,952	1,649	412	3,742	1.54
Sub-Total	17,232	13,109	11,872	-	41.65
Droylsden					
Droylsden Marina	2,300	1,725	1,725	3,500	6.04
TOTAL	-	36,282	32,952	-	135.85

Notes: ¹ – Gross Floorspace derived from Tameside Council
² – Net floorspace based on WYG judgement
³ – Net convenience floorspace derived from Verdict Grocery Retailers (2009) where available or WYG judgement
⁴ – Sales densities derived from Verdict (2009) or Mintel Retail Rankings (2009) for national multiples and WYG assessment for unnamed operators.
 Assumed that the additional floorspace created by the mezzanine will trade at 50% expected levels as it is intended be operated by existing occupiers
 At 2007 prices



- 8.146 With regard to convenience goods, **Table 8.33** identifies that outstanding commitments achieve a turnover of up to £18.05m. This allows for an element of the Arcades extension within the Ashton-under-Lyne Town Centre to be occupied by convenience goods retailers.
- 8.147 By allowing for improved productivity, this turnover is identified to increase to £18.23m by 2014 and to £18.71m by 2027. Accordingly, outstanding commitments will meet almost 26% of the identified capacity within the Borough through to 2014 (£71.38m). However, by 2027, outstanding commitments (if implemented) will meet less than 13% of the identified convenience goods capacity within the Borough (£144.38m).
- 8.148 In the comparison goods sector, as outlined at **Table 8.34**, there are a number of significant commitments for additional retail floorspace. These include permission to extend the Arcades Shopping Centre in Ashton-under-Lyne (19,799 sq m gross) and the Oldham Batteries site in Denton (15,280 sq m gross).
- 8.149 If implemented, outstanding commitments are identified to achieve a comparison goods turnover of £135.85m. By allowing for increased productivity, this turnover is identified to increase to £142.78m by 2014 and to £173.27m by 2027. Should all these commitments come forward, it is notable that the identified capacity (£76.38m in 2014), at least in the short-term, will be met. In the longer-term (i.e. 2027) outstanding commitments are identified to meet 37% of the identified capacity (£462.65m). However, the capacity identified in the long-term should be treated with a 'note of caution' given the wide number of variables that are likely to affect future capacity.



9.0 SUMMARY AND CONCLUSIONS

Introduction

- 9.01 This section of the report seeks to summarise the evidence gathered as part of this study. As can be seen from the analysis undertaken within the study, by the year 2027 there is identified to be notable capacity for additional retail floorspace (both convenience and comparison goods) within the Borough.
- 9.02 In addition, it is evident from the analysis that there is a qualitative need for enhanced and improved retail provision within particular parts of the Borough, most notably within the sub-regional centre of Ashton-under-Lyne.
- 9.03 With this in mind, it is appropriate for Tameside Council to pro-actively and positively plan to accommodate the need identified. It is also important to ensure that the vitality and the viability of the main centres within the Borough are maintained and preferably enhanced.
- 9.04 In doing this, PPS4 highlights that local planning authorities should, as part of their economic vision for their area, set out a strategy for the management and growth of centres over the plan period. As part of their strategy, PPS4 advises that local planning authorities should, *inter alia*:
- Set flexible policies for their centres that are able to respond to changing economic circumstances;
 - Define a network and hierarchy of centres;
 - Define the extent of the centre and the primary shopping area in their Adopted Proposals Map having considered distinguishing between realistically defined primary and secondary frontages in designated centres and set policies that make clear which uses will be permitted in such locations;
 - Consider setting thresholds for the scale of edge-of-centre and out-of-centre development that should be subject to an impact assessment; and
 - Define any locally important impacts.



Current Market Shares

9.05 Based on the findings of the Household Survey existing facilities within the Borough (i.e. existing centres, freestanding stores, out-of-centre retail parks, etc.) **Table 9.1** summarises the market share achieved within the Study Area.

Table 9.1: Market Share of Existing Facilities within the Borough

Goods	Market Share (%)										
	Oldham	Manchester East	Stockport	Uppermill	Glossop	Droylsden	Denton	Ashton	Stalybridge	Hyde	TOTAL
Convenience	8.1	10.7	18.5	64.9	18.3	34.1	97.9	95.5	98.4	88.0	40.4
Comparison	10.1	18.0	11.0	42.7	23.7	35.0	68.2	78.7	66.3	61.7	32.0
Total	9.2	14.9	13.4	51.4	21.6	35.8	79.4	85.1	78.5	71.7	35.1

Source: NEMS Tameside Household Survey (August 2009)
Based on expenditure

9.06 **Table 9.1** illustrates that the highest retention achieved for all retail expenditure generated in a particular zone is within the Ashton-under-Lyne Zone, where more than 85% of retail expenditure generated (both convenience and comparison) is attracted to facilities in the Borough. This compares to only 9% of total retail expenditure generated within the Oldham Zone. This low market share is understandable given that this zone falls within the neighbouring authority of Oldham. Notably, within the Denton, Ashton-under-Lyne, Stalybridge and Hyde zones (the identified Core Catchment), at least 70% of total retail expenditure generated in each zone is directed to existing facilities within the Borough.

Retail 'Capacity' (Quantitative Need)

Convenience Goods

9.07 The market share achieved by all convenience goods facilities within the Borough derived from the Study Area is approximately 40% of expenditure generated in 2009. This increases to more than 95% within zones 7 through to 10 of the Study Area, which broadly equates to Tameside Borough (although excludes Droylsden). This suggests that overall limited convenience goods expenditure generated within broadly the Tameside local authority area (c. £14m in 2009) is being directed to competing facilities elsewhere.

9.08 Based on current market shares, our analysis identifies capacity in the short-term (i.e. 2014) of some £71m within the Borough. This is forecast to increase to more than £144m by 2027. This capacity compares to outstanding commitments (if all are implemented) within the Borough (not



including any new proposals as part of the Hattersley redevelopment) having a combined convenience goods turnover of approximately £18m in 2014, increasing to almost £19m by 2027.

9.09 Accordingly, outstanding commitments could meet a quarter (25%) of the identified capacity within the Borough through to 2014. However, there will remain notable residual capacity within the Borough of more than £53m in 2014, which is forecast to increase to almost £126m by 2027.

9.10 Importantly the identified capacity is available for the Borough as a whole. However, as outlined within the report there are particular needs for improved convenience goods provision to meet local needs in order to reduce overtrading and provide improved consumer choice and competition.

Comparison Goods

9.11 The market share achieved by all comparison goods facilities within the Borough is identified to be approximately 32% in 2009. This increases to 69% within zones 7 to 10 (inclusive) of the defined Study Area. This suggests that despite the strength and proximity of competing provision (most notably Manchester City Centre) existing facilities retain a relatively high proportion of comparison goods expenditure.

9.12 Of the comparison goods expenditure directed to facilities elsewhere from within zones 7 to 10 (c. £156m) most is identified to be directed to facilities in Stockport (8%) and Manchester (7%). In addition, some 6% of comparison goods expenditure generated is identified is spent online or through mail order.

9.13 By assuming that this market share remains constant and allowing for increases in Special Forms of Trading, this assessment identifies of some £76m in 2014 to support additional comparison goods floorspace within the Borough. This capacity is forecast to increase to £174m by 2019, to £334m by 2023 and to £463m by 2027. Existing commitments (if implemented) with an estimated turnover of approximately £143m in 2014, are identified to meet the identified capacity in the short-term – based on current market share. In the longer term, there is identified to be residual capacity of approximately £21m in 2019, increasing to more than £289m by 2027. Whilst our analysis suggests in the long term scope for a significant increase in the comparison goods offer within the Borough, any capacity over such a long period should be treated with a 'note of caution'.



Summary

9.14 **Table 9.2** provides a summary of retail 'capacity' (over and above outstanding commitments) for additional retail floorspace in the Borough on a centre-by-centre basis, assuming no change in existing market shares. It is important to note that the level of capacity identified in the long term should be treated with a note of caution.

Table 9.2 Capacity for Additional Retail Floorspace within Tameside Borough (2009-2027)

	Surplus Expenditure (£m)					Potential Floorspace Requirements (sq m net)				
	2009	2014	2019	2024	2027	2009	2014	2019	2024	2027
Convenience Goods										
Borough	47.04	71.38	97.84	126.29	144.38	2,830-9,315	5,815-14,135	7,890-19,180	10,085-24,510	11,460-27,855
Ashton-under-Lyne	36.18	46.60	58.48	71.24	79.34	2,875-7,235	3,795-9,225	4,715-11,465	5,690-13,825	6,295-15,305
Hyde	7.00	12.76	18.94	25.59	29.82	575-1,400	1,040-2,525	1,525-3,715	2,045-4,965	2,365-5,755
Denton	-	-	-	-	-	-	-	-	-	-
Stalybridge	13.37	16.20	19.23	22.49	24.55	1,100-2,675	1,320-3,205	1,550-3,770	1,795-4,365	1,950-4,735
Droylsden	1.66	2.78	4.46	6.28	7.43	135-330	225-550	360-875	500-1,220	590-1,435
Comparison Goods										
Borough	-	-	20.63	167.83	289.38	-	-	3,645-6,075	27,520-45,865	45,375-75,625
Ashton-under-Lyne	-	-	25.03	120.30	193.05	-	-	4,420-7,370	19,725-32,875	30,270-50,450
Hyde	-	2.88	14.44	37.77	55.52	-	550-915	2,550-4,250	6,195-10,320	8,705-14,510
Denton	-	-	-	19.70	42.38	-	-	-	3,230-5,385	6,645-11,075
Stalybridge	-	-	-	0.49	4.07	-	-	-	80-135	640-1,065
Droylsden	-	-	-	-	-	-	-	-	-	-

Notes: WYG (2010)
 Floorspace requirement based on an average sales density of between £5,000 - £12,155 per sq m for convenience goods and allowing for increased productivity of +0.2% per annum
 Floorspace requirement based on an average sales density of between £3,000 - £5,000 per sq m for comparison goods and allowing for increased productivity of +1.0% per annum between 2009 and 2014 and +1.5% per annum post 2014
 At 2007 prices

9.15 The capacity identified at **Table 9.2** is based on current market shares, both in terms of overall market share of all facilities in Tameside and for individual centres. It is important to note that any improvement within the retail offer both within and outside the Borough will have an impact on the identified capacity. For example, our analysis identifies quantitative need for further convenience goods floorspace within Ashton-under-Lyne (£47m by 2014). However, this capacity is due primarily to the strong trading performance of existing provision. The survey evidence suggests that residents from throughout Tameside currently use facilities in Ashton-under-Lyne, most notably the out-of-centre Asda store on Cavendish Road. Consequently, improvement in particular parts of the Borough (such as at Hattersley) may reduce the need for residents to continue using their current facility and therefore reduce this overtrading and subsequent capacity.

9.16 Similarly, the identified capacity for comparison goods is based on existing market shares. Therefore, any improvement in the retail offer, such as the implementation of extant permissions including the extension to The Arcades Shopping Centre in Ashton-under-Lyne, is likely to have an impact on shopping patterns within the Borough.



Qualitative Need

Convenience Goods

- 9.17 Throughout the Borough there is a reasonable provision of main food shopping destinations with limited convenience expenditure within Zones 7 to 10 (which broadly equates to the local authority area) being directed to facilities outside the Borough (c. 5%). However, within the Borough there is a qualitative need for further provision in order to address the overtrading at existing stores and in parts of the Borough to provide improved consumer choice and provide more sustainable shopping patterns, such as improved provision in Hattersley and potentially Ashton-under-Lyne and improved choice in Droylsden and Stalybridge.

Comparison Goods

- 9.18 The market share achieved by comparison goods facilities within the Borough from Zones 7 to 10 of the defined Study Area (69%) is less than that identified for convenience goods (95%). Despite this lower market share it is considered that collectively existing facilities are performing a relatively strong comparison goods shopping role, boosted by the recent IKEA store at the edge-of Ashton-under-Lyne Town Centre and the success of the Crown Point North Shopping Centre in Denton.
- 9.19 Although Ashton-under-Lyne is identified to be the dominant destination within the Borough for comparison goods shopping, its market share has reduced in recent years due to the strength of Crown Point North Shopping Centre. Given the sub-regional status of Ashton-under-Lyne it will be important that the quality of the overall retail offer of Ashton-under-Lyne Town Centre is improved through its retail and wider town centre offer, in order to reflect its position within the local hierarchy.

Role of Existing Centres

- 9.20 Based on the analysis undertaken, and in accordance with guidance in PPS4, it is possible to identify a hierarchy or network of centres within the Borough.
- 9.21 The total turnover of the five main centres identified for this study within the Borough is identified to be almost £789m in 2009 (both convenience and comparison goods). **Table 9.3** summarises the hierarchy, turnover and the market share achieved by the main centres within the Borough.



Table 9.3: Hierarchy and Market Share of the Main Centres within the Borough

Centre	Floorspace (sq m)	Convenience Turnover (£m)	Comparison Turnover (£m)	Total Turnover (£m)	Market Share in Study Area (%)	Market Share Amongst Centres (%)
1. Ashton-under-Lyne ¹	53,980	135.23	186.26	321.49	11.2	40.8
3. Hyde	40,340	98.45	79.27	177.72	6.2	22.5
3. Denton*	46,378	59.56	113.23	172.79	6.0	21.9
4. Stalybridge	13,650	49.16	18.62	67.78	2.4	8.6
5. Droylsden	16,141	28.85	19.90	48.75	1.7	6.2
TOTAL	170,489	371.25	417.28	788.53	27.5	100.0

Notes: WYG (2009)

¹ – Excludes Snipe Retail Park, Ashton Moss and IKEA

Floorspace based on occupied convenience and comparison goods floorspace only and derived from Experian Goad (updated) or WYG assessment

* Includes Crown Point North Shopping Park and Sainsbury's store At 2007 prices

9.22 Based on our analysis of the current role of existing centres within the Borough together with guidance contained in PPS4, WYG suggests the following hierarchy of centres:

Sub-Regional Town Centre

Ashton-under-Lyne

Town Centres

Denton

Hyde

District Centres

Stalybridge

Droylsden

Hattersley

Local Centres

Mossley

9.23 The above hierarchy is based on a combination of the existing retail trading performance of existing centres (as outlined at Table 9.3) and their geographical location, such as the catchment the centres serve and their proximity to higher-order centres

Key Recommendations and Future Role of Existing Centres

9.24 The retail strategy contained within the Local Development (LDF) should reflect the overall objectives of PPS4. This should include the need to promote the vitality and viability of town and



other centres as important places for communities. They should also have regard to the wider objectives of other strategies relating to the Region. These are outlined in the adopted RSS for the North West.

- 9.25 The policy approach contained within the Tameside LDF in relation to main town centre use (e.g. retail) should seek to encourage news facilities in existing centres of a scale consistent with their current role and function and that assist in maintaining their viability and vitality.

Ashton-under-Lyne

- 9.26 Within the Borough Ashton-under-Lyne serves an important convenience and comparison goods shopping role. However, despite being identified as the sub-regional centre in the Borough, Ashton-under-Lyne's comparison goods market share has declined in recent years due to increased competition within and outside the Borough. In particular the success of Crown Point North Shopping Park in Denton has had a notable impact on the comparison goods shopping role of Ashton-under-Lyne (particularly in the Clothing & Footwear sector).
- 9.27 Therefore, whilst the new market has helped to improve the overall attraction of the town centre, there is a clear need to improve the comparison goods role of Ashton-under-Lyne if it is to fulfil its role as a sub-regional centre. In addition to increasing the level of comparison goods floorspace in the town centre, there is also a specific qualitative need to improve the quality and range of the comparison goods sector. There is also an identified need for major leisure operators within Ashton-under-Lyne.
- 9.28 However, it is important that any additional retail development within Ashton-under-Lyne contributes to the vitality and viability of the centre. The proposed extension to the Arcades Shopping Centre will provide almost 20,000 sq m (gross) of additional floorspace within the town centre. However, there is some uncertainty as to which this scheme will be implemented, work may not commence until the Metrolink extension to Ashton-under-Lyne is completed.
- 9.29 Given this uncertainty and the level of retail capacity identified for Ashton-under-Lyne, it is important for the Council to seek to identify appropriate sites to meet the identified need. Indeed, if Ashton-under-Lyne Town Centre is to serve a sub-regional shopping role it will be important that opportunities are identified. Such opportunities could include developing underused areas within the town centre in order to provide a comprehensive development opportunity. In this respect,



opportunities may come forward following the completion of the Northern By-pass in Ashton-under-Lyne.

- 9.30 In addition to identifying sites to accommodate additional retail floorspace, the Council should also seek to identify opportunities to improve the wider quality of the town centre. These improvements could include improving linkages between the town centre and the train station, particularly to/from the St Petersfield area of the town and the immediate gateway/vista around the train station, and helping to revitalise secondary areas of the town centre such as Stamford Street, which is showing some signs of vulnerability.
- 9.31 In terms of convenience goods, whilst there is identified to be a need for further convenience goods floorspace (over and above outstanding commitments) this is based on maintaining existing market share. It is notable that the strong trading performance of existing convenience goods facilities in Ashton-under-Lyne is due (in part) to the wide trade draw of current provision. Consequently, improvement in the convenience goods offer elsewhere in the Borough (such as the proposed new district centre at Hattersley, which will be anchored by a large-format foodstore) is likely to reduce the need for residents within parts of the Borough to travel to facilities elsewhere, such as to Ashton-under-Lyne. Consequently, this would reduce the identified need for additional convenience goods floorspace in Ashton-under-Lyne, although food retailer should not dominate the scheme given the need to improve the retail offer of Ashton-under-Lyne Town Centre in order to reflect its sub-regional status.
- 9.32 In considering any future need for additional convenience goods floorspace in Ashton-under-Lyne it will be important that this located in-centre or at a good edge-of-centre location in order to address the imbalance between in-centre/edge-of-centre facilities and out-of-centre facilities. Indeed, existing large-format convenience goods provision within Ashton-under-Lyne is focused in out-of-centre locations where the opportunities for linked trips to take place with other businesses in the centre are limited. Therefore, it will also be important for the Council to identify appropriate opportunities to meet this need. In this respect, the proposed extension to the Arcades Shopping Centre could include additional convenience goods floorspace.
- 9.33 Overall, whilst there is likely to be a need for further convenience goods provision within Ashton-under-Lyne, even after taking into account proposed improvements elsewhere in the Borough, the



priority for any improvement in the retail offer in Ashton-under-Lyne should be in the comparison goods sector.

Hyde

9.34 Hyde is identified to be an important retail destination for residents within the south-eastern part of the Borough. In particular, Hyde is a popular destination for convenience goods shopping being anchored by an Asda and Morrisons store. Despite the strength of the convenience goods sector there is limited scope for additional convenience floorspace within Hyde, at least in the short-term, which will be met by outstanding commitments. Furthermore, the proposed new district centre at nearby Hattersley is likely to reduce the strong performance of existing facilities in Hyde and the subsequent need for additional convenience goods floorspace in the longer term.

9.35 Although the comparison goods offer in Hyde is not as strong as the convenience goods sector, Hyde still performs an important role in meeting some of the day-to-day shopping needs of the local population. Indeed, although existing floorspace within Hyde is identified to be trading below expected levels, there remains capacity for further comparison goods floorspace. However, it is evident that opportunities within Hyde to accommodate additional retail floorspace are limited. Although opportunities within Hyde are limited to create additional retail floorspace within the district centre, the Council should consider other areas of improvement that would contribute in the long-term, such as improving connections from both the train station and bus station to the district centre.

Denton

9.36 Denton serves an important convenience goods shopping role. Furthermore, the Crown Point North Shopping Park development has significantly increased the attraction of Denton in recent years as a comparison goods shopping destination. Analysis of shopping patterns within the Borough since 2005 identifies that Denton's market share has increased at the expense of Ashton-under-Lyne. Furthermore, this overall increase in the attraction of Denton through the success of the Crown Point North Shopping Park has impacted on Denton by shifting the focus of retail activity away from the traditional district centre.

9.37 The continued success of Crown Point North Shopping Park suggests a need for further comparison retail floorspace through to 2027. However, there is a need for the Council to address the falling market share achieved by the sub-regional centre of Ashton-under-Lyne. Therefore, the Council



should not seek to encourage significantly more retail floorspace (particularly in the non-bulky goods sector) within Denton. Indeed, whilst opportunities exist to provide additional floorspace within Denton, such as the Oldham Batteries site, it will be important for the Council to carefully consider development proposals on this site to ensure that it does not impact upon future plans for Ashton-under-Lyne Town Centre or further impact upon the traditional district centre of Denton (such as restricting development to bulky comparison goods, for which a need has been identified, or leisure uses).

- 9.38 Given that major new comparison goods development in the Borough should be focused in Ashton-under-Lyne, the Council should not seek to encourage significantly more retail floorspace within Denton. Similarly, there is no pressing need for further convenience goods floorspace in Denton given its existing offer and current shopping patterns.

Stalybridge

- 9.39 Stalybridge serves a limited role in serving the retail needs of the local population. The centre generally serves a convenience goods shopping role (together with a strong evening-economy) with the majority of expenditure directed towards the Tesco store, which dominates shopping patterns in the local area. Despite the limited convenience goods offer in Stalybridge, given the strong performance of existing facilities (most notably the Tesco store) there does appear scope for some additional convenience goods floorspace in Stalybridge. However, it is notable that the strong trading performance of existing floorspace in Stalybridge is due, in part, to the attraction of facilities in Stalybridge from the Uppermill Zone of the defined Study Area (which comprises part of the neighbouring authority of Oldham). In this respect, extant permission does exist for a new foodstore at Greenfield, which will be well positioned to meet some of the day-to-day convenience goods shopping needs of the local population and reduce the need to travel to competing facilities elsewhere, such as to Stalybridge.
- 9.40 Accordingly, the existing market share (and subsequent need) for additional convenience goods floorspace in Stalybridge may reduce in the future. Despite this, there is likely to remain a need for further convenience goods floorspace in Stalybridge, in particular in terms of providing improved consumer choice and provide increased competition to the dominant Tesco store.
- 9.41 Therefore, it will be important for the Council to seek to identify appropriate opportunities to accommodate further retail development in Stalybridge. In this respect, the Stalybridge West



opportunity site, which lies to the west of the defined centre beyond Caroline Street, provides an opportunity for further retail and mixed use development. This site provides the only opportunity within Stalybridge for large-scale comprehensive development. However, should this site come forward for development it will be important that linkages between the site and the existing retail core are improved in order to integrate with the existing business and so that any development at this location contribute to the long-term vitality and viability of the centre. Other opportunities within Stalybridge are likely to be much smaller than the Stalybridge West site. Such sites might include the Casablanca site to the south of Armentieres Square, Longlands Mill and Castle Street Car Park. It will be important for the Council to fully assess the suitability of such sites in considering future town centre development in Stalybridge.

- 9.42 The comparison goods offer of Stalybridge is much more limited and identified to be trading below expected levels. Given this, there is no pressing need for further comparison goods floorspace, particularly if the retail offer in nearby Ashton-under-Lyne is to be improved to reflect its sub-regional centre status.

Droylsden

- 9.43 Droylsden District Centre primarily serves a convenience goods shopping role. Although its role as a comparison goods destination is more limited, this is reflective of its position within the local retail hierarchy and the proximity of Ashton-under-Lyne. Despite this, the centre does have representation from a number of a national multiple retailers, which are primarily focused within the Droylsden Centre.
- 9.44 Consequently, given the current role and function of Droylsden and its position within the local hierarchy, our assessment identified that future retail need is focused on the convenience goods sector rather than the comparison goods sector. In this respect, there is scope to improve the convenience goods offer, most notably by improving consumer choice for local residents and by providing increased competition to the dominant Tesco store within the centre. However, the new district centre currently under construction at nearby Openshaw (which falls within the Manchester local authority area), which is to be anchored by a Morrisons foodstore, is likely to impact upon shopping patterns within the local area. Consequently, the identified need for additional convenience goods provision is likely to reduce once the new Morrisons store opens.



Future Planning Policy

9.45 As previously highlighted, PPS4 (Policy EC3) that local planning authorities should:

'...consider setting floorspace thresholds for the scale of edge-of-centre and out-of-centre development which should be subject to an impact assessment under (EC16.1) and specify the geographic areas these thresholds will apply to.'

9.46 In accordance with guidance in PPS4, it is appropriate as part of the Local Development Framework to identify floorspace thresholds. WYG does not consider a blanket threshold may not be suitable for all types of centres across the Borough. For example, a 500 sq m convenience store (that could be operated by Tesco Express or Sainsbury's Local) will have a greater impact on a smaller centre when compared to a 500 sq m facility located just outside a larger centre such as Ashton-under-Lyne. Therefore, in developing the policy in the future, it may be more appropriate to have a range of thresholds depending upon which centre the development applies to.

9.47 The policy could advocate a tiered approach whereby the following threshold should be applied in determining planning applications at edge-of and out-of-centre locations are subject to an impact assessment:

Sub-Regional Centre/Town Centres – over 500 sq m (gross);

District Centre – over 300 sq m (gross); and

Local Centre – over 200 sq m (gross).

9.48 The impact on existing centres of development beyond these thresholds should be considered for all centres falling within the likely catchment of any new retail development.

9.49 In addition, and again in accordance with PPS4, it is important for local planning authorities to identify the primary shopping area of existing centres as this will form the basis in applying the sequential approach. In this respect, Annex B to PPS4 identifies the Primary Shopping Area as the:

'Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are contiguous and closely related to the primary shopping frontage).'



9.50 Based on the guidance contained in PPS4, the plans contained at **Appendix 6** provide suggestions to the possible extent of the primary shopping area of the main centres within the Borough.

Implementation and Monitoring

9.51 It is important that any future planning application for the improved retail provision in the Borough should be supported by a detailed retail assessment, based upon the baseline evidence contained within this study, or any subsequent updates. The supporting information will also need to demonstrate that there would not be any material adverse impact upon the vitality and viability of any existing centres, taking into account any strategies for the regeneration of such centres and that any development accords with the sequential approach of in-centre first, followed by edge-of-centre sites.

9.52 The recommendations and projections within this study are intended to inform the Council's LDF strategy regarding new retail and leisure development, and to assist development control decisions. The study provides a broad overview of the potential need for further retail development up to 2027. However, projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available.

9.53 In this context, we would recommend that this study should be updated every three to four years and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- Population projections;
- Local expenditure estimates (information from MapInfo or other recognised provides);
- Growth rate assumptions for expenditure per capita (information from MapInfo or other recognised data provides);
- Forecast increases in turnover to floorspace efficiency;
- The impact of potential increases in home and internet shopping;
- Existing retail floorspace and average turnover to floorspace densities (floorspace surveys and turnover data from Mintel and Verdict); and
- Implemented development within and around the Borough.



9.54 It may be appropriate to undertake an updated household survey, should there be approvals and implementation in the intervening period of any major development proposals within and in the vicinity of the Sub-Region, which could significantly affect shopping patterns.

9.55 In addition to this, taking into account guidance in PPS4, it is also appropriate for local planning authorities to review the vitality and viability of existing centres on a regular basis. This should be informed by a regular update of the survey of ground floor uses in the main centres in the Borough. This will allow the Council to analyse the mix and diversity of uses in the centres, vacancy levels, any deficiencies which may arise, and the overall performance of the centres over time, and should be used to inform the review and preparation of policies and proposals.