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Sheffield & Rotherham Joint Retail & Leisure Study

Sheffield City Council & Rotherham Metropolitan Borough Council

February 2017

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Contents

Appendices

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For and on behalf of GVA Grimley Limited

1. Introduction

Scope and Purpose

1.1 This report has been prepared by GVA in response to an instruction by both Sheffield City Council ('SCC') and Rotherham Metropolitan Borough Council ('RMBC'), in 2016, to prepare a Joint Retail and Leisure Study ('the Study'). The Study will provide essential background information to assist both Councils in the production of their relevant future development documents, and to support their development management function.

1.2 In Sheffield, there have a been a few studies in the past few years with an 'Independent Assessment of the Retail Strategy for Homeware Retailing in Sheffield' produced by GVA in July 2012 and a 'Retail Study' produced by Cushman and Wakefield in March 2010 ('the 2010 Study'). GL Hearn also produced a 'Retail Capacity Update' in 2014

1.3 In Rotherham, Colliers have produced two reports; the 'Rotherham Town Centre Retail and Leisure Study' in January 2010 (with the Retail Group) and the borough wide 'Retail and Leisure Study' in March 2011.

1.4 The objectives of this study, as identified in the brief issued by the Councils are as follows:

- Provide a new survey of household shopping patterns for convenience and comparison goods across the Sheffield and Rotherham catchment areas;
- An assessment of the trends in retail and leisure development and an assessment of demand from operators for representation in the Sheffield and Rotherham area;
- An assessment of the vitality and viability of Sheffield City Centre, Rotherham town centre and also nine of the most important town/district centres across the two settlements
- An quantitative assessment of retail capacity for convenience and comparison goods floorspace across Sheffield and Rotherham up to 2034;
- An assessment of any changes in shopping patterns and the catchment areas of Sheffield and Rotherham since the completion of the previous retail studies in both local planning authority areas;
- An assessment of the leakage of shopping trips/expenditure from Sheffield's and Rotherham's catchments and consideration of how this leakage may be clawed back in the future;
- An assessment of how Rotherham town centre serves the retail and leisure needs of its local catchment population and how this has changed since the completion of the previous similar assessment in 2010;

- Review the effectiveness of the retail and town centre policies in Sheffield's draft City Policies and Sites document and in the adopted Core Strategy.

Contents of Report

1.5 The remainder of this report is structured as follows:

- Section 2 provides a summary of the salient national and local planning policy context facing retail, leisure and 'town centre' issues across both Sheffield CC and Rotherham MBC, including the contents of the National Planning Policy Framework ('NPPF'), Planning Practice Guidance ('PPG'). It will also review emerging planning policies within both Local Planning Authorities administrative areas.
- In Section 3 we provide a review of the salient trends affecting retailing and leisure provision in the UK, along with key issues affecting town centres and how these trends have the potential to affect both Councils approach to planning for their 'town centres' plus retail and leisure issues.
- In Section 4, we provide an overview of the sub-regional hierarchy and how both Sheffield CC and Rotherham MBC, and their centres sit within this hierarchy. It will also comment on relevant national schemes affecting the sub-region i.e. high speed rail links.
- In Section 5, we provide a review of the health of Sheffield City Centre and the several defined district centres across the City. In addition, we provide a review of the scale and type of out of centre retail provision across Sheffield and the surrounding area, and discuss how this out of centre provision (including Meadowhall) is affecting the performance of the City Centre and other retail facilities.
- Section 6 provides a similar review to Section 5 but this time focusing on the health of Rotherham town centre and the three other defined town centres across the Borough.
- We provide a basis for the assessment of quantitative and qualitative need for additional retail and leisure provision in Sheffield and Rotherham in Section 7.
- Section 8 provides an assessment of quantitative and qualitative need for additional retail and leisure floorspace in Sheffield. This exercise draws upon the results of the available household survey data to provide an assessment of the availability of retail expenditure to support new retail floorspace in the city, along with a review of the qualitative aspects of existing retail and leisure provision within and outside of the defined centres.
- Section 9 provides a similar review to Section 8 but this time focusing on the need for retail and leisure floorspace in Rotherham.
- Section 10 provides a series of policy recommendations for SCC in relation to retail and leisure uses, including recommendations regarding the need to allocate land to meet the

identified need for new retail and leisure floorspace and recommendations regarding town centre boundary policy allocations.

- Finally, in section 11, we provide a summary of the findings of the study along with a set of recommendations for both Councils in relation to retail, city/town/district centre and leisure issues for their development plan documents.

1.6 All plans and statistical information referred to in the text of this report are contained in appendices found at the rear of this document.

2. Planning Policy and Strategy Context

Introduction

2.1 From the outset of this Study, it is important to summarise the salient parts of national planning policy and recent research relating to retailing and leisure. This section will also review relevant existing and emerging development plan policies for both SCC and RMBC.

National Planning Policy

National Planning Policy Framework

2.2 The National Planning Policy Framework ('NPPF'), which was published on 27 March 2012, sets out the Government's planning policies for England. It replaced the suite of national Planning Policy Statements, Planning Policy Guidance and some Circulars with a single, streamlined document.

2.3 At the heart of the National Planning Policy Framework is a 'presumption in favour of sustainable development', which should be seen as a golden thread running through both plan-making and decision-taking. The National Planning Policy Framework encourages local planning authorities to positively seek opportunities to meet the development needs of their area.

2.4 The National Planning Policy Framework continues to recognise that the planning system is plan-led and therefore local plans, incorporating neighbourhood plans where relevant, are the starting point for the determination of any planning application. In line with the government's aim to streamline the planning process, each Local Planning Authority should produce a single local plan for its area, with any additional Development Plan Documents or Supplementary Planning Documents to be used only where clearly justified.

2.5 The National Planning Policy Framework advocates a 'town centres first' approach, and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. In planning for town centres local planning authorities should:

- recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- define a network and hierarchy of centres that is resilient to anticipated future economic changes;

- define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary shopping frontages in designated centres and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres that provide customer choice and a diverse retail offer which reflect the individuality of town centres;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- allocate a range of suitable sites to meet the scale and type of economic development needed in town centres. Where town centre sites are not available, Local Planning Authorities should adopt a sequential approach to allocate appropriate edge-of-centre sites;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development can play an important role in ensuring the vitality of centres; and
- where town centres are in decline, plan positively for their future to encourage economic activity.

2.6 The NPPF indicates that local planning authorities should ensure that the local plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. These assessments should be integrated and take full account of relevant market and economic signals. Local planning authorities should use the evidence base to assess, inter alia:

- the needs for land or floorspace for economic development, taking account of both quantitative and qualitative requirements for all foreseeable types of economic activity over the plan period, including retail and commercial leisure development;
- the existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs;
- the role and function of town centres and the relationship between them, including any trends in the performance of centres; and
- the capacity of existing centres to accommodate new town centre development.

2.7 Ultimately, whilst the NPPF (paragraph 154) specifies that local plans should be aspirational, they are required to be realistic and deliverable. They should address the spatial implications of economic, social and environmental change and set out opportunities for development and clear policies indicating what will or will not be permitted and where. The recommendations of this study are therefore grounded within this context.

2.8 The NPPF constitutes a material consideration which local planning authorities should take into account from the date of publication in development management decisions.

Planning Practice Guidance ('PPG')

2.9 In March 2014 the Department for Communities and Local Government launched the web-based Planning Practice Guidance, which cancelled a number of previous planning practice guidance documents, including the Practice Guidance on Need, Impact and the Sequential Approach (2009). Although it does not constitute a statement of government policy, it provides technical guidance on how to prepare a robust evidence base and how to assess the impact of proposals for main town centre uses.

2.10 The web-based resource provides guidance on how to assess and plan to meet the needs of main town centre uses in full through production of a positive vision or strategy for town centres. This strategy should be based on evidence of the current state of town centres and opportunities to meet development needs and support their viability and vitality and should consider:

- the appropriate and realistic role, function and hierarchy of town centres in the area over the plan period. This will be informed by audits of existing centres to assess their role, vitality, viability and the potential to accommodate new development. It should cover a three to five year period, but also take the lifetime of the local plan into account and be reviewed regularly;
- the most appropriate mix of uses in the centre to enhance overall vitality and viability;
- the potential to expand centres or enable new development or redevelopment of under-utilised spaces to accommodate the scale of need identified for main town centre uses. This should involve evaluating different policy options (for example, expanding the market share of a particular centre) or the implications of wider policy such as infrastructure delivery and demographic or economic change;
- appropriate timeframes for provision of new retail floorspace;
- complementary strategies that may be necessary or appropriate to enhance the town centre and help deliver the vision for its future; and
- how car parking provision can be enhanced and both parking charges and enforcement be made proportionate in order to encourage town centre vitality.

2.11 In seeking to identify appropriate, sequentially compliant development site opportunities, it is necessary to complete a thorough assessment of the suitability, viability and availability of locations for main town centre uses. The guidance directs local planning authorities to take full account of relevant market signals when planning for town centres and keep land allocations under regular review.

2.12 The PPG sets out a range of indicators relevant when assessing the health of town centres over time, and we use these indicators as the basis of our 'health check' assessments set out in sections 5 and 6 of this report. These include:

- diversity of uses;
- proportion of vacant street level property;
- commercial yields on non-domestic property;
- customer views and behaviour;
- retailer representation and intentions to change representation;
- commercial rents;
- pedestrian flows;
- accessibility;
- perceptions of safety and occurrence of crime; and
- state of town centre environmental quality.

2.13 When applying the sequential approach in plan-making, local planning authorities should take into account the need for main town centre uses, the supply and demand for land, and whether there are sites which are suitable, available and viable having regard to the nature of the need that is to be addressed. If the additional main town centre uses cannot be accommodated in town centre sites, the next sequentially preferable sites should be considered. Local plans should contain policies to apply the sequential test to proposals for main town centre uses that may come forward outside identified sites or locations allocated in the local plan.

Local Planning Policy

2.14 A review of the relevant parts of both Sheffield and Rotherham's statutory development plans, along with an overview of emerging policy has been undertaken. In addition a summary has been included of the contents of supplementary planning guidance documents which have been adopted by both Councils to provide further guidance on retail and town centre issues.

Sheffield City Council

2.15 At the time of preparing this Study, Sheffield's Statutory Development Plan consists of the Core Strategy (2009) and the saved policies from the Unitary Development Plan ('UDP') (1998).

Core Strategy (2009)

2.16 The Core Strategy was adopted in March 2009. A range of evidence and background reports were used by SCC to inform the Core Strategy including:

- 'A City Wide Quantitative Study of Comparison Goods Retailing' (Cushman & Wakefield Healey & Baker June 2002);
- Sheffield Retail Study (White Young Green, October 2003); and
- Sheffield Retail Study: Revised Convenience Goods Expenditure Capacity Assessment (June 2005).

2.17 The Core Strategy sets out the overall vision, objectives and spatial strategy and policies for Sheffield over the period to 2026.

2.18 **Chapter 3** identifies the Vision and Objectives for Sheffield with the City Centre and complementary areas to be regenerated as the core location for major expansion of business, shopping, leisure and culture (Para 3.9).

2.19 Para 3.13 details the objectives for Successful Neighbourhoods as:

- Vital and successful neighbourhoods sustained, restored or created;
- Local economic and development initiatives promoted at the district and neighbourhood level to support local communities and small businesses;
- Provision at district and neighbourhood level of local community, health, education, training, shopping, open space, leisure and other services and facilities.

2.20 **Chapter 4** identifies that the City Centre (defined as the area within the Inner Ring Road together with Kelham / Neepsend) is the key economic driver for the City and the City Region. It goes on to state that:

> *"The City Centre will play a crucial role in the transformation of the city's economy and in the development of Sheffield's role as the core city for its city region. It will be the focus for most new development of offices, shops, leisure, culture, higher education and other services".*

2.21 **Chapter 5** introduces the policies contained within the Core Strategy. It also notes the areas that form the basis of the spatial strategy. It states the heart of the strategy is the City Centre with peripheral areas including Mosborough/Woodhouse, Chapeltown/Ecclesfield, Stocksbridge/ Deepcar.

2.22 **Chapter 6** focuses on promoting economic prosperity and providing sustainable employment. Policy CS7 (Meadowhall) outlines the strategy for Meadowhall and states:

> *"the shopping centre will remain at around its present size and large-scale leisure uses that cannot be located in the City Centre or at its edge may also be located close to the Interchange".*

2.23 It continues to state that Lower and Upper Don Valleys will complement the City Centre and:

"all new development around the Meadowhall Shopping Centre should be integrated with the existing development".

2.24 **Chapter 7** looks at enriching the Sheffield City Region as the most sustainable location for regional services, jobs and facilities. This chapter identifies that the spatial policies for shopping are based on a three-tier hierarchy of centres of different sizes serving a range of catchment populations.

2.25 **Policy CS14 (City-wide Distribution of Shopping and Leisure Development)** states that 'new shops and leisure facilities with city-wide and regional catchments will be concentrated in the City Centre Primary Shopping Area and immediately adjacent shopping streets of the City Centre, which will be strengthened through a major retail-led, mixed use regeneration scheme, which will form the New Retail Quarter'.

2.26 This policy also confirms that Meadowhall will remain at around its present size and that major non-food retail development will not occur outside the City's Primary Shopping Area and District City Centre's and their edges. Para 7.3 indicates that major non-food development will usually consist of increases in gross floorspace of more than 2,500sq m.

2.27 **Policy CS15 (Locations for Large Leisure and Cultural Developments)** indicates that the development of leisure and cultural facilities that serve the city and wider region will be located in, or at the edge of, the City Centre where possible. It goes on to state that if no sites are suitable or available in the City Centre or its edge, then major leisure facilities will be located in the Lower Don Valley, and if no sites are available in existing centres then leisure development serving smaller catchments will be located in the specified alternative concentrations in the Upper Don and Sheaf Valleys

2.28 **Policy CS17 (City Centre Quarters)** outlines the strategy for the various quarters in the City Centre, which are identified as (a plan identifying the location of these quarters is included in Figure 5.1 in Section 5 of the report:

- Heart of the City
- Cathedral Quarter
- Cultural Industries Quarter
- Sheaf Valley
- The Moor
- Devonshire Quarter
- St Vincent's
- Castlegate
- Kelham/Neepsend
- West Bar
- Wicker/Riverside

2.29 **Policy CS18 (Shopping in the City Centre)** specifically notes that:

- Major non-food development will be concentrated in the Primary Shopping Area, extending from Moorhead to the north end of Fargate. This area will be strengthened…by the development of the New Retail Quarter.

- Within and adjacent to the Primary Shopping Area, development that might individually or cumulatively prejudice or delay the success of the regeneration of the Primary Shopping Area will not be permitted.
- Retail uses will also be required on the ground floor frontages of...The Moor (north of Fitzwilliam Gate) and High Street...at the approaches to the Primary Shopping Area.
- More limited levels of new retail uses will be located on the ground floor frontages on Division Street, Devonshire Street, King Street, Angel Street, Haymarket, Arundel Gate (between High Street and Norfolk Street) and Surrey Street.

2.30 **Chapter 8** focuses on creating attractive, sustainable and distinctive neighbourhoods. Within this chapter, Policy CS34 (District Centres) lists the following 17 District Centres, of which 6 (in bold) are the focus of this study. These centres:

> *"will be encouraged in fulfilling their role of providing for everyday needs with a range of retail, leisure and community facilities, appropriate in scale and function to the role of the centre".*

- Banner Cross
- Broomhill
- **Chapeltown**
- Chaucer (proposed)
- Crookes
- **Crystal Peaks**
- Darnall
- **Ecclesall Road**
- Firth Park
- Heeley
- **Hillsborough**
- London Road
- Manor Top
- Spital Hill
- Woodhouse
- **Woodseats**

2.31 **Policy CS36 (Hillsborough District Centre)** emphasises that Hillsborough district centre will be maintained and supported at around its present size by consolidating development and by continuing environmental improvements and centre management.

2.32 **Policy CS39 (Neighbourhood Centres)** states that new development for local shops and community facilities to serve everyday needs of the community will be encouraged.

UDP (1998)

2.33 Whilst the Core Strategy has superseded some of the policies in the UDP many of the policies ('saved policies') continue to form part of the development plan. These 'saved policies' will be superseded once the new Sheffield Plan is formally adopted.

2.34 **Chapter 9** of the UDP details Sheffield's shopping strategy with Policies S2 & S3 providing the Council's framework for shopping in the City Centre.

2.35 **Policy S2 (Development of Frontages in the City Centre's Retail Core)** indicates that new retail and complementary uses which add to the vitality and viability of the Central Shopping Area will be encouraged. The 'Central Shopping Area' is the entire shopping area within the City Centre and the Retail Core consists of the frontages on the main shopping spine of the Central Shopping Area. The policy indicates that:

- In the Fargate area, only shops (A1) will be permitted on ground floor frontages;
- In the rest of the Retail Core on ground floor frontages the preferred use will be shops (A1); but acceptable uses include offices used by the public (A2); food and drink outlets (A3); and amusement centres. All other uses will be unacceptable.
- Non shopping uses on ground floor frontages will be required to provide and retain a window display or frontage appropriate to a shopping street location.

2.36 **Policy S3 (Development in the Central Shopping Area)** accepts the following uses, other than on the ground floor frontages in the Retail Core:

- Preferred: Shops (A1); offices used by the public (A2); food and drink outlets (A3); and housing (C3);
- Acceptable: Business (B1); hotels (C1); residential institutions (C2); community facilities and institutions (D1); leisure and recreation (D2); amusement centres; car parks; and hostels.
- Unacceptable: General industry (B2); warehouses and open storage (B8); car showrooms; garage and transport depots; petrol filling stations; and scrapyards.

2.37 The following policies detail the Council's framework for proposals in other shopping locations:

- Policy S4 (District Centre Shopping) – retail and food retail development will be promoted within these areas. Food retail will be promoted at their edges where there are no suitable sites within such Centres. All the District Centres that are part of this study are mentioned within this policy.
- **Policy S5 (Shop Development outside the Central Shopping Area and District Centres)** – details the strategy for shop development outside the Central Shopping Area and District Centres. It provides the strategy for edge of centre and other development, and also provides a set of criteria for all retail development outside the Central Shopping Area and District Shopping Centres.
- **Policy S6 (Conditions on Major Shop Development)** - details that conditions that will be applied to the permission for new shop development to restrict the range of goods sold and the maximum or minimum unit size.
- **Policy S7 (Development in District and Local Shopping Centres)** – identifies shops (A1) as preferred uses and leisure and recreation facilities (D2) as acceptable.

- **Policy S8 (Development at Meadowhall)** identifies acceptable and unacceptable uses. Proposals for major non-food development will not be permitted where it undermines the Plan strategy of concentrating such development within the central Shopping Area and District Shopping Centres, and provides a set of criteria to assess this against. It also details the criteria that proposals for non-retail development must comply with.
- **Policy S9 (Development in Retail Parks)** outlines the type of development acceptable at retail parks and includes a list of all the retail parks in Sheffield.
- **Policy S10 (Conditions on Development in Shopping Areas)** provides a criteria based approach to assessing if a change of use would be permitted.

2.38 **Chapter 11** of the UDP outlines the Council's approach to Leisure and Tourism. Policy LR2 (New Leisure Uses and Facilities) provides a criteria based approach to new leisure uses and facilities. The policy carries on to states that 'for entertainment and leisure development which attract a lot of people the development must not undermine the vitality and viability of the evening economy of the City Centre and comply with the conditions of Policy S5'.

Emerging Policy

2.39 Sheffield City Council is underway with developing a new Sheffield Plan to replace both the UDP and the Core Strategy. Consultation on the 1st stage of the Sheffield Plan ended in January 2016. The main document in this Consultation, the 'Citywide Options for Growth to 2034' reports on the challenges and opportunities for planning a growing city.

2.40 Page 17 refers to the challenges for how the Sheffield Plan shapes changes and supports the City Centre and district/local centres across Sheffield. The challenges include:

- How to integrate new retail development with a wider range of uses in the City Centre;
- How to balance leisure uses, and particularly the night time economy, with a growing residential use of the City Centre;
- How to balance demand for out-of-centre shopping with the need to regenerate city and district/local centres;
- How to support district and local centres in providing a range of shops and services that meet the needs of all groups in the society.

2.41 The document continues to comment on opportunities for the City Centre and district/local centres. It refers to the Sheffield Retail Quarter scheme and a drive for more independent retailers especially those serving specific markets.

2.42 This document includes a section on the options for Retail and Leisure growth, and poses the question:

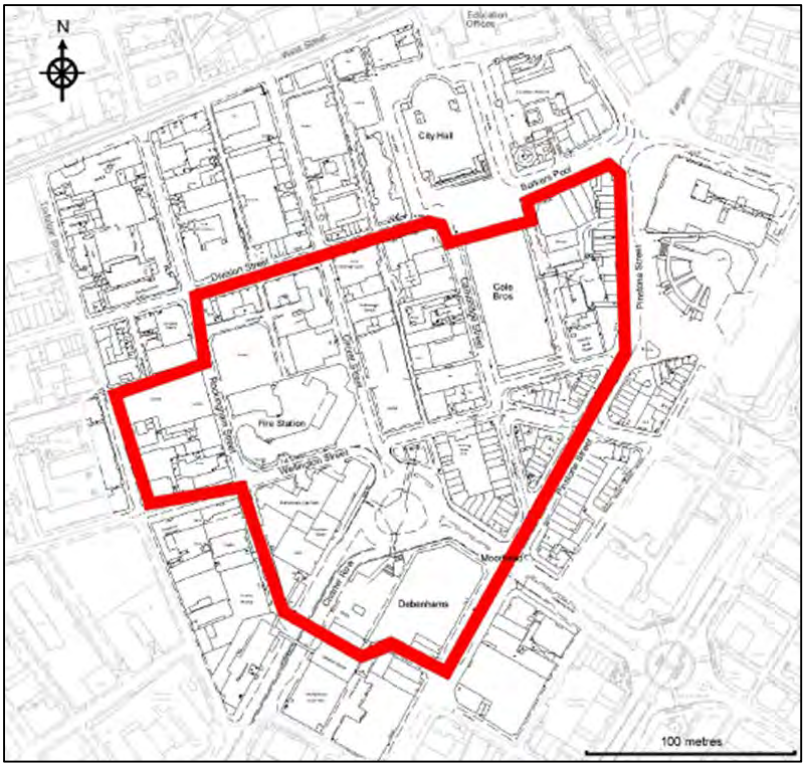
"Should areas such as Meadowhall Shopping Centre and retail parks be identified as commercial centres and preferred locations for retail and leisure development, if no in- or edge-of-centre sites are available?"

Other Supplementary Planning Guidance

2.43 One of the SPG documents adopted by SCC relates to the New Retail Quarter area, and was adopted in July 2002. The SPG describes the New Retail Quarter proposal as 'a large retail led mixed-use development containing at least 65,000sq m of retail floorspace'. It is to be developed in the area shown on Figure 2.1 below, centred on land west of Pinstone Street broadly bounded by Rockingham Street, Division Street and Barkers Pool. The site lies in the middle of the Retail Core of the Central Shopping Area between Moorhead and Fargate.

2.44 The boundary illustrated in Figure 2.1 has altered slightly with the Pre-Submission Proposals Map with some units along the south of Division Street, to the west of John Lewis. It also now excludes the Debenhams store, located on The Moor and the former BT exchange on Charter Row. The later building however was included within the red line boundary for the current pending application for the Sheffield Retail Quarter development (SCC ref. 15/02917/OUT). The full extent of the red line boundary for this application is provided within Appendix III.

Figure 2.1: A plan of the New Retail Quarter as illustrated with the SPG



2.45 This document explains the strategy for the 'New Retail Quarter', including guidelines for development. In addition, it outlines SCC's approach to development outside of the Central Shopping Area:

> *"Outside the Central Shopping Area the Council will not permit major non-food retail development that may prejudice or delay the achievement of the Council's re-development strategy for the New Retail Quarter".*

Rotherham MBC

2.46 At the time of this study the Statutory Development Plan for Rotherham consists of the Core Strategy (2014) and the saved policies from the UDP (1999).

Core Strategy (2014)

2.47 **Objective 5** of the Core Strategy indicates that the Council will take a "town centre first" approach to development decisions. Rotherham's 2011 Retail and Leisure Study was used by RMBC to inform the Core Strategy.

2.48 **Policy CS1 (Delivering Rotherham's Spatial Strategy)** outlines the approach to delivering Rotherham's Spatial Strategy and details the Borough's settlement hierarchy. The hierarchy is shown in Table 2.1 below:

Table 2.1: The hierarchy of settlements in Rotherham

Hierarchy	Settlement	Indicative Retail Provision (Gross sq m of floorspace)
Main Location for new growth	**Rotherham urban area** (including Bassingthorpe Farm Strategic Allocation)	7,500sq m convenience goods 11,000sq m comparison goods (Rotherham town centre)
Principal Settlements for growth	**Dinnington**, Anston and Aughton Common; **Wath-upon-Dearne**, Brampton, Bierlow and West Melton; and Bramley, Wickersley and Ravenfield Common	1,500sq m convenience goods in Bramley, Wickersely and Ravenfield Common
Principal Settlements	Waverley; **Maltby** and Hellaby; Aston, Aughton and Swallownest; Swinton and Kilnhurst; and Wales and Kiveton Park	Zero
Local Service Centres	Catcliffe, Treeton and Orgreave; Thorpe Hesley; Thurcroft; Todwick; Harthill; and Woodsetts	Zero
Other Villages	Laughton en le Morthen and Harley	Zero
Green Belt Villages		Zero

(N.B. Town Centres assessed as part of this study highlighted in bold)

2.49 The Rotherham urban area is defined as the main location for new housing and employment growth, with the town centre being the principal focus for new retail and leisure floorspace although more localised retail and service floorspace is available at Parkgate and Rawmarsh.

2.50 **Policy CS12 (Managing Change in Rotherham's Retail and Service Centres)** sets out the approach to retail and service centres. It stipulates that 'to maintain and enhance the vitality and viability of the Borough's retail and service centres new retail, leisure, service facilities and other main own centre uses will be directed to the most appropriate centre in line with the hierarchy' which is set out in the table below.

Table 2.2: The hierarchy of retail and service centres in Rotherham

Hierarchy	Centre	Strategy
Principal Town Centre	Rotherham Town Centre	Maintain and enhance role as the principal town centre
Town Centre	Dinnington	Improve the range of retail and service provision, reduce vacancies and improve townscape and landscaping
	Maltby	Improve pedestrian mobility / accessibility, the quality and range of comparison shopping outlets, and environmental quality
	Wath-upon-Dearne	Maintain the range of retail and service provision
District Centre	Kiveton Park, Parkgate, Swallownest, Swinton and Wickersley	(There is a different strategy for each of the town centres. All are largely based around maintaining and improving the quality and range of retail and service provision, and environmental quality. Please refer to the policy in the Core Strategy for further detail).
Local Centres	To be defined on the Policies Map	Encourage developments which improve convenience and comparison goods and service facilities provision and reduce vacancies.

2.51 There are a number of Local Centres identified in Rotherham however these are not detailed in Policy CS12 but are to be shown and located on the associated policies map.

2.52 Policy CS12 goes on to state that:

> *"to achieve this and meet forecast need we will plan to accommodate 9,000sq m gross of convenience goods floorspace, and 11,000sq m gross of comparison goods floorspace (comprising 3,000sq m gross of non-bulky goods floorspace and 8,000sq m of bulky goods floorspace)".*

2.53 The policy also refers to the sequential approach and impact assessments (the latter being for retail, leisure or office proposals of 500sq m gross or above on the edge of or outside of designated centres)

2.54 **Policy CS13 (Transforming Rotherham Town Centre)** details the Council's plans to regenerate Rotherham town centre and to help maintain its role. It stipulates that the Town Centre will be the main focus for the majority of new retail, office and other town centre uses within Rotherham. It includes a list of developments the Council will support in the town centre which include:

- Promote Rotherham Town Centre as a family friendly destination;
- Delivery of new entertainment, leisure and cultural offer focused on the western part of the town centre;
- Support well integrated proposals on the former Guest and Chrimes site which support the vitality and viability of the town centre; and
- Support for proposals which improve the range and quality of retail and leisure facilities.

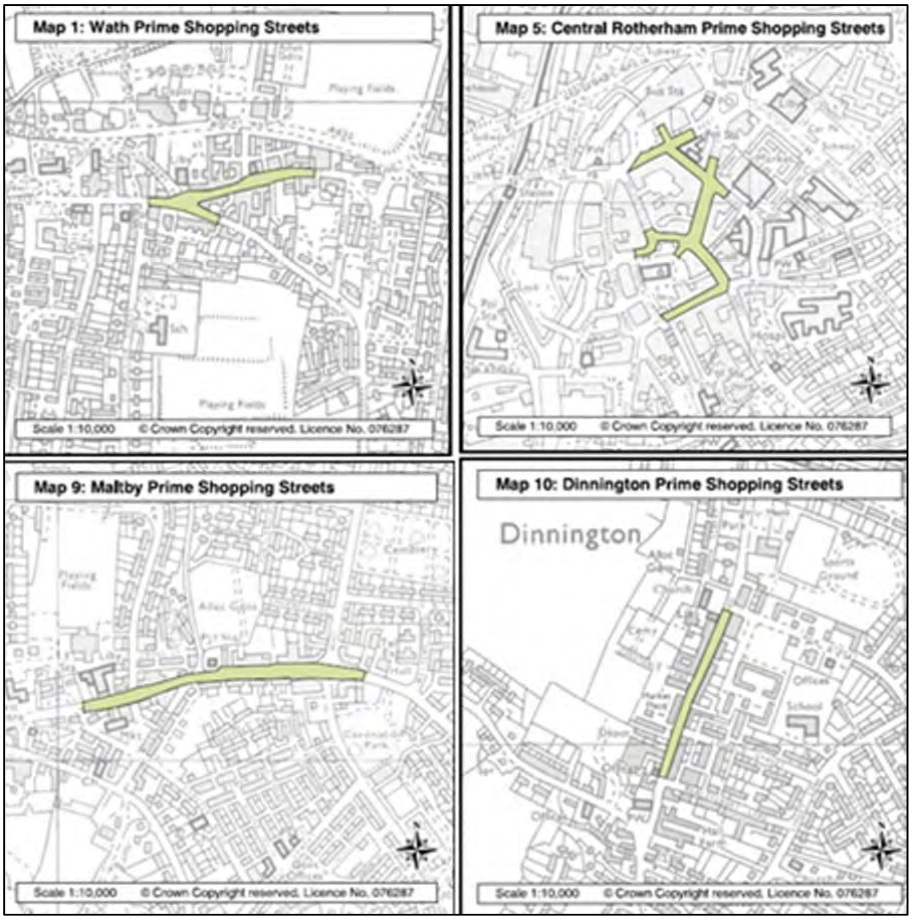
2.55 **Policy CS14 (Accessible Places and Managing Demand for Travel)** indicates that 'the Council will work with partners and stakeholders to focus transport investment on making places more accessible and on changing travel behaviour'. It goes onto list several criteria that will help promote accessibility through the proximity of people to employment, leisure, retail, health and public sector services.

UDP (1999)

2.56 The following saved policies in the UDP which conform to national planning guidance and have not yet been replaced by the Local Plan documents are taken into account in determining planning applications :

- **Saved Policy RET1.1 (Shopping Environment)** – provides a criteria based approach for the development of high quality, attractive and secure environments within shopping areas.
- **Saved Policy RET1.2 (Prime Shopping Streets)** – it stipulates that the Council will limit ground floor use to Class A1, unless a proposed use contributes to the vitality and viability of the centre and does not undermine its retail character and function. The prime shopping streets are shown in Figure 2,2 below.

Figure 2.2: An extract from the UDP showing the Prime Shopping Streets for the centres included as part of this study



- **Saved Policy RET4 (Out-of-Centre Retail Warehouses)** – proposals (over 1,000sq m gross) catering specifically for bulky durable goods, which may not be readily accommodated within existing town centres, will be acceptable in principle on a limited number of sites at Canklow Meadows, Cortonwood and Parkgate-Aldwarke.
- **Saved Policy RET6 (Local Shopping Provision)** – supports development proposals for convenience shopping facilities serving local communities generally and the needs of those residents with restricted mobility, in established local shopping centres or in new locations or residential growth. The policy also encourages the retention of existing shops and other local services and opposes changes from retail use, unless it can be demonstrated no longer viable.

Rotherham Economic Growth Plan 2015-2025

2.57 The Economic Growth Plan sets out the vision for Rotherham to be a place where businesses flourish and grow, the population is highly skilled and enterprising and there is quality housing provided for all sections of society. It seeks to deliver 10,000 net new jobs in the private sector

over the next 10 years, create 750 additional new businesses over the next 5 years and increase GVA through growing, attracting and starting businesses.

2.58 One of the key themes is Rotherham town centre, and the aim to create a town that provides an attractive, safe, clean destination with strong independent retail offer including; high quality cafes, a thriving High Street and a range of markets. It continues to comment on challenges relating to Rotherham being located within 3 miles of both Meadowhall Shopping Centre and Parkgate, meaning it faces some of the highest levels of competition of any town centre in the country.

2.59 It also advises that the evening and night time economy is focused around pubs and clubs, with no real family offer available and the overall culture and leisure offer is relatively weak.

2.60 The ambition of the town centre is:

- To improve the perception of the town centre as a place to shop, live, work and visit.
- The current Civic Theatre attracts significant numbers of visitors and remains a popular destination within the town centre. However, there are opportunities to further develop the culture/ leisure offer, including a cinema with associated developments, a hotel and a more family-centric evening offer.
- To redevelop the markets complex as a shopping destination and as a link between Tesco and the retail core of the town centre.
- To deliver a major office, leisure or housing development on the Forge Island site.
- To improve the retail offer, building on our success to date and our designation as a Portas Pilot.
- To increase town centre living which is critical to the vitality of the area and includes targeting a new retirement living development.

Emerging Policy

Publication Sites and Policies

2.61 The Council submitted its Local Plan Sites and Policies document to the Secretary of State on 24th March 2016 for examination in public. This emerging document, once adopted, will form part of Rotherham's Statutory Development Plan and will sit alongside the Core Strategy. It will replace the remaining saved UDP Policies.

2.62 The retail use allocation table accompanying draft Policy SP1 (Sites allocated for Development) includes the following sites in the Rotherham Urban Area:

Table 2.3: Draft allocations within the emerging Local Plan Sites and Policies document

Reference	Name	Area (Sq. Metres) (gross)
R1	Outdoor markets complex, Rotherham Town Centre	5,000
R2	Drummond Street car park, Rotherham Town Centre	5,000
R3	Corporation Street, Rotherham Town Centre	1,000
R4	Main Street/ Bawtry Road, Bramley	6,000
R5	Littlefield Road / Constable Lane, Dinnington	3,500
R6	Harding Avenue, Symonds Avenue, Rawmarsh (allocated as a local centre)	5,200

2.63 Table 7 refers to Policy CS12 of the Core Strategy which advises on a requirement for 20,000sq m gross of retail floorspace (split provided above). It goes on to detail that the site allocations provided in the emerging plan equate to 25,700sq m.

2.64 **Draft Policy SP22 (Development within Town, District and Local Centres)** indicates that main shopping areas are the primary locations for new and existing shop facilities. New retail development within these areas will be supported and non- retail uses at ground floor level will only be supported where the requirements of draft Policies SP23 and SP24 are met.

2.65 It goes on to state that in Town, District and Local Shopping Centres but outside of Main Shopping areas, the following uses will be acceptable in principle:

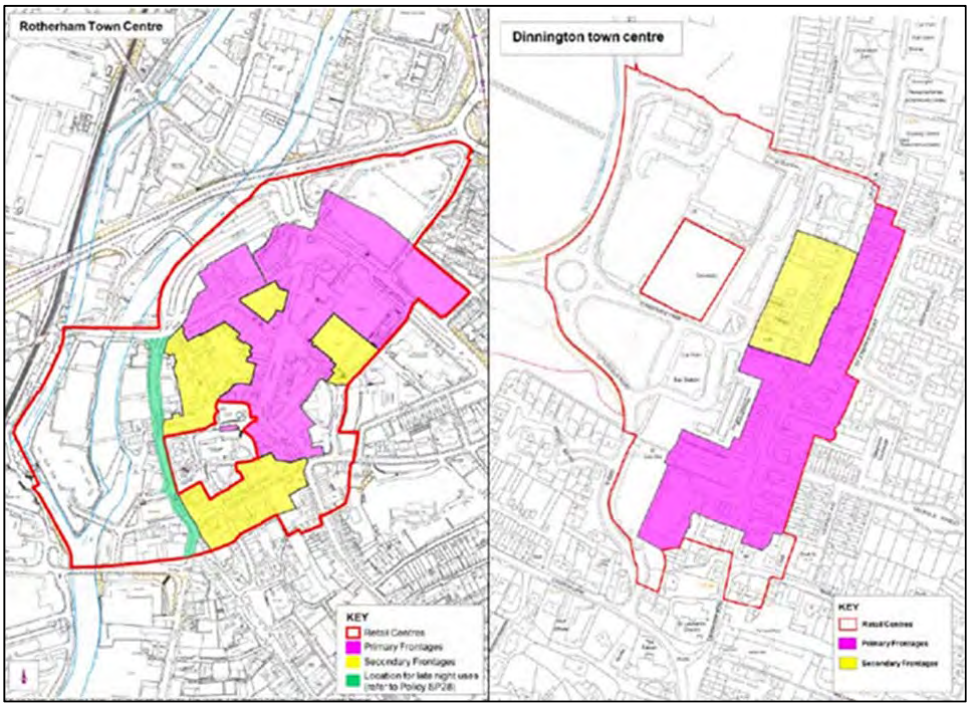
- A1 shops; A2 financial and professional services; A3 restaurants and cafes; A4 drinking establishments; A5 hot food takeaways; B1 offices; D1 non-residential institutions; D2 assembly and leisure; C1 hotels; C3 dwelling houses; theatres; retail warehouse clubs; casinos; amusement arcades; Taxi booking offices; and public toilets, baby changing and breast feeding facilities.

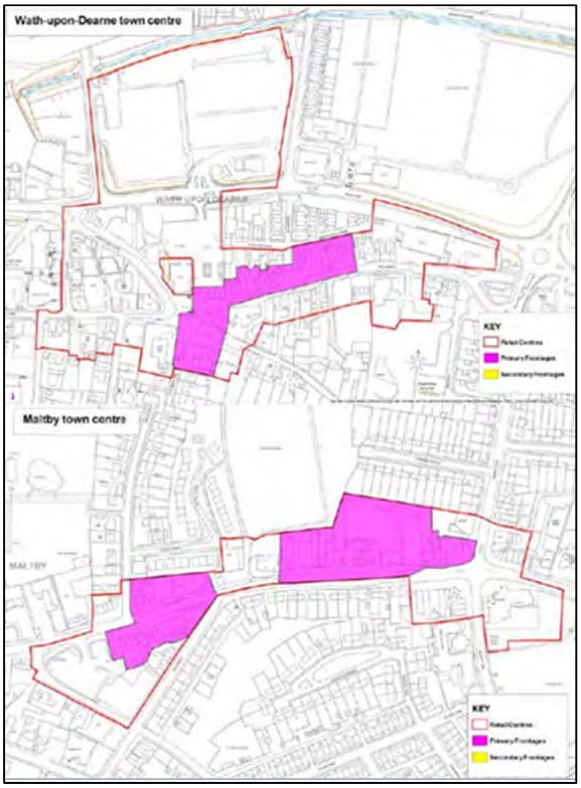
2.66 **Draft Policy SP23 (Primary Shopping Frontages)** provides a criteria based approach for proposals for A2 financial and professional services and A3 restaurants and café uses at ground floor level within Primary Shopping Frontages. These frontages can be seen in Figure 2.3 below.

2.67 **Draft Policy SP24 (Secondary Shopping Frontages)** provides a criteria based approach to the development of A2 financial and professional services, A3 restaurants and cafés, A4 drinking

establishment uses, D1 non-residential institutions and D2 assembly and leisure at ground floor level within Secondary Shopping Frontages. These frontages can be seen in Figure 2.3 below.

Figure 2.3: An extract from the Publication Sites and Policies document showing proposed primary and secondary shopping frontages





2.68 **Draft Policy SP25 (Hot Food Takeaways)** also provides a criteria based approach to the development of hot food takeaways within town, district and local centres (but outside of Primary and Secondary Shopping Frontages.

2.69 **Draft Policy SP26 (Out-of-Centre Retail Parks and Other Out of Centre Developments)** notes that proposals for such development will not be supported unless the proposal satisfies the requirements of Core Strategy Policy CS12.

2.70 **Draft Policy SP27 (Rotherham Town Centre Regeneration)** notes that the redevelopment of the following areas will be encouraged:

- Forge Island (bounded by the River Don, the Canal and Bridge Street) for office or leisure uses. The plan notes that the former Tesco site offers the potential to deliver new entertainment, leisure and cultural uses. Alternatively there is potential for major officer development.
- The bus station and multi-storey car park area to provide a new transport interchange, parking and leisure uses. The plan highlights the potential of this area to improve the condition of existing building, along with new leisure facilities that will have good public transport accessibility.
- Allocation R1 relates to the outdoor market and proposes an increased level of accessibility to the markets complex and to provide more market-attractive retail floorspace. As part of this proposal there is an aspiration to improve accessibility between Tesco store and town centre.
- Allocation R2 proposes new retail floorspace for the Drummond Street area. The aspiration here is to provide new retail floorspace in close proximity to public transport facilities.
- Allocation R3 relates to land at Corporation Street and proposes retail floorspace at ground floor level with residential uses above. The aspiration here is to contribute towards increasing urban living and the vitality and viability of the town centre.

2.71 **Draft Policy SP28 (Rotherham Town Centre Evening Economy)** states that planning permission will be granted for pubs, clubs, restaurants, cafés and night time entertainment uses in Rotherham town centre. It goes onto state that late night uses which open beyond midnight will only be encouraged in Westgate; Market Place and Corporation Street.

2.72 **Draft Policy SP67 (Development Within Mixed Use Areas)** lists key sites and those relating to D2 (Assembly and Leisure) uses include:

- MU01 – Manvers Lakeside;
- MU06 – Parkgate Business Park (North);
- MU07 – Masbrough Street (West of Centenary Road), Rotherham

- MU09 – Main Street, Rotherham
- MU12 – Doncaster Gate / Percy Street, Rotherham

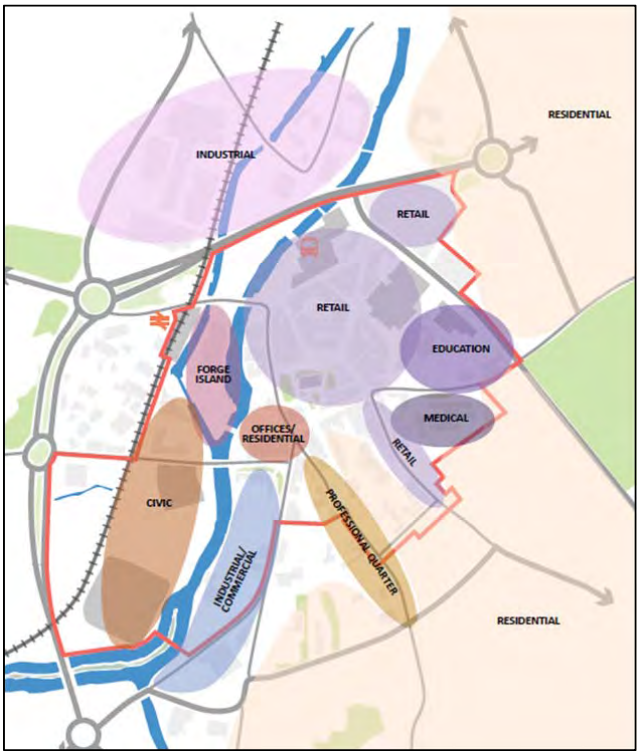
Rotherham Town Centre SPD

2.73 Following a public consultation process between 18th April 2016 and 16th May 2016, the Rotherham Town Centre SPD was adopted by the Council on 11th July 2016. The document focuses on 'eight key moves' which are expected to result in the creation of a thriving, re-energised town centre and deliver the future vision for Rotherham. Those directly related to retail and leisure are listed below:

- Development of a central Mixed Use Leisure Hub at Forge Island;
- Creation of pedestrian 'Gold Routes' through the Town Centre, improving wayfinding and reconfiguring Town Centre footfall;
- Opening up Rotherham's Riverside;
- Support for 'Making and Trading' in the Town Centre.

2.74 The SPD separates the town centre into different character areas and quarters with retail being located in the heart of the town centre. The 'Retail Quarter' surrounds Market Hall and encompasses the Minster and the traditional High Street. It refers to issues relating to retail vacancies, with this causing an absence of a night time economy. Figure 2.4 below illustrates the location of these town centre character areas and quarters.

Figure 2.4: An extract from the draft Rotherham Town Centre SPD showing the Rotherham town centre character areas and quarters



3. Retail and Leisure Trends

3.1 To put our assessment into context and inform our advice on the need for additional retail and leisure floorspace in the Sheffield and Rotherham areas, we have undertaken a review of the current retail market and social trends influencing the retail sector. Our review draws on published data sources, including research by Experian and Verdict.

3.2 This section also provides a brief analysis of relevant government research and town centre strategies which have come forward over the last few years, partly in response to the retail trends identified, to promote a consistent policy objective which seeks to strengthen town centres.

Economic Outlook

3.3 Following the vote to leave the European Union, the Bank of England forecast (in August 2016) that, due to uncertainty, economic activity would weaken and unemployment would rise. It also forecast that inflation would rise above the target of 2% as a result of the depreciation of sterling that has accompanied the referendum result.

3.4 However, since August 2016, the Bank of England has reported that indicators of activity and business sentiment have recovered from their lows immediately following the referendum and estimates of GDP growth in the third quarter of 2016 are above expectations. The data suggests that the near-term outlook for activity is stronger than expected with higher growth in household spending and a more resilient housing market. However, by contrast, investment intentions have continued to soften and the commercial property market has been subdued.

3.5 The Bank of England expects output growth to be stronger in the near term but weaker towards 2019. This reflects the impact of lower real income growth in household spending and also the uncertainty over future trading arrangements (including the risk that UK-based firms' access to EU markets could be materially reduced, which could restrain business activity and supply growth over a protracted period)

Population Change

3.6 The rate at which the UK population is growing is accelerating. Between 1971 and 1991 it increased by just over 0.1% pa, whereas over the subsequent 20 years it increased by almost 0.5% pa. Over the period 2016-26 it is expected to increase by 0.7% pa, or 7.1% in total. This population growth will vary between regions over the next 10 years, with London expected to show the strongest growth (+12%), followed by the East (8.7%), South East (7.9%) and the South

West regions (+7.0%). This contrasts with growth of just 4.5% in Yorkshire and Humberside and 3.7% in the North West. Marked disparities can occur between local authorities within the same region, due to differences in housing demand, land availability and local policies.

3.7 Advances in healthcare and medicine mean that people are living much longer. It will therefore be increasingly important for Councils to ensure that older consumers are adequately catered for with the right type of facilities in the right locations. The proportion of the population aged over 65 is expected to increase from 17.5% of the total population in 2016 to 19.5% in 10 years' time, a growth rate of 20%, which is more than double the rate of total population growth (7.1%).

Retail Expenditure and Sales Efficiency

Retail Expenditure Growth

3.8 Set out below are the latest retail expenditure forecasts from Experian, dated November 2016.

3.9 Comparison goods spending is expected to grow at a much higher rate than convenience goods spending over the period to 2035. For comparison goods, expenditure growth per head was 2.2% in 2013, increasing to 7.2% in 2014 and 4.6% in 2015 according to Experian. Following a forecast growth of 3.3% in 2016 Experian forecast much lower growth in 2017 and 2018 (of 1.4% and 1.0% respectively) and then annual average growth in comparison goods spending is expected to be around of 3% pa between 2019-2023.

3.10 For convenience goods, spending declined every year in real terms between 2007-2015. Experian estimate that there will be no growth in 2016 and a further decline in 2017 and 2018 (of -0.2% and -0.9% respectively). Between 2019-2023 Experian forecast static expenditure and then modest growth of +0.1% per annum between 2024-2035.

3.11 To put these forecasts into historical context, comparison goods growth averaged 4.2% pa over the last 40 years, with stronger growth of 5.2% pa over the last 30 years and 5.6% pa over the last 20 years. Convenience goods growth has been much weaker, averaging 0.4% pa over the last 40 years and 0.3% pa over the last 20 years.

Online Spending

3.12 The popularity of online retailing continued to grow rapidly over the past decade. Most retailers now have an online presence, thus it is expected that this growth will be slow going

forwards. It is, however, likely to continue outpacing growth in total retail sales each year from 2014 to 2019, rising from £41.5bn to £56.7bn, an overall increase of 37%1.

3.13 Internet spending and other forms of sales which are not derived from physical floorspace need to be taken into account when undertaking retail studies. Special Forms of Trading ('SFT'), includes all types of non-store retailing (internet, markets and mail order) and in 2015 was equivalent to 13.4% of total retailing (15.6% for comparison goods and 9.2% for convenience goods). In 2021, Experian predict that non-store sales (SFT) will reach 18.3% of total retail, growing steadily to around 19.6% by 2035.

3.14 Not all of non-store sales reduce the need for physical floorspace (for instance click and collect and the fulfilment of many grocery internet orders through local stores). Therefore, to account for this when calculating the effect of SFT on the need for retail floorspace, Experian recommend adjustments of 12.4% for comparison goods and 3% for convenience goods in 2016. These are forecast to rise to 15% and 4.4% respectively by 20212.

Sales Efficiency Growth

3.15 The sales efficiency growth rate represents the potential ability of retailers to increase their productivity and absorb higher than inflation increases in their costs (e.g. rent, rates and service charges) by increasing their average sales densities. Applying a turnover 'efficiency' sales density growth rate is a standard approach used in retail planning studies and has been used in this study in accordance with good practice.

3.16 Following the weak or negative overall sales growth during the recession and the growth of online shopping, many retailers have struggled to increase or maintain sales density levels and, together with other financial problems, this has led some retailers into administration. As a result sales density growth is now significantly lower than the high rates seen during the boom of the latter half of the 1990s and first half of the 2000s.

3.17 The trend towards the demolition of inefficient stores and the provision of more modern stores with higher and more efficient sales densities is expected to result in less scope to increase comparison goods sales densities in the future. Accordingly, Experian expect an efficiency growth rate for comparison goods of 1.9% pa between 2018 and 2022 and 2.0% pa between 2023-2035.

3.18 Scope for increased sales densities is even more limited for convenience goods because the majority of foodstores already drive high sales efficiencies. An efficiency growth rate of -0.1%

[1] Source: Verdict, 2014
[2] Experian: Retail Planner Briefing Note 13, October 2015

pa between 2018 and 2022 and zero between 2023-2035 is recommended by Experian and these assumptions inform our approach.

Internet Growth & Multichannel Retailing

3.19 The online shopping population is reaching saturation, with over 40m online shoppers in the UK expected by 2017. Future growth in the market is likely to come from increased spend driven by new technology and improved delivery options. Changes in technology are driving sales with the expansion of tablet devices which provide a better browsing experience. According to Verdict, in most sectors the average spend per trip is 64.5% higher on a tablet than a laptop/PC[3].

3.20 Click and collect is forecast to be one of the most significant drivers of growth, with a rise of 62.7% in click and collect purchases expected between 2013 and 2018[3]. The service provides physical retailers with an important benefit over pure internet operators and creates opportunities for making additional purchases when customers collect orders from stores.

3.21 The growth in online sales has implications for bricks and mortar stores as it potentially reduces the need for so many outlets. However, trends indicate that online and in-store shopping channels are becoming more blurred as shoppers increasingly research items online or in stores before making purchases. According to Verdict, in 2012 61% of shoppers researched goods online before purchasing in store, and some 38% of customers researched goods in store before buying online.

3.22 These trends, combined with the importance of 'click and collect' highlight that physical stores will still have a significant role in the multichannel shopping environment, although their size and format will differ from traditional stores. The advantages of physical stores, in terms of the shopping experience, service and immediacy of products in a showroom setting, will see a network of key stores remain a fundamental component of retailer's strategies to provide an integrated multichannel retail proposition.

Changing Retailer Requirements

Space Requirements

3.23 The retail sector has undergone significant changes over the last decade which has fundamentally altered how, where and when we shop. This has had major implications for retailers' space requirements, which combined with the recent recession, has changed the retail landscape of our towns and cities.

[3] Verdict: Online & Remote Shopping, E Retail in the UK (August 2013)

3.24 During the recession retailers' margins were squeezed, whilst other costs continued to rise and a raft of multiple and independent retailers either collapsed or have significantly shrunk their store portfolios. The decline in the amount of occupied retail space in town centre locations has not typically been offset by new retail developments. Many town centre schemes have been put on hold or significantly scaled down in size, and with 'fairly weak' expenditure growth forecast in the medium term, retailers are expected to remain cautious about store expansion.

3.25 The growth of the internet means that retailers no longer need stores in every town to achieve national coverage. Many retailers are therefore focusing their development programmes on the provision of large flagship stores in strategic locations, supported by smaller satellite stores and transactional websites. The larger flagships accommodate full product ranges whilst smaller stores offer more select ranges, supplemented by internet kiosks allowing access to the full range. This offers many advantages to retailers including lower property costs, more efficient logistics and being able to open stores where there is a high level of demand despite there being space restrictions.

3.26 Research by Verdict indicates that, in 2009, there were 293,000 physical stores and this is expected to fall to 278,000 in 2016 and then remain relatively constant to 2019. This fall in store numbers was also accompanied by a fall in the amount spent in the UK's high streets, from £110bn in 2009 to £107bn in 2016.

3.27 This polarisation of retailing will result in larger dominant centres continuing to attract key retailers (where space is available), with medium sized centres potentially struggling to attract investment. Local, or neighbourhood, centres should be less affected by this trend and are likely to retain their attraction for top-up and day-to-day shopping. In addition to national multiple retailers, all levels of centre in the retail hierarchy accommodate local independent traders. Such traders face pressure from both the internet and national multiples and have found that success lies in being able to offer a product or service not available elsewhere, or a level of customer service which marks them apart from mainstream retailers. Indeed, this level of differentiation can mark a town out as a specialist in a certain area of retailing.

Out-of-Centre Retailing

3.28 Retailers are opting to develop stores in the most strategic and cost effective locations, with a notable resurgence of out-of-centre destinations, which offer benefits of lower rents, larger retail units and in most cases, free car parking. According to Verdict, out-of-town retailing is the only form of retailing which has seen store numbers increase between 2004-2014, with a 2.1% increase, against 13% falls for town centres and neighbourhood shops.

3.29 Many traditional town centre retailers have developed out-of-town store formats, including John Lewis, who now operate a portfolio of 'At Home' stores in out-of-centre locations, as well as other retailers such as Next (Next Home, Next Home & Fashion) and TK Maxx (TK Maxx and Homesense formats).

The Role of the Town Centre

3.30 In recent years much has been made of spiralling vacancy rates in town centres and the pressures the traditional high street is under. While it is true that the changing role of high streets is an issue for retailers and society alike, it is important not to overplay the woes of the channel. High streets remain the most visited locations, with 82.1% of consumers having shopped there in the past 12 months. Moreover, these shoppers visit, on average, more than once a week. Indeed the high street retains many strengths. It is the predominant location of many leading brands.

3.31 The challenge is that, as the biggest location, the high street has the most to lose from the growth of new areas particularly neighbourhood, malls and online. It will be the smaller town centres which lose out and particularly those also under pressure from uneconomical rates and rents charges and difficulty providing parking facilities.

3.32 With new channels springing up and fighting for a share of shopper spend, some town centres will grow, some will stagnate and some will become smaller or obsolete. However, overall the high street will remain a hugely significant channel for retail for the foreseeable future and one retailers can't afford to blindly dismiss.

3.33 An on-going transference of spend from physical locations to online means retailers have to change the way they approach each of the physical channels. In many ways, retail parks enjoy the best synergies with the internet. With lower rents and easier access, retail park stores can be used to provide showrooms to complement a retailer's online experience. They are also more practical for fulfilling click and collect orders, and even dispatching stock for home delivery. However, few retailers are yet to exploit this in a way consumers appreciate.

3.34 Neighbourhood stores also fit well into a multichannel strategy. They can be used for small, local shops to 'top up' larger online orders and to fulfil click and collect orders although the latter obviously presents some logistical issues.

3.35 High streets face the most difficult task in adapting to an 'online world'. In order to survive and thrive they need to focus on what they can offer that's different, such as the enjoyment of the shopping experience, or the ability to physically interact with products and retailer brands.

3.36 As retail evolves so do the places where retailers are looking to open stores and expand. Expansion no longer means automatically looking through vacant town centre units. Demand for new neighbourhood stores in ultra-convenient locations, set against a lack of supply, has led to a huge increase in unit change of usage in order to create new retail space. The grocers in particular have re-purposed old pubs, houses and offices. Retail park stores are also changing, with demand for ever larger spaces in reverse. Instead, spaces are being sub-divided and sub-let to drive sales per square foot.

Retail Sector Trends

Food and Grocery

3.37 The top four supermarkets (Tesco, ASDA, Sainsburys and Morrisons) continue to dominate the market and represent approximately 55% of the total convenience market[4]. Although this has fallen from 59% in 2011.

3.38 With vast store networks and online offers, their coverage reached peak levels in recent years. However, combined with weaker spending on convenience goods, the transfer of trade online and the rise of the discounters (ALDI and Lidl), expansion plans have been put on hold and the top four retailers have diverted investment to cutting prices on goods rather than increasing the quantum of floorspace in their larger store portfolios. Indeed, space within some larger format stores is being sub-let to restaurants and other retailers. An example of this is Sainsburys with Argos concessions in a number of its stores.

3.39 The development of smaller store formats for top up food shopping has become increasingly popular in response to consumers seeking to reduce waste by moving from weekly shops to more frequent smaller shops. As a result, many of the main operators are expanding their smaller concept stores - Tesco Express, Sainsbury's Local, Little Waitrose, Marks & Spencer Simply Food etc.

3.40 The value/discount retailers are continuing to expand, having gained considerable market share during and after the recession. Aldi and Lidl have both succeeded in attracting customers who are looking to trade down in price but not quality, and between 2011 and 2016, Aldi has increased its market share by three and a half times, from 1.9% to 5.3% Over the same period, Lidl's market share has risen from 1.9% to 2.7%. ALDI have recently overtaken the Co-op as the 5th largest grocer in the UK by market share.

3.41 Food retailers are also continuing to develop online offers to meet increasing consumer demand for convenient food shopping, much of which is still fulfilled through existing store

[4] Verdict – predicted 2016 market share levels for the biggest four grocery retailers

networks. Click and collect services are expanding into the grocery sector with some retailers developing 'drive-thru' collection points for picking up online orders.

Clothing and Footwear

3.42 By 2017, Verdict estimates that the clothing and footwear sector will represent 15.9% of total retail spend (a marginal increase from 15.2% in 2012). The proportion of clothing sales transacted online is expected to rise to just over 20% by 2017 as browsing services improve.

3.43 Low levels of consumer confidence in addition to high prices are expected to keep clothing and footwear sales volumes low. Premium and luxury brands will continue to maintain their consumer appeal, whilst growth from value retailers will become more subdued as they seek to ensure their profitability.

Premium and Luxury Goods

3.44 More affluent consumers have been able to maintain a higher level of personal and discretionary spending during the recession and therefore the premium and luxury goods sector has remained relatively strong. There is still high demand for premium brands and goods across all retail sectors, from clothing and accessories to high tech items.

3.45 In response to this trend, Verdict predict that the premium sector of the UK department store market (e.g. Harrods and Selfridges) will account for 43% of total department store expenditure in 2017 as midmarket department stores (e.g. John Lewis, House of Fraser and Debenhams) expand designer and luxury goods ranges.

Electricals

3.46 The electrical sector has suffered as a result of the recession as households cut back on 'big ticket' items combined with the shift of spending online. Since 2008 the proportion of electrical spending which takes place online has more than doubled to 43%[5]. Casualties in the sector include Comet and Jessops, along with Best Buy who exited the UK market.

3.47 Growth remains strong however for smaller, high tech items such as tablets and premium electrical goods, with retailers such as Apple and John Lewis continuing to do well. There is also demand for 'value' ranges of electrical goods, much of which has been captured by the supermarkets. Over the medium-term at least, sales of big-ticket items are likely to remain subdued.

[5] Verdict: UK Retail Review & Sector Forecasts to 2017

Homewares

3.48 Growth in the more traditional part of the homewares market (such as furniture and floorcoverings) is heavily reliant on the housing market and has been weak in recent years. Growth is expected to remain subdued, but will improve as the housing market strengthens. The softer end of the homewares market (i.e. smaller more decorative items), has been more resilient as consumers look at cheaper ways to refresh their homes.

Music, Video and Books

3.49 Technology is removing the need for physical stores as consumers can now download/stream music and films directly. As a result the music and video sector has shrunk significantly with negative growth in retail spending. Over three quarters (78%) of music and video sales are now online and Verdict predicts that by 2017 online sales will account for 90% of the market.

3.50 The book sector has in recent years been heavily influenced by the growth of e-reader devices (e.g. Kindle), although this growth appears to be weakening. By 2018 it is estimated that around three-quarters of book sales will be via the internet and, of this market, around half will be attributed to digital sales (i.e. ebook readers such as Kindle). However, for the first time in several years, the high street bookseller Waterstones returned to profit in 2016/2017.

Summary

- Economic growth will continue to remain muted over the plan period, with relatively weak expenditure growth in the short-medium term.
- It is evident that the traditional high street faces many challenges, not least from the impacts of the recession, including tightening of retail spending and changing consumer behaviour, but also from increasing competition posed by the internet, multichannel retailing and out of centre developments.
- Town centre strategies which support the continued evolution of the high street are considered ever more vital. This may involve providing a high quality shopping 'experience', maximising the benefits of tourist trade, and improving the mix of retail and non-retail outlets to increase length of stay and spend.
- It will be important for town centres to be well positioned to be able to adapt to on-going changes in the retail and leisure sector over the development plan period and to reaffirm their unique selling points which differentiate their retail offer from other centres.
- The on-going pattern of polarisation suggests that larger centres are well placed to maintain and enhance their offer. However, this is dependent on continued investment to ensure the right mix of retailers and other services.

4. Sub-regional hierarchy

Introduction

4.1 Before the study provides a detailed review of the health of the main 'town centres' in Sheffield and Rotherham, it is important to provide the sub-regional context for Sheffield and Rotherham, including their relative place in the sub-regional retail hierarchy. In addition, this section also reviews local economic initiatives that have been set up by the public sector, such as the Sheffield City Region Local Enterprise Partnership.

The Local Enterprise Partnership ('LEP')

4.2 In addition to the current and future development plan documents, another initiative which will be relevant to the future of retailing and 'town centres' in the Sheffield and Rotherham area is the actions of the LEP. Both LPAs are located within the Sheffield City Region LEP, with the City Region also including Barnsley, Bassetlaw, Bolsover, Chesterfield, Derbyshire Dales, Doncaster and North East Derbyshire.

4.3 The LEP's Economic Overview has identified 9 priority sectors which are recognised as key to the future economic growth and job creation in the city region. Included in these 9 priority sectors are Retail Group and a Sport, Leisure and Tourism Group.

4.4 The vision for the Retail Sector Group is to develop the Sheffield City Region as the premier shopping area of choice in the north of England. The group has identified that in the Sheffield City Region the retail sector has an economic output of over £1.6 billion, and employs around 79,000 people. The LEP has forecasted that the retail sector will continue to grow in the future.

4.5 The Retail Sector Group has identified the following as priority areas for further development:

- Accessibility and improved signage and transport links;
- Marketing and branding of the Sheffield City Region retail offer including identifying the unique selling point for different areas of the City Region;
- Skills development and business support; and
- Improving and widening the retail and leisure offer.

4.6 The vision for the Sport, Leisure and Tourism Sector Group is:

> *"to further develop the region's reputation as a world class destination for sports and leisure, whilst growing the tourism economy to create jobs, wealth and a global platform for marketing the area".*

4.7 The Group has identified that sport, active leisure and tourism has a total economic value in excess of £800 million, generating 50,000 jobs for the City Region.

4.8 The following projects have been prioritised to strengthen the sector:

- Ensure that we have a sustainable major events programme;
- Develop a family-based visitor experience of national significance;
- Promote a high quality conference and exhibition experience;
- Create an internationally acclaimed sports and leisure zone; and
- Develop a health and fitness culture across city region organisations.

Strategic Economic Plan ('SEP') – a focused 10 year plan for the private Sector Growth 2015- 2025

4.9 The SEP, produced by the Sheffield City Region, stipulates that in order to transform the Sheffield City Region Economy, a stronger, larger private sector is required. At the centre of their plan is the concept of a 'growth hub' which will take advantage of Sheffield's unique position as a key business-to-business supply chain, which includes the retail sector. Although the SEP identifies that Sheffield is the fourth largest city in England, a major centre for engineering, creative and digital industries, with a wide range of culture and retail facilities, and it identifies Sheffield City Centre as the largest hub for Leisure Services in the City Region, it does not go into further detail into the future of their retail and leisure industry.

HS2

4.10 Current recommendations for the HS2's route and station proposals in South Yorkshire propose that HS2 services between London and Sheffield would take a spur off the new north-south high speed line and travel directly to the existing Sheffield Midland station in the city centre using the existing railway line. The alternative option was to provide a line to Meadowhall.

Sheffield and Rotherham in the context of other centres

4.11 As stated above both Sheffield CC and Rotherham MBC are identified within the Sheffield City Region LEP, along with seven other neighbouring authorities. The City Region encompasses more than 1.8 million people and approximately 700,000 jobs.

4.12 Sheffield and Rotherham are located in the heart of the country with good transport links, in terms of the east coast train line, between London and the North, a good motorway network, in terms of the A1, M1 and M18 and also a Supertram provision.

4.13 Table 4.1 below shows the relatively positive position of Sheffield City Centre and Rotherham town centre in the sub-regional context, compared with surrounding town and city centres, plus Meadowhall Shopping Centre (referred to as 'MSC' for the remainder of the report) and the district centres in the local area. The data to provide this context is provided by the total size of the centres (provided by Experian GOAD) and also the ranking of each centre provided by VenueScore.

4.14 VenueScore is an annual survey compiled by Javelin Group, which ranks the UK's top 2,700+ retail venues including town centres, stand-alone malls, retail warehouse parks and factory outlet centres. VenueScore rankings are based on a consistent, weighted scoring system which seeks to measure the overall attraction of each venue compared to other venues across the country. VenueScore evaluates each centre in terms of its provision of multiple retailers – including anchor stores, fashion operators and non-fashion multiples. The sectors covered include comparison retail, convenience retail and foodservice (e.g. restaurants). The score attached to each operator is weighted to reflect their overall impact on shopping patterns. For instance, anchor stores such as John Lewis, Marks & Spencer and Selfridges receive a higher score than other stores. The resulting aggregate score for each venue is its VenueScore. The VenueScore reflects the presence and importance of multiple retailers trading in each venue, and generally correlates closely with the actual market size of these shopping venues in terms of actual consumer spending. The lower the number, the higher the ranking.

4.15 In addition to its Venuescore, each location is assessed in terms of a range of other attributes including:

- Market positioning (i.e. is the offer aspirational or down-market?)
- Age focus (is the offer targeting younger or older consumers?)
- Fashion focus (how dominant is the venue's clothing offer?)
- Fashionability of its offer (is the clothing offer traditional or progressive?)

- Foodservice bias (how strong is the food and beverage offer?)
- Comparison vs. convenience bias
- Anchor strength (how much of the overall score is delivered by major anchors such as department stores, variety stores, supermarkets, etc.)
- Shopping centre vs. high street dominance (is there a powerful mall offer?)

Table 4.1: Sub regional city/town centre floorspace and rankings data

	Floorspace[6] (sq ft gross)	2015/16 Venuescore	2014 Venuescore	2011 Venuescore
Leeds	2,749,000	4	3	6
York	1,455,600	27	20	23
Sheffield	**1,612,100**	**22**	**22**	**35**
Meadowhall Shopping Centre (MSC)	**1,401,600**	**37**	**38**	**41**
Doncaster	1,636,000	47	45	44
Barnsley	990,700	153	152	187
White Rose Shopping Centre (Leeds)	654,700	150	158	216
Crystal Peaks Shopping Centre and Retail Park	660,900	175	183	360
Rotherham	**741,400**	**259**	**250**	**270**
Retail World Retail Park (now known as Parkgate Shopping)	568,985*	270	293	303
Hillsborough	412,000	530	601	485
Ecclesall	352,200	882	966	944
Woodseats	-	1,486	1,361	1,261
Dinnington	136,100	1,372	1,406	2,029
Wath–upon–Dearne	-	1,429	1,468	1,724
Chapeltown	-	1,908	1,895	
Maltby	86,400	3,152	2,775	2,142

4.16 Table 4.1 indicates that Sheffield's ranking rose between 2011 and 2014. In the surrounding area the majority of the main centres have also risen over the same period, apart from Doncaster where there has been little change. Likewise, Rotherham has also risen from 270 to

[6] Floorspace data provided by Experian, apart from locations marked with a * where data have been taken from the Trevor Woods Database for retail warehouses

250 over the same period which indicates the both centres have had a comparatively better performance than their closest rivals in the UK (although this may not reflect detailed local circumstances).

4.17 MSC has a similar level of retail floorspace to Sheffield City Centre and nearly double the floorspace of Rotherham town centre. MSC is one of the leading out-of-town shopping centres in the UK and the largest in the region with White Rose Shopping Centre (which has plans to redevelop) having less than half the gross floorspace.

4.18 In terms of other town and district centres, there is a mixture of some performing better between in 2014 to 2011 however some like Maltby and Hillsborough performing significantly worse. Crystal Peaks, Dinnington and Wath-upon-Dearne have all performed significantly better since 2011.

5. The Sheffield Retail Hierarchy and Health Check Assessments

Introduction

5.1 This section provides an assessment of the health of Sheffield City Centre and six of the largest district centres in the city. This assessment of town centre health has been carried out through a series of detailed assessments of the key characteristics of these centres. In addition, whilst separate to town centre health issues, this section provides an overview of the out of centre retail and leisure provision in the city.

5.2 When considering the health of the main defined centres in Sheffield, we have utilised a varied evidence base. Indicators which the PPG suggests should be used are outline below:

- Vacancy levels in each centre,
- A review of the key retail sectors, including where applicable the presence of anchor retailers,
- A review of the shopping patterns associated with each centre (via the results of the household survey undertaken by NEMS), for both convenience and comparison goods shopping,
- Rental levels and commercial yields on retail property;
- Accessibility;
- Pedestrian flows;
- Crime statistics; and
- Customer reviews.

5.3 Based upon these indicators, we set out our review of the health of the City Centre and the six largest district centres in Sheffield. However, from the outset it should be noted that information relating to some of the above indicators will not be available to all of the district centres. This is primarily due to their size and the type of retail and commercial property which is present.

The current defined Retail Hierarchy within Sheffield

5.4 As well as Sheffield City Centre, the following district centres highlighted in bold, which are listed within Policy CS34 of the Core Strategy, will be assessed. These are the district centres that have most floorspace.

Table 5.1 – District Centres

Banner Cross	Broomhill	**Chapeltown**
Chaucer	Crookes	**Crystal Peaks**
Darnall	**Ecclesall Road**	Firth Park
Heeley	**Hillsborough**	**London Road**
Manor Top	Spital Hill	Woodhouse
Woodseats	Stocksbridge	

5.5 Beyond these designated centres, there is also a substantial amount of retail floorspace provision within retails parks and superstores across the city. Apart from the retail park at Crystal Peaks, these facilities lie outside of the defined retail hierarchy in the Core Strategy and contain a wide range of shops including clothing and fashion retailers, sports goods stores, mixed goods, toy stores, along with retailers selling bulkier electrical, furniture and DIY goods.

5.6 The most significant retail facility outside of the defined retail hierarchy is Meadowhall Shopping Centre ('MSC'). MSC lies on the site of a former steelworks and opened in 1990. It has a total floor area of around 140,000sq m.

5.7 For the purposes of the health checks for Sheffield we have relied upon two sets of land use data; Experian GOAD data and SCC data. The previous study, produced by Cushman and Wakefield ('C&W') in 2010, undertook a health check for all the centres and used the centre boundary according to the UDP (referred to as 'District Shopping Centre' on the Proposals Map). For this study we have used the centre boundary according to the Pre-Submission Proposals Map (referred to as 'District Centre' boundary on the Proposals Map), which on some occasions differs from the UDP defined boundary. For all the centres assessed below we have identified what these differences are.

5.8 In terms of GOAD data, these boundaries also differ from both the UDP Proposals Map and Pre-Submission Proposals Map and therefore for the purposes of this study we have deleted those units identified on GOAD which are outside the 'district centre' boundary as defined in the Pre-Submission Proposals Map. A copy of these 'district centre' boundaries for all the centres is attached in Appendix IV.

Sheffield City Centre

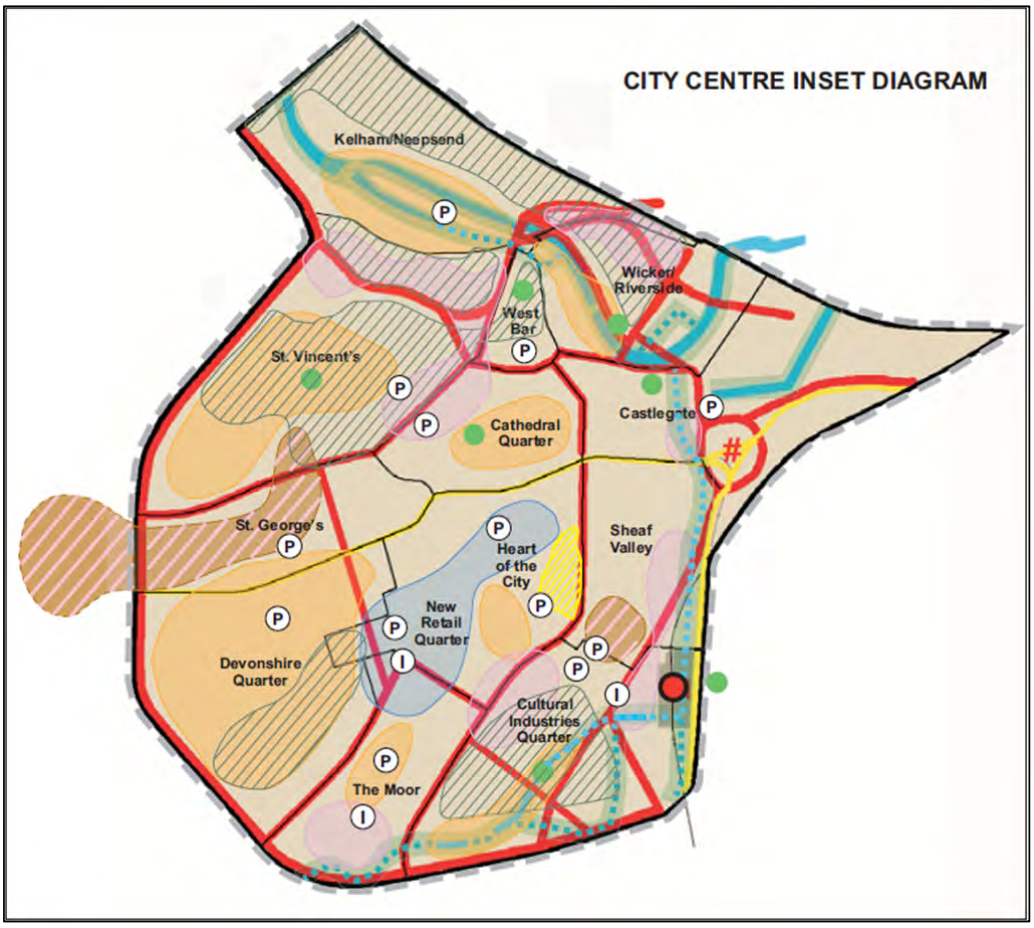
5.9 Sheffield City Centre, as defined in the Core Strategy, is the area within the Inner Relief Road together with the Kelham/Neepsend area. Within this, the Core Strategy identifies a Retail Core.

5.10 The extent of Sheffield City Centre is shown on the Core Strategy Key Diagram (Fig. 5.1). The Central Shopping Area and Central Primary Shopping Area are depicted in the Pre-Submission Proposals Map (approved by Full Council April 2013 but not taken forward to adoption), shown in Appendix IV. Most of the Central Primary Shopping Area is within the Heart of the City, with only The Moor and a spur along Division Street outside it where it becomes the Central Shopping Area along The Moor. For ease of reference, this Study refers to both of these areas together as the Central Shopping Area (CSA) in the City Centre. These aspects are currently under review as the Council prepares its new Local Plan. In common with most City Centres, Sheffield City Centre encompasses several different areas which have different identities and functions. These 'quarters' have distinctive and fundamental roles to play in the City Centre. Figure 5.1 below illustrates the location of the following quarters:

- Heart of the City, including the New Retail Quarter – the prime office and retail streets and main civic, arts and cultural buildings, with high-quality public spaces;
- Cathedral Quarter –the main professional, legal and financial district;
- Cultural Industries Quarter –a wide mix of uses and established as the main location for the city's creative and digital industries;
- Sheaf Valley – an important gateway area and the academic focus for Sheffield Hallam University;
- The Moor – a linear retail area anchored by several major stores and the new indoor market. This area is currently experiencing large redevelopments;
- Devonshire Quarter – a vibrant area with city living, niche shops, restaurants and bars and a variety of business uses;
- St. George's – a mixed area that is an academic focus for the University of Sheffield, with complementary retail and business uses;
- St. Vincent's – a mixed business, residential and educational area with links to the University of Sheffield;
- Castlegate – an area for a mix of uses including offices, housing, hotels and leisure, linking the Heart of the City with Victoria Quays, as a focus for mixed waterside uses;
- Kelham/Neepsend – formerly dominated by industry but becoming a focus for new riverside housing and jobs with the Inner Relief Road as a catalyst to redevelopment;

- West Bar – a mixed area of predominantly business uses, with a possible emphasis on the legal and financial professions, being located close to the Courts complex; also a location for new housing and a new neighbourhood centre and public space;
- Wicker/Riverside – a gateway location on the Inner Relief Road and key business area with new housing taking full advantage of the opportunities presented by the river.

Figure 5.1 – An extract from the Sheffield Development Framework Core Strategy Key Diagram



Land Uses and Retailer Representation

5.11 The majority of the Central Shopping Area (CSA), as defined in the Core Strategy, is covered by regular land use surveys carried out by Experian GOAD and Table 5.2 below provides details of Experian's surveys in 2010, 2013 and 2015. In addition, GVA has also updated the

latest (October 2015) Experian survey via a further survey in June 2016 and this is also contained in Table 5.2.

5.12 It should be noted that the Experian GOAD plan does not include that part of the CSA that extends westwards along Division Street past Sheffield City Hall. The GOAD plan also excludes those premises located to the west of John Lewis that are within the defined CSA and also included within the Sheffield Retail Quarter ('SRQ') allocation[7]. The GOAD land use survey includes parts of Cathedral Quarter, Castlegate, Sheaf Valley, Moorfoot and units to the south of the Inner Relief Road. Those units to the south of the Inner Relief Road are included in the London Road district centre and therefore have been discounted from the 2015 and 2016 figures below[8].

Table 5.2 – Land use composition for Sheffield City Centre, 2010-2016

Classification	Number of Outlets											
	2010			2013			2015			2016		
	GOAD (2010)	%	GB Ave. %	GOAD (2013)	%	GB Ave. %	GOAD (2015)	%	GB Ave. %	GOAD (2016)	%	GB Ave. %
Convenience	50	9.7	9.1	37	7.6	8.8	49	10.0	9.3	47	9.6	9.3
Comparison	183	35.5	41.8	180	36.1	40.9	163	33.3	39.7	161	32.9	39.7
Service	148	28.7	34.9	156	31.3	36.6	148	30.3	37.6	155	31.6	37.7
Miscellaneous	12	2.3	1.2	13	2.6	1.2	12	2.5	1.2	11	2.2	1.2
Vacant	122	23.7	13.1	112	22.5	12.6	117	23.9	12.2	116	23.7	12.1
TOTAL	515	100.0	100.0	498	100.0	100.0	489	100.0	100.0	490	100.0	100.0

Source: Experian GOAD data. Figures may not add due to rounding. Figures are to 1 decimal place

5.13 Table 5.2 shows a clear trend of falling comparison goods retail units in Sheffield City Centre. In 2010, there were 183 units occupied by comparison goods retailers which was equivalent to 35.5% of all retail units in the City Centre. This is below the national average at that time of 41.8%. Since 2010 the number and proportion of comparison goods retailers had declined by approximately one tenth by June 2016, with 161 units being equivalent to 32.9% of all units in the City Centre. This proportion is now significantly below the national average of 39.7%. It should be noted that there has also been a national trend of falling proportion of comparison

[7] please note that this is sometimes referred to as the New Retail Quarter or NRQ, however for the purposes of this Study we are referring to both as the SRQ

[8] Those units that are located to the south of the Inner Relief Road and included within the London Road district centre includes 2 convenience units, 6 comparison units, 9 service uses and 2 vacant units.

goods retailers in city and town centres, as shown in Table 5.2. This trend suggests a long term decline in the City Centre's comparison goods shopping role within the local community and therefore demonstrates the vulnerability of the City Centre to increased competition.

5.14 The majority of national multiple comparison goods retailers can be found near High Street and along Fargate, Pinstone Street and The Moor. This route generally forms a straight line from north to south. Along the pedestrianised section of Fargate there is a large M&S variety store, New Look, River Island, H&M, Next and Topshop/Topman.

5.15 The main department stores are located along The Moor, which is also pedestrianised, and includes Debenhams, T J Hughes and Atkinsons. It should be noted there was also a large BHS store (1,990sq m gross ground floor floorspace) which has recently closed.

5.16 The southern part of The Moor is located outside the current definition of the Core Retail Area in the Core Strategy. The location of The Moor is illustrated on Figure 5.1 above and details of current and future development proposals are referred to later in this chapter.

5.17 The location of the SRQ is partly off Pinstone Street and extends westwards to encompass the John Lewis store and other retailers including Mothercare and Maplin.

5.18 Several of the more value-orientated retailers in the City Centre are located in the northern part of the centre, outside the Central Shopping Area, in the quarter known as Castlegate / Cathedral Quarter. These include a Wilko and B&M Bargains on Haymarket, and a Poundland and Argos on Angel Street. On the edge of the defined CSA to the south of The Moor there is also a Decathlon sports goods store, along with a Staples and Wickes.

5.19 In relation to other land uses, there has been a small fluctuation in convenience goods retailers in the City Centre over the period 2010-2016 and, in November 2015, convenience retailers comprised 10.0% of all retail units in the centre. Although the number of units has dropped from 49 to 47 units between November 2015 to June 2016, the proportion has stayed above the national average of 9.3%. This has been largely consistent over the period 2010-2016.

5.20 The largest convenience goods retailer located in the current CSA boundary is a Sainsbury's supermarket which extends to 1,411sq m net and is located on The Moor. Within the CPSA, which extends to close to but not including this Sainsbury's, Marks and Spencers has a food section, a Sainsburys Local on Division Street and a Tesco Express located on Church Street. Other than these stores there are a selection of independent convenience goods stores scattered around the centre and an Iceland frozen food store on the Moor and Sainsbury's convenience stores on Arundel Gate and High Street.

5.21 On The Moor there is a recently upgraded and high quality Market which provides a variety of retail and leisure stores. This forms part of phase 1 of The Moor redevelopment which is discussed in more detail later in this section.

5.22 Although there has been a rise in the number of service uses (i.e. café, restaurant, banks/building society uses), from 148 to 155 over the period from 2010 to 2016, the percentage of service units in the City Centre is 31.6% which is below the national average of 37.7%. This rise has partially off-set the fall in the number of comparison goods retailers. There are a high percentage of service uses located around Peace Gardens and the Winter Garden. These include cafes/restaurants including Bill's, Piccolino, Café Rouge, Café Nero, Pizza Express and Cosmo.

5.23 Of particular note is the large number of vacant units within Sheffield City Centre. This has been an on-going theme since 2010 with the number of vacant units and proportion of retail units being vacant staying relatively constant. In 2016 there are 116 vacant units, which is equivalent to 23.7% of all retail units in the City Centre. This is almost double the current national average of 12.1%. In addition, the BHS store at The Moor, has closed due to the BHS business going into administration. Vacant units can be found across all parts of the City Centre, although there is are clusters located in the Castlegate quarter, at the bottom of The Moor and Moorfoot, along with the proposed new Retail Quarter area (which are arising due to the proposed redevelopment scheme).

Floorspace Provision

5.24 We have also examined Experian's survey of floorspace within convenience, comparison and service uses, along with vacant retail floorspace, for the same years as the land use survey except the latest 2016 survey and this is shown in Table 5.3 below.

Table 5.3 – Floorspace composition for Sheffield City Centre, 2010-2016

Classification	Number of Outlets								
	2010			2013			2015		
	Sq Ft Gross	%	GB Ave. %	Sq Ft Gross	%	GB Ave. %	Sq Ft Gross	%	GB Ave. %
Convenience	229,800	14.9	17.3	223,600	14.9	17.8	264,800	16.4	18.4
Comparison	771,700	50.1	47.2	687,500	45.8	45.9	737,300	45.7	45.0
Service	267,300	17.4	23.1	273,900	18.2	24.5	341,300	21.2	25.5
Miscellaneous	15,300	1.0	1.0	15,400	1.0	1.0	16,500	1.0	1.0
Vacant	255,000	16.6	11.4	302,300	20.1	10.7	252,200	15.6	10.2
TOTAL	1,539,100	100.0	100.0	1,502,700	100.0	100.0	1,612,100	100.0	100.0

Source: Experian GOAD data. Figures may not add due to rounding.

5.25 This above data in Table 5.3 shows the following:

- There has been a small rise in the amount of floorspace occupied by convenience goods retailers, although the proportion has remained consistently below the national average.
- Over the 5 year period the amount of floorspace within comparison goods retailers has fallen slightly since 2010 however increased since 2013. Overall the proportion of comparison floorspace in 2015 is in line with the national average.
- The amount of floorspace in service uses has increased greatly since 2010, however it has been consistently below the national average over the 5 year period.
- The vacancy rate between the figures in 2010 and 2016 has remained constant however there was a surge in 2013. In relation to national average there has been considerably more vacant floorspace over for each year of the study.

Leisure Uses

5.26 Given the size of Sheffield City Centre there is a fairly good variety of leisure uses currently on offer and others which are being proposed in the future.

5.27 Although table 5.2 shows that there is a below average number of services in the City Centre there is clearly a good level of restaurants and bars particularly around Peace Gardens and along Division Street that all contribute to the night time / evening economy.

5.28 In terms of cinemas within the City Centre there is a 10-screen Odeon cinema located between Pond Street and Arundel Gate. The cinema was opened in 1992 with it previously

being a nightclub. Curzon cinema is located in George Street, close to Fargate, and offers 3 screens, a bar and a rooftop terrace. Showroom cinema is located on Paternoster Row and is a 4-screen independent cinema with a café/bar in the foyer.

5.29 There are a range of theatres within the centre including Sheffield Theatres, which is a theatre complex comprising three theatres; the Crucible, the Lyceum and the Crucible Studio. These are located next to each other and just off Arundel Gate. Sheffield City Hall also provides space for up to 2,300 people for the hosting of concerts and events.

5.30 Within the City Centre, near Castlegate Quarter there is Ponds Forge International Sports Centre which offers a gym, spa, two swimming pools (one of which is an Olympic sized swimming pool) and a diving pool.

5.31 Other leisure uses in the City Centre include

- The O2 Academy located on Arundel Gate with a capacity of 2,350.
- The Genting Club casino also located on Arundel Gate. Within the casino there is also Fahrenheit bar and grill and a separate bar.
- Millennium Gallery and Sheffield Winter Garden located between Arundel Gate and Peace Gardens.
- Mecca bingo hall located off Flat Street, which is close to Arundel Gate.

5.32 A new cinema is currently being constructed on The Moor. Further details of this and other schemes are included later in this Section.

Rents and Yields on Retail Property

5.33 Data on Zone A rental levels for retail property collected by GVA in recent years shows that Sheffield has seen an increase in £150/sq ft in 2014 to £180/sq ft in 2016. However, whilst there has been an increase, these levels are well below Zone A rental levels in Leeds and Manchester which were at £250/sq ft and £280/sq ft in 2016.

5.34 Data held by GVA indicates that yields on retail property fell (i.e. improved) from 6.25% in 2014 to 6.0% in 2016. In comparison, yields on retail property in Manchester and Leeds were lower (i.e. better) at 4.75% apiece.

Market Shares and Turnover

5.35 In order to understand the importance of the City Centre as a shopping destination, it is useful to examine the results of the 2016 household survey which provides data for shopping patterns across the study area. The full extent of the study area plan is shown in Appendix I. Tables 4 and 6 in Appendix II, which form part of our quantitative assessment of shopping patterns and

expenditure flows, provides a detailed breakdown of these convenience and comparison shopping patterns. The following paragraphs provide the most salient information regarding shopping patterns. In terms of shopping patterns in the local area, Zones 1 - 10 are broadly equivalent to the city administrative area. Sheffield City Centre falls within Zone 10.

5.36 With regards to the trading performance of the City Centre, the data informing the quantitative need assessment is Sections 7 and 8 provide useful information regarding the comparison goods sectors which are key to the centre's performance (Section 8). Table 5.4 outlines the composition of the £732m of comparison goods expenditure which the City Centre currently attracts from the study area:

Table 5.4 – Study area derived turnover of Sheffield City Centre, 2016

Sector	Expenditure (1st and 2nd choice)	Proportion of the Study Area Turnover
Clothes and shoes	£217.1m	30%
Furniture, Floor Coverings and Carpets	£80.4m	11%
Household textiles and soft furnishings	£28.6m	4%
Household appliances	£32.3m	4%
Audio visual equipment	£82.3m	11%
DIY	£9.6m	1%
Chemist and medical goods	£107.4m	15%
Books	£21.4m	3%
Kitchen utensils	£22.8m	3%
Luxury goods and sports goods	£130.5m	18%
Total	**£732.4m**	**100%**

Source: Table 7a at Appendix II (figures may not add due to rounding)

5.37 The above analysis shows the important contribution that spending on clothes and shoes makes to the economy of the City Centre, with 28% of the total amount of expenditure. The City Centre therefore relies to a significant extent on the clothing / footwear sector for its vitality and viability. In terms of the other comparison goods 'luxury goods and sports goods' contributes to 18% of expenditure. In addition spending of audio visual equipment and chemist and medical goods[9] contributes 15% and 14%, respectively, of total study area derived turnover.

5.38 In terms of clothes and shoe shopping trips, only Zone 10 is able to command a majority market share of clothes and shoe shopping trips with 79%, compared to a 17% share for MSC. Zone 6 which covers the south east of the authority commands the second largest market share at 44%. In Zones 1-5 and 7-9, the City Centre market shares are 18%, 14%, 37%, 35%, 42%,

[9] Including health and beauty goods

33%, 16% and 28% respectively. Unsurprisingly in these zones, the highest market share of clothes and shoe shopping is in main stores and shopping centres outside of the City Centre, most popular being MSC. Throughout the whole of Sheffield, there is only a very minor leakage of clothes and shoe shopping outside of their boundary. This low market share outside of the city is unsurprising given the wide range of shops on offer.

5.39 In relation to shopping patterns for other types of comparison goods:

- *Furniture, floor coverings and carpets* - The City Centre attracts a moderate market share from the surrounding zones for this sector. Zones 4 (to the north west of the City Centre), 5 (to the south west) and 10 (the City Centre) have a relatively high market share with 55%, 61% and 44% respectively, attracted to the City Centre. A high percentage (32%) of first choice market share for Zone 10 is lost to mail order, catalogue and internet. The John Lewis store is able to attract a good level of market share with 25% of Zone 5 attracted to this retailer for this sector. In terms of second choice for this sector the most popular zones are 11, with 59% of the market share and 6 with 42% of the market share. The most popular location for residents in Zone 10 for this sector is Drakehouse Retail Park which attracts a market share of 34% for second choice.
- *Household textiles and soft furnishings* – For first choice shopping destinations the strongest market shares for the City Centre are from Zones 5, 10 and 11 (57%, 60% and 41% respectively). The most popular store in the centre is the John Lewis which is able to attract up to 20% of market share from Zone 5 residents. In terms of leakage from the City Centre, the most popular destination for this sector for residents in Zone 10 is Hillsborough and in particular the Dunelm Mill on Bradfield Road. There is a similar trend for second choice shopping trips, the exception being that 47% of Zone 10 residents second choice for household textiles and soft furnishings is outside of the study area[10].
- *Household appliances* – The City Centre attracts a moderate market share across Sheffield for household appliances with Zone 10 taking the highest market share for household appliances at 72%. Zone 5 has the next largest market share for household appliances with in the City Centre at 54%, with John Lewis being the most popular store across the zones. For second choice shopping destination the most popular zones for shopping in the City Centre are Zones 4 (with 50%), 6 (with 47%) and 10 (with 50% also). Unsurprisingly John Lewis is the most popular store in the City Centre. 50% of market share for Zone 10 is lost to the internet.
- *Audio-visual equipment* – Again, the City Centre attracts a moderate market share across Sheffield for audio-visual equipment, attracting an average of 30%-40% market share

[10] Such as Manchester and Nottingham

across most of the Sheffield zones although Zones 10 achieves the highest market share of 55%. As with household appliances and audio-visual equipment, second choices places for audio-visual equipment is spread across the majority of the zones with Zone 4 having the highest market share of 46%. The most popular store, unsurprisingly, is John Lewis. In terms competing destinations for the City Centre for this type of shopping, these are MSC, the internet and Drakehouse Retail Park.

- *DIY goods* – As expected, the City Centre has a relatively low market share in DIY goods shopping. The City Centre itself (Zone 10) has the highest market share at 22%. The most popular stores are the out of centre B&Q stores on Penistone Road and Queens Road, along with the Wickes on Rutland Road.
- *Chemist and medical goods* – for chemist, medical and health and beauty goods the City Centre has a variable market share as a first choice destination. For example, it is able to retain 90% of trips from local residents in Zones 10, whilst it has a 30%-50% share in zones 1 and 3-7. However, it is only able to attract 5% of trips in Zone 2 and 19% of trips in Zone 9. Generally, the largest competition for these goods comes from MSC, although some of the district centres are also able to compete with the City Centre for custom in the zones where they lie. A very similar picture emerges for second choice shopping destinations for these goods.
- *Books* – The City Centre retains a significant proportion of trips for books in Zone 10 and Zone 5 at 66% and 43% respectively. In the other Sheffield zones, the City Centre's market penetration is much lower with the main source of competition coming from the internet followed by MSC. Beyond the Sheffield zones, the City Centre has generally a low market share as a first choice shopping destination for books, although its market penetration improves amongst second choice shopping trips. The data at Table 6 in Appendix II also shows that MSC has a much stronger and wider catchment than the City Centre for books shopping.
- *Kitchen utensils* – in all of the Sheffield zones, except for Zone 8, the City Centre has a market share above 25% as a first choice shopping destination for kitchen utensils shopping. The main source of competition in Zone 8 comes from Crystal Peaks district centre which has a 47% market. Across most of the Sheffield survey zones, the City Centre has a materially better market share (amongst first choice shopping trips) than MSC.
- *Jewellery, games, toys and sporting goods* – the attraction of Sheffield City Centre for jewellery, games, toys and sporting goods varies considerable across the ten zones covering the Sheffield urban area. For example, it is able to retain circa 90% of first choice trips in Zone 10, whilst its share totals 33%-44% in Zones 3-7. However, it has a much lower share in zones 8 and (24%-27%) and zones 1 and 2 (12-15%). It is out-performed by MSC in

several of the Sheffield zones, although Table 6 at Appendix II indicates that the roles are reversed in relation to second choice shopping trips in these ten zones.

5.40 The City Centre's market share for main and top-up food shopping is shown in Table 4 at Appendix II. Table 4 shows that the City Centre is unable to attract a high market share of first choice main food trips from any of the zones across the city. The highest market share within Zone 10 at 15%. This indicates that the City Centre is a relatively unpopular location for main food shopping across the district which is unsurprising given the abundance of small supermarkets and the lack of large supermarkets within the City Centre. The most popular main food shopping locations for Zone 10 residents is Tesco on Montgomery Terrace Road with 43% of the market share.

5.41 For second choice food shopping trips, the City Centre is able to attract 54% from Zone 10, proving that residents within this zone will visit/use more local stores in the City Centre rather than travelling further afield to their first choice destinations. The most popular second choice food shopping location within Zone 10 is the Sainsbury's on The Moor.

5.42 As shown in Table 4, the City Centre is only able to attract a small market share from Zones 1-9, ranging from 0.6% (Zone 1) to 6.7% (Zone 5). These market shares are predictable given the nature of convenience shopping across the city and distribution of large supermarkets across many of the ten zones which cover the Sheffield urban area.

5.43 The City Centre has a better market penetration rate for top-up food shopping and is able to attract approximately one fifth of top up shopping trips from Zone 10 residents and 16% from Zone 3 residents (Zone 3 is located to the north east of the centre). Again, the majority of top up shopping trips made across all zones take place predominantly in main foodstores outside of the City Centre, namely Tesco on Montgomery Street.

5.44 Overall, Table 5a at Appendix II indicates that the city has an overall study area derived convenience goods turnover of £75m at 2016. Residents of zones 5 and 10 contribute around half of this level of turnover. The Sainsburys store has the highest individual turnover at circa £22m per annum.

Accessibility

5.45 Sheffield City Centre has good accessibility via private and public transport. Car users have the choice of a range of car parks, including:

- Wellington Street MSCP – 694 spaces
- Arundel Gate – 668 spaces

- Charles Street – 530 spaces
- Hartshead Square – 505 spaces
- Atkinsons – 433 spaces
- Castlegate – 403 spaces
- Furnival Gate – 327 spaces
- John Lewis – 322 spaces
- Campo Lane – 150 spaces
- Wellington Street – 139 spaces

5.46 In terms of public transport, the city's main railway station lies to the east of the City Centre providing regular services to Leeds, Hull, Manchester, St Pancras International, Edinburgh and Plymouth. There is also a Supertram that provides links from the City Centre to the Universities, Hillsborough, MSC and Crystal Peaks Shopping Centre. There are also bus stops through the centre with a main bus intercourse located close to the train station. The bus station provides services locally, which includes Rotherham town centre, Stocksbridge, Hillsborough and MSC, and nationally, which includes London and Leeds.

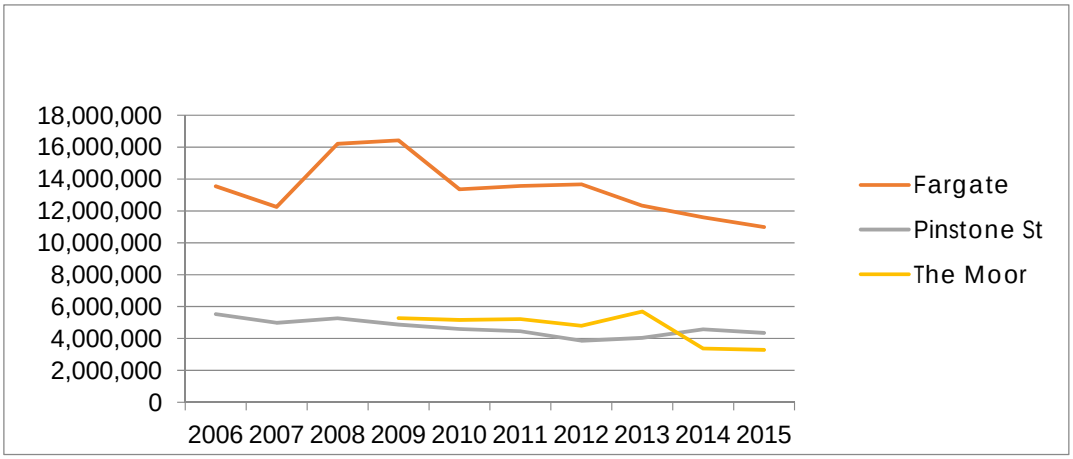
5.47 A useful indicator to show comparative levels of vitality across the City Centre are pedestrian flow counts. SCC commission a yearly annual footfall study which has data between 2006 and 2015. There are data for the three main retail streets: Fargate, Pinstone Street and The Moor (the latter only having data between 2009 and 2015).

5.48 The pedestrian flow data should be used with care, as it is only a snap shot in time, although as illustrated in both the table and the graph below the data shows there has been a fall in the footfall number across the study period for all the main streets. In particular Fargate has shown a large decline in footfall with a peak of just over 16m to a figure in 2015 of less than 11m.

Table 5.5: A table showing the footfall trends for Sheffield City Centre between 2006 and 2015

	Fargate	Pinstone St	The Moor
2006	13,545,124	5,533,032	-
2007	12,256,901	4,985,387	-
2008	16,210,793	5,269,390	-
2009	16,423,189	4,870,858	5,275,729
2010	13,354,971	4,602,084	5,160,226
2011	13,567,980	4,451,677	5,225,526
2012	13,671,979	3,862,519	4,795,170
2013	12,325,670	4,041,856	5,695,334
2014	11,605,257	4,581,367	3,368,826
2015	10,992,162	4,350,038	3,282,466

Figure 5.2: A graph showing the footfall trends for Sheffield City Centre between 2006 and 2015



Source: Sheffield City Council

Crime levels

5.49 In relation to crime levels in and around the City Centre, we have sourced data from South Yorkshire Police for the neighbourhood area[11] which covers the City Centre boundary (as

[11] Defined by South Yorkshire Police

defined in the Core Strategy). The table below indicates the number of reported incidents of crime between November 2015 and October 2016. The table below also provides data for those neighbourhoods which cover Leeds city centre, Doncaster town centre, Barnsley town centre and Rotherham town centre.

Table 5.6 – Reported crime in Sheffield City Centre

	Nov 2015	Dec 2015	Jan 2016	Feb 2016	Mar 2016	April 2016	May 2016	June 2016	July 2016	Aug 2016	Sept 2016	Oct 2016
Sheffield	1209	1152	1085	988	1060	1079	1128	1060	1180	1076	1266	1359
Leeds	1059	1074	986	1029	962	976	1141	1008	1029	978	1161	1256
Rotherham	230	203	208	170	218	228	211	250	225	214	212	220
Barnsley	496	420	392	398	434	451	519	484	484	534	520	642
Doncaster	499	531	443	480	458	459	516	483	629	621	568	652

Source: South Yorkshire Police and West Yorkshire Police

5.50 The above data shows that Sheffield city centre generally has higher reported crime levels than Leeds city centre, with over 1,000 reported crimes per month. In addition, the neighbourhood covering the city centre has around 5-6 times as high reported crimes as Rotherham town centre and over twice as many reported crimes as the neighbourhood covering Doncaster town centre.

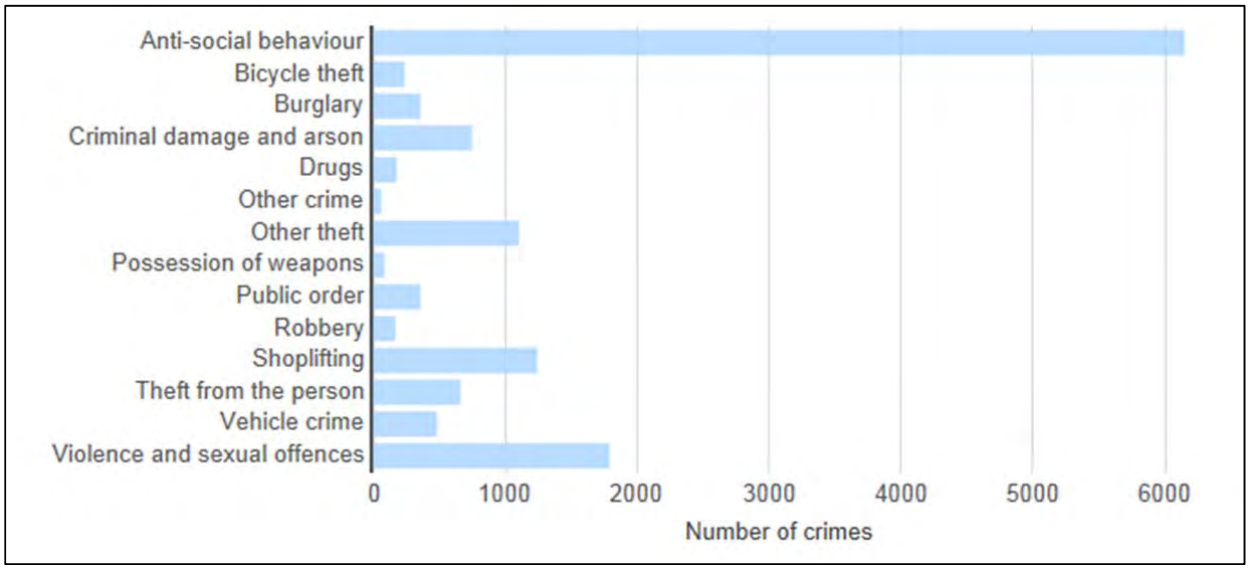
5.51 The tables below outline the types of crime in Sheffield city centre between November 2015 and October 2016 and these set alongside comparable data for Leeds, Barnsley, Rotherham and Doncaster.

Crime type	Sheffield	Leeds	Rotherham	Barnsley	Doncaster
Anti-social behaviour	6150	1485	1026	2489	2089
Bicycle theft	240	513	20	15	71
Burglary	358	420	121	178	229
Criminal damage	747	542	145	521	312
Drugs	181	195	53	80	144
Other crime	63	101	18	39	102
Other theft	1106	2103	180	385	514
Possession of weapons	86	61	23	31	52
Public order	359	658	139	215	164
Robbery	169	133	24	32	47
Shoplifting	1245	2121	301	519	1036
Theft from the person	661	1416	51	101	222
Vehicle crime	486	685	57	276	208
Violence and sexual offences	1791	2226	431	893	1149

5.52 The above data shows that anti-social behaviour and violent-related offences are particularly high in Sheffield City Centre when compared with Leeds and the other smaller surrounded settlements. However, theft-related offences in Sheffield City Centre are lower than in the central area of Leeds.

5.53 For Sheffield, a graph showing the full breakdown of crimes, by type, is shown in figure 5.3 below.

Figure 5.3 – Crime levels between November 2015 and October 2016 for Sheffield City Centre



Recent and Future Planned Developments

5.54 There are a number of recent and future planned developments in the City Centre which have the potential to significantly improve its attractiveness. One of the main areas of change is in relation to parts of The Moor. This development is split into three phases which are explained below:

- Phase 1 relates to planning permission 06/04145/FUL, and the junction of The Moor and Cumberland Street, which has now been built and includes 8,388sq m of retail space (A1) and an indoor market with ancillary facilities. It is understood that 1,579sq m has recently been let to a gym operator. The development involved the loss of 5,350 sq.m. of space that was previously retail.
- Phase 2 relates to planning permission 12/03759/FUL and is located between The Moor and Charter Row. The retail element of this phase is now complete and includes restaurants totalling some 2,322sq m and Class A1 retail floorspace. Primark occupy 4,200sq m of the A1 space. A nine screen cinema is due for completion and opening shortly.
- Phase 3 is located at the junction of The Moor and Furnival Gate. Planning permission has recently been granted (16/03725/FUL) for the erection of a three-storey retail unit, with a digital screen, intended to accommodate a fashion retailer,. A total of 3,619 sqm GIA of A1 floorspace is proposed, which will replace the existing, vacant, 7,953 sqm of A1 floorspace.

5.55 The main current proposal within the City Centre is the proposed SRQ scheme which is located at Wellington Street and within the CPSA. An outline planning application was been submitted (Ref. 15/02917/OUT) to Sheffield City Council in 2015 for the following uses and floorspace:

Table 5.7: A table showing the GIA floorspace schedule (as stated on Schedule 1 of the application form)

Use Class / Type of Use	Total illustrative floorspace proposed (including change of use) (Sq m GIA)	Estimated Net additional floorspace following development (Sq m GIA)
A1 / A2 Retail Total	**Up to 71,582**	**+36,502**
A3/A4/A5 Food and Beverage Total	**Up to 5,777**	**+659**
B1 Business	Up to 37,038	+25,243
C1 Hotels	0	-7,435
D1 Non-residential institutions	0	-196
Sui Generis (Nightclubs etc.)	0	5,525
Vacant (Leah's Yard)	0	1,858
Car Parking Areas	Up to 69,931	+69,831
TOTAL	**Up to 184,228**	**+116,924**
C3 Residential	Up to 7,768	+7,125

Source: submitted SRQ planning application documentation.

5.56 19,633sq m of the proposed Class A1 is allocated for a new department store, and it will be noted that the application area for the SRQ development includes the existing John Lewis department store.

5.57 In June 2016 the Council confirmed that Queensbury Real Estate ('QRE') had been chosen as the Council's development partner. Following this, the principles of the proposal were endorsed by the Planning and Highways Committee in August 2016 though not officially approved. This was in response to changing operator and occupier demand, the needs of the city centre and the outstanding concerns of the Local Planning Authority. It is understood that the content of the SRQ is now been revised and new proposals will be submitted in due course.

5.58 The first phase of the SRQ development includes the demolition of the Grosvenor Hotel and surrounding shops, and the construction of a new office block which will be the city's new headquarters of HSBC. A detailed planning permission has been approved (16/03328/RG3). It will include 7,960 sqm floorspace at street level for shops and restaurants and the first phase is expected to be finished by early 2019.

5.59 In and around the City Centre there are a few schemes that are either being constructed or in the pipeline. The West Bar Square development is a mixed-use scheme located within the City Centre just to the north of the City Centre CSA. An outline planning application was submitted in July 2016 (16/02518/OUT) with the project expected to create up to 140,000sq m of prominent space fronting Sheffield's inner relief road. The scheme includes plans for apartment blocks, a four-star hotel, restaurants, retail units and landscaped public spaces. It will contain up to 5,000 sqm of Class A and Class D floorspace. The new development comprises ten buildings, each with self-contained parking.

5.60 New Era Square is currently being constructed and expected to be completed in 2018. The scheme, which is located to the south of the City Centre on the ring road, includes 690 student beds, private accommodation of 21 stories, shops (including a Chinese supermarket), cafes, businesses and an open air square for events. It includes 4,363sq m of retail and 1,933sq m of offices. The scheme also includes an exhibition / conference centre on the first floor.

Conclusions regarding the health of Sheffield City Centre

5.61 Our health check confirms that Sheffield City Centre remains a very important and popular shopping destination, particularly for a range of different types of comparison goods. It remains able to attract a substantial amount of comparison goods expenditure (£762m) and this is supplemented by a convenience goods turnover of £82m. The biggest contributors of comparison goods expenditure are in relation to clothing and fashion, health and beauty goods and jewellery, games, toys and sporting goods.

5.62 However, as detailed in the previous retail study for SCC in 2010, the City Centre faces a number of pressures. It is continuing to see a falling number of comparison goods retailers and the vacancy rate (23%) is considerably higher than the national average (12%). Its comparison goods expenditure has declined by 12%, from £830m in 2010. The financial performance is clearly being influenced by two factors: the continued success of the Meadowhall Shopping Centre ('MSC') as a comparison goods shopping destination and also the influence of the internet (a phenomenon which is affecting all physical stores whether they be in or out of centre locations). Indeed, our quantitative assessment, which takes into account the results of a survey of household shopping patterns conducted earlier in 2016, indicates that MSC now has a higher comparison goods turnover than the City Centre, which is a reversal of the situation in the 2010 and 2014 retail studies for SCC. In the 2014 study, Meadowhall was predicted to have a comparison goods turnover of £635m[12]. Its, survey-derived turnover has now risen to £813m in 2016.

5.63 These recent trends and the current situation reinforce the need for the City Centre to take measures to maintain its role as the primary shopping destination in the city and sub-region and also improve its performance and market share. The first phases of redevelopment and refurbishment at The Moor are likely to make good progress in achieving these aims although there remains a need for the City Centre to continue to improve its retail and leisure offer and key to this is the successful implementation of the SRQ scheme.

[12] Based upon the results of a household survey undertaken in 2010

Chapeltown

5.64 Chapeltown is a relatively compact district centre located 6 miles (10 km) directly north of the City Centre. It is primarily centred on a roundabout with Station Road heading north and parts of Lound Side and Burncross Road to the west.

5.65 The surrounding land uses to the north, west and south are predominantly residential with a cricket pitch located to the north-west and a large woodland area along the western boundary. There are no Conservation Areas within or in close proximity of the district centre.

5.66 The extent of the Chapeltown district centre, as illustrated by the Pre-Submission Proposals Map (approved by Full Council April 2013), is shown in Appendix IV. This map does not designate any of the district centres as a 'Primary Shopping Area'.

5.67 The boundary on the Pre-Submission Proposals Map differs slightly from the boundary of the district centre of the UDP Proposals Map in the previous Study. The current map includes a church located on the western side of Lound Side, even though this is not classed as a town centre use. It excludes the new built residential flats located to the south of the main roundabout. Land use data for the district centre has been provided by SCC for the years 2010 and 2015 and we have updated the 2015 survey to provide 2016 data for this study.

Table 5.8 – Land use composition for Chapeltown district centre, 2010-2016

Classification	Number of Outlets								
	2010			2015			2016		
	Cushman & Wakefield	%	GB Ave. %	Sheffield CC* (July 2015)	%	GB Ave. %	GVA (June 2016)	%	GB Ave. %
Convenience	6	7.4	9.1	9	13.0	9.3	8	11.3	9.3
Comparison	25	30.9	41.8	22	31.9	39.7	20	28.2	39.7
Service	48	59.3	34.9	37	53.6	37.6	37	52.1	37.7
Miscellaneous	0	0	1.2	0	0	1.2	0	0	1.2
Vacant	2	2.5	13.1	1	1.5	12.2	6	8.5	12.1
TOTAL	81	100.0	100.0	69	100.0	100.0	71	100.0	100.0

Figures may not add due to rounding.
**These figures relate to data collected by Sheffield City Council and produced on the date specified*

5.68 As shown in Table 5.8 the centre currently has 71 premises which is an increase in 2 from the SCC survey in July 2015, although between 2010 and 2015 there was a reduction from 81 to 69 units.

5.69 There are currently 8 convenience goods retailers within the centre, which is equivalent to 11.3% of all retail and above the national average (9.3%). There has also been an increase in the number of convenience retailers in the centre over the period 2010-2016. Current convenience goods retailers in the centre include a Tesco Express within a petrol filling station, an ASDA superstore, Premier convenience store, delicatessens and two bakeries. The ASDA superstore, which is located centrally at Lound Side, is the largest convenience goods store and extends to 4,975sq m net sales area.

5.70 The 2016 household survey results indicate that convenience goods stores in Chapeltown have a high market share for main food shopping trips, with a 49% share of first choice main food trips in Zone 2 (Zone 2 is where Chapeltown is located). The large Asda store contributes a 48% market share to this total. Chapeltown is also able to attract 6% of shopping trips from Zone 1 residents. Outside of the district centre, the closest large supermarket is Morrison on The Common in Ecclesfield. It manages to attract an 11% market share of trips within Zone 2 for second choice main food shopping.

5.71 In terms of top-up food shopping, the district centre attracts 43% of trips from Zone 2. The Asda on the Market street and Tesco Express are the two most popular stores for top-up trips within the centre. Outside of the district centre there are other stores that are used with the most popular one being ALDI on The Common with 16% market share.

5.72 There are currently 20 comparison goods retailers within Chapeltown district centre which is equivalent to 28.2% of all units in the centre. This is well below the national average of 39.7%. Between 2010 and present day there has been a reduction in the number of comparison goods premises from 25, although the proportion of comparison goods units has consistently been well below the national average at 2010 and 2015. In terms of businesses present there are a variety of stores ranging from photography to homeware and stationary shops.

5.73 The results of the 2016 household survey indicate Chapeltown has a low market share across most comparison goods categories and a catchment which does not extend beyond Zone 2. The exceptions to this are a share of 19% of second choice trips on household textiles, a 30% share of first choice health and beauty goods trips and an 18% share of first choice trips for kitchen utensils. All of these market shares relate to Zone 2 residents only.

5.74 Of all the units in the district centre, 52.1% are occupied by service uses. This is well above the national average of 39.7% although there has been a fall in the number of stores since the previous survey in 2010. The 37 service uses include hairdressers, beauticians, cafés, travel and estate agents, takeaways and banks. In terms of evening economy, there is a high level of takeaways but only a small number of restaurants. The Waggon public house is located in the centre of Chapeltown and provides a focal point when entering the district centre from the south.

5.75 In terms of vacancy rates, the previous study stated that there were 2 vacant units whilst the 2015 survey undertaken by SCC found only 1 vacant unit. Our 2016 survey found 6 vacancies. Since the 2015 survey the following uses have closed: HSBC bank (service classification), a café (also service) and three independent comparison retailers. Although there has been an increase in vacant units, the proportion of vacancies remains less than the national average. The majority of the vacant units are located on Station Road.

5.76 The district centre consists mainly of post-war retail units which lack character and include the shopping parade on Lound Side and units based below the ASDA supermarket. The majority of the shops front onto the main roads and are intermingled with residential dwellings and other uses which fall outside of the GOAD classification, including a public house, a church, working men's club, Council offices and a betting shop. The centre also lacks a significant public realm.

5.77 The Wagon & Horses public house is prominent within the centre of the district centre to the north of the main roundabout. There are a couple of other public houses in the district centre and a working men's club off Lound Side. The Royal Oak public house, located on Station Road, has recently closed. Along Station Road there is Cue Ball Snooker Club.

5.78 Pedestrian flows are greatest near the ASDA supermarket, where retail units are built below which front onto the main junction and roundabout and around the outdoor market. Although the ASDA store is located within the defined centre boundary of Chapeltown it isn't the most accessible of stores from other parts of the centre. Parking is located off Arundel Road which is identified within the centre boundary however due to its location it discourages people from visiting other shops in the centre. There is a limited amount of on-street parking within the District Centre.

5.79 In terms of accessibility and public transport, Chapeltown has a train station which provides regular services to Sheffield City Centre, Huddersfield and Leeds. There are also bus stops that provide further services to Sheffield City Centre, Rotherham, Ecclesfield and Barnsley.

5.80 Overall, Chapeltown is considered to be a reasonably healthy district centre located in the northern part of the Sheffield urban area. There remains a lower than average proportion of vacancies within the centre and it continues to serve an important service-related role for the local community. The ASDA supermarket dominates the centre's convenience goods shopping function and allows the centre to retain half of first choice main food trips and the district centre as a whole is able to attract four out of every ten top-up food shopping trips from local residents. However, the attractiveness of the district centre for comparison goods shopping is relatively limited and the overall retail catchment of the centre is generally limited to just Zone 2 of the study area.

Crystal Peaks

5.81 Crystal Peaks is a modern, purpose-built shopping centre located 7.7 miles (12.4 km) to the south east of the City Centre. The district centre is split over various levels with the Crystal Peaks Shopping Centre located in the southern part of the centre and is a covered shopping mall with a central, atrium-covered plaza. In the northern part of the centre is Crystal Peaks Retail Park which offers a range of comparison goods retailers and restaurants.

5.82 The centre is surrounded by residential areas to the south and east, with Drakehouse Retail Park to the north-west, whilst there is some open space to the west and south. There are no Conservation Areas within or in close proximity of the district centre.

5.83 In addition to its retail and service uses (including an indoor market), the district centre has a medical centre, veterinary surgery, library, a public house and a range of other facilities and services.

5.84 The extent of the Crystal Peaks district centre, as illustrated by the Pre-Submission Proposals Map, is shown in Appendix IV. The Crystal Parks Shopping Centre is identified as within a Primary Shopping Area.

5.85 In order to analyse the land use profile of the district centre, we have used data from Experian, from their GOAD plan. Land use data for 2010 and 2015 has been obtained and we have updated the 2015 data to a 2016 base.

Table 5.9 – Land use composition for Crystal Peaks district centre, 2010-2016

Classification	Number of Outlets								
	2010			2015			2016		
	Cushman & Wakefield	%	GB Ave. %	GOAD* (April 2015)	%	GB Ave. %	GVA* (June 2016)	%	GB Ave. %
Convenience	4	4.7	9.1	10	7.9	9.3	8	8.1	9.3
Comparison	49	57.0	41.8	76	60.3	39.7	57	58.2	39.7
Service	19	22.1	34.9	34	27.0	37.6	28	28.6	37.7
Miscellaneous	0	0	1.2	0	0	1.2	0	0	1.2
Vacant	14	16.3	13.1	6	4.7	12.2	5	5.1	12.1
TOTAL	86	100.0	100.0	126	100.0	100.0	98	100.0	100.0

Source: Experian GOAD data. Figures may not add due to rounding.
**These figures are in line with the GOAD report produced April 2015 but discounting the units located outside the current defined district centre boundary according to the Pre-Submission Proposals Map. These units include 16 comparison goods retailers and 4 service uses.*

5.86 Table 5.9 shows that the current district centre (i.e. the Pre-Submission Proposals Map) boundary accommodates 98 premises with the majority of these concentrated within the covered Shopping Centre. There are currently 8 convenience goods uses in the centre including a bakery, a health food store, an Iceland frozen food store, the indoor market and the large Sainsbury's foodstore. The Sainsbury's store extends to 5,810sq m net sales area. The Iceland frozen food store extends to 622sq m net.

5.87 Over the survey period between 2010 and 2016 there has been a doubling in the number of convenience goods uses, rising from 4 to 8. Convenience goods uses now comprise 8.1% of all units in the defined district centre, which is slightly below the GOAD national average of 9.3%.

5.88 The 2016 household survey results indicate that Crystal Peaks is able to attract a 22% market share of main food convenience goods shopping from Zone 8 residents, which is the zone where the district centre is located. Zone 8 is the core main food shopping catchment for the centre, although it is also able to attract 6% of first choice main food trips from Zone 13, along with 11% of second choice main food trips from this zone and 10% of second choice main food trips from Zone 7. It is also able to attract 12% of top-up food shopping trips from Zone 9. The Sainsburys supermarket contributes most to this market share, although this store has seen a small decrease in turnover since the opening of the nearby ASDA store.

5.89 Currently there are a total of 57 comparison goods retailers within Crystal Peaks district centre which is a slight increase in the number of units since 2010 although the proportion of these uses has remained relatively constant. At the present time, 58.2% of all units in the centre are

in comparison goods use which remains well above the national average of 39.7%. One reason why the proportion/number of comparison goods retailers is so high is due to the presence of a number of national multiples. These include the likes of Next, Marks and Spencer, New Look, Burton and Dorothy Perkins. There are also discount/value stores within the shopping centre including Wilko, Poundland and Poundworld. Further national multiple retailers can be found in Crystal Peaks Retail Park, including TK Maxx, Boots and Argos.

5.90 The district centre attracts a first and second choice comparison goods from several zones in the study area. In relation to Zone 8, in terms of first choice the market shares are as follows:

- Clothes and shoes – 35%
- Furniture, floor coverings and carpets – 12%
- Household textiles and soft furnishings – 17%
- Household appliances – 14%
- Audio-visual equipment – 5%
- DIY – 20%
- Chemist and medical goods – 38%
- Books – 18%
- Kitchen utensils – 47%
- Luxury and sports goods – 10%

5.91 It should also be noted that in relation to clothing, health/beauty, book and kitchen utensils, Crystal Peaks has a better market share in Zone 8 than Sheffield City Centre, allowing it to achieve an overall study area derived turnover of £139.3m in 2016.

5.92 There are 28 service units within the district centre which is equivalent to 28.6% of units in the centre and below the national average of 37.7%. This represents a reasonable increase in the number (19 units) and percentage (22.1%) of service uses since the 2010 study and whilst the proportion remains below the national average this is more to do with the dominance of comparison goods retailers in the centre rather than any particular inadequacy with the quality of service use provision. The majority of the service uses are food and drink related, including McDonald's, KFC and Subway but restaurants (such as Aagrah) and a range of independent cafes. Of the 28 service units, 12 are food and drink related. There is a cluster of estate agents at the western entrance to the shopping centre, a couple of travel agents, some banks and hair and beauty establishments.

5.93 Since the previous Study the number of vacant units has decreased significantly from 14 units in 2010 to just 5 units in 2016 (although one reason for this could be due to the recently

constructed vacant units at the time of the last survey now being occupied). The percentage of vacant units is now 5.1% which is much lower than the national average of 12.1%. Of the vacancies which remain, there is a large vacant unit at the eastern entrance to the shopping centre and within the central atrium there are three vacant units of which two have become vacant in the last year with the closing down of Blue Inc. menswear and an interior decor store.

5.94 To the north and still within the district centre there is a public house and a couple of restaurants (Aagrah and Pizza Hut). Just outside, to the north and west of the district centre, are Drakehouse Retail Park, a couple of fast food restaurants (McDonalds and KFC), another public house, an American restaurant, a Places Gym and Health Club and an ASDA supermarket on Beighton Road.

5.95 In terms of levels of vitality the shopping centre is relatively clean and well-maintained, if a little dated and lacks much character. The different elements of the district centre are relatively disjointed mainly due to the topography of the area. The district centre benefits from a supertram station and good bus services with links to Sheffield City Centre. There is a high number of customer car parking spaces, totalling approximately 1,595 free car parking spaces with approximately a further 1,000 free spaces just outside the district centre in Drakehouse Retail Park.

5.96 An outline planning application (Ref. 15/00277/OUT) was approved in 2015 for a 3,100sq m retail development consisting of an Aldi (1,742sq m), Costa Coffee (204sq m) and a Frankie & Benny's (409sq m) on land off Drake House Way to the north of Drakehouse Retail Park. The floorspace in this development was increased to 3,649sq m through outline planning application 16/00566/OUT). A reserved matters application (Ref. 16/01066/REM) was approved so construction is expected to commence soon.

5.97 Overall, Crystal Peaks is a very popular shopping destination for comparison and convenience goods in the south-eastern part of Sheffield. The centre as a whole accommodates a number of national multiple retailers and its attractiveness is boosted by the presence of both the covered shopping mall and the adjacent retail park. The centre is dominated by comparison goods retailers and these help the centre to achieve a study area derived turnover of £139m, which is the third highest turnover of any single shopping destination in Sheffield (behind MSC and the City Centre).

Ecclesall Road

5.98 Ecclesall Road is a linear centre south-west of, but very close to, the City Centre. The centre extends 1.1 km (0.7 miles) in length and also includes parts of Sharrow Vale Road and Hickmott Road. The majority of the centre is focused on the south side of the Ecclesall Road.

5.99 Ecclesall Road offers a wide range of restaurants, pubs, bars, cafes and shops. The centre serves local residents, which includes a large student population, and also attracts people from further afield, in particular those from the affluent areas to the south west of the city.

5.100 There are Conservation Areas in close proximity of the district centre with Broomhall Conservation Area opposite some of the properties near Denham Road.

5.101 The extent of the Ecclesall Road district centre as illustrated by the Pre-Submission Proposals Map is shown in Appendix IV. This map does not designate any of the district centre as a Primary Shopping Area.

5.102 There is a difference between the boundary on the Experian GOAD plans and the boundary of the district centre in both the UDP and Pre-Submission Proposal Maps. The GOAD plan includes a large number of premises which are located to the south of the Moore Street roundabout. Conversely, the GOAD plan does not include those units which are located along Sharrow Vale Road and Hickmott Road. Given the large differences in the GOAD boundary plan from the defined district centre boundary we are not including the GOAD figures in the assessment of Ecclesall Road, and therefore referring to the figures used in the previous Study in 2010.

5.103 The boundary of the district centre for the previous study was as shown on the UDP Proposals Map. The main difference between this centre boundary and the Pre-Submission Proposals Map boundary are that additional small units have been included along Sharrow Vale Road and Hickmott Road. It should be noted that the majority of those units that are not identified within the new district centre boundary are residential dwellings.

Table 5.10 – Land use composition for Ecclesall Road district centre, 2010-2016

Classification	Number of Outlets					
	2010			2016		
	Cushman & Wakefield	%	GB Ave. %	GVA (June 2016)	%	GB Ave. %
Convenience	12	7.7	9.1	20	10.3	9.3
Comparison	64	41.3	41.8	67	34.5	39.7
Service	65	41.9	34.9	90	46.4	37.7
Miscellaneous	3	1.9	1.2	1	0.5	1.2
Vacant	11	7.1	13.1	16	8.3	12.1
TOTAL	155	100.0	100.0	194	100.0	100.0

Figures may not add due to rounding.

5.104 Table 5.10 shows that the defined district centre boundary accommodates 194 premises, with 177 of these in retail and leisure use. There are currently 20 convenience goods uses in the centre including delicatessens, off-licences, a butcher, a Sainsbury's Local Store, a Tesco Metro on Berkeley Precinct and a M&S Foodhall. The M&S Foodhall is the largest convenience goods store and extends to 975sq m net sales area.

5.105 Over the survey period between 2010 and 2016 there has been a fluctuation in the number of convenience goods uses, rising from 12 to 20. Convenience goods uses now comprise 10.3% of all retail and service uses in the defined district centre and this is marginally higher than the GOAD national average of 9.3%. The main convenience goods retailers in the centre are Marks & Spencer and Tesco Metro.

5.106 The 2016 household survey results indicate that in terms of convenience goods shopping, for first and second choice food shopping, Ecclesall Road does not attract a large market share of trips. In Zone 5, where Ecclesall Road is located, only 5% of residents undertake their first choice main food shopping within the centre, whilst the percentage rises to 14% for second choice main food shopping. The centre is also only able to retain 6% of top-up food shopping trips from Zone 5 residents. In terms of the leakage of expenditure outside Zone 5, this includes the Sainsburys and ALDI stores on Archer Road and London Road district centre.

5.107 At the present time there are 67 comparison goods retailers within Ecclesall Road District Centre, which is a reduction in the number of such uses recorded in the previous study. At the present time, 34.5% of all retail and service units in the centre are in comparison goods use which remains below the national average of 39.7% and is a fall from 41.3% of such uses in 2010.

5.108 In terms of the businesses present, there is a high percentage of local independent traders and include clothing and fashion shops, jewellery, pharmacy, charity shops and gift shops. There are also some national multiple retailers including White Stuff and Fat Face clothing stores and a Boots chemist on Berkeley Precinct. The quantity of clothing and gift shops within the centre is a sign of its popularity and attractiveness.

5.109 The results of the 2016 household survey indicate that Ecclesall Road does not feature in many types of comparison goods shopping trips. Its highest market penetration rate is in relation to health and beauty goods where it is able to attract 7% of trips from Zone 5 and also a small share of trips from zones 2, 4, 6 and 10.

5.110 The majority of service uses within this centre cater for evening entertainment in the form of restaurants, bars, cafes and takeaways. The restaurants range from independent restaurants like Graze Inn Bar & Restaurant, Craft & Dough Restaurant and Smith & Baker which are all

located at the northern end of Ecclesall Road. Towards the southern end there are some national multiple business including Pizza Express, Carluccio's and Nando's. In addition to the large number of restaurants and take-aways there are also hair salons, beauticians, estate agents and banks/building societies. The number of service outlets has increased from 65 (41.9%) in 2010 to 90 (46.4%) as present which is well above the national average of 37.7%.

5.111 Since the previous Study in 2010 the number of vacant units has increased from 11 units to 16 units. This is only a small percentage increase and the proportion of vacancies in the centre remains below the national average of 12.1%. Along Ecclesall Road there are 9 vacant units with a number of these located at the southern end of the road. It should be noted that 7 of the vacant units are located on either Sharrow Vale Road or Hickmott Road which are off the main street which runs through the centre (Ecclesall Road) and some of these were not part of the defined district centre boundary at the time of the previous Study.

5.112 As stated above within the district centre there is a very good variety of restaurants, bars and public houses that cater for users during the day and into the evening. These uses are well distributed through the district centre. There are no other leisure venues within the district centre however it is located very close to the City Centre where other leisure venues are available. Sheffield Botanical Gardens is located to the north and Hallamshire tennis and squash club is located to the south-west of the district centre off Ecclesall Road.

5.113 In terms of levels of vitality in the district centre, the whole of Ecclesall Road appears to be vibrant, clean and well-maintained, with the highest level of movement of pedestrians along the southern side of Ecclesall Road. The majority of the premises include a small front terrace area which sometimes acts as an addition to the adopted highway pavement, subsequently the public realm is disjointed.

5.114 Pedestrian movement is slightly hampered by the lack of dedicated pedestrian crossings which can cause a delay in crossing the subsidiary roads off Ecclesall Road. Ecclesall Road has a high volume of vehicular traffic as it is the main route out of the City Centre towards the affluent south west region of Sheffield. This also hampers pedestrian movement between different parts of the centre at busy peak times.

5.115 Given its location, within close proximity of the City Centre, Ecclesall Road district centre has good accessibility by public transport. There are various bus stops along Ecclesall Road which provides services to Ecclesfield, Chapeltown, Fulwood, Dore and Sheffield City Centre. The City Centre is located approximately 30 minutes' walk from the District Centre.

5.116 Due to the demographics of the local area, the volume of people visiting by car is high and, given the traffic on Ecclesall Road, parking is limited with the side streets reserved for permit holders and pay and displays. A small area of parking is provided within Berkeley Precinct.

5.117 In summary, Ecclesall Road is a large centre and one which is dominated by service uses, particularly food and drink uses. This is the defining role for the centre and food and non-food retailing, particularly non-food retailing, occupy a secondary role. In terms of these retail functions, Ecclesall Road is more of a top-up food shopping destination to the nature and size of the stores within the centre and it also provides a limited comparison goods shopping role.

Hillsborough

5.118 Hillsborough is the second largest district centre located approximately 3 miles (5km) to the north-west of the City Centre. There are two distinct areas within the Centre, one of which includes a traditional older part of the centre situated on Middlewood Road, Bradfield Road, Holme Lane and Langsett Road. The other is the Hillsborough Barracks shopping complex which also includes a Morrison's foodstore.

5.119 The surrounding land uses consist of mainly residential, however there are some commercial units to the south and industrial units, along with Sheffield College and Owlerton Greyhound Stadium to the east. Hillsborough Park is located to the north east of the District Centre with River Loxley running through the middle of the Centre.

5.120 Other than the retail and service uses that are discussed below there are offices and public houses, together with a hotel that is part of the Hillsborough Barracks development. There is also a library in Hillsborough Park which includes an advice centre.

5.121 There are no Conservation Areas within the district centre although Hillsborough Park, immediately to the north-east, is a Conservation Area.

5.122 The extent of Hillsborough District Centre, as illustrated by the Pre-Submission Proposals Map, is shown in Appendix IV. This Pre-Submission Proposals Map (2013) identifies the traditional part of the centre as the 'Primary Shopping Area'.

5.123 The boundary of the centre being assessed as part of this study differs slightly from the district centre boundary from the previous Study. The two main areas where it differs are the inclusion on the latest Proposals Map of the school at the northern extent of Middlewood Road and the Riverside Inn and health centre on the south-eastern side of Walkley Lane.

5.124 The GOAD plan includes some properties that are outside the defined district centre boundary. The area (on the GOAD plan) that are outside the district centre boundary, according to the Pre-Submission Proposals Map, have been discounted from the 2015 and 2016 figures shown below.

Table 5.11 – Land use composition for Hillsborough district centre, 2010-2016

Classification	Number of Outlets								
	2010			2015			2016		
	Cushman & Wakefield	%	GB Ave. %	GOAD* (April 2015)	%	GB Ave. %	GVA (June 2016)	%	GB Ave. %
Convenience	9	5.0	9.1	22	14.1	9.3	22	13.4	9.3
Comparison	48	26.7	41.8	62	39.7	39.7	63	38.4	39.7
Service	101	56.1	34.9	59	37.8	37.6	60	36.6	37.7
Miscellaneous	0	0	1.2	1	0.6	1.2	1	0.6	1.2
Vacant	22	12.2	13.1	12	7.7	12.2	18	11.0	12.1
TOTAL	180	100.0	100.0	156	100.0	100.0	164	100.0	100.0

Source: Experian GOAD data. Figures may not add due to rounding.
**These figures are in line with the GOAD report produced April 2015 minus those units located outside the current defined District Centre boundary. This includes 1 convenience goods store, 4 comparison goods stores, 6 service uses, zero miscellaneous and 1 vacant property.*

5.125 As shown in Table 5.11 above there are currently 164 premises within the district centre boundary, with 145 currently in retail or service use. Since the previous Study in 2010 there has been a fall in the total number of premises within retail or service use. The defined district centre boundary for both studies has remained relatively constant, with a small increase, which suggests that new non-retail uses have been introduced in to the centre. Over the period since the previous study in 2010 the total number of premises in the centre has reduced by 16, however there has been an increase of 8 units since the April 2015 GOAD survey.

5.126 There are currently 22 convenience goods retailers in the district centre boundary which equates to 13.4% of all surveyed units in the centre. This is an increase since the previous study when 5.0% of units were occupied by convenience goods retailers. A large majority of these convenience uses (20) are within the defined Primary Shopping Area. Outside the Primary Shopping Area there is a large Morrison's superstore, which has a net floorspace area of 5,128sq m. Within the Primary Shopping Area there are three frozen food stores (Heron Foods, Fulton's and Farmfoods), 6 bakeries, 4 butchers, two greengrocers, two tobacconists and a health food store.

5.127 The 2016 household survey results indicate that Hillsborough is able to attract around one third of first and second choice main food trips from Zone 4 (which Hillsborough falls into). The district centre is also able to attract first and second main food shopping trips from zones 1, 3, 5 and 10. The majority of these trips are associated with the large Morrisons supermarket. The centre has a 22% market share of top-up food shopping trips in Zone 4. Our quantitative analysis shows that the Morrisons store has a survey-derived convenience goods turnover of

£99m. This is over twice the benchmark turnover of this store[13] and is higher than the £67m convenience goods turnover assessed by the 2009 Retail Study. However, it should be noted that around £31m of this latest turnover forecast is shown to derived from spending from residents of Zone 23 (which covers the Huddersfield, Wakefield and Pontefract area). This is considered to be a likely over-estimate and if it is excluded then the turnover of the Morrisons falls to around the 2009 assessed level and suggests that the opening of the Sainsburys store on Clay Wheels Lane has not had an effect on the turnover of Morrisons.

5.128 Within Hillsborough district centre there are currently 63 comparison goods retailers, which equates to 38.4% of all surveyed units and is just below the national average of 39.7%. Since the previous study in 2010 there has been a significant increase in the number of comparison goods stores, rising from 48, which, at that time, was below the national average.

5.129 There are a variety of stores ranging from independent to national multiple retailers within the centre. Within the Primary Shopping Area the national multiple retailers include a B&M Home Store, Home Bargains, Wilko, Dunelm Mill, Peacocks, Superdrug and Boots. The independent stores include clothing and retail, opticians, charity shops, arts and craft shops and furniture shops.

5.130 Outside the Primary Shopping Area and within the Hillsborough Barracks Shopping Mall there is a Poundland, B&Q and another Peacocks located within the Morrisons supermarket.

5.131 The 2016 household survey indicates Hillsborough is able to attract the following market shares for individual first choice comparison goods categories in Zone 4:

- A 4% market share for clothes and shoe shopping;
- A 14% market share for furniture, floor coverings and carpets;
- A 34% market share for household textiles and soft furnishings;
- A 6% market share for household appliances;
- A 3% market share for audio- visual equipment;
- A 10% market share for DIY goods;
- A 36% market share for chemist and medical goods;
- An 8% market share for books;
- A 30% market share for kitchen utensils; and
- A 5% market share for luxury and sports goods.

[13] Based upon company average sales density performance levels

5.132 Outside Zone 4, Hillsborough is also able to attract a small market share of comparison goods shopping trips from zones 1 and 3. It also appears to be a particular destination for household textiles and furnishings with a market share of between 10%-14% in Zones 1, 2, 3 and 10. Overall, Hillsborough district centre has a comparison goods turnover of £34m and a convenience goods turnover of £106m at 2016.

5.133 The number of service uses has fallen since 2010. The previous Study advised there were 101 premises in service use which was 56.1% of all district centre uses. This is significantly more than the national average at the time which was 34.9%. Although the number of service uses has reduced by 41 units the proportion of service units is in line with the national average. There is a high variety of service uses on offer including restaurants, takeaways, banks, cafes, beauticians, salons, barbers, estate and travel agents and a pawnbroker. At the entrance to Hillsborough Barracks Shopping Mall there is a McDonald's[14].

5.134 There are currently 18 vacant units within the district centre which equates to 11% of all units and therefore puts the centre in line with the national average. The number of vacant units has increased (by 6) since the GOAD survey in 2015, although this is still 4 lower than the vacancy rate observed by the 2010 study. Within the Primary Shopping Area there are 16 vacant units. These are generally spread across the centre with a cluster in the northern area of Middlewood Road.

5.135 At the junction of Langsett Road, Bradfield Road and Middlewood Road there are some public houses which take advantage of the River Loxely and the visible weir. Close to Penistone Road, to the east of Morrison's there are a couple of fast food restaurants (McDonalds and KFC). In the surrounding areas there are several leisure uses including Owlerton Greyhound Stadium, Hillsborough football stadium, Hillsborough leisure centre, Hillsborough bowling club, Parkwood karting and Hillsborough Arena.

5.136 As stated above, there are two distinct parts to the district centre; the Hillsborough Barracks Shopping Mall and Middlewood Road. There is separation between these two parts. However, there appears a good variety and mix of uses which all complement each other to make a vibrant centre. The River running through the centre provides an attractive setting which benefited from the range of uses, which include a couple of public houses.

5.137 As in the other district centres there is a main road running through it with a busy junction between Middlewood Road, Bradfield Road, Holme Lane and Langsett Road ('Hillsborough Corner'). On top of this there is a tram line running down Middlewood Road and Holme Lane that forms a barrier for pedestrian movements through the district centre. There is however a

[14] [NOTE – Service figure in 2010 study appears incorrect as 2009 GOAD figure is in line with the 2015 and 2016 results]

range of pedestrian crossing points that ensure pedestrians can move through the Centre fairly freely. There is a covered parade of shops known as Hillsborough Centre and a pedestrianized area linking Langsett Road and Hillsborough Barracks.

5.138 In the Primary Shopping Area there is limited parking except on-street. However, there is a large amount of parking in Hillsborough Barracks, including a multi-storey car park providing approximately 600 spaces.

5.139 Although there is no train station in close proximity of the District Centre the Supertram provides links to MSC and the City Centre, and the bus interchange, providing links to Dore, Woodhouse and the City Centre. Car traffic is often congested through Hillsborough Corner and around the Hillsborough Barracks.

5.140 Overall, Hillsborough district centre is a healthy district centre which has a catchment which extends beyond the immediate local centre. Vacancy levels are reasonably low and the amount of service and comparison goods uses are generally in line with the national average. The proportion of convenience goods uses in the centre are well above national average levels. Convenience goods floorspace provision is dominated by the large Morrisons store which attracts around one third of all main food trips from the local area and appears to be trading very well. The district centre is also able to attract a modest amount of different types of comparison goods from across the north-western part of the Sheffield urban area.

London Road

5.141 London Road is a linear district centre directly south of Sheffield City Centre and extends 0.75 km (0.5 miles) from St Mary's Gate, to the north, and where London Road splits to form Abbeydale Road, to the south.

5.142 The district centre is a diverse area with an extensive range of takeaway units, restaurants and bars. The centre has a pharmacy, ATM, post office, library, youth facilities, doctor and dentist. A number of the buildings are in a poor state of repair and due to the number of night time economy uses, a high level of units are closed during the day, contributing to numerous dead frontages.

5.143 The surrounding land uses are mainly residential along with some commercial uses concentrated across the northern boundary of the centre in close proximity to the City Centre. There is a relatively high level of student accommodation in the area with The Forge development located adjacent to the Wilko and Aldi stores. The Forge development, located on Boston Street, is a large student accommodation associated with Sheffield Hallam University and consists of 1,162 bedrooms spread over four blocks.

5.144 The district centre is not covered by any Conservation Areas. The nearest Conservation Area is located to the east called 'John Street Conservation Area'.

5.145 The extent of the London Road district centre, as illustrated by the Pre-Submission Proposals Map, is shown in Appendix IV. This map does not designate any of the district centre as a 'Primary Shopping Area'.

5.146 The boundary differs from the boundary shown on the Experian GOAD plans and the boundary of the district centre in the previous Study in 2010. The northern extent of the Pre-Submission Proposals Map, i.e. north of the junction of Boston Street and London Road, is located outside the GOAD plan for London Road. However, this area is located within the GOAD plan for Sheffield City Centre. Given that this area has been included within the London Road district centre, according to the Pre-Submission Proposals Map, and it is clearly outside of Sheffield City Centre we are classing these units as within the London Road district centre count and not within the Sheffield City Centre count. These units will therefore not be double counted.

5.147 The boundary of the district centre in the Pre-Submission Proposals Map differs slightly from the UDP boundary. The difference relates to the exclusion of the vacant property to the west of the Waitrose car park and removal of properties along the southern end of London Road to the south of Highfield Trinity Church.

Table 5.12 – Land use composition for London Road district centre, 2010-2016

Classification	Number of Outlets								
	2010			2014			2016		
	Cushman & Wakefield	%	GB Ave. %	GOAD* (Oct 2014)	%	GB Ave. %	GVA** (June 2016)	%	GB Ave. %
Convenience	11	6.6	9.1	14	10.9	9.3	11	8.1	9.3
Comparison	37	22.2	41.8	32	25.0	39.7	34	25.2	39.7
Service	87	52.1	34.9	64	50.0	37.6	70	51.9	37.7
Miscellaneous	6	3.6	1.2	1	0.8	1.2	1	0.7	1.2
Vacant	26	15.6	13.1	17	13.3	12.2	19	14.1	12.1
TOTAL	167	100.0	100.0	128	100.0	100.0	135	100.0	100.0

Source: Experian GOAD data. Figures may not add due to rounding.
**Please note the GOAD plan boundary differs from the Pre-Submission Proposals Map as detailed above. Those units that have been excluded from the GOAD figures for 2014 include 2 convenience uses, 3 comparison and 4 vacant properties*
***Please note these figures correspond with the district centre boundary as identified by the Pre-Submission Proposals Map. The units identified outside the GOAD plan includes 2 convenience units, 7 comparison units, 10 service units and 3 vacant units)*

5.148 Table 5.12 shows that the defined district centre boundary accommodates 135 premises, with 115 of these are in active retail and service use. In the period since the 2010 study the total number of premises in the district centre has dropped by 32 from 167. This is likely to be due to the units along the southern part of London Road being excluded from the boundary.

5.149 There are currently 11 convenience goods uses in the centre including an Ozmen food store a baker, grocery stores, an off licence, two independent convenience stores, a Sainsbury's Local, Waitrose supermarket and an Aldi. The net floorspace for these national multiple convenience goods stores extends to approximately:

- Waitrose Supermarket – 3,216sq m;
- Aldi Supermarket – 1,275sq m; and
- Sainsbury's Local – 274sq m.

5.150 Over the survey period between 2010 and 2016 the number of convenience stores has remained relatively constant. Convenience goods uses now comprise 8.1% of units in the defined district centre and this is slightly below the GOAD national average of 9.3%. The multiple national retailers, identified above, are all located at the northern part of the centre.

5.151 The 2016 household survey results indicate that convenience shopping on London Road is the only location throughout Sheffield to attract a higher number of shopping trips from outside of that zone. London Road attracts just 4% of main food shoppers from Zone 6, but attracts 18% of shoppers from Zone 10, 2% from Zone 7, 14% from Zone 5, 5% from Zone 4 and 1% from Zone 3. It does, however, lie on the boundary between zones 5, 6 and 10. The Waitrose on Ecclesall Road attracts the majority of these main food trips. In terms of second choice main food shopping trips, it attracts a slightly higher figure of 10% of shoppers, however this is still lower than the 12% of second choice main food shoppers it attracts from Zone 5. Regarding top-up shopping, the district centre is not able to attract a high number of shopping trips from across the district, with only 1% of trips coming from Zone 6.

5.152 At the present time there are 34 comparison goods retailers within the district centre boundary, which is a slight reduction since the previous study in 2010. This equates to 25.2% of all units in the centre and remains well below the national average of 39.7%. As illustrated in Table 5.11 above, this is a common trend for the district centre with only 22.2% of units in comparison goods use in 2010 when the national average in 2010 was 41.8%.

5.153 In terms of businesses present, there is a high variety of uses on offer ranging from computer goods stores to charity shops to clothing and fashion shops. There is a relatively even spread across the Centre with a couple of household goods stores located in the north of the centre. In terms of multiple national retailers there is Wilko, a Lloyds Pharmacy and a Boots chemist within the Waitrose. The majority of comparison goods retailers are local independent traders.

5.154 In terms of shopping patterns associated with comparison goods stores in London Road district centre, the 2016 household survey does not record many specific trips. The only areas to attract shoppers in Zone 6 are furniture, floor coverings and carpets and chemist and medical goods, both at only 1%. Although only a small minority, London Road mainly attracts shoppers from within Zone 6 and a very low number of shoppers from Zone 5 which are often for second choice shopping.

5.155 A consistent trend between 2010 and 2016 is the high proportion of units within the service sector. The latest (2016) survey indicates that there are 70 service units within the centre, which equates to 51.9% of all units. This is much higher than the current national average of 39.7%. Within the service sector, there are a high number of restaurants (27 units) and takeaways (19 units) which implies that the centre is a popular destination for evening entertainment, which is perhaps unsurprising given the level of student accommodation in the local area. There are also a further 7 public houses / bars which are not included in the number of service uses (as these fall outside of the standard GOAD classification).

5.156 Since the 2010 study, the number of vacant units has reduced from 26 units to 19. This is equivalent to a fall from 15.6% in 2010 to 14.1% in 2016. However, whilst there has been a fall, the proportion of vacancies within the centre remains above the national average of 12.1%. Since Experian's survey of the centre in October 2014 the following units have closed: a Gregg's bakery, a Chinese restaurant, two grocery stores and two takeaways. There is a high concentration of vacant units in the northern part of the centre before the junction of London Road with Boston Street.

5.157 There are many restaurants throughout the district centre including a cluster around Woodhead Road and Sharrow Lane. There are also a couple of bars in this area. Along Bramall Lane which runs parallel to London Road to the east is Sheffield United Football Club's home stadium (called Bramall Lane) and some sports pitches further south.

5.158 Due to the role of London Road as a main vehicular route into the southern part of the city, the district centre has a busy appearance. Whilst this characteristic has the potential to provide the centre with a substantial amount of passing trade, London Road dissects the centre and this can lead to problems moving between the different parts of the centre on the western and eastern edges of London Road. This is reinforced by the lack of pedestrian crossings.

5.159 Given the high density residential uses surrounding the centre, available parking is limited to on-street. Parking is provided in the Aldi and Waitrose however these facilities are for customers of these stores and have limited parking time rules.

5.160 Given its location and role as a main route into the City Centre, the district centre has a good level of accessibility by public transport. There are various bus stops along London Road which provide services to Chesterfield, Chapeltown, Hillsborough and Sheffield City Centre. Sheffield City Centre is located approximately 10 minutes' walk from the district centre.

5.161 In terms of recent developments, the Sainsbury's Local convenience store has opened in place of a Chinese restaurant since the last Retail Study. To the east of the Aldi store, the New Era Square is currently being constructed with further details on this development provided earlier in this Section.

5.162 Planning permission 16/00515/FUL, known as Ecclesall Junction, was approved June 2016 on the former Peugeot Garage to the west of the Waitrose. The permission was for the change of use of the show room to mixed use commercial retail (A1-A5, B1 and D2) in 7 units. The gross internal floorspace proposed is 3,482sq m (net additional gross internal floorspace of 2,437sq m (i.e. 70% of the gross figure)).

5.163 In summary, London Road is likely to be influenced by similar issues to those experienced by Ecclesall Road, in particular the close proximity to the City Centre which influences both shopping patterns and also the range of retailers and other businesses which are present. These influences affect the health and function of the centre, including the higher than average vacancy rate. The proportion of convenience and comparison uses are below the national average whilst the proportion of service uses is well above the national average. Indeed, it is likely the service uses within the centre are a key attractor for the day to day needs of the local catchment.

Woodseats

5.164 Woodseats is also a linear Centre located approximately 3 miles (5 km) to the south of the City Centre with its retail and service functions based either side of Chesterfield Road and along Abbey Lane to the south of the centre. The district centre extends approximately 1km from north to south. It also lies on the same main vehicular route to the south of London Road district centre

5.165 The surrounding land uses are mainly made up of residential and office uses at the first floor level, with retail uses below. Other uses include public houses, a nursery and a call centre. There is a new library and medical centre under construction (due to open in 2017) and which will sit on the site of the old library. This is located within the defined centre boundary.

5.166 There are no designated Conservation Areas within or in close proximity of the district centre.

5.167 The extent of Woodseats district centre, as illustrated by the Pre-Submission Proposals Map, is shown in Appendix IV. This map does not designate any of the district centre as a 'Primary Shopping Area'.

5.168 The proposed boundary of the centre in the Pre-Submission Proposals Map boundary differs from the boundary of the UDP Proposals Map which was used for the 2010 study. The current district centre boundary includes some units to the south of Cobnar Road, however it should be noted that these units are outside of the land use classification for retail or service uses. They include a nursery, Woodseats centre and residential flats. There is no GOAD plan available for this district centre and therefore SCC data has been used.

Table 5.13 – Land use composition for Woodseats district centre, 2010-2016

Classification	Number of Outlets								
	2010			2015			2016		
	Cushman & Wakefield	%	GB Ave. %	SCC* (July 2015)	%	GB Ave. %	GVA (June 2016)	%	GB Ave. %
Convenience	13	8.4	9.1	10	7.0	9.3	7	4.9	9.3
Comparison	46	39.9	41.8	54	38.0	39.7	55	38.7	39.7
Service	86	55.8	34.9	70	49.3	37.6	70	49.3	37.7
Miscellaneous	0	0	1.2	1	0.7	1.2	1	0.7	1.2
Vacant	9	5.8	13.1	7	4.9	12.2	9	6.3	12.1
TOTAL	154	100.0	100.0	142	100.0	100.0	142	100.0	100.0

Figures may not add due to rounding.
**Data produced by Sheffield City Council following their in-house survey and updated by GVA in 2016*

5.169 Table 5.13 shows that the defined district centre boundary accommodates 142 premises, with 132 currently in active retail and service use. In the period since the previous study in 2010 the total number of premises has dropped by 12 from 154. As the district centre boundary has remained relatively similar between the UDP and Pre-Submission Proposals Map this fall would suggest that some units have fallen out of retail use.

5.170 There are currently 7 convenience goods retailers within the district centre which equates to 4.9% of all units in the centre and is below the national average of 9.3%. This is a fall from the 13 convenience goods units recorded in the 2010 study. Convenience goods stores in the district centre include Farmfoods and Iceland frozen food stores, an ASDA supermarket, Spar convenience store, along with some specialist retailers including a butcher, a fishmonger and a bakery. The ASDA unit was previously occupied by Netto (whose UK stores were bought by ASDA Wal-Mart in 1999). The other notable change is the closure of a Tesco Express store,

which has been replaced by an Original Factory Shop. The largest of the convenience stores in terms of floorspace is the ASDA store at 537sq m (net).

5.171 In terms of market penetration rates, Woodseats in arguably the least popular of the six district centres covered by our analysis, as the 2016 household survey results indicate that convenience goods shopping in Woodseats has a very small catchment within the local authority, and only manages to attract 1% of main food shoppers from Zone 6. It also attracts 1% of shoppers from Zone 4 with the Asda on Chesterfield Road the most popular store. In terms of top-up shopping, it is able to attract 4% of shopping trips from Zone 6 and 1% of shopping trips from Zone 5.

5.172 There are currently 55 comparison goods retailers within the district centre which equates to 38.7% of all units. The number of comparison goods retailers within the centre has gradually increased since 2010 and now the proportion of comparison goods uses in the centre is generally in line with the national average of 39.7%.

5.173 In terms of the type of comparison goods retailers present in the district centre, there are a variety of independent stores including household and homeware goods, charity shops, gift shops, opticians, 'phone shops and fashion/clothing stores. The largest comparison shops are The Original Factory Shop (1,611sq m gross) and Pyramid Carpets, which is 1,365sq m gross.

5.174 The results of the household survey indicate that Zone 6 provides the majority of comparison goods shopping trips to Woodseats. The most common comparison goods shopping trips are for chemist and medical goods and furniture and floor coverings and carpets at 7% and 4% respectively. Woodseats district centre attracts no shopping trips for luxury and sporting goods, kitchen utensils, DIY goods, and clothing and shoes. Woodseats has a very limited catchment, mainly attracting shoppers from Zone 6.

5.175 Like London Road district centre, Woodseats district centre has a higher than average proportion of service uses (when measured against the national average). In total there are currently 70 service uses within the centre which is equivalent to half of all the units in the centre. This compares to the national average of 37.7% of all retail units in a centre. The higher than average proportion of service uses within the centre has been a common theme since 2010, although there has been a reduction from 55.8% in 2010. Within the District Centre there is a high level of evening economy uses, including 4 restaurants and 18 takeaways / fast food premises. National multiple operators include Subway, KFC and Costa Coffee. In the service uses recorded by the land use survey there are also 6 public houses / bars within the district centre.

5.176 There is also a high level of health and beauty service uses, with a total of 22 beauticians, hair salons and barbers. There are also 4 banks: Yorkshire Bank, HSBC, Natwest and Lloyds.

5.177 The number of vacant units over the survey period has remained relatively constant with 9 vacancies in 2010, 7 in 2015 and 9 vacant units in 2016. The current level of vacancies equates to 6.3% of all surveyed units in the centre, which is well below the national average of 12.1%. Since the 2015 survey the following premises have become vacant: a charity shop, a money shop, two estate agents and a take-away. There appears to be an even spread of vacant units across the district centre.

5.178 In terms of leisure uses there is a hotel located at the southern end of the district centre on Chesterfield Road. There is a cluster of public houses and restaurants at the junction of Chesterfield Road and The Dale. There are no other leisure uses within the district centre however further afield there is Graves Park to the east, where there is an animal farm, playing fields and a golf course. Beauchief Abbey and Beauchief Golf Club is located to the south west off Abbey Lane.

5.179 The nature of the district centre, with a main road running its centre, makes the centre appear busy. The main cluster of units is within the centre of Chesterfield Road heading north towards the City Centre. The Centre becomes quieter with the number of residential properties increasing on the southern side of Chesterfield Road and larger units like, KFC, Gilder Honda and The Abbey Hotel on the northern side. This provides a definitive gap in the district centre between units north around Cobnar Road to the retail units located at the junction of Chesterfield Road and Abbey Lane. This is currently reinforced by the construction site which forms the site of the proposed library and medical centre.

5.180 There is a large Morrisons superstore to the south of the district centre, on Chesterfield Road and large Tesco and Sainsbury's superstores located to the west of the district centre which together could have an impact on visitors to the centre and are likely to explain the centre's low convenience goods market penetration rate.

5.181 Pedestrian areas and areas of public realm within the centre are relatively limited as the retail units abut the edge of the pavement on both sides of the busy main road. Due to the level of traffic using Chesterfield Road pedestrian connections between the different sides of the street can be difficult at peak times, however there are some pedestrian crossing points along Chesterfield Road to ensure visitors can access retail and service premises on either side of the road.

5.182 Given the surrounding residential uses the level of parking available is limited to on-street parking and time-restricted. A small parking area is provided to the rear of the ASDA and Iceland stores, the Kashmiri Aroma restaurant and The Original Factory Shop. However, these car parks are restricted to customers only.

5.183 There is no train station within or close to Woodseats district centre; however there is a good bus service between Sheffield City Centre, Woodhouse and Chesterfield.

5.184 Over the study period, 2010 to 2016, the trend in provision of retail uses has changed as following:

- Overall fall in the number of units from 154 to 142;
- Convenience uses have halved and now considerably below the national average;
- Comparison uses have increased and the provision is now relatively in line with the national average;
- Service uses have dropped considerably from 86 to 70, however in terms of provision it is still considerably above the national average;
- Vacant properties have stayed the same and are significantly below the national average.

5.185 In summary, Woodseats district centre serves a limited local catchment, due to the type and nature of the stores present in the centre and also due to influence of large supermarkets in out of centre locations around the centre. It is very much a service use orientated centre and a location which functions by meeting the day to day needs of the local population and the drive-by catchment.

Overall Conclusions City Centre & District Centres

5.186 Based upon the foregoing analysis, Table 5.14 below outlines the key characteristics of each centre and overall conclusions regarding their health:

Table 5.14: overall conclusions regarding the health of Sheffield city centre and the main District Centres in Sheffield

Centre	Key characteristics	Overall Conclusions Regarding Health of Centre
Sheffield City Centre	▪ Comparison goods turnover of £732m and a convenience goods turnover of £75m. ▪ Clothing/fashion, health/beauty and sports/recreation goods make largest contribution to turnover.	City centre remains a very important and popular shopping destination, albeit one which has seen a small decline in turnover and market share in recent years. Whilst improvements to The Moor area are having a materially positive impact

	▪ Comparison goods turnover now lower than Meadowhall (with smaller catchment area) ▪ Higher than average vacancy rate (although this is influenced by proposed investment at the Retail Quarter site) ▪ Recent (and on-going) development at The Moor has had a positive impact.	upon the centre, there remains ample scope for further improvements in retail and leisure provision in the centre and the continued focus will be on the planned investment in the Retail Quarter area.
Chapeltown	▪ A district centre with lower than average vacancy levels. ▪ Food retail offer anchored by ASDA supermarket ▪ Strong but relatively small catchment for food shopping ▪ Half of all units occupied by service uses	A reasonably healthy district centre in the northern part of the city, with a strong food shopping and service use focus. A popular centre amongst the local community for main and top-up food shopping.
Crystal Peaks	▪ A district centre which is split into two parts: modern shopping centre and retail warehouse park. ▪ Low vacancy rate ▪ Proportion of comparison goods stores in considerably higher than the national average ▪ Sainsburys supermarket anchors the food retail offer in the centre ▪ Good market share across some comparison goods categories	Crystal Peaks is a healthy modern district centre, located in the south-eastern part of the city. Alongside its important food shopping role, the centre is also very popular for non-food shopping trips and rivals the city centre and Meadowhall in terms of market penetration in the local catchment.
Ecclesall Road	▪ Limited market penetration for food and non-food	A district centre which is defined by its service use

	shopping. ▪ Increase in vacancies in recent years although they remain below the national average ▪ Significant service offer within the centre, including evening entertainment.	role, which underpins its health and attractiveness.
Hillsborough	▪ Second largest district centre which is split into two distinct parts. ▪ Food shopping role underpinned by Morrisons supermarket ▪ Range of uses are generally in line with the national average, although convenience goods uses are above average ▪ Centre contains a mix of national multiple and independent businesses.	Hillsborough is healthy centre which draws trade from a reasonably wide catchment in north-west Sheffield. The centre is one of the few district centres to attract a reasonably high amount of comparison goods shopping trips.
London Road	▪ A district centre close to the city centre, which attracts a modest amount of main and top-up food shopping trips. ▪ Food retail offer anchored by Waitrose and ALDI ▪ Proportion of comparison goods uses lower than the national average ▪ Centre lies on main route through the city, leading to benefits of passing trade but to the disadvantage of pedestrian movement.	A centre whose health is influenced by its close proximity to the city centre. The centre is underpinned by its service use role and functions as the focal point for the day to day needs of the local catchment population.
Woodseats	▪ A district centre with a	Woodseats is a centre in

	falling proportion of convenience and service uses. However, services remain above the national average. ▪ Weakest of the centres reviewed in terms of food shopping role ▪ Vacancies lower than the national average.	reasonable health. It is not the most popular of district centres, but has a good range of shops and services and is able to provide for the day to day needs of the local population.

Out of Centre locations and Retail Warehouse Provision

Foodstores and supermarkets

5.187 The main foodstores and supermarkets in out-of-centre locations across the Sheffield urban area are as follows (and are shown on the plan at Appendix VIII):

5.188 There are a range of Aldi stores in out-of-centre locations, ranging from 693sq m to 990sq m net floorspace. They are located at The Common in Ecclesfield, Turner Business Park, Meadowhall Retail Park, Flora Street and Archer Road.

5.189 An ASDA Supercentre is located at Handsworth Road to the east of the City Centre and extends to 6.968sq m net. Another ASDA is located on Beighton Road near Crystal Peaks District Centre and extends to 5,340sq m net.

5.190 There are two out-of-centre Sainsburys of similar size located within Sheffield. The Archer Road store, located to the south-west of the City Centre, close to Woodseats District Centre, extends to 5,299sq m of net floorspace and the Claywheels Lane store, located north-west of the City Centre and close to Hillsborough District Centre, extends to 5,858sq m net.

5.191 Marks and Spencer has a large store at MSC, extending to 7,872sq m net with the Foodhall extending to 1,459sq m.

5.192 Three Morrisons stores are located within SCC administrative boundary. The Oxclose store extends to 3,435sq m net and is located to the south-east of the City Centre. The Common store, Ecclesfield, extends to 2,997sq m net and is located close to Chapeltown District Centre to the north-west of the City Centre. The Meadowhead store is located to the south of Woodseats District Centre and extends to 2,382sq m net floorspace. A fourth store is located to the east of the City Centre at Catcliffe. This is in Rotherham but is close to the Sheffield

boundary. It extends to 5,080sq m net. There is also a garden centre and a Boundary Mill within this development.

5.193 A large Tesco Superstore is located adjacent to the Archer Road Sainsbury's store. It extends to 3,376sq m net floorspace. There is also a large Tesco supermarket on Montgomery Terrace Road.

5.194 The most popular stores for main food shopping include Asda at Handsworth Road which has a market share of 22% in Zone 7 and 42% in Zone 9, Tesco at Montgomery Terrace which has a market share of 43% from Zone 10, Sainsbury's on Archer Road has a market share of 16% and 12% for Zones 6 and 5 respectively and Aldi on Turner Business Park which has a market share of 19% for Zone 9. It is evident that the majority of these stores do not cater for top up shopping which means that top-up stores are either located in district centres or smaller shops outside the city and district centre.

Retail / Shopping Park Locations

5.195 The main out-of-centre shopping centre in the region is MSC which is an indoor shopping centre located 5 miles (8 km) north-east of Sheffield City Centre and 3 miles (5 km) south-west of Rotherham town centre. MSC opened in 1990 and is owned by British Land. At the time of the latest Experian GOAD survey in April 2015, there were 299 retail units covering a total of 1,401,600sq ft (130,213sq m) of ground floor floorspace. In total there were 19 vacant outlets which equates to 6% of the shopping centre and 49,500sq ft (4,598sq m) of floorspace. In total there are 221 national multiple operators including Argos, Debenhams, H&M, House of Fraser, M&S, Next, Primark, Topman and Topshop, WH Smiths and New Look.

5.196 MSC is currently undergoing a £60m refurbishment programme which will include a major interior overhaul to make it brighter, smarter and easier to move around. The refurbishment is expected to be complete later in 2017.

5.197 In early November 2016, British Land submitted a planning application for the proposed extension to MSC. The extension, if permitted, will comprise a range of leisure, catering and retail within a new building extension. In addition it is proposed to replace the existing cinema within the new extension and to reconfigure the existing cinema to form alternative leisure uses in this unit. The proposed additional floorspace is shown in the table below.

Table 5.15: A table showing the additional floorspaces at MSC

Proposed Use	Approximate sq m (gross)
Leisure	7,854
Cinema	4,903
Catering	10,682
Retail (comparison)	5,573
Mezzanine for retail	1,139
Foodstore	3,054

Source: planning application documentation

5.198 In June 2016 British Land confirmed[15] that Jump Inc. the urban trampoline brand, have been signed up to open a 22,000sq ft (2,043sq m) site at Vulcan Road, Meadowhall . In May 2016 it confirmed that L'Oreal-owned cosmetics brand Urban Decay has opened its first standalone store outside London at MSC with a new 554sq ft (51sq m) store.

5.199 Other than MSC there are several retail parks / out of centre shopping centres which all provide a good number of free car parking on site. These include (all figures below are gross floorspace unless specified):

- **Archer Road Retail Park** is a modern retail park located to the south-west of the City Centre and 1km to the north-west of Woodseats district centre. There is one access point to the retail park off Archer Road with a McDonald's, Benson Beds, Laura Ashley, Bathstore and PureGym to the right and a Sainsbury's (5,299sq m of net floorspace) to the left. An alternative access point is provided for the Virgin Active Health & Fitness which extends to 3,939sq m floorspace. Excluding Sainsbury's there is 7,065sq m of floorspace with Benson Beds, Laura Ashley and Bathstore all having a floorspace of 372sq m.
- **Meadowhall Retail Park** is located off Attercliffe Common to the south of MSC and adjacent to Valley Centertainment. It is one of the larger retail parks in Sheffield with various retail and leisure operators, including Toys 'R' Us (4,109sq m floorspace), The Range (3,826sq m), Pizza Hut (295sq m) and an Aldi supermarket (1,165sq m). The whole retail park provides 18,755sq m of occupied floorspace and an Iceland store opened at the park earlier in 2016.

[15] http://news.costar.co.uk//en/assets/news/2016/June/BL-lands-Jump-Inc-at-Meadowhall/?utm_source=CoStar%20Daily%20News&utm_medium=email&utm_campaign=7211285_%5BCoStar%5D%20Email%20%3A%20Daily%20News%20Bulletin%3A%2013%2F06%2F2016%2015%3A11%3A46&dm_i=UQT,4AK9H,4BF5KK,FPEFR,1

- Adjacent to Meadowhall Retail Park and MCS there is a Next Fashion, Home and Garden and a Costa Coffee Drive Thru. The Next unit restricted to bulky goods only with a floorspace of 60,000sq m and the Costa extending to 2,013sq m.
- **Parkway Central Retail and Leisure Park** is located on Sheffield Parkway which is the main road heading directly east out of Sheffield City Centre. The Park is accessed off Sheffield Parkway or Cricket Inn Road and totals 9,904sq m of retail and leisure floorspace. Included in this total are two units (totalling 371sq m floorspace) which have not been constructed. The largest unit is Matalan which extends to 4,465sq m with the Gala Bingo extending to 2,323sq m. There is also an Iceland on the Park which extends to 865sq m.
- **St Mary's Gate Retail Park** is a small retail park with just two units with a Staples, extending to 1,882sq m floorspace, and an empty unit extending to 1,104sq m floorspace. These units are inside the inner relief road, with the Staples unit included in the land use calculation for Sheffield City Centre.
- **Heeley Park Retail Park** is a relatively dated retail park with poor quality signage. It is located off Chesterfield Road to the south of Sheffield City Centre and just to the south west of Heeley district centre. There are 6 A1 non-food retail units including a Matalan (1,860sq m), Currys (1,905sq m) and a Next Clearance (937sq m). The total floorspace of A1 non-food is 7,032sq m. There is also a relatively new build Costa Coffee which extends to 158sq m.
- **Queens Road Retail Park** is located close to London Road district centre and Sheffield City Centre just off Queens Road. There are two A1 food units; Netto which extends to 952sq m and Asda Supermarket, which extends to 926sq m. There is one A1 non-food units which is a Poundstretcher and extends to 1,064sq m. There are also three units restricted to bulky goods only; Dreams which extends to 1,599sq m, Magnet which extends to 927sq m and United Carpets 742sq m. The whole retail park extends to 6,211sq m.
- **Flora Street Retail Park** provides both retail and leisure offer. There are two A1 food stores in Aldi and Iceland (579sq m floorspace). There is also a Home Bargains which extends to 1,394sq m and a health and fitness centre whose current operator is BEX Fitness.
- **Woodside Retail Park, Chesterfield Road** only offers three units and they extend to 5,736sq m of floorspace. Two are currently occupied with one being operated by Homebase, which also has a garden centre, and extends to 2,963sq m and a Dunelm Mill, which extends to 1,858sq m. Better Bathrooms takes up a unit of 942sq m.
- **Kilner Way Retail Park** is a newly constructed development which is half occupied. It is located on Halifax Road to the north of Hillsborough district centre. The retail park offers a TK Maxx (1,510sq m), Argos (1,719sq m), Poundland (1,006sq m), Halfords (1,173sq m) and Pets at Home (973sq m). A 'Guess How Much' has opened recently in a 1,142 sqm unit. The retail park provides 13,851sq m of retail (A1) floorspace of which 2,579sq m, in 5 units, is

currently vacant. There is also a Gala Bingo which extends to 2,572sq m and there will be 3,241sqm of other leisure floorspace.

- **Drakehouse Retail Park** is adjacent to Crystal Peaks district centre and offers A1 non-food retail units and a McDonald's. There are a total of 18 units which extend to 28,258sq m of floorspace with the units surrounding a central car parking area. The largest units include Homebase (3,751sq m), B&M (3,368sq m), Smyths Toys (2,317sq m) and Wickes (1,871sq m).

5.200 On top of the retail parks listed above there is also Fox Valley which is the newest retail park in the city and opened in June 2016. The development is located to the north of Sheffield, near Stocksbridge, on a 28 acre former steelworks site. It was developed by Dransfield Properties and includes 5,500sq m of office space, 13,400sq m of retail and leisure units and 118 homes. The development is spacious with the units provided around a central parking area which is free to customers.

5.201 There are a range of stores in the development ranging from cafés and restaurants like Central Bean Coffee House, Ponti's Italian Kitchen and Costa Coffee to multi-national retailers like Pets at Home, Next, Home Bargains, Regatta and Poundworld. There are also independent retailers like Sorelle Jewellery and Sandersons Boutique. There is an Aldi store with a floorspace of 1,858sq m. Due to the development only opening earlier this year there are some currently vacant properties, with retailers Holland & Barrett and Paperchase displayed as 'coming soon'.

Out of centre leisure provision

5.202 A high number of the out of centre leisure uses within Sheffield are located within the retail parks that are listed above. There is one out of centre development that is solely devoted to leisure uses and that is Valley Centertainment. This is a large, purpose built leisure park centred around a 20-screen (including an IMAX) Cineworld which amounts to 8,361sq m floorspace. Other leisure offers include a Hollywood Bowl (2,846sq m), Laser Quest (333sq m), Monkey Bizness (1,679sq m) and a Paradise Island (817sq m). There are also a number of restaurants ranging from Nando's (307sq m) to Five Guys (588sq m) to Coast to Coast (687sq m). The total leisure floorspace at Valley Centertainment is 18,434sq m).

5.203 On the opposite side of Broughton Lane is Sheffield Arena and iceSheffield. Sheffield Arena was originally built in 1991 and has a range of capacities; 9,500 for ice hockey, 12,500 for seated central area and 13,500 for standing central area. iceSheffield is an ice arena which was constructed in 2003 and consists of two Olympic-size ice rinks with seating for 1,500 people.

5.204 Grosvenor casino is located on Queens Road directly to the south-east of the City Centre. The casino includes a restaurant, bar, sports and entertainment lounge and conference room. The unit extends to approximately 3,300sq m (gross floorspace).

5.205 Within Sheffield there are nine leisure centres which are listed below

- **Concord Sports Centre** is located on Shiregreen Lane, 4 miles to the north-east of the City Centre, and offers a range of indoor and outdoor facilities including a gym, spa, multiuse sports hall, bowls hall, outdoor football pitches, two swimming pools and children's activities.
- **Graves Tennis and Leisure Centre** is located in Bochum Parkway, 5 miles to the south of the City Centre, and offers tennis courts, gymnastics and trampolining, a gym and a swimming pool.
- **Hillsborough Leisure Centre** is located Penistone Road, 0.5 miles to the north-east of Hillsborough district centre, and offers a range of indoor facilities including a gym, spa, sports hall and swimming pool.
- **Park Academy** is located on Beaumont Road North, 3 miles to the east of the City Centre, and offers a range of sports pitches for football, rugby, badminton, netball and basketball.
- **Springs Leisure Centre** is located on East Bank Road, 2.5 miles to the south-east of the City Centre, and offers a range of facilities including a gym, outdoor and indoor courts and swimming pool.
- **Stocksbridge Community Leisure Centre** is located in Stocksbridge, 10 miles to the north-west of the City Centre, and offers an indoor bowls hall, swimming pool, gym, squash courts and multi-purpose sports hall.
- **Westfield Sports Centre** is located on Eckington Road, 0.5 miles to the south-east of the Crystal Peaks district centre, and offers a 25m indoor pool, fitness classes, multi-use sports hall, full size, grass and synthetic football and rugby pitches, 5-a-side football pitches and multi-sport courts for tennis, basketball and netball.
- **Verdon Recreation Centre** is located on Verdon Street, 1 mile to the north of the City Centre, and has a large sports hall and outdoor play area.
- **Zest Centre** is located 1 mile to the north-west of the City Centre and offers a two gyms and a public swimming pool.
- **Thorncliffe Health and Leisure Centre.** A new leisure facility including 6 lane, 25 metre swimming pool, learner pool, fitness suite, exercise/dance studio, multi-use studio, changing facilities and health consultation/treatment rooms

5.206 There are also two further public swimming pools:, Heeley pool and King Edward VII swimming pool.

5.207 On top of the public leisure centres, there are several private gyms and health centres around Sheffield, including LivingWell Health Club on Napier Street, PureGym's at Archer Road, Carlisle Street and Manton Street, Virgin Active's at Archer Road and Broadfield Park and The Fitness Club at Surrey Street.

5.208 In Sheffield there are two out of centre cinemas with a total of 31 screens. These are :

- Cineworld in Centertainment – 20 screens
- Vue in MSC – 11 screens

5.209 On top of the 48 screens currently in Sheffield, including those in the City centre, a further 9 are proposed in the City Centre as part of The Moor Phase 2 scheme.

Out of centre commitments

5.210 There are several out of centre retail commitments within Sheffield. Detailed information regarding the amount of retail floorspace within each commitment is contained in Table 8b at Appendix II and a summary is provided below :

- 10,000sq m net at the former Norton College site.
- Extension to the Lidl foodstore at Castlebeck Avenue, along with additional retail floorspace at Woodside Retail Park (Chesterfield Road), New Era Square and Archer Drive
- An Ikea store at Lock House Road
- Conversion of the former Peugeot garage on Ecclesall Road
- New retail floorspace at Woodside Retail Park

5.211 There are also several out of centre leisure commitments in Sheffield and these include the following:

- A planning application (Ref. 14/03911/FULR) at **Sheffield United Football Club** was approved January 2015 to extend the time limit on planning application 09/02488/OUT for the extension of the south stand. The proposed extension would create an additional 6,671 seats, additional car parking and ancillary facilities (350sq m A1 retail, 500sq m of A3 pub/restaurants, 840sq m of offices and 800sq m of D2 leisure). A new planning application (17/00555/FUL) for residential and retail uses (plus car parking) on part of the site subject to this wider permission.

- A planning application (Ref. 14/00709/FUL) at **Graves Tennis and Leisure Centre**, at Bochum Parkway, was approved January 2015 for a two-storey extension to the tennis centre, to include two new indoor courts, swimming pool, ten-pin bowling, gym and soft play area. The development commenced in March 2015 and is expected to be complete Summer 2017.

6. The Rotherham Retail Hierarchy and Town Centre Health Checks

Introduction

6.1 This section provides an assessment of the health of Rotherham town centre and the three town centres in the district. This assessment of town centre health has been carried out through a series of detailed assessments of the key characteristics of these centres. In addition, whilst separate to town centre health issues, this section provides an overview of the out of centre retail and leisure provision in Rotherham.

6.2 When considering the health of the main defined centres in Rotherham, we have utilised a varied evidence base. Indicators which the PPG suggests should be used are outline below:

- Vacancy levels in each centre,
- A review of the key retail sectors, including where applicable the presence of anchor retailers,
- A review of the shopping patterns associated with each centre (via the results of the household survey undertaken by NEMS), for both convenience and comparison goods shopping,
- Rental levels and commercial yields on retail property;
- Accessibility;
- Pedestrian flows;
- Crime statistics; and
- Customer reviews.

6.3 Based upon these indicators, we set out our review of the health of the principal town centre and the four district centres in Rotherham. However, from the outset it should be noted that information relating to some of the above indicators will not be available to all of the town centres. This is primarily due to their size and the type of retail and commercial property which is present.

The current defined Retail hierarchy within Rotherham

6.4 As set out in Section 2 of this report, the retail hierarchy in Rotherham defines Rotherham as a 'Principal Town Centre' and Dinnington, Maltby and Wath-upon-Dearne as 'Town Centres'. See Table 6.1 below.

Table 6.1: Town Centres

Principal Town Centre	Rotherham
Town Centre	Dinnington
	Maltby
	Wath-upon-Dearne

6.5 Beyond these designated town centres, there are also a range of district and local centres (which are not included as part of our health check assessments) and also a considerable amount of retail floorspace provision within retails parks across RMBC's administrative area. These latter facilities lie outside of the defined retail hierarchy in the Core Strategy and contain a wide range of shops including clothing and fashion retailers, sports goods stores, mixed goods, toy stores, along with retailers selling bulkier electrical, furniture and DIY goods. The content and location of these facilities is described at the end of this section.

6.6 For the purposes of the health checks for Rotherham we have relied upon two sets of land use data; Experian GOAD data and RMBC data. Experian GOAD data has been used for Rotherham, Dinnington and Maltby, whilst RMBC data has been used for Wath-upon-Dearne. For all centres, where necessary, the land use data has been refined in order that the information and analysis provided by this study matches the town boundaries defined by the Publication Sites and Policies document (2015) and associated maps which are currently at examination. As such, there are instances where we have deleted those units identified on GOAD which are outside of the 'town centre' boundary as defined in the Pre-Submission Proposals Map. A copy of these 'town centre' boundaries for all the centres is attached in Appendix V[16].

[16] The town centre boundaries included in Appendix II match the boundaries as defined in the UDP. For Dinnington and Maltby, these match the town centre boundaries included within the Publication Sites and Policies document. For Rotherham and Wath-upon-Dearne, although largely similar, the boundaries included do not reflect the Publication Sites and Policies document, as the Tesco sites in both centres are included in the study area.

Rotherham Town Centre

6.7 Rotherham town centre, as defined on the UDP proposals map, incorporates a relatively large area stretching from the River Don in the north, to Drummond Street to the east, along Eastwood Lane and down to Mansfield Road at the southern tip. The western boundary extends along the Sheffield and South Yorkshire Navigation.

6.8 As defined on the UDP proposals map, there is an area in the middle of the town centre which is omitted from the town centre boundary and is allocated as Community Facilities – Civic Buildings, and an area adjacent to this allocation which is allocated as Urban Greenspace. There are two areas identified as Development Sites located within the town centre allocation, one to the north adjacent to the bus transport interchange, and one to the south west located adjacent to the River Don.

6.9 Part of Rotherham town centre is covered by a Designated Conservation Area. This includes many of the main shopping streets in the town centre and includes Corporation Street to the west, along Bridgegate and part of Effingham Street to the north, along College Street to the east and runs around Wilfred Street in the south. The associated Rotherham Town Centre Conservation Area Appraisal and Management Plan defines 4 areas of distinct character in the Conservation Area: the northern section, the central medieval core, Wellgate Terrace and Clifton Bank and Westgate, Main Street and Moorgate.

6.10 The UDP also identifies Prime Shopping Streets, which are shown in Figure 2.2 (in Section 2 of this report). These Prime Shopping Streets include Frederick Street, Effingham Street, High Street and Water Street.

6.11 The Publication Sites and Policies document which is currently at Examination identifies a larger town centre boundary in Rotherham than is allocated in the UDP. The proposed town centre allocation extends beyond Drummond Street up to the Centenary Way roundabout at the north east, but does not include the land on Wellgate at the south of UDP allocation. The Publication Sites and Policies Proposals map identifies Rotherham town centre as 23.13ha in size.

6.12 The extent of Rotherham town centre, as depicted in the Publication Sites and Policies document Proposals Map (currently at Examination), is shown in Appendix V.

6.13 The Sites and Policies Proposals map also includes areas of Primary and Secondary Shopping Frontages. The areas of Primary Shopping Frontages extend along Effingham Street, Howard Street, Frederick Street and Drummond Street. The areas of Secondary Shopping Frontages include part of Howard Street and Effingham Street, around the Market Hall, along Upper Millgate and Bridgegate and part of Market Street and the High Street.

6.14 The Conservation Area boundary shown on the Publication Sites and Policies map is largely similar to that included in the UDP map.

Land Uses and Retailer Representation

6.15 The majority of the town centre is covered by regular land use surveys carried out by Experian GOAD and Table 6.2 below provides details of Experian's surveys in 2011, 2013 and 2014. In addition, GVA has also updated the latest (December 2014) Experian survey via a further survey in June 2016. This information is also contained in the table below.

6.16 It should be noted that the Experian GOAD plan includes a larger proportion of properties within Rotherham than defined by the UDP town centre boundary and the draft town centre boundary identified in the Publication Sites and Policies document. As such, the areas which extends south down Wellgate, Westgate and Ship Hill, which are excluded in the Publication Sites and Policies document town centre boundary have not been included in the data in the table below.

Table 6.2: Retail Composition of Rotherham Town Centre 2011-2016

Classification	Number of Outlets											
	2011			2013			2014			2016		
	GOAD (Feb. 2011)	%	GB Ave %	GOAD (Jan. 2013)	%	GB Ave %	GOAD (Dec. 2014)	%	GB Ave %	GVA (June 2016)	%	GB Ave %
Convenience	26	7.9	9.1	27	8.6	8.8	30	9.5	9.3	27	10.1	9.3
Comparison	112	33.8	41.8	107	34.2	40.9	115	36.3	39.7	84	31.3	39.7
Service	103	31.1	34.9	106	33.9	36.6	109	34.4	37.6	79	29.5	37.7
Miscellaneous	5	1.5	1.2	5	1.6	1.2	7	2.2	1.2	3	1.1	1.2
Vacant	85	25.7	13.1	68	21.7	12.6	56	17.7	12.2	75	28.0	12.1
TOTAL	331	100.0	100.0	313	100.0	100.0	317	100.0	100.0	268	100.0	100.0

Source: GOAD data for 2011, 2013 and 2014. 2014 data updated by GVA in 2016. Figures may not add due to rounding. These figures are in line with the GOAD report produced April 2015 minus those units located outside of the current defined town centre boundary. This includes 3 convenience units, 16 comparison units, 24 service uses, 3 miscellaneous units and 6 vacant units.

6.17 Table 6.2 shows that the defined town centre boundary in the Publication Sites and Policies document accommodates 268 premises. This figure excludes those units included on the GOAD map which fall outside the defined boundary as discussed earlier, including a number

of units to the south of the town centre which are located on Westgate, Ship Hill and Wellgate[17]. The table shows a clear trend of falling comparison goods retail units in Rotherham town centre. In 2011 there were 112 units occupied by comparison goods retailers which was equivalent to 33.8% of all retail units in the centre. This fell short of the national average of 41.8% at that time. Since 2011, the number of comparison goods retailers has declined to June 2016 with 84 comparison goods present. This is equivalent to 31.3% of all retail units in the town centre and is lower than the current national average of 39.7%. It should be noted that nationally, the proportion of comparison goods retailers in city and town centres has also reduced in recent years, suggesting that Rotherham town centre has mirrored the national trend. However, this should not detract from the observation that Rotherham town centre's comparison has become weaker in recent years, suggesting that it is vulnerable to increased competition.

6.18 The majority of national multiple comparison goods retailers can be found on Effingham Street, College Street, Howard Street, Frederick Street and the High Street. Along the pedestrianised section of Effingham Street there is a Boots, Shoe Zone, Carphone Warehouse, EE and H Samuel jewellers. Located on the pedestrianised section of College Street are Game, O2, Card Factory, Clintons Cards, Specsavers and Bargain Buys. On the High Street there is a Primark store, whilst Howard Street accommodates Argos, Poundworld and Superdrug. Finally, located on Frederick Street are New Look, Bon Marche, Warren James and Home Bargains.

6.19 There are other national multiple comparison goods retailers outside of these main streets including a Wilko located on Corporation Street.

6.20 In relation to other land uses, there has been a small rise in convenience goods retailers in the town centre over the period 2011-2016. In 2011 there were 26 convenience retailers but this has risen to 27 in 2016. At 10.1% the current proportion of convenience goods retailers is slightly above the national average of 9.3%.

6.21 National multiple convenience goods retailers present within Rotherham town centre include Tesco, Holland and Barrett, Herons Foods and Fulton's Foods. There are also various local convenience goods retailers located in the town centre, including butchers, greengrocers, baker, oriental supermarket and various small convenience food shops. Tesco occupy the largest convenience goods unit in their 'Extra' format, which is located on Drummond Street. The store extends to approximately to 10,219sq m gross[18], with the net sales of the store split

[17] Those units that are located to the south of the Centre which fall outside the defined boundary include 3 convenience units, 16 comparison units, 24 service uses, 3 miscellaneous units and 6 vacant units.
[18] As estimated by Experian GOAD

between approximately 60% devoted to convenience goods sales and 40% comparison goods sales.

6.22 It is worth noting that on Tuesdays, there is an outdoor market stall situated on Effingham Street which consists of approximately 95 outdoor market stalls.

6.23 The number of service uses within the town centre has fluctuated in recent years, rising from 2011-2014 and then dropping to 79 units in 2016. Overall, there has been a fall in the proportion of service uses from 31.1% in 2011 to 29.5% in 2016 based on the overall number of retail units in the centre. The 2016 figure is below the national average of 37.7%. There are various fast food takeaways located around the centre, with a concentrated number located to the south west of the town. There are numerous cafés situated around the main shopping streets, and hair and beauty salons located right across the centre. The night time economy seems to be focused around the south west of Rotherham with the majority of bars and takeaways located on Domine Lane, Westgate and Moorgate Street.

6.24 The biggest fluctuations in retail units in the centre over recent years can be found in the number of vacant units. Although the number of vacant units has dropped from 2011 levels, where there were 85 vacant units, the number has risen significantly from 56 vacant units in 2014 to 75 vacant units in 2016. While the table indicates there has been a fall in national average vacancy rates, the rate seen in Rotherham is significantly higher. This is a clear sign of the fragility in the health of the town centre. The largest vacant unit is the former Tesco located on Forge Island which is to the west of the town centre. The car park associated with the Tesco has been granted permission on 3rd September 2015 for use as a site for car boot sales. When not used for car boot sales, the car park is utilised as a public car park serving the town centre. This car park offers 2 hours free parking. The Core Strategy (2014) identifies the Forge Island site as an attractive location for entertainment, leisure or cultural uses. Further to this, Rotherham MBC had earmarked the site for a mixed use development including leisure uses such as a cinema and supporting food and drink uses. This is reflected in the Town Centre SPD which identifies Forge Island as a new mixed-use leisure hub and, in October 2016, the Council resolved that the Forge Island site be purchased (the Council is now in the legal process of seeking to purchase the site from Tesco).

Connectivity

6.25 The town centre incorporates a large designated pedestrian zone which begins on Frederick Street in the north of the town, and runs down Effingham Street, along Howard Street and Henry Street, along Eastwood Lane to the east, includes College Street and All Saints Square, part of Bridgegate and Upper Millgate to the west of the town, and to the south includes Church Street, Market Street, High Street and Vicarage Lane. This large expanse of a pedestrian only zone makes the town centre very accessible to those on foot and encourages

movement around the centre. The busiest areas of the centre, in terms of pedestrian flow, appear to be the pedestrianised streets of the High Street and College Street.

6.26 In August 2016 the Rotherham Town Centre Shopper Survey was undertaken. This on-street survey was carried out with 607 shoppers in the town centre collecting both quantitative and qualitative information covering several topics including the shopping offer, transport & accessibility, shopping habits, spending patterns, the environment and safety & security.

6.27 We have reviewed the results and the following is salient:

- Two thirds of all survey respondents came from postcode areas S60, S61 and S65. These cover the Rotherham urban area and indicate that the primary catchment of the town centre is relatively limited.
- Just over half of all respondents gave shopping as their main reason for visiting the town centre. 31% of respondents were in the centre for non-food shopping and 17% were visiting for food shopping. When compared to a similar survey in 2012, there has been a drop in the proportion of people visiting the town centre for non-food shopping, but little change in relation to food shopping visits.
- Most people choose to visit Rotherham town centre because it is close to home. In terms of other reasons for visiting, a survey in 2012 indicated that 24% chose the centre because of a particular shop/service, whilst 35% visited the centre because of a perceived good range of shops. However, there has been a noticeable drop in these reasons to 9% and 6% respectively.
- Over half (56%) of respondents visit Rotherham town centre 2-3 times a week and 23% visit once a week. In 2012, these levels of frequency were 11% and 73%, which clearly indicates that people are visiting the centre more frequently.
- Three-quarters of respondents (74%) spend 1-2 hours in Rotherham town centre.
- survey respondents were asked to name their main centre for non-food shopping. 32% indicated Rotherham, closely followed by Parkgate at 27%. 16% indicated Meadowhall and 11% indicated Sheffield. Whilst this order of popularity has not changed since the 2012 survey, the percentage responses have changed significantly. For example, 70% of visitors in 2012 indicated that Rotherham was their main town centre for non-food shopping (which has now fallen to 32%). Conversely, Parkgate has grown in popularity (from 20% in 2012 to 27% in 2016), as has Meadowhall (1% in 2012 and 16% in 2016). This shows the pressure that Rotherham town centre is under from competing shopping destinations in the local area.
- Respondents were also asked about what products were important for them and also which products they wanted to purchase but were not available. At the top of both lists

was clothing and fashion items. Survey respondents also indicated that non-food multiple retailers, supermarkets, value-orientated stores and markets were particularly important. In terms of gaps in provision, the most popular answers were the lack of choice and department stores.

6.28 Rotherham is very accessible by public transport. The Rotherham Interchange is located to the north of the centre, adjacent to a multi storey car park making the centre accessible to those using public transport or private transportation. There are approximately 56 different bus services that use the Rotherham Interchange, including some free bus services and the National Express coach service. These bus routes include (but is not limited to) services to MSC, Parkgate, Dinnington, Sheffield Centre, Barnsley Town Centre, Maltby, Rawmarsh, Chapeltown, Doncaster Town Centre and Leeds. There are also numerous bus stops located throughout the town centre. The Rotherham train station is located just outside the Town Centre boundary to the west of the centre and is separated by the River. There is therefore a barrier between the train station and the town centre. The station provides a regular train service to a wide range of locations, most notably Sheffield, Leeds, Lincoln and York.

6.29 In terms of private transportation accessibility, there is a multiple multi-storey car park located to the north of the town adjacent to the Rotherham Interchange which has approximately 730 car parking spaces, and a multi-storey car park to the south of the town, located off Wellgate which consists of approximately 400 car parking spaces. There are also numerous designated surface car parks located at Wellgate to the south which has approximately 20 spaces, Ship Hill which has approximately 52 spaces, Keppel Wharf which has approximately 30 spaces, Unity Place which has approximately 30 spaces, and adjacent to the River Don, south of the vacant former Tesco site to the west of the centre which has approximately 309 spaces. There are other large car parks located just outside of the centre, including Nottingham Street / Drummond Street which has 240 spaces. There is also parking associated with the Tesco Extra supermarket and there are numerous streets around the town both inside and outside of the designated town centre that accommodate on street parking. There is also parking associated with the train station (approximately 60 spaces). In total, not including the on street parking spaces and parking associated with the Tesco, there are more than 1,800 car parking spaces available in Rotherham, making it an attractive place to visit by car.

6.30 Plans are being prepared for an innovative tram service which is scheduled to reach Rotherham in the near future. Plans have already been submitted for new tram stops at Rotherham Central. A two year pilot will be undertaken with a view to permanent operation. Three tram services are expected to operate per hour and will run on the national rail network from Rotherham Parkgate Retail Park via Rotherham Central Station. These will then join the existing Supertram network at Meadowhall South which continues to Sheffield City Centre. The introduction of a tram network in Rotherham will create further linkages to neighbouring areas

like Sheffield and Meadowhall which could be seen as both beneficial (by creating an easy service for people to visit Rotherham) and also a threat in terms of shopping trips (encourage a greater outflow of existing visitors / residents).

Floorspace Provision

6.31 Alongside the data on the range of land uses within the centre, we have also examined Experian's recent surveys of floorspace from 2011, 2013 and 2014. Like the data on the number of units, Table 6.3 below breaks this floorspace down into convenience, comparison and service uses along with vacant retail floorspace.

Table 6.3: Floorspace Composition of Rotherham Town Centre 2011-2014

Sector	2011			2013			2014		
	Sq. Ft Gross	%	GB Ave %	Sq. Ft Gross	%	GB Ave %	Sq. Ft Gross	%	GB Ave %
Convenience	93,900	14.4	17.3	93,300	15.6	17.8	165,200	22.5	18.4
Comparison	231,800	35.5	47.2	227,500	38.2	45.9	236,300	32.1	45.0
Service	154,700	23.7	23.1	162,400	27.2	24.5	160,300	21.8	25.5
Miscellaneous	9,900	1.5	1.0	10,200	1.7	1.0	31,800	4.3	1.0
Vacant	162,200	24.9	11.4	102,900	17.3	10.7	141,600	19.3	10.2
TOTAL	652,500	100.0	100.0	596,300	100.0	100.0	735,200	100.0	100.0

Source: GOAD data. Figures may not add due to rounding.

6.32 The above data shows the following:

- There has been a large rise in the amount of floorspace occupied by convenience goods retailers from 2011 - 2014, with 2014's figure being higher than the national average. This is due to the average size of convenience goods units in the town centre growing.
- There has been a slight increase in the amount of floorspace occupied by comparison goods retailers in Rotherham, although this proportion has consistently been below the national average.
- The amount of floorspace in service uses has increased over the period 2011 – 2014 although it still remains below the national average.
- There has been a large increase in the amount of floorspace occupied by miscellaneous uses over the period 2011 – 2014, which is now above the national average.
- In 2014, around 19% of all retail floorspace was vacant, which is noticeably higher than the national average of 10%. Over the period 2011 – 2014, the amount of vacant retail floorspace has remained consistently above the national average.

Leisure Uses

6.33 There is a limited mix of leisure uses currently on offer in Rotherham town centre, however there are potential leisure uses proposed for certain sites in the future.

6.34 The current service unit provision in Rotherham is below the national average for 2016, as detailed in table 6.2, which is commensurate with the level of restaurants that are located within the town centre.

6.35 There are no cinemas located within Rotherham town centre, however there is a Mecca Bingo located on Corporation Street which extends to 1,360sq m gross[19]. There are also no hotels located within the Rotherham town centre boundary. There is also a theatre, the Civic, located on Bridgegate, which accommodates a range of touring and local musical, comedy and theatrical performances.

6.36 There are a cluster of takeaways located to the west of the town centre, primarily on Main Street, Westgate and Ship Hill. In addition there are various nightclubs and bars that can be found inside and outside of the town centre boundary. Those which lie inside the town centre boundary are primarily located around the Market Place and Westgate Chambers. There are other bars sporadically located around the town centre, including bars on Bridgegate and Effingham Street.

6.37 Other leisure uses within the town centre include:

- A snooker club located on the High Street, above Eastwood Domestics.
- Snafu live concert venue which is located on the Market Place which incorporates two separate bars.
- Rotherham Minster Gardens located off Corporation Street.
- Various amusement centres located on Wellgate and Bridgegate.

6.38 There are other leisure uses which can be found within Rotherham but which fall outside of the defined town centre boundary. These are discussed later in this chapter.

6.39 Within the Rotherham Town Centre SPD Forge Island has been earmarked as a central Mixed Use Leisure Hub. Proposals should incorporate a mix of residential units and leisure developments (including A3/A4/D2 uses); to help create a new and vibrant Leisure Quarter that compliments the existing Retail Quarter. Market analysis suggests there may be an appetite amongst cinema operators to located on Forge Island. This would form an anchor for

[19] As estimated by Experian GOAD

a wider leisure scheme, most likely comprising A3/A4 units, which would lie in a sequentially preferable location for leisure uses

Market Shares and Turnover

6.40 In order to understand the importance of Rotherham town centre as a shopping destination, it is useful to examine the results of the 2016 household survey data which provides data for shopping patterns across the study area. The full extent of the study area is shown in Appendix I. Again, Tables 4 and 6 in Appendix II, which form part of our quantitative assessment of shopping patterns and expenditure flows, provides a detailed breakdown of these convenience and comparison shopping patterns. The following information provides the most salient information regarding shopping patterns.

6.41 In terms of shopping patterns in the local area, Zones 15 – 20 are broadly equivalent to the Borough's administrative area, with Rotherham falling within Zone 15. The breakdown of the remaining zones are as follows:

- Zone 13 located to the south of the district and covers the areas of Aston, Aughton, Swallownest, Catcliffe, Orgreave, Treeton and Waverley and Wales;
- Zone 16 located to the north of the district and includes Thorpe Hesley;
- Zone 17 covers Maltby and Hellaby;
- Zone 18 located to the east of the main urban area and covers Thurcroft, Wickersley, Bramley and Ravensfield Common;
- Zone 19 covers Dinnington, Anston and Laughton and Kiveton to the south east of the urban area; and
- Zone 20 to the north covering Swinton and Kilnhurst, Wath, Brampton and West Melton.

6.42 With regards to the trading performance of the town centre, the data informing the quantitative need assessment in Section 7 and 9 provide useful information regarding the comparison goods sectors which are key to the centre's performance. Table 6.4 outlines the composition of the £113.5m of comparison goods expenditure which the town centre currently attracts from the study area:

Table 6.4 – Study area derived turnover of Rotherham town centre, 2016

Sector	Expenditure (1st and 2nd choice)	Proportion of the Study Area Turnover
Clothes and shoes	£21.1m	19%
Furniture, Floor Coverings and Carpets	£9.7m	9%
Household textiles and soft furnishings	£4.0m	4%
Household appliances	£3.8m	3%
Audio visual equipment	£4.4m	4%
DIY	£3.3m	3%
Health and beauty goods	£30.9m	27%
Books	£3.8m	3%
Kitchen utensils	£3.3m	3%
Jewellery, games, toys and sports goods	£29.4m	26%
Total	**£113.5m**	**100%**

Source: Table 7a at Appendix II (figures may not add due to rounding)

6.43 The above analysis shows the important contribution that spending on jewellery, games, toys and sporting goods makes to the economy of the town centre, with 26% of the total amount of expenditure. Health and beauty goods have a market share of 27% generating £30.9m to the economy. The town centre therefore relies to a significant extent on both of these sectors for its vitality and viability. In terms of the other comparison goods only 'clothes and shoes' have a market share greater than 10%, at 19% of the study area derived turnover.

6.44 With regards to comparison goods market shares, for clothes and shoe shopping trips, the town centre is distinctly less popular than the out of centre locations. As can be seen in Table 6 in Appendix II, the highest market share for the town centre is within Zone 15, with 19% of trips.

6.45 Within Zones 15 and 16 the majority of trips for clothes and shoes take place in Parkgate Shopping, at 36% and 43% respectively. It is worth noting that MSC attracts 26% of trips from Zone 15, and 26% from Zone 16. MSC is also the most popular place for main clothes and shoe shopping trips in Zone 13 at 43%. For Zones 17-20, the majority of clothes and shoes shopping trips take place in MSC in Sheffield, with 36%, 41%, 42% and 32% respectively. The town centre falls into third place, behind Parkgate Shopping in all zones with exception of Zone 19. This trend shows the pressure which Rotherham town centre finds itself under in the local area.

6.46 In relation to shopping patterns for other types of comparison goods:

- *Furniture, floor coverings and carpets* - Given the bulky nature of some of these goods, it is unsurprising that the town centre does not attract a significant market share for these items. The highest market shares are in Zones 13 and 18, at 18% and 17% respectively, whilst Zones 15 and 16 are 15% and 10% respectively. Outside of the town centre the majority of

the market share for Zone 15 is attracted to Parkgate Shopping and Great Eastern Retail Park.

- *Household textiles and soft furnishings* – Rotherham town centre attracts 19% of shopping trips for household textiles/furnishings from Zone 15 residents. It also attracts 8% from Zone 13, 14% from Zone 16, 9% from Zone 17 and 13% from Zone 18. The main competitors for the town centre for this type of goods are Parkgate Shopping, which has a higher market share in Zones 15-17 and the internet (which accounts for 20% of trips in Zone 16 and 29% in Zone 18). Meadow attracts 14% of first choice shopping trips for these goods from Zone 15.
- *Household appliances* – Rotherham town centre has a 21% market share in first choice shopping trips for household appliances in Zone 15. However, 57% of these first choice trips are attracted to Parkgate from Zone 15 residents. The internet also accounts for a significant amount of spending on household appliances across the RMBC administrative areas and it is clear from the data in Table 6 that Rotherham town centre's core catchment is limited to Zone 15 whereas Parkgate is able to attract a significant market share across most of the RMBC area.
- *Audio-visual equipment* – Table 6 indicates that the same pattern of shopping is occurring for shopping on audio-visual goods, with Rotherham town centre's catchment generally limited to Zone 15 (and a low market penetration rates across the other RMBC zones) whereas Parkgate is able to command a market share of at least 40% in Zones 15, 16, 17, 18 and 20 (plus Zone 21 also).
- *DIY goods*– due to the nature of these goods, it is unsurprising that Rotherham town centre has a low market across the local area. The town centre attracts a 17% share of first choice shopping trips in Zone 15, 11% in Zone 16 and 10% in Zone 18. The out of centre market share is 48% of trips in Zone 15, 40% in Zone 16 and 44% of trips in Zone 18, although this is based upon survey respondents indicating the B&Q store at Parkgate which has now closed. As a consequence, it is likely that the level of leakage of expenditure on DIY goods will now have risen.
- *Health and beauty goods* – The attraction of shopping trips for health and beauty goods is one of the strongest aspects of Rotherham town centre according to the results of the 2016 household survey. Table 6 at Appendix II indicates that the town centre is able to attract 58% and 48% of first choice trips for these goods from zones 15 and 16, along with 29% of trips from Zone 18. These are noticeably higher market shares than Parkgate.
- *Books* – Table 6 indicates that shopping for books for residents of the RMBC administrative area is dominated by the internet. Within Zone 15 33% of spending is via the internet and this rises to 65% in Zone 16 and 56% in Zone 17. Rotherham town centre has a 32% share of spending in Zone 15 and is also able to attract 11% of spending from Zone 16 and 17% of spending from Zone 18.

- *Kitchen utensils* – Rotherham town centre is able to attract a reasonably good market share from the following zones (the percentage figures relate to first choice shopping trips): 13 (21%), 15 (37%), 16 (23%), 17 (14%) and 18 (15%). Table 6 shows that Parkgate is able to attract similar market penetration rates. There is also a considerable amount of leakage of expenditure for kitchen utensils to MSC across most of the RMBC administrative area,
- *Jewellery, games, toys and sporting goods* – the final category is spending on jewellery, games, toys and sporting goods. Rotherham town centre is able to obtain a 32% market share of first choice shopping trips from Zone 15 residents, whilst 19% of first choice trips come from Zone 16. Parkgate also has a similar market penetration to the town centre across the RMBC area, and Table 6 shows that there is also considerable leakage of expenditure on these types of goods to MSC.

6.47 The household survey data illustrates that within Zone 15, the majority of main food shopping and top-up shopping trips are undertaken within Rotherham town centre. As can be seen in Table 4 in Appendix II, the town centre is able to attract 33% of trips within Zone 15 for main food shopping. The Tesco Extra on Drummond Street is the most popular main food shopping location in Zones 15 and 16 (which covers the area to the north of the main urban area). For second choice main food trips, Zone 15 (where the town centre is located) is only able to attract 20% of trips, with the majority, a further 20%, going to out of centre Rotherham urban areas, namely Asda on Aldwarke Lane and Aldi on Park Street.

6.48 For top-up shopping, 41% of trips within Zone 15 take place in Rotherham town centre. This is closely followed by 38% of trips within Zone 15 going to Rotherham's out of centre urban areas, namely Tesco Express on Moorgate Road. The Tesco Extra on Drummond Street again dominates the number of trips attracted to the town centre.

6.49 For Zones 13 and 17-20 the town centre's market share for main food shopping is much lower. Rotherham town centre is only able to attract 8%, 5%, 3%, 3% and no trips respectively. This is not unexpected given the location of large supermarkets in Sheffield, Maltby, Wath, Dinnington and Rotherham out of centre urban areas.

6.50 Overall, the results of the 2016 household survey provide important information regarding the role and catchment of Rotherham town centre. In particular it is clear that:

- The town centre remains a popular location for main food and top up shopping. This is not surprising given the presence of the large Tesco Extra on Drummond Street.
- Residents of Rotherham are increasingly looking to stores outside of the town centre for comparison goods, leading to a lower market share for the town centre amongst local residents. Parkgate Shopping is the main competition for the town centre in terms of

clothes and shoe shopping which is unsurprising given the choice on offer in Parkgate Shopping. In addition, MSC presents significant competition for the other zones in Rotherham and dominates the luxury and sports goods market.

- As would be expected, for bulkier goods like furniture, flooring and household appliances residents are using stores on out of centre retail parks in Rotherham, namely Parkgate Shopping. For DIY goods, out of centre retailers like B&Q are dominating the market share.
- The large collection of stores in Parkgate Shopping, are becoming increasingly attractive to residents of Rotherham.
- Rotherham town centre's market penetration in the local authority is relatively weak, with residents in Zones 15, 16 and 18 increasingly looking towards the shopping parks at MSC and Parkgate for their clothes/fashion and luxury goods shopping.
- In summary, the town centre's retail core is clearly vulnerable to competition from out of centre retail units accommodating a range of clothing/ fashion and luxury goods. There is a clear dominance by MSC in Sheffield for these types of goods, closely followed by Parkgate Shopping.

Crime levels

6.51 In relation to crime levels in the town centre, data has been sourced from South Yorkshire Police for the crime statistics neighbourhood which covers the town centre. This is shown in the table below alongside data for Leeds, Sheffield, Barnsley and Doncaster for reported incidents of crime between November 2015 and October 2016.

Table 6.5 – Reported crime in Rotherham town centre, compared with Leeds, Sheffield, Doncaster and Barnsley

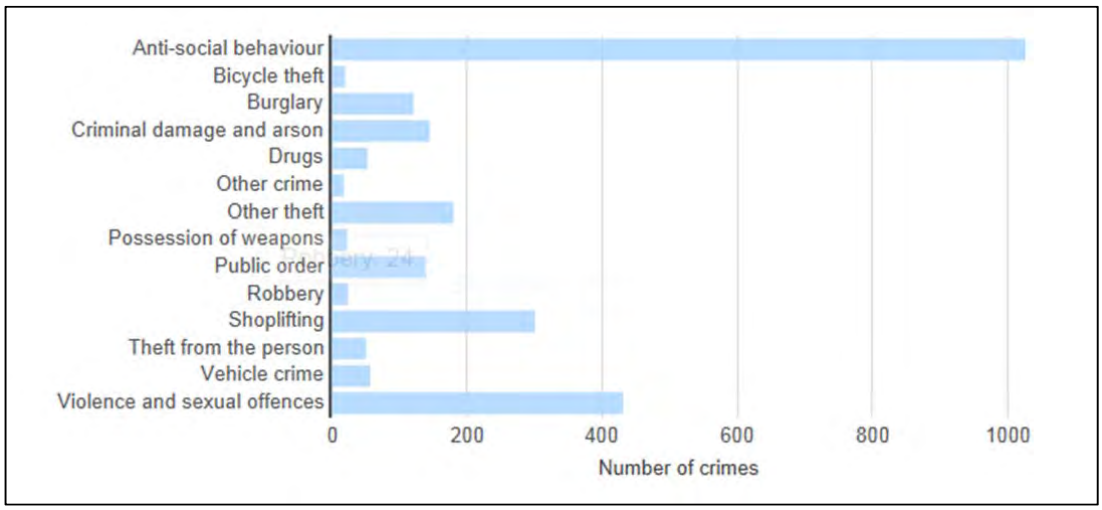
	Nov 2015	Dec 2015	Jan 2016	Feb 2016	Mar 2016	April 2016	May 2016	June 2016	July 2016	Aug 2016	Sept 2016	Oct 2016
Sheffield	1209	1152	1085	988	1060	1079	1128	1060	1180	1076	1266	1359
Leeds	1059	1074	986	1029	962	976	1141	1008	1029	978	1161	1256
Rotherham	230	203	208	170	218	228	211	250	225	214	212	220
Barnsley	496	420	392	398	434	451	519	484	484	534	520	642
Doncaster	499	531	443	480	458	459	516	483	629	621	568	652

Source: South Yorkshire Police and West Yorkshire Police

6.52 The above data shows that Rotherham generally has the lowest amount of reported crime out of the five centres for which data has been sought, including crime levels which are around half of those in Barnsley and Doncaster. Section 5 of this report also provides a breakdown of crime types in the neighbourhood covering Rotherham town centre and shows that anti-social behaviour and violence-related offences are the most predominant types of crime, although across all areas Rotherham has lower levels of reported crime than in Barnsley and Doncaster.

6.53 The full breakdown of crimes, by type, for Rotherham town centre is shown in figure 6.1 below.

Figure 6.1 – Crime levels between November 2015 and October 2016 for Rotherham Town Centre



Source: South Yorkshire Police

6.54 As can be seen, the most prevalent crimes are antisocial behaviour and violence-related offences.

Proposed allocations

6.55 In relation to recent and proposed developments in Rotherham town centre, there is a proposed allocation detailed within the Publication Sites and Policies document for approximately 5,000sq m at the outdoor markets complex (Centenary Market) reference R1. The purpose of this allocation is for redevelopment to include new retail units which will have the potential to enhance the vitality of the markets complex. This proposed site is located to the north of the centre just off the pedestrianised area of the town and provides a good opportunity to improve the attractiveness and vitality of the markets which are a unique and important asset to Rotherham. Surrounding uses include a bank, various comparison units including a butcher and a baker, various clothes shops and service uses including takeaways and a café.

6.56 There is also a proposed retail (reference R2) at the Drummond Street car park for approximately 5,000sq m. The allocation proposes redevelopment of this site for retail uses. To the west of the site is a large Tesco, to the north and east of the site are residential properties and to the south of the site are Rotherham College of Art and Technology and the Rotherham Market Hall.

6.57 There is also a proposed retail allocation, reference R3, for 1,000sq m at the north of Corporation Street. This site includes the vacant and derelict properties located on Corporation Street. This site has included properties that have been vacant for several years following fire damage. The unsightly nature of these buildings presents a good opportunity to redevelop the site and create a vibrant and exciting new retail site.

6.58 In addition, the Council is proposing to allocate sites which could potentially deliver new homes in and around the town centre. Not only does this have the potential to add vitality to the town centre, during the day and the evening, but it also provides a greater pot of retail expenditure to be spent in the town centre. As can be seen from the experience of Sheffield city centre, there is a clear tendency for residents in a city/town centre location to spend a greater proportion of their expenditure in that location, particularly to convenience and day-to-day comparison goods. As a consequence, the allocation of a substantial number of new homes is likely to provide a positive factor for the health of the town centre.

Summary

6.59 Our health check assessment of Rotherham town centre has outlined the pressures that the centre faces in terms of its position in retail landscape across the RMBC administrative area and its relationship to retailing in Sheffield. Rotherham is at the pinnacle of the retail hierarchy in the Borough but it is not the location with the highest comparison goods turnover. That role has been taken by Parkgate which is, for some types of comparison goods shopping, considerably more attractive than the town centre. In addition Rotherham town centre also faces considerable competition from Meadowhall, and these factors leave the town centre with a relatively small geographic catchment and a weak market penetration level with this catchment. These pressures also leave the town centre with a vacancy level which is noticeably higher than the national average and also lower than average levels of comparison goods retailing and service uses.

6.60 These characteristics are likely to shape how Rotherham town centre aims at improving its health and attractiveness. In particular, with the ability to increase its comparison goods market share rather challenging, we consider that the future health of the town centre lies in the ability to diversify its offer and suite of land uses. This will include introducing a greater diversity of leisure and food/drink uses, in order to increase vitality and activity throughout the day and evening. This will also be assisted by an increase in the local residential population.

The Council has already started to take steps in this regard, including acquiring and promoting development sites and commissioning a town centre masterplan, and will now have to carefully consider the impact of development proposals for retail and leisure uses in the wider area in order to ensure that they do not impact upon the delivery of this planned investment..

Dinnington

6.61 Dinnington town centre is located circa 12km to the south east of Rotherham. The district centre, as defined in the 1999 UDP proposals map, is mainly focused around the southern end of Laughton Road, with some units off New Street, and two supermarkets off Undergate Road and Littlefield Road. Dinnington is the largest of the three town centre when compared to Maltby and Wath-upon-Dearne.

6.62 The extent of Dinnington town centre, as depicted in the Publication Sites and Policies document Proposals Map (currently at examination), is shown in Appendix V.

6.63 As defined on the UDP proposals map, there is an area near the centre of the Dinnington town centre allocation, the cemetery, which is allocated as Urban Greenspace. The UDP map includes a Designated Conservation Area boundary but this only includes a small section of the designated town centre at the south. There is a Prime Shopping Street designation within the UDP which stretches along Laughton Road, beginning at the junction of New Street to the north and finishing at the junction of Barleycroft Lane to the south, which can be seen in figure 2.2.

6.64 The UDP also includes an area for Traffic Management / Safety Schemes. This area is focused around the main street in the town centre, Laughton Road. The proposals map also identifies two development sites in the west of the town centre, one on greenfield land to the rear of the Constable Lane car park and one on the land to the north of the cemetery which now houses the Tesco.

6.65 The Publication Sites and Policies document identifies a slightly smaller town centre boundary for Dinnington. The smaller town centre proposal excludes the section of the UDP allocation which extends north along Laughton Road. This smaller town centre boundary excludes a library and a number of residential uses.

6.66 The Publication Sites and Policies document map retains the retail allocation in the western part of the town centre to the rear of the Constable Lane car park. The document identifies a similar primary shopping frontage as in the UDP however it includes a section of secondary frontage in addition. As in the UDP, Laughton Street is identified as a Primary Frontage starting at New Street to the north and stopping just before Barleycroft Lane, with some units to the north west of Laughton Road are designated as Secondary Frontages.

6.67 The Conservation Area boundary shown on the Publication Sites and Policies map is largely similar to that included in the UDP map and still only includes a small section to the south of Town Centre boundary.

6.68 Land use survey data from Experian from 2010, 2012 and 2014 for Dinnington town centre is provided in Table 6.6 below. The 2014 data has been updated by GVA following visits to the town centre in 2016.

6.69 It should be noted that the Experian GOAD plan does not include the section of the town centre boundary that extends eastwards along Barleycroft Lane. These omitted units have been included within the data in the table below. They include three service units.

Table 6.6: Land use composition Dinnington town centre 2010 – 2016

Classification	Number of Outlets											
	2010			2012			2014			2016		
	GOAD (July 2010)	%*	GB Ave %	GOAD (Aug. 2012)	%	GB Ave %	GOAD (Aug. 2014)	%	GB Ave %	GVA (June 2016)	%	GB Ave %
Convenience	9	11.5	9.1	9	10.7	8.8	10	12.0	9.3	11	12.6	9.3
Comparison	25	32.1	41.8	35	41.7	40.9	33	39.8	39.7	33	37.9	39.7
Service	28	35.9	34.9	31	36.9	36.6	29	34.9	37.6	26	29.9	37.7
Miscellaneous	1	1.3	1.2	2	2.4	1.2	2	2.4	1.2	2	2.3	1.2
Vacant	15	19.2	13.1	7	8.3	12.6	9	10.8	12.2	15	17.2	12.1
TOTAL	78	100.0	100.0	84	100.0	100.0	83	100.0	100.0	87	100.0	100.0

Source: GOAD data. Figures may not add due to rounding.

6.70 Table 6.6 shows that the defined town centre boundary accommodates 87 retail-related premises and this has grown from 78 retail-related premises in 2010.

6.71 Table 6.6 indicates that the number of convenience goods retailers in the centre has been relatively static over the years, with a rise of two convenience units from 9 to 11 over the years 2010 – 2016. The main convenience stores in the centre of Dinnington are the Tesco located on Undergate Road and an Aldi located on Littlefield Road. Tesco is the largest convenience goods retailer in the town centre extending to 3,010sq m gross area[20]. Around 70% of the net sales area of the Tesco store is devoted to convenience goods sales. The Aldi store has direct access from the High Street, although the Tesco, whilst also located within the town centre boundary, is separated from the Laughton Road and therefore has an adverse impact on the main street as it prevents customers making linked trips to the main shopping area. Other local convenience goods retailers catering primarily for local residents top-up food shopping trips include two off-licenses, Heron Foods frozen food store, a baker and a butcher.

6.72 The results of the 2016 household survey indicate that convenience goods stores in Dinnington town centre are able to retain 70% of first choice and 62% of second choice main food shopping trips made by residents of Zone 19. They are also able to retain 70% of top-up food shopping trips in Zone 19. In relation to the remainder of main and top-up food expenditure,

[20] As estimated by Experian GOAD

there is a relatively small leakage of trips to out of centre stores in Sheffield and stores in Rotherham. Convenience goods stores in Dinnington town centre are also able to attract a modest amount of main food trips from the residents of zones 18 and 19.

6.73 At present there are 33 comparison goods retailers in Dinnington which is equivalent to 37.9% of all retail units in the centre. This is slightly below national average which is 39.7%. The total number of comparison goods retailers in the town centre has risen from 25 in 2010 to 33 in 2016. The businesses present include national and local retailers. The national retailers include Poundstretcher, Superdrug and Lloyds Pharmacy. Local retailers include charity shops, a pet shop, an optician, a homeware / DIY shops and a carpet shop.

6.74 Household survey data relating to comparison goods stores in Dinnington confirms that its core comparison goods shopping catchment is generally limited to Zone 19 of the study area. The results indicate that the highest market share is in chemist and medical goods where the centre is able to attract 54% of trips from Zone 19. Shopping trips for kitchen utensils and furniture, floor coverings and carpets are also high at 20% and 14% respectively.

6.75 There are currently 26 service units in the centre of Dinnington which equates to 29.9% of all retail and leisure units, which is well below the national average of 37.7%. The main service uses that can be found include estate agents, hair and beauty salons, barbers and fast food takeaways.

6.76 There are currently 15 vacant units in the centre equating to 17.2% of all retail units, which is higher than the national average of 12.1%. As the vacancy rate is higher than the national average, this suggests that Dinnington may be a less popular and attractive location for retailers and also suggests a weak catchment. The number of vacancies has fluctuated over recent years as it fell to from 15 units in 2010 to 7 units in 2012, and then rising to 9 in 2014 and again to 15 units in 2016.

6.77 In terms of leisure uses, there is a village hall located at the northern end of Laughton Road. There is also a restaurant and a takeaway located on Laughton Road and a working men's club located on Barleycroft Lane. There is also a snooker club located on Laughton Road, close to the Aldi supermarket. There are no other leisure uses within the town centre however further afield there are another two restaurants, one on Laughton Road and one on Lordens Hill, and there is a pub located on the outskirts of the town called Monk's Bridge Farm located on Nobel Way. There is a martial arts centre located on Barleycroft Lane and the Dinnington Rugby Sports Pitches on Lodge Lane.

6.78 Retail, service and commercial business uses within the centre are housed in predominantly terraced properties of different styles. As the entire town centre is focused around one main street, the centre is well contained and very easily accessible with a number of car parking

spaces located along the eastern side of Laughton Road. There are two designated car parks, both located off Constable Lane, one which consists of approximately 80 spaces, and one which consists of approximately 60 spaces. Further parking associated with the Aldi supermarket, approximately 100 spaces, is available via Laughton Road and parking associated with the Tesco supermarket is available via Undergate Road which consists of approximately 200 spaces.

6.79 There are bus stops located to the north end of Laughton Road (just outside the defined district centre) and on surrounding streets including New Street. The Dinnington Interchange is located in close proximity to the Centre, just off Laughton Road. There are several different routes which service Dinnington, these include services to Sheffield City Centre, Worksop, Rotherham town centre, Laughton-en-le-Morthen and Doncaster.

6.80 In terms of pedestrian flow, the busiest area appeared to be at the northern end of Laughton Street, to the north of Leopold Street.

6.81 Regarding recent and proposed developments, there is a proposed allocation identified in the Publication Sites and Policies document for 3,500sq m[21], at Littlefield Road / Constable Lane reference R5. This proposed site is located in close proximity to the Dinnington Interchange and therefore is well served by public transport and is sustainably located. The site is surrounded by Constable Lane to the north, the B6060 to the south, the Dinnington Interchange to the east and a roundabout connecting the B6060, Constable Lane and Athorpe Road to the west.

6.82 In summary, Dinnington has, over the years, increased its retail offer, both in terms of convenience and comparison goods, although the number of vacant properties is still higher than the national average. Dinnington is a popular location for main and top-up food shopping in its location and in the surrounding area, however has a relatively localised comparison retail catchment which is focused on medical goods, which are mostly purchased from the Tesco. Out of the three town centres, Dinnington, Maltby and Wath, Dinnington is arguably the most popular town centre for convenience goods shopping. This is mainly due to the provision of the Tesco and Aldi within the town centre boundary.

Maltby

6.83 Maltby town centre is a compact centre which lies approximately 11km to the east of Rotherham close to the boundary with Doncaster. Maltby's centre is primarily focused around the High Street, with some units situated on Grange Lane, Muglet Lane and Millindale.

[21] Allocated for retail uses and forms part of the town centre

6.84 The extent of Maltby town centre, as depicted in the Publication Sites and Policies document Proposals Map, is shown in Appendix V.

6.85 As defined on the UDP map, the majority of the town centre boundary extends north of the High Street, with two small sections located south of the High Street. There is a Prime Shopping Street designation within the UDP which stretches along the High Street, which is commensurate with the town centre boundary in the UDP and Publication Sites and Policies document. This can be seen in figure 2.2 in Section 2 of this Study. The Prime Shopping Street does not extend to the units which are located on Grange Lane or Muglet Lane. The whole of the town centre falls within a defined Traffic Management / Safety Scheme. The UDP map also includes an area of Traffic Management / Safety Schemes.

6.86 The Publication Sites and Policies document identifies the same town centre boundary as the UDP town centre allocation. There is an additional area to the south of the existing and proposed Town Centre allocation, opposite Coronation Park which is identified as a Local Centre. The sites and policies document identifies a different Primary Frontage than in the UDP. It identifies two areas of Primary Frontage, one to the east and one to the west of Muglet Lane. There are no Secondary Frontages identified in the Publication Sites and Policies document.

6.87 Land use survey from GOAD data from 2010, 2012 and 2014 has been used to show the diversity of uses in Maltby town centre and in addition GVA has updated the 2014 data in 2016 and this is contained in Table 6.6 below.

6.88 It should be noted that the Experian GOAD plan includes areas of Maltby that fall outside the emerging town centre boundary. These areas include three units to the north of Grange Lane, and two units to the west of the High Street. These have been excluded from the data and calculations in the table below.

Table 6.7: Land use composition Maltby Town Centre 2010 – 2016

Classification	Number of Outlets											
	2010			2012			2014			2016		
	GOAD (Jul. 2010)	%*	GB Ave %	GOAD (Sep. 2012)	%	GB Ave %	GOAD (Jun. 2014)	%	GB Ave %	GVA (June 2016)	%	GB Ave %
Convenience	8	10.8	9.1	9	12.7	8.8	10	14.3	9.3	8	11.6	9.3
Comparison	29	39.2	41.8	29	40.8	40.9	28	40.0	39.7	24	34.8	39.7
Service	26	35.1	34.9	26	36.6	36.6	26	37.1	37.6	27	39.1	37.7
Miscellaneous	1	1.4	1.2	1	1.4	1.2	1	1.4	1.2	1	1.4	1.2
Vacant	10	13.5	13.1	6	8.5	12.6	5	7.1	12.2	13	18.8	12.1
TOTAL	74	100.0	100.0	71	100.0	100.0	70	100.0	100.0	73	100.0	100.0

Source: GOAD data. Figures may not add due to rounding

6.89 Table 6.7 shows that the defined town centre boundary currently accommodates 73 retail-related premises which is a reduction from 74 retail-related premises in 2010.

6.90 Table 6.7 indicates that the number of convenience goods retailers in the centre has again been relatively static over the years, with the number of convenience goods retailers in 2016 commensurate to the figure from 2010. The largest convenience store in the centre of Maltby is the Tesco located off the western side of the High Street and which extends to 1,290sq m gross[22]. Other national convenience goods retailers include a Heron Foods frozen food store and Fulton's Foods, and other local convenience retailers include a butcher and a baker.

6.91 The results of the 2016 household survey shows that convenience goods stores in Maltby only attract a relatively small number of main food shopping trips across all zones in Rotherham, with the highest market share coming from residents within Maltby (Zone 17) at 25%, all of which is apportioned to Tesco. Zone 16 is the only other zone in the Borough which contributes to main food shopping trips is Maltby, but this is only a 0.6% market share. A similar trend is seen for second choice shopping trips, with Zone 17 attracting 29% of the market share. Again the majority of this is apportioned to Tesco, with only 3% of the market share going to other convenience shops in Maltby town centre. Top-up food shopping attracts a higher market share, with a 67% market share in Zone 17. There are no other zones in the Borough which contribute second choice or top-up food shopping trips to Maltby.

[22] Gross ground floor area estimated by Experian GOAD

6.92 At present there are 24 comparison goods retailers in Maltby which is equivalent to 34.8% of all retail units in the centre. This is below the national average which is 39.7%. The total number of comparison goods retailers in the town centre has slowly dropped over the years 2010-2016 from 29 in 2010 to 24 in 2016. The businesses present include national and local retailers. Retailers include an Age UK charity shop and other local charity shops, a pet shop, a jeweller, homeware shops, shoe repair shop and an optician.

6.93 Household survey data relating to comparison goods stores in Maltby shows that Zone 17 provides the majority of comparison goods shopping trips to Maltby, predominantly for furniture, floor coverings and carpets; DIY goods; chemist and medical goods and kitchen utensils at 14%, 21%, 72% and14% respectively. As such, Maltby has a small shopping catchment.

6.94 There are currently 27 service units in use in the centre which equates to 39.1% of all retail units. The main service uses that can be found include estate agents, hair and beauty salons, barbers and various fast food takeaways. The majority of service units are split between the east of the centre and the intersection with Tickhill Road, Muglet Lane and Grange Lane and at the west of the centre boundary on the High Street.

6.95 There are currently 13 vacant units in the centre equating to 18.8% of all retail units, which is higher with the national average and suggests that Maltby is not a particularly popular location for retailers. The number of vacancies has fluctuated over the past several years, falling from 10 units in 2010 to 6 in 2012, 5 units in 2014 then rising to 13 vacancies in 2016.

6.96 There are a limited number of leisure uses within Maltby town centre. There is the Queens Hotel which incorporates a Wetherspoon's public house located within the town centre boundary and is located on the junction on Tickhill Road and Muglet Lane. There are takeaways and cafés clustered along the eastern side of the High Street and to the western side of the High Street. There is a martial arts studio located on the High Street, and a children's nursery also located on the High Street. There is also an amusement centre located on the eastern edge of the High Street. Outside of the town centre boundary there is the Maltby Leisure Centre located to the west of the High Street, and also the Maltby Community Library located adjacent to the town centre boundary. There is also an Indian restaurant located south of Muglet Lane and the Maltby Progressive Sports Club located on Walter's Road.

6.97 In terms of pedestrian flow, our visits to the centre indicate that the busiest area is around the eastern end of the High Street up to its intersection with Grange Lane, Muglet Lane and Tickhill Road. In terms of general pedestrian flow, vitality across the centre appears to be relatively modest. Outside of the pedestrianised area, pedestrian crossings across the main highways only exist at the top of the High Street at the intersection with Grange Lane, Muglet Lane and

Tickhill Road, which again hampers pedestrian movement, especially at rush hour when traffic can queue up along the High Street.

6.98 The area boasts wide expanses of pavements running along the High Street and along the Grange Lane, Muglet Lane and Millindale which aides accessibility for pedestrians.

6.99 The centre is highly accessible to those using cars and public transport as there a various on-street parking bays located on the west of the High Street, and some expanses of road where the dwellings are located to the east of the High Street where there are no parking restrictions in place. There is also car parking associated with the vacant Co-operative supermarket which is accessed via the High Street and parking associated with the Tesco supermarket which contains approximately 130 parking spaces. There are bus stops located on the High Street itself, some which fall just outside of the defined centre and some within, and there is a bus stop located on Grange Lane which falls just inside the Town Centre boundary. There are a number of different routes which service Maltby, these include services to Dinnington, Rotherham Town Centre, MSC and Hooton Levitt.

6.100 Regarding recent and proposed developments, there are two existing commitments on Muglet Lane in Maltby, references: RB2015/1197 and RB2015/1298. The former application is for the development of a new Aldi food store (1,852sq m (gross)) which was granted permission on 29th October 2015, and the latter development is for an A1 unit of 1,672sq m gross, which was granted permission on 11th March 2016. Both these developments fall outside the town centre allocation and outside the proposed local centre.

6.101 Our assessment of Maltby has indicated that the town centre has slightly decreased its convenience and comparison retail offer in recent years. In addition, Maltby has a higher than average vacancy rate and a higher than average service unit rate. In terms of convenience main food shopping, the survey data indicates a low level of retention with many residents choosing to go to Bramley, Rotherham and Dinnington for main food shopping. A similar trend can be seen in comparison goods shopping, as Maltby has a limited comparison shopping catchment area, mainly limited to residents within Zone 17.

Wath-upon-Dearne

6.102 Wath–upon–Dearne town centre is situated approximately 9km north of Rotherham town centre, close to the border with Barnsley to the north and Doncaster to the east. As defined in the Publication Sites and Policies document, Wath town centre extends along Montgomery Road and Church Street to the east and along the High Street up to the west, with some units located to the east of Sandygate. The centre also includes some residential dwellings primarily focused on the along the High Street.

6.103 As defined on the UDP proposals map, there is an area in the middle of the Wath-upon-Dearne town centre allocation which is currently home to the Wath-upon-Dearne library which is omitted from the Town Centre boundary and is allocated as Community Facilities – Civic Buildings. There is a Prime Shopping Street designation within the UDP which stretches along the High Street and reaches along part Church Street and part of Sandygate, which can be seen in figure 2.2.

6.104 The UDP map also includes a designated Conservation Area boundary which includes most of the designated town centre and only excludes small areas to the north, east and south of the boundary.

6.105 The Publication Sites and Policies document identifies a slightly larger town centre boundary for Wath–upon-Dearne town centre. This larger boundary definition extends up into part of the previously allocated mixed use area to the north of the existing town centre allocation which is currently occupied by Tesco and its adjoining car park. The document identifies similar Primary Frontages as the UDP, along the High Street and part of Sandygate, however it omits a section on Church Street. There are no Secondary Frontages identified. The extent of Wath-upon-Dearne Town Centre, as depicted in the Publication Sites and Policies document Proposals Map, is shown in Appendix V.

6.106 The Conservation Area boundary shown on the Publication Sites and Policies map is largely similar to that included in the UDP map.

6.107 The appearance of Wath-upon-Dearne town centre is quite dated, with the retail uses accommodated within post war era buildings which are not particularly attractive, especially the units on the section of the High Street which is pedestrianised. Wath–upon-Dearne is the smallest of the town centres with just 61 retail units.

6.108 As there is no Experian GOAD data available for Wath, data on land uses in has been obtained from RMBC for the years 2010, 2012, 2014 and updated by GVA to provide data for 2016[23]. The data which has been provided by RMBC relates to the adopted UDP town centre boundary. This data is shown in Table 6.7 below.

[23] RMBC provided data for Wath for the years 2001-2015. The years included in table 6.7 (2010, 2012 and 2014) have been used for consistency, so they are commensurate with the years analysed for Dinnington and Maltby.

Table 6.8: Land use composition Wath–upon–Dearne Town Centre 2010 – 2016

Classification	Number of Outlets											
	2010			2012			2014			2016		
	RMBC (2010)	%*	GB Ave %	RMBC (2012)	%	GB Ave %	RMBC (2014)	%	GB Ave %	GVA (June 2016)	%	GB Ave %
Convenience	9	14.5	9.1	9	14.3	8.8	10	16.7	9.3	7	11.5	9.3
Comparison	22	35.5	41.8	22	34.9	40.9	20	33.3	39.7	24	39.3	39.7
Service	26	41.9	34.9	27	42.9	36.6	24	40.0	37.6	23	37.7	37.7
Miscellaneous	1	1.6	1.2	1	1.6	1.2	2	3.3	1.2	1	1.6	1.2
Vacant	4	6.5	13.1	4	6.3	12.6	4	6.7	12.2	6	9.8	12.1
TOTAL	62	100.00	100.0	63	100.0	100.0	60	100.0	100.0	61	100.0	100.0

Source: GOAD data. Figures may not add due to rounding

6.109 Table 6.8 above shows that the defined town centre boundary currently accommodates 61 retail-related premises. Within this total amount, Table 6.7 indicates that the number of convenience goods retailers in the centre has dropped from 9 in 2010 to 7 in 2016. This equates to 11.5% of all surveyed retail units, which is higher than the national average of 9.3%. The largest convenience store in the centre is an Asda located at east High Street which extends to approximately 1,143sq m (gross)[24]. There is a distinct lack of other national retailers in Wath-upon-Dearne with the only other national convenience goods retailers being McColl's convenience store. The majority of convenience goods retailers are local retailers including a butcher, greengrocer and a baker.

6.110 The results of the 2016 household survey indicate that in terms of convenience goods shopping, Wath is also able to retain around one third of first and second choice main food trips in Zone 20 (the zone in which it lies) and is also able to attract 22% of first choice and 39% of second choice trips from Zone 21 (Mexborough). Few top-up food shopping trips are attracted from outside Zone 20 whilst the retention of trips in Zone 20 is at around 35%.

6.111 At present there are 24 comparison goods retailers in the centre which is equivalent to 39.3% of all retail units in the centre and falls just below the national average of 39.7%. The total number of comparison goods retailers in the town centre has risen since 2010 from 22 to 24. The businesses present consist of local independent retailers. These local retailers include local

[24] Gross ground floor area estimated by Promap

charity shops, chemists, a DIY shop, florist and a carpet shop. The majority of comparison and convenience shops are located along the High Street.

6.112 In terms of shopping patterns associated with comparison goods stores in Wath-upon-Dearne, the 2016 household survey data has reported that the centre attracts the highest market share of shopping trips in Zone 20 for chemist and medical goods at 53%. These predominantly are apportioned to Tesco, then other shops within the centre. Shopping trips for DIY goods from Zone 20 residents attract a 13% market share and kitchen utensils attract a 25% market share (again from Zone 20 residents).

6.113 There are currently 23 service units in use in the centre which equates to 37.7% of all retail units and is commensurate with the national average. The main service uses that can be found include hair and beauty salons, barbers, cafés and various fast food takeaways. The majority of pubs/bars and takeaways are focused around Church Street and Sandygate.

6.114 There are currently 6 vacant units in the centre equating to 9.8% of all retail units, which is lower than the national average of 12.1%. This number remained static from 2010 to 2014, when there were 4 vacant units in the centre, but has risen slightly between 2014-2016 to 6 vacant units.

6.115 There are several pubs located within Wath-upon-Dearne town centre, with a cluster around the High Street, and another on Church Street. There is also a gym located on the High Street. There are also fast food takeaways and cafes located along Sandygate and the east of the High Street. Located outside of the defined town centre boundary are other main town centre uses, including various fast food takeaways (Domino's and KFC), a Holiday Inn Express, a Thai restaurant and a public house, all located on Manvers Way. The Community Library can be found on Montgomery Road, although outside of the town centre boundary. There is a snooker and sports bar located on Norton Way and the Wath-upon-Dearne Leisure Centre is located on Festival Road. There is another gym located on Church Street, alongside Wath Rugby Club which is located on Moor Road.

6.116 The centre includes a designated pedestrian area which begins at the top of Montgomery Road and extends along the High Street up to the junction with Moor Road to the east of the centre. It also extends along Church Street and stops at the entrance to Fitzwilliam Street at the western boundary of the town centre.

6.117 Wath-upon-Dearne bus station is located in the pedestrian zone on Montgomery Road making the centre accessible to those on foot and those using public transport. There are several different routes which service Wath-upon-Dearne, these include services to Swinton, Rotherham Town Centre, Thurnscoe, Doncaster Town Centre, Mexborough, Conisbrough, Cortonwood, Chapeltown, Wombwell, Narnsley Town Centre and Manvers.

6.118 There is some parking available at the east end of the High Street and Moor Road. There is also an off-street car park associated with the library, which consists of 75 spaces. There is also parking associated with the Asda supermarket located on the boundary of the District Centre to the east which can be accessed via the High Street and there are on-street parking bays located off Sandygate. There is also a car park located of Church Street and a vast expanse of parking associated with the Tesco located inside the town centre as defined by the Publication Sites and Policies document boundary off Biscay Way which is easily walkable from the centre.

6.119 In terms of vitality of the centre, our visits to the centre observed a comparatively modest level of pedestrian flow although the busiest area is around the public house located on Church Street. Pedestrian movement around the centre is encouraged via the provision of the pedestrianised area and there are wide expanses of pavements to be found on the eastern side of the High Street. The main cluster of retail units are located in the pedestrianised section of the High Street and on the eastern side of Church Street and western side of Sandygate. The centre becomes quieter with the number of residential properties increasing along the eastern end of the High Street where the number of retail units starts to decrease.

6.120 Overall, Wath-upon-Dearne town centre is in reasonable health with a proportion of vacant property below the national average and a proportion of retail and service uses with are in line with the national average. The town centre does not retain the majority of convenience goods expenditure generated by local residents, leading to leakage of expenditure to Cortonwood Retail Park, stores outside of the Borough and stores in Rotherham. The town is also able to attract main food and top-up food shopping trips from Mexborough which is located to the north-east.

Town Centre Health Checks – Overall Conclusions

6.121 Table 6.9 below provides a summary of our health checks for Rotherham, Wath-upon-Dearne, Maltby and Dinnington, including the key characteristics and the overall health of each centre:

Table 6.9: overall conclusions regarding the health of Rotherham, Dinnington, Wath-upon-Dearne and Maltby

Centre	Key characteristics	Overall Conclusions Regarding Health of Centre
Rotherham	▪ Falling levels of comparison goods and service uses ▪ Recent investment in the	Rotherham town centre has faced a number of challenges in recent years which have affected its

	High Street area ▪ A vacancy rate well above the national average ▪ A shopping catchment which is constrained by Meadowhall and Parkgate	health and popularity as a retail destination. The centre, which is vulnerable to future competition, needs to diversify its offer in order to grow its attractiveness.
Maltby	▪ Centre has higher than average convenience goods uses. ▪ Small increase in vacancies which are now above average. ▪ Low attractiveness for main food shopping ▪ Higher than average service role.	A centre with average health and a catchment which is constrained by Bramley, Rotherham and Dinnington.
Dinnington	▪ Increases in convenience and comparison retail uses in recent years ▪ Vacancies remain above national average ▪ Tesco and ALDI stores anchor food retail offer ▪ Good retention rate for food shopping and modest retention for comparison goods shopping.	Reasonably healthy centre, whose attractiveness is boosted by the presence of two anchor foodstores.
Wath-upon-Dearne	▪ Below average vacancies. ▪ Little change in land use profile since 2010. ▪ Around one third of food trips retained. ▪ Food trips also attracted from Mexborough ▪ Food sector anchored by ASDA ▪ Non-food sector	A centre in reasonable health which faces pressures from nearby Cortonwood Retail Park but also benefits from expenditure from Mexborough.

	dominated by local independents	

Out of centre locations and Retail Warehouse Provision

6.122 Outside of its defined town and local centres, Rotherham Metropolitan Borough possesses a large amount of retail floorspace. This section provides a review of retail provision in these areas and is split between supermarkets and foodstores and retail shopping park locations.

Supermarkets and Food stores

6.123 The main food stores and supermarkets in out-of-centre locations across the Rotherham MBC area are as follows (figures are in gross sqm unless stated):

- An **ASDA** superstore is located on Aldwarke Lane in Rotherham, which extends to approximately 4,866sq m (net).
- There are four out of centre **Morrisons** stores, located at Parkgate in Rotherham, Bramley, Catcliffe and Cortonwood Retail Park. The store in Parkgate is a large sized store extending to approximately 4,000sq m (net). The store in Bramley is also a large sized store extending to approximately 3,546sq m (net) and the store in Catcliffe extends to approximately 3,600sq m (net). The Cortonwood Retail Park Morrisons store extends to approximately 4,900sq m.

Retail / Shopping Park Locations

6.124 There are some retail/shopping parks located in out-of-centre locations within Rotherham. As identified in the Core Strategy, alongside Rotherham town centre, Cortonwood Retail Park and Parkgate Shopping Park are the main shopping locations in the Borough.

6.125 **Parkgate Shopping Park** is the largest shopping park in the Borough and is located approximately 2km north east of Rotherham Centre. It comprises 43 units totalling 61,273sq m of retail and leisure floorspace. The majority of units are for retail use and key comparison retailers include Card Factory, Argos Extra, Marks and Spencer, Wilko, Sports Direct, Next and River Island. Key service retailers include KFC, Subway, Nando's, Frankie and Benny's and Thomson holiday Superstore.

6.126 **Cortonwood Retail Park** is located approximately 10km north of the centre of Rotherham. It comprises 16 units totalling 54,099sq m of floorspace. The key convenience retailer on site is Morrisons and key comparison retailers include Sports Direct, Boots, Next, Argos and TK Maxx.

6.127 An extension has been planned for the Park which will see the current distribution warehouse demolished to make way for ten large units. Cortonwood Retail Park has recently signed deals with Outfit, H&M, New Look, River Island, Marks and Spencer Simply Food, Clark's, JD Sports, Wilkos, Poundland and Frankie & Benny's who have all signed up to take units. Construction started in May 2016 and is expected to finish by June 2017.

6.128 The other key retail parks in Rotherham include:

- **Canklow Meadows Retail Park** is located approximately 3km south of the centre of Rotherham and provides circa 3,300sq m of retail floorspace and comprises a Poundstretcher, Halfords and Dunelm Mill. The units range from around 950sq m to 1,700sq m.
- **Gate Park** is located approximately 5km north of the centre of Rotherham. It is a relatively small retail park comprising convenience, comparison and service retailers' including Aldi, Iceland, Home Bargains, Barnado's, Pizza Hut Delivery and a motoring accessories retailer. There is also a vacant unit on site which is currently being marketed. Overall, the retail park provides approximately 4,700sq m of retail floorspace.
- **Gateway 33 Shopping Park** lies approximately 6km south of Rotherham Centre. It comprises two units including Boundary Mill Stores and a Morrisons with a petrol station.
- **Great Eastern Retail Park** is located approximately 3km north east of Rotherham Centre, in close proximity to Parkgate Shopping Park and contains 13 retail and leisure units with a total retail floorspace of approximately 17,300sq m. Key tenants include The Range, DFS, Oak Furniture Land and Carpetright. There is a Health and Fitness Centre which appears to be located on the outside of the site and there are two vacant units on site, totalling 930sq m.
- **Northfields Retail Park** lies approximately 2km north east of Rotherham Centre and has permission for 9,289sq m (gross) of retail floorspace which is limited to bulky goods. There is currently a vacant B&Q (4,812sq m) and two other smaller comparison retailers on site. Therefore there is 4,477sq m (gross) retail floorspace remaining to be built on site.

Out of centre leisure provision

6.129 As mentioned in the Rotherham town centre leisure uses section, several leisure uses within Rotherham fall outside of the defined town centre boundaries. The following leisure units can be found within close proximity to Rotherham town centre.

- Rotherham Leisure Complex on Effingham Street which incorporates a swimming pool, gym, sports courts, a shop and a café.

- The Town Hall located on Moorgate Street, which hosts weddings and other events.
- The Rotherham Civic Theatre, which is located on Catherine Street.
- Various gyms including Exercise4Less on Greasborough Street and I-Motion Gym on Stoddart Way.
- Gala Bingo located on Aldwarke Way.
- Various nightclubs and bars located just outside the town centre boundary on Westgate and Ship Hill.
- Clifton Park and Museum located on Clifton Lane which incorporates a museum, adventure playground and water play area.
- Magna Science Adventure located on Magna Way which is an educational visitor attraction appealing to younger age groups.

6.130 There is also leisure units located around Rotherham that fall outside the defined town centres. These are detailed below:

- Rotherham Superbowl located at Kimberworth which offers ten pin bowling alongside drinking facilities.
- Various leisure and health and fitness centres including Aston-cum-Aughton Leisure Centre, Rotherham Oasis at Kimberworth, Bodyscene Leisure Club and Spa in Bramley and Bannatyne Health Club in Bramley.

7. The Basis for the Need Assessment for Retail and Leisure Floorspace

Introduction

7.1 A key element of an up-to-date evidence base for the various elements of preparing the development plans for both Sheffield CC and Rotherham MBC is the assessment of need for additional retail and leisure floorspace.

7.2 Therefore, given the importance of the characteristics of the 'need' for new retail and leisure floorspace, these next three sections of the study provides an analysis of the need for new retail and leisure floorspace/development in both Sheffield (Section 8) and Rotherham (Section 9). The NPPF outlines the requirement for local planning authorities to assess the need for retail development and notes that this should be undertaken in both quantitative and qualitative terms. The leisure assessment concentrates upon qualitative factors, apart from a quantitative assessment of cinema screen capacity.

Quantitative Assessment of Retail Floorspace

7.3 The quantitative assessment of need for retail floorspace focuses upon the level of available retail expenditure to support retail floorspace within a defined area. For both convenience and comparison goods, retail expenditure available in the study area is estimated, then allocated to existing stores and centres using information from the household survey on their market share.

7.4 These survey-based estimates of turnover are then compared with existing retail floorspace to determine whether there is a surplus in expenditure, which would suggest that there is a quantitative need to plan for additional retail floorspace. When undertaking this exercise, judgements can be made regarding the future market share level of existing, committed and proposed facilities in any particular area. Section 8 and 9 of the study set out the results of our assessment for convenience and comparison goods retail floorspace across both Sheffield and Rotherham and this section outlines the basis for the quantitative need forecasts and also the criteria which have been used to consider qualitative aspects of retail and leisure provision in Sheffield and Rotherham.

The Structure of the Quantitative Assessment Tables (Appendices II & IX)

7.5 Given the stage of preparation of the Sheffield Plan, there is not at the present time a single set of agreed population and housing growth figures for the city for the period 2014 to 2034. Therefore, two versions of the quantitative assessment have been provided in order to take

into account the varying levels of potential population growth in Sheffield. Further information on the issue of population is contained later in this section.

7.6 The two quantitative assessments are contained in Appendix II (72,000 population growth) and Appendix IX (100,000 population growth).

7.7 The two sets of quantitative need assessment tables informing this study are structured in the following same manner:

- Table 1 - Population forecasts;
- Tables 2a-2k - Per capita expenditure forecasts;
- Tables 3a-3l - Total available retail expenditure forecasts;
- Table 4 - Market share of convenience shopping facilities;
- Tables 5a-5e - Turnover of convenience goods expenditure forecasts;
- Table 6 - Market share of comparison shopping facilities;
- Tables 7a-7e - Turnover of comparison goods expenditure forecasts;
- Table 8a - Benchmark turnover of convenience goods facilities in Sheffield and Rotherham;
- Table 8b - Commitments for new retail floorspace in Sheffield and Rotherham;
- Tables 9a-9d - Quantitative need / capacity forecasts for convenience retailing in Sheffield and Rotherham; and
- Tables 10a-10c - Quantitative need / capacity forecasts for comparison retailing in Sheffield and Rotherham.
- Tables 11-13 – Cinema Screen Capacity in Sheffield and Rotherham.

Study Area

7.8 The first stage in the assessment of retail expenditure capacity / retail floorspace need is to set a study area for the assessment. The area should be wide enough to capture shopping patterns associated with the different types of retail facilities in Sheffield and Rotherham and should be broken down into separate sub-areas to capture shopping patterns in different geographic areas.

7.9 The study area chosen for our assessment is shown on the plan at Appendix I. It covers a wide area, including all of Sheffield and Rotherham and several neighbouring authorities, including

parts of Doncaster, Barnsley, Huddersfield and Chesterfield. This reflects the area of influence of both Sheffield and Rotherham. There are 27 zones in the Study Area.

7.10 Zone 10 covers Sheffield City Centre. The rest of Sheffield is covered by Zones 2 - 9 and most of the habitable area of Zone 1.

7.11 Zone 15 covers Rotherham town centre. Other zones within Rotherham MBC area include zones 16, 18, 19 and 20 and parts of zones 13, 17 and 21.

Forecasting Dates

7.12 In order to forecast the need for additional floorspace and how this may be phased over time, our assessment provides five forecast dates. These are 2016 (the current year), 2021, 2026, 2031 and 2034.

Catchment Population

7.13 Table 1 sets out the population forecasts for each of the study area zones for the five assessment years. The base population data for each of the postcode sectors in each of the zones data is based upon 2011 Census data. Projections are based upon population forecasts provided by Experian and, for those zones covering the SCC and RMBC administrative areas, forecasts prepared by each Council for their plan-making purposes (and which therefore match the other parts of each Council's development plan evidence base). We have apportioned Councils' forecast population to each zone in accordance with their share of housing commitments in each local authority area. Housing commitments consist of completions, permissions and development plan allocations in emerging Local Plans.

Price Basis

7.14 All monetary values in this report are in constant 2015 prices, unless otherwise stated, so as to exclude the effects of price inflation.

Per Capita Expenditure

7.15 For this assessment, we have obtained up-to-date estimates of per capita retail expenditures on convenience and comparison goods from Experian, for each of the study area zones. The data which has been obtained is for the year 2015, expressed in 2015 prices.

7.16 In order to bring the per capita spending levels up to the base year for the assessment (2016) and then across the assessment period (2016-2034) we have followed these assumptions:

Table 7.1: Assumed annual growth in expenditure on convenience and comparison goods

Year	Convenience Goods Expenditure (%)	Comparison Goods Expenditure (%)
2016	-0.1	3.3
2017	-0.1	1.5
2018	-0.9	0.9
2019	-0.1	2.1
2020	0.0	2.9
2021	0.2	3.3
2022	-0.1	3.4
2023	-0.1	3.4
2024	0.0	3.3
2025	0.0	3.1
2026	0.0	3.1
2027	0.1	3.1
2028	0.1	3.0
2029	0.0	3.1
2030	0.1	3.2
2031	0.2	3.4
2032	0.1	3.2
2033	0.2	3.3
2034	0.2	3.3

Source: Experian – Retail Planner Briefing Note 14, November 2016

7.17 These forecasts have been provided by Experian in their Retail Planner Briefing Note 14 (November 2016).

7.18 Data on per capita expenditure on convenience goods and the ten different categories of comparison goods are in Tables 2a-2k at Appendices II & IX.

Total Available Retail Expenditure (including internet shopping)

7.19 Tables 3a-3l show total available expenditure within each of the 27 study area zones, totals which are calculated by multiplying the resident population data in Table 1 with the per capita expenditure data within Tables 2a-2k.

Shopping Patterns in the Study Area

7.20 As outlined earlier in this report, a new survey of household shopping patterns has been commissioned for this Study. The survey has been structured in order to obtain information on the following types of shopping in the 27 study area zones:

- For convenience (food) goods shopping, separate information on first choice and second choice main food and top-up shopping trips has been obtained;
- Comparison goods shopping has been split up into 10 categories including: clothes/shoes, furniture/floor coverings/carpets, household textiles/soft furnishings, household appliances, audio visual equipment, DIY, chemist/medical goods, books, kitchen utensils and luxury goods/sports goods. For each of the categories both first and second choice locations have been specified. Separate shopping patterns information has been obtained for each of these categories.

7.21 The 'raw' shopping patterns information from the household survey has been summarised and arranged into the above categories for convenience and comparison goods shopping. This 'summarised' information is contained within Table 4 of Appendices II & IX for convenience goods shopping and Table 6 of Appendices II & IX for comparison goods shopping.

7.22 Within Table 4 the markets shares for stores in Sheffield City Centre, each of the 17 district centres in Sheffield (including the 6 assessed as part of this study), out of centre locations in Sheffield CC, Rotherham town centre, the other 3 town centres of Maltby, Dinnington and Wath-upon-Dearne, the 4 other district centres of Rotherham and out of centre locations in Rotherham MBC, have all been grouped together, with main food and top-up food shopping market shares within each of the 27 study area zones separately.

7.23 Tables 5a to 5e turn the market share levels for convenience goods into study area derived turnover estimates by applying the market shares in Table 4 to the total available expenditure estimates in Table 3 for each zone. In order to take account of the split between main food, second choice and top-up food expenditure, we have applied a split of 70% main and second choice food and 30% top up. Main food and second choice food is then split 70/30%. Turnover levels for these four types of convenience goods shopping are calculated individually in Tables 5a-5e and then combined on the right-hand side of each table to provide a total survey derived turnover for stores and centres.

7.24 Table 5a shows the survey-derived turnover levels for each shopping location in the study area at 2016. Projected turnovers at 2021, 2026, 2031 and 2034 are shown in Tables 5b-5e. It should be noted that turnover levels for future years are projected on the assumption that each shopping destination retains its current market share although in reality their market share may increase when committed retail floorspace begins trading. Therefore, Tables 5b-5e should be seen as only the starting point for the quantitative assessment as they do not necessarily show actual future turnover levels for all stores and centres (as they may change as and when commitments are implemented).

7.25 A similar approach is taken in relation to comparison goods shopping, with Table 6 showing the market shares of the main locations in both Sheffield and Rotherham along with the market shares of centres outside of both administrative areas. Table 6 is arranged to show the market share for each location for each comparison goods category in each of the 27 study area zones.

7.26 Using a similar approach to the convenience goods assessment, Tables 7a-7e translate the market shares in Table 6 into the study area derived turnover levels for each location, broken down in the first choice and second choice for the 10 comparison goods categories.

Visitor Expenditure from outside the Catchment Area

7.27 An allowance has been made for spending at retail facilities in Sheffield and Rotherham by visitors traveling from outside the study area. In our view, this is a reasonable approach to take given the potential attractiveness of the Sheffield City Centre and Meadowhall Shopping Centre, to residents in neighbouring local authorities. Given the size of the study area, we have made an allowance for 3% inflow for comparison goods shopping when assessing existing and future retail expenditure capacity. It should be noted that this is a lower proportion than used in the 2010 and 2014 Sheffield retail studies (who used 5% expenditure inflow) although the use of 3% still provides a significant amount of comparison goods expenditure inflow[25] as can be seen from Tables 10a and 10b at Appendix II.

7.28 Due to the smaller catchment of food shops, no allowance has been made for expenditure inflow for the convenience goods assessment.

Existing Shop Floorspace

7.29 In order to inform the assessment of convenience goods floorspace capacity, we have obtained details of existing shop floorspace for the main foodstores and supermarkets across Sheffield and Rotherham. This has been obtained from several sources including the most

[25] £67.3m at 2016

recent version of the Institute of Grocery Distribution ('IGD') database, supplemented by information from the Councils, the Council's planning application records, GOAD data, Valuation Office records and estimates by GVA using Ordnance Survey information. This data is shown in Table 8a within Appendix II.

7.30 For those (convenience and comparison) retail commitments included in the study, floorspace information has been obtained from planning application forms and supporting information, plus data held by the Council. This data is shown in Table 8b within Appendix II

Sales Densities & Benchmark Turnover Levels

7.31 A key component of the quantitative assessment of retail floorspace is the need to set out benchmark turnover levels.

7.32 To calculate benchmark turnovers for foodstores we have applied the latest estimates of company average performance levels (£/sq m) provided by Verdict Research for existing foodstores and supermarkets. These estimates are based on the average performance level of each retailers convenience goods floorspace stock, rather than its overall retail floorspace offer. For other convenience floorspace, where accurate data on current convenience goods floorspace is not available we have assumed that existing (2016) turnover levels are in equilibrium with benchmark turnover levels.

7.33 For the comparison goods assessment within Tables 10a-10d, we have assumed that the 2016 total turnover potential level for all comparison goods stores/floorspace is also the benchmark turnover of existing stores/floorspace. Given the difficulty in obtaining company average performance data for all comparison goods stores in any given area, due to the number of businesses involved, it is common practice for comparison goods capacity assessments to assume an equilibrium position at the base year of assessment (i.e. 2016 in this case) unless there is clear evidence of under or overtrading in stores.

Commitments

7.34 The commitments which have been included in the convenience and comparison goods floorspace assessments are listed in Table 8b within Appendices II & IX. As the table shows, there is a mixture of operator-specific and speculative retail commitments. Many of the speculative commitments are not constrained to selling any particular type of retail goods and in such cases we have made judgements about how the permitted Class A floorspace will be split in terms of convenience or comparison goods sales or other Class A uses.

Assessment of Quantitative Need

7.35 Using the data from the preceding tables, our forecasts for quantitative need for convenience goods floorspace are contained in Tables 9a-9d at Appendices II & IX, whilst Tables 10a-10c provide the comparison floorspace forecasts. The next section of this report examines in detail the content of these tables although before we do so it is important to provide further information on how the floorspace capacity figures are calculated.

7.36 In order to translate surplus expenditure capacity levels in Sheffield and Rotherham into floorspace equivalents, we have used indicative sales densities for convenience and comparison goods floorspace. For new convenience goods floorspace, we have adopted a sales density of £12,000/sq m at 2016 and then changing over time to allow for changes (per annum) in floorspace efficiency (as outlined above). This sales density is broadly equivalent to grocery operators such as Sainsburys, Morrisons and Tesco, although ASDA and Waitrose have company average sales which are materially higher than this level and operators such as Lidl and Co-op (and to a lesser extent ALDI) have lower company averages.

7.37 Therefore, the floorspace capacity figures for Sheffield and Rotherham in Tables 9a-9b can only ever be indicative as the level will change depending on the density adopted. However, the use of a £12,000/sq m density (at 2016) is considered to be a sensible average although we would recommend that it will therefore be necessary to review the implications for retail capacity in each location as and when specific proposals for new floorspace come forward, taking account of the format of the proposed store and their likely occupiers and sales densities.

7.38 Similar principles apply for certain types of comparison goods floorspace, where we have used an indicative density of £7,500/sq m for Sheffield and £5,000/sq m for Rotherham. In particular, trading densities vary across different types of comparison goods sales and will also vary across the format and location of floorspace (i.e. city/town centre and retail warehouses). Therefore, the principles outlined in the previous paragraph will apply.

7.39 In relation to the format of the quantitative capacity forecasts, we have provided the forecasts for the whole of the Sheffield City Council administrative area and for the whole of the Rotherham MBC administrative area.

7.40 Within the 2010 retail study, a different approach was taken, where separate assessments were undertaken for the North, East and South Sheffield areas. However, whilst this analysis broke the city down into three constituent areas and considered the trading performance of some individual stores and convenience goods shopping patterns between the different zones (which are issues picked up in our qualitative analysis in this study) the 2010 capacity analysis only assessed capacity on the basis of the selective trading performance of a limited

number of the larger stores in the city. Our analysis instead includes all convenience goods floorspace across the city's administrative boundary and assesses quantitative capacity not only at the base year (2016)[26] but also for 2021, 2026, 2031 and 2034.

7.41 For Rotherham, we have following the same approach as the 2011 Colliers retail study for RMBC which initially assessed the quantitative capacity for the whole of the Borough. We consider that this is an important first step in the assessment of quantitative capacity in the Rotherham area as there is a considerable inter-relationship between the different settlements for convenience and comparison goods shopping, not least due to their close proximity. For example, in relation to convenience goods shopping, the large Morrisons store in Wickersley has a considerable influence over shopping patterns in Maltby and the eastern side of the Rotherham urban area. Similar, shopping patterns in the Wath-upon-Dearne catchment are influenced by Cortonwood Retail Park to the west, which lies in RMBC's administrative area but also has a catchment extends to cover the south-eastern parts of Barnsley's administrative area.

7.42 Indeed, whilst the 2011 Colliers retail study did attempt to break the quantitative capacity forecasts down into the individual zones and settlements, it was acknowledged that the zone/settlement analysis needed careful interpretation and Colliers advised that the Borough-wide forecasts should receive most attention. Indeed, we would advise the same approach and would suggest that the Borough-wide forecasts are considered alongside our qualitative assessment of convenience goods provision in the different parts of the Borough.

Quantitative Need Forecasts for Cinema Screens

7.43 The one area of the leisure need assessment which is quantitative in nature is an assessment of the capacity for the number of cinema screens in the Sheffield and Rotherham area. The assessment, which is contained in Tables 11-13 at Appendices II & IX shares the same study area as the quantitative retail assessment and also the population data for the 27 study area zones.

7.44 The cinema screen assessment is based upon the following structure:

- In line with the quantitative retail assessment, the base year for the cinema assessment is 2016, with future forecast years of 2021, 2026, 2031 and 2034.
- Following the calculation of the amount of resident population within each of the 27 study area zones, the average number of cinema visits per person per annum is provided. This is

[26] the 2010 study appeared to only assess quantitative capacity at the base year for that study (2009) and not across the assessment period (2009-2026)

based upon forecasts from Dodona Research[27] and is multiplied with the resident population in each zone to give an estimate of the total number of visits from the residents of each zone.

- In order to calculate the number of cinema visits at existing cinemas in Sheffield, the results of the 2016 household survey have been utilised. The survey asked respondents to give information on their usual cinema-going destination and the responses which mentioned Sheffield have been used to inform the Sheffield market share level in Table 11.
- This market share is then applied to the total number of cinema visits in each zone to calculate the number of cinema visits at existing facilities in Sheffield.
- These number of (Sheffield) visits are then divided by the average number of attendances per screen. This 'attendance per screen' rate (of 42,000) is a figure provided by Dodona and works in the same way as the benchmark turnover levels in the quantitative retail capacity assessment.
- The product of this calculation provides a forecast of the number of screens which are required to support the existing number market penetration levels of Sheffield's existing cinemas. This is then compared with the number of existing and committed cinema screens in Sheffield to estimate whether there is a quantitative need for additional screens.

Qualitative Need Assessment

7.45 Alongside the quantitative assessments of need for new retail and leisure floorspace, we have also undertaken a qualitative review of existing provision. Within the NPPF and NPPG there is not any guidance on how qualitative factors of need should be assessed although we consider that the following factors, many of which are taken from the (now superseded) Practice Guidance supporting PPS4, are relevant:

- An assessment of existing convenience and comparison shopping patterns, along with patterns associated with visits to leisure facilities;
- An assessment of the quality and type of existing provision, consumer choice and competition, including an assessment of the potential market demand for new retail and leisure provision;
- Deficiencies, gaps in provision or location-specific needs;
- Whether existing facilities are over or under-trading; and

[27] Dodona Research is a well-respected cinema market commentator and data provider, publishing data on cinema attendance rates and other cinema-related research

- The quality of existing provision.

7.46 The above factors have been taken into account in our assessments of qualitative need in Sections 8 and 9 of this report.

8. Assessment of Need for Retail and Leisure Floorspace in Sheffield

8.1 This section reviews and assesses the quantitative and qualitative need for retail and leisure floorspace in Sheffield.

Quantitative Need Assessment for Retail Floorspace

Convenience goods floorspace

8.2 As noted in the previous section of this report, two alternative versions of the quantitative capacity assessment have been prepared to take into account different potential levels of population growth in Sheffield. The capacity assessment at Appendix II is based on a 72,000 person growth in Sheffield over the period 2014-2034. The capacity assessment at Appendix IX is based on a 100,000 person growth for Sheffield between 2014-2034. In the first instance, this section describes the results of the capacity assessment at Appendix II, which is then followed by the assessment within the higher population growth at Appendix IX.

8.3 In Appendix II, Table 9a indicates that all convenience goods stores within Sheffield City Council currently attract £1,312.2m of convenience goods expenditure from the study area. Within the wider study area this represents a market share of 22.4%.

8.4 When comparing this level of turnover with the benchmark turnover of existing stores (£1,229.9m), it is necessary to take into account the turnover associated with relevant commitments. Based upon the contents of Table 8b within Appendix II, Table 9a makes an allowance of £71.5m for commitments, a total which is made up of specific convenience goods store proposals, such as Fox Valley, Drake House Crescent, the former Norton College site and New Era Square.

8.5 A comparison of the benchmark turnover of existing facilities and the turnover of commitments with the current (2016) turnover of existing convenience goods stores indicates that there is a 'surplus' of expenditure of around £10.9m (i.e. £1,312.2 m minus £1,229.9m for benchmark turnover and then minus £71.5m for commitments).

8.6 Moving forwards across the assessment period, Table 9a indicates that, based on a constant market share over the assessment period, the amount of 'surplus' convenience goods expenditure associated with stores in Sheffield rises substantially to £48.3m in 2021 and £82.7m in 2026. On an indicative basis, these levels of 'surplus' expenditure are equivalent to 4,000sq m net in 2021 and 6,900sq m net in 2026.

8.7 On face value, these are substantial levels of floorspace capacity, although it is important to understand the contribution of residents in the various neighbouring study area zones to the existing financial performance of convenience goods stores in Sheffield. Bearing in mind Zones 1-10 cover the SCC administrative area and Zones 11-13 have a close relationship with the city, it is useful to focus on the other zones (14-27). An analysis of the expenditure flows in Table 5a indicates that some £227m of convenience goods expenditure flows from Zones 14-27. Whilst it is important to acknowledge that Sheffield has a large attraction in terms of shopping trips, we consider that it is: (A) undesirable that Sheffield should rely on all of this expenditure for its future retail capacity forecasts, because surrounding local authorities can plan (and grant planning permission) for new convenience goods floorspace; and (B) there is a concern that the 2016 household survey may have over-estimated the amount of convenience goods shopping trips that are being attracted from Zones 14-27.

8.8 Therefore, as a sensitivity test, we have considered a scenario which reduces the amount of expenditure which convenience goods stores take from Zones 14-27 of the study area (i.e. we have reduced Sheffield's market share in zones 14-27). Table 5a at Appendix II indicates that, based upon the 2016 survey data, Sheffield stores attract £227m from Zones 14-27. We have reduced this by 30% for the reasons outlined above and this is fed in to the sensitivity test in Table 9b Appendix II.

8.9 This is therefore a more conservative approach which reduces, in a reasonable way, the reliance that convenience goods stores in Sheffield have on expenditure from residents living a some distance from the city. On this basis, Table 9b indicates that, with all commitments taken into account there is no 'surplus' expenditure until after 2026. By 2031, 'surplus' expenditure returns and extends to £22.9m. This is equivalent to an indicative floorspace capacity of 1,914sq m. By 2034, 'surplus' expenditure rises to £39.8m and is equivalent to a convenience goods floorspace capacity of 3,312sq m net.

8.10 We have also examined whether there is any scope for an increase in Sheffield's convenience goods market share in those zones which cover the city (i.e. Zones 1-10), however as shown in Table 8.1 below there is very little leakage of main food trips to physical stores outside the city[28].

[28] most of the main food convenience goods expenditure which isn't spent in stores in Sheffield is being spent on internet based food shopping.

Table 8.1: retained convenience goods expenditure by Sheffield convenience goods stores and internet spending, Zones 1-10

	Zone									
	1	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**
1st choice main food shopping										
Retained	75%	94%	95%	90%	83%	89%	83%	78%	78%	100%
Internet	15.09%	1.40%	3.29%	9.47%	16.83%	9.03%	8.22%	3.31%	0.96%	0.00%
2nd choice main food shopping										
Retained	83%	92%	93%	97%	95%	94%	86%	79%	81%	98%
Internet	1.15%	0.00%	4.92%	2.95%	1.69%	1.56%	6.17%	9.33%	0.00%	2.44%
Top-up food shopping										
Retained	82%	100%	99%	95%	94%	95%	90%	99%	93%	97%
internet	0.00%	0.00%	0.00%	0.00%	0.93%	0.00%	0.00%	0.00%	0.00%	0.00%

8.11 On the basis of the analysis above, we consider that there is no case for concluding that there is a substantial quantitative need in the short term for SCC to plan for new convenience goods floorspace in Sheffield. There is little leakage of trips from the city's urban area and the financial performance shown within the quantitative assessment appears to be driven in part by the survey data showing that convenience goods expenditure is flowing to stores in the city from a considerable distance outside the city. Given the challenges in making precise forecasts from this level of sample across these areas, we would caution against the Council relying on all of this expenditure inflow when proposals in surrounding administrative areas (outside of the control of SCC) could reduce this amount of expenditure inflow into the city.

8.12 The alternative capacity assessment, which is based upon the higher population growth forecast for Sheffield (100,000 person growth over 2014-2034), is contained at Appendix IX. Like the other capacity assessment, two scenarios are tested: one which adopts a constant market share and one which adopts a lower market share to reduce the amount of expenditure which stores in Sheffield attract from some of the outlying zones in the study area. Table 9a at Appendix IX (the constant market share scenario) unsurprisingly indicates a higher level of surplus convenience goods expenditure across the assessment period: £64.9m at 2021, £111.6m at 2026 and £191.7m at 2034. These translate to indicative floorspace capacity levels of 5,452sq m at 2021, 9,364sq m net at 2026 and 15,961sq m net at 2034.

8.13 The alternative scenario at Table 9b reduces the amount of convenience goods expenditure being drawn from Zones 14-27 by 30%. This results in no surplus capacity until 2026 (630sq m net), rising to 3,018sq m net by 2031 and 4,559sq m net by 2034.

8.14 Whilst this capacity exercise indicates that, on a global scale, there is not any surplus retail capacity or 'need', there may be discrete sub-areas of Sheffield where, during the course of

the study period, a specific need may subsequently be identified by a developer to provide new floorspace. For example it is feasible that an area specific analysis and survey could identify a sub area currently underserved by retail provision or an area where significant future residential growth is planned and which requires an enhanced level of shopping facilities. This may be in the form of a new local centre which can act as the focus for the day-to-day needs of the community. The latter scenario should be borne in mind by the Council when planning for new communities and is an issue which we return to later in this report. Development proposers should be required to carry out specific sub area analysis and surveys using appropriate methodologies in order to identify the capacity for the area and demonstrate a clear need for the development.

Comparison goods floorspace

8.15 Table 10a at Appendix II outlines our assessment of comparison goods floorspace capacity based upon a forecast population growth for Sheffield of 72,000 people between 2014 and 2034. As explained in the previous section, the assessment assumes that actual total turnover levels at 2016 represent the benchmark turnover of existing floorspace and moving towards 2021, 2026, 2031 and 2034 we have assumed that this turnover level changes in line with floorspace efficiency forecasts provided by Experian. Table 10a assumes that there is an increase in productivity within existing and committed comparison goods floorspace and assumes that expenditure inflow is maintained at a constant proportion of study area derived turnover. Table 10 also assumes that Sheffield's overall market share remains constant over the assessment period, which is based on the following principles:

- The city as a whole is not able to increase its share of comparison goods shopping trips across the study area;
- Likewise, the city does not lose any of its current share of shopping trips; or
- if there are any gains/losses, they are counter-balanced by corresponding gains/losses.

8.16 Based upon this constant market share, Table 10a indicates that all comparison goods stores in Sheffield attract £2,200.4m of expenditure from the study area at 2016 and this would increase to £2,266.4m on the basis of stores gaining an extra 3% of turnover from expenditure flowing from outside of the study area.

8.17 In relation to the composition of this turnover, Table 7a provides a break-down of the turnover of in-centre and out-of-centre comparison goods stores. It shows that the shopping destination in Sheffield with the highest level of study area derived turnover is now Meadowhall at £813m. The City Centre is now in second place with the comparison goods turnover of £732m.

8.18 This is a reversal of the situation found by the 2010 and 2014 retail studies prepared for SCC, with the 2014 estimating a study area derived turnover for the City Centre of £859m and a turnover for Meadowhall of £635m.

8.19 Table 46 of the 2014 retail study update indicated that the study area derived turnover of Sheffield City Centre was £775.35m in 2013 (expressed in 2011 prices). When expressed in 2014 prices to match this current study this is altered to £773.8m. The 2014 study adopted the same shopping patterns survey data as the 2010 retail study, a document which, when converted to 2014 prices, indicated that the 2009 comparison goods (study area derived) turnover of the City Centre was £784.8m. Given that the same survey data was used in both documents, this fall in forecast turnover in real terms between the 2010 and 2014 studies must have been due to lower total available expenditure estimates in the latter study.

8.20 Table 46 of the 2014 study also predicted, based upon population and economic forecasts in 2014, what the study area derived turnover of the City Centre would be at 2016 assuming that it held a constant market share between 2013-2016. This turnover was predicted to be £1,040m in 2011 prices (equivalent to £1,068m in 2014 prices). Our current study indicates that the study area derived turnover of the City Centre is £732.4m[29] which suggests that the City Centre has not been able to increase its turnover over the last seven years and, in the context of rising available comparison goods expenditure in the study area, instead has seen a material fall in its market share.

8.21 In relation to other specific destinations in Sheffield with high comparison turnover levels, these include Crystal Peaks district centre at £138m, Heeley district centre at £41m, Hillsborough district centre at £34m and Meadowhall Retail Park at £95m.

8.22 When assessing total comparison goods expenditure/floorspace capacity across the city as a whole, Table 10a at Appendix II takes into account several commitments for new floorspace across the city including the Fox Valley development, the new Ikea store, the new comparison goods floorspace within The Moor area of the City Centre and the retail development at the former Norton College site. Collectively, the comparison goods commitments are assessed to have a turnover of circa £182m and which is fed into the capacity analysis at the base assessment year of 2016.

8.23 On the basis of a constant market share for the city, the inclusion of these commitments indicates that there will be an initial (2016-2021) deficit in expenditure capacity and a large part of expenditure growth up to 2026 will be utilised to accommodate these commitments. However, by 2026 there will be a surplus level of expenditure capacity of £106.6m which, using

[29] 2015 prices

a sales density of £9,196/sq m, translates to an indicative floorspace capacity of circa 11,500sq m net.

8.24 By 2031, and on the basis of a continued constant market share, the level of 'surplus' comparison goods expenditure will rise to £391m. This is a substantial amount of potentially available expenditure and reflects the high market penetration of the city with a share of just over one quarter of all comparison goods expenditure in the study area (an area which contains a number of other settlements including Barnsley, Chesterfield, Doncaster, Wakefield, Huddersfield and Mansfield). On the basis of an indicative sales density of £10,252/sq m, this level of 'surplus' expenditure translates to a floorspace capacity of circa 38,100sq m net. For the avoidance of doubt, the expenditure/floorspace capacity figures in Table 10a are cumulative – i.e. any development which soaks up the 11,587sq m net capacity at 2026 will lead to the 2031 capacity of 38,130sq m net being adjusted downwards.

8.25 Beyond 2031, the level of potentially available 'surplus' comparison goods expenditure rises further still although we would urge a considerable amount of caution with the use of these figures due to their reliance on longer-term economic forecasts.

8.26 It is useful, at this point, to compare the estimated levels of quantitative capacity with the amount of floorspace being proposed in the current Sheffield Retail Quarter ('SRQ') planning application. As set out within the documentation submitted with the application, the total gross Class A floorspace of the development will be 77,359sq m (including both A1 and A3/4 floorspace) and 71,582sq m excluding the A3/4 floorspace. However, there is a need to take into account the existing retail floorspace which is being lost from the application site. The application documentation indicates that some 35,377sq m gross Class A1/2 floorspace will be lost and therefore the net gain in gross A1/2 floorspace is 36,205sq m.

8.27 Whilst this figure has the potential to include Class A2 floorspace, this level of net gain floorspace could provide up to 36,205sq m of gross A1 floorspace. Using a net to gross ratio of 70% this is equivalent to a net sales area of up to 25,343sq m net. This would soak up all the potential quantitative capacity at 2026 and around half of the growth in capacity between 2026 and 2031.

8.28 Given that the SRQ scheme requires the majority of the forecast quantitative capacity by 2031, there is a strong argument to suggest that SRQ scheme should be the sole major comparison goods proposal to be allocated in the Sheffield Plan. This conclusion is reinforced by the fact that the identified capacity will not become available until 2026, by the potential for the actual economic situation between 2016-2026 to turn out differently than is currently forecast (for example, as a result of the United Kingdom leaving the European Union) and by the potential for other comparison goods floorspace developments to be granted planning permission between 2016-2026 and thus soak up some or all of the remaining 'surplus' by 2026.

8.29 The analysis at Table 10a is based upon all comparison goods stores/floorspace in Sheffield collectively maintaining a constant market share over the assessment period 2016-2034. Within the previous 2010 and 2014 retail studies, capacity scenarios were modelled where Sheffield City Centre was able to increase its market share based upon a substantial new retail development coming forward in the centre. However, these studies examined the market share of just the City Centre and did not examine the implications for Sheffield's overall market share.

8.30 In terms of the potential and desirability of an increase in Sheffield's overall comparison goods market share, we consider that a range of factors should be considered. We consider that projects such as the new Ikea store and, if permitted, the SRQ scheme have the potential to reinforce and strengthen Sheffield's overall market penetration rate in the study area. However, a large part of the diversion to a major City Centre scheme, such as SRQ, is likely to come from Meadowhall, due to substantially overlapping catchments, which will limit the increase in market share for the city as a whole. In addition, realism is also needed in terms of the level of increase which can be achieved, particularly in the context of the strong catchments of other cities such as Manchester, Leeds and Nottingham.

8.31 Finally, whilst a primary purpose of any desire for an increase in Sheffield's catchment is to see it compete better with the likes of Manchester and Leeds, the unintended consequence could also be stronger competition (and trade diversion) from smaller surrounding towns such as Rotherham and Barnsley. Based upon the findings elsewhere in this study, a stronger level of leakage of comparison goods shopping trips from Rotherham is unlikely to be desirable.

8.32 As a consequence, , consideration of the above factors lead us to the conclusion that it is not desirable to plan for an increased market share for comparison goods shopping provision in Sheffield. This is reinforced by the likelihood that there will be large amount of quantitative need by 2026 without the need for increase in market share.

Qualitative Need Assessment for Retail Floorspace

8.33 Alongside the assessment of quantitative capacity (or need), national policy requires consideration of qualitative aspects of retail floorspace provision. In order to understand qualitative aspects of provision, the following indicators should be examined; the standard of existing retail provision (including available retail formats), the range and mix of goods on offer, the distribution of retail provision and accessibility.

8.34 These factors are considered in relation to convenience and comparison goods floorspace provision for Sheffield below.

Convenience goods floorspace provision

8.35 In terms of overall provision of convenience goods floorspace, Sheffield has an extensive number of stores ranging from large supermarkets occupied by all of the 'big four' grocers (Tesco, ASDA, Sainsburys and Morrisons), a number of increasingly popular discount foodstores (ALDI and Lidl) and numerous smaller convenience store format facilities through the city. Therefore, as a consequence, locational characteristics aside, the city has a very good range of stores and it certainly does not lack for a particular format of store.

8.36 In relation to the locational aspects of provision, previously identified deficiencies, such as in the Chaucer area, have now been met although we have examined the results of the survey to understand the distances that local residents are travelling to undertake their main food shopping:

- Zone 1. Zone 1 covers a much wider area than just Stocksbridge and also, in part, extends into neighbouring administrative areas (including settlements such as Penistone). Bearing this in mind, Table 4 of the quantitative assessment indicates that stores in Stocksbridge district centre attract around one third of main food shopping trips and around half of all top-up food shopping trips. Of the remaining trips, these are generally to nearby stores including Hillsborough (9% of first choice trips and 18% second choice main food trips), the large Sainsburys store at Claywheels Lane, the ALDI in Ecclesfield and the new Tesco supermarket in Penistone.
- Zone 2. Zone 2 covers the Chapeltown and Ecclesfield area in the northern part of the city and the survey data indicates that a large majority of first choice shopping trips remains within the local area, including Chapeltown district centre (49%), Chaucer (8%), Morrisons, Ecclesfield (19%) and ALDI, Ecclesfield (3%). A similar picture emerges for second choice main food and top-up food shopping including a higher market share for the ALDI store in Ecclesfield for second choice main food shopping destinations.
- Zone 3. This zone covers an area which includes Firth Park and Chaucer district centres. The household survey results indicate that the ASDA store at Chaucer has a 27% share if first choice main food trips and a 5% share of second choice main food trips. This data indicates that the new ASDA store has achieved, to a certain extent, the aims of the previous qualitative assessments and the decision to identify the need for a new store in this area. However, other stores and centres in the local area, such as the Tesco Extra at Sptial Hill, Morrisons at Hillsborough[30] and ALDI in Ecclesfield[31] all have reasonably large market shares, particularly for main food shopping. In addition, whilst Firth Park does not

[30] Which lies on the boundary of zones 3 and 4
[31] Which lies close to the boundary between zones 2 and 3

feature to any significant extent in terms of main food shopping trips for Zone 3 residents, it does however have a 10% market share in top-up food shopping trips from local residents.

- Zone 4. Zone 4 lies to the north-west of the City Centre and, as noted above, has Hillsborough on its boundary with Zone 3. The convenience goods shopping patterns data indicates that the Morrisons store in the district centre attracts around one third of first and second choice main food shopping trips. The ALDI store on Flora Street (which lies close to the boundary with the City Centre zone, Zone 10) also attracts 14% of first and second choice main food trips. Another large store in this area is the Tesco at Montgomery Terrace which attracts 4% of first and second choice main food trips. Where some leakage in trips does occur this is in relation to second choice main food trips although this is in relation to the City Centre and the Sainsburys at Clay Wheels Lane, both of which are close to the boundary with Zone 4.
- Zone 5. Zone 5 lies to the south west of the City Centre and contains the district centres of Broomhill and Ecclesall Road along with a rural area on the western edge of the city. The shopping patterns survey information shows that Ecclesall Road district centre attracts 5% of first choice main food trips, whilst there are leakages of first choice main food trips to Hillsborough (5%), ALDI at Archer Road (7%), Sainsburys Archer Road (11%), Tesco Montgomery Road (7%) and London Road (14%). Crookes district centre is also able to retain around 12% of second choice main food trips, although there is also a similar pattern of leakage to surrounding zones for other second choice main food trips.
- Zone 6. Zone 6 lies in the southern part of the Sheffield urban area and the shopping patterns survey reveals that several large supermarkets within the zone boundary retain the majority of first choice main food trips: Morrisons on Chesterfield Road (17%), Sainsburys on Archer Road (16%), ALDI Archer Road (11%), Tesco on Abbeydale Road (20%). First choice main food trips are also retained by London Road district centre although, interestingly, it is less popular with Zone 6 residents (the zone within which it sits) than with Zone 5 residents to the west. London Road district centre is more popular as a second choice main food shopping destination (10% market share), whilst Heeley district centre is able to attract 19% of second choice main food trips. The other larger supermarkets (outlined above) are able to retain the majority of other second choice main food trips, leading to a situation where there is very little leakage in trips to surrounding zones.
- Zone 7. Located to south-east of Sheffield City Centre, Zone 7 includes Manor Top district centre although the shopping patterns survey information indicates that a large proportion of first choice main food trips are travelling to stores outside of the zone. This includes stores in Meadowhead (Morrisons), the ASDA on Handsworth Road to the north and stores at Crystal Peaks district centre. Similar patterns occur for second choice main food shopping and top-up shopping.

- Zone 8. Zone 8 lies on the south-eastern edge of the Sheffield urban area and includes Crystal Peaks district centre. The household survey indicates that around one quarter of first choice main food shopping trips are captured by Crystal Peaks, with the Morrisons at Oxclose Park Road North attracting 22%, ASDA at Beighton Road attracting 7% and the ASDA at Handsworth Road attracting 9% of these type of trip. A similar pattern emerges for second choice main food shopping destinations although stores in London Road district centre are also attracting this type of trip. Generally there is very little leakage of convenience goods trips from this zone which is unsurprising given the number and choice of foodstores and supermarkets within this area of the city.
- Zone 9. Located to the east of the City Centre, Zone 9 includes the Darnall and Attercliffe areas of the city. The two most popular stores in this area for main food shopping are the ASDA store on Handsworth Road and the ALDI at Turner Business Park. The third most popular main food shopping destination is the Morrisons at Catcliffe which lies outside of the zone to the east, although journeys to this store are not significantly lengthy.
- Zone 10. The final zone which lies within the Sheffield urban area is Zone 10. This covers the City Centre area and the results of the 2016 household survey show that the Tesco supermarket on Montgomery Road is by far the most popular main food shopping destination for City Centre residents (at 43% of first choice main food trips), followed by London Road district centre (18% of first choice main food trips) and the Sainsburys store at The Moor (10% of first choice main food trips). Overall, the City Centre retains 15% of first choice main food trips, 54% of second choice main food trips and only 19% of top-up food shopping. Whilst the low level of top-up food shopping trips is somewhat surprising, the leakage of main food trips is not although the stores which benefit from these trips are relatively close to the City Centre.

8.37 In light of the above analysis, we consider that it is reasonable to conclude that most areas of the city have good access to a range of convenience goods facilities for both main and top-up food shopping. This is demonstrated by both the location of convenience goods shopping facilities across the different parts of the city and also the survey of shopping patterns which show that most shopping trips remain within individual zones and where there is leakage it is generally to stores in the 'next door' zone. The areas where longer shopping trips are taking place are zones 1,5 and 7 although we do not consider that this is leading to a significant qualitative deficiency within these areas.

8.38 The household survey results do however reveal the competition that district centres are facing from out-of-centre foodstores and supermarkets across the city. In such a large urban environment such as Sheffield it would certainly be unrealistic to suggest that one particular location, whether it be a district centre or an out-of-centre foodstore/supermarket, could

attract the majority of all convenience goods trips. However, apart from a few exceptions, such as Crystal Peaks, Chapeltown, Stocksbridge and Hillsborough, district centres across Sheffield are generally attracting much lower market shares than the larger out-of-centre supermarkets and discount foodstores. With food shopping being a high frequency trip (and becoming more so in recent years), visits to foodstores for main and top-up food shopping are an important driver of footfall and vitality within centres and we would recommend that SCC continues to investigate opportunities for the provision of new convenience goods floorspace in and adjacent to defined centres.

8.39 Turning now to the consideration of the trading performance, this is an aspect which has traditionally been considered as part of both quantitative and qualitative assessments of need. Trading levels which are significantly above benchmark levels can be a sign that there is a need for additional floorspace although, from a qualitative perspective, a range of factors need to be taken into account. First, it is very common for foodstores to trade above or below their respective company average or assumed benchmark levels. Simply because a store trades above its company average is not, in itself, a clear sign of a qualitative need for additional floorspace. Indeed, this must be compared against the other stores in the catchment which might be trading below average which might counter-act any suggestion of a qualitative deficiency. Therefore, for over-trading to be used as a clear sign of a qualitative need, we consider that there is evidence of the majority of stores trading above average and also supported by evidence of congestion in stores.

8.40 In relation to evidence of trading conditions in Sheffield, using the 2016 household survey, our quantitative assessment shows a mixed picture with convenience goods in the City Centre trading collectively below average. This is also matched by some of the district centres, including Broomhill, Crystal Peaks, Chapeltown, Chaucer and Manor Top. There are however some district centres that trade above average and these include Stocksbridge, London Road, Hillsborough and Crookes. Outside of the defined retail hierarchy, out-of-centre stores are collectively trading above average, with good (survey derived) performance levels in the Morrisons stores at Meadowhead and Ecclesfield and the Tesco at Montgomery Road. However, because of this mixed picture, along with the possibility that the survey is over-estimating the market penetration of some convenience goods stores in the wider catchment, we do not consider that the trading performance of stores in Sheffield prompts a conclusion that there is a qualitative need.

8.41 In relation to the requirements of the grocery retail sector, there has been a significant slow-down in the construction of new large supermarkets by the 'big four' retailers, with new stores being built on a very selective basis. With all the main grocers represented, we consider it unlikely that there will be demand in the foreseeable future for another large supermarket in the city. Instead, the current focus of demand is from the two discount foodstore operators

(ALDI and Lidl) and we would expect to see further proposals for these types of store going forward. Indeed, Lidl has published requirements for several new stores across the city whilst ALDI has three published requirements. These requirements are likely to be supplemented by the on-going demand, from many of the national grocery operators, for smaller convenience style stores. Demand for these stores, particularly those with up to 280sq m sales area (in order to conform to the Sunday trading laws) will be focused upon city and district centre locations and on main transportation routes.

8.42 Overall, and in light of the foregoing analysis, we have reached the view that there is not a strong qualitative deficiency in convenience goods provision across Sheffield. We consider that there is a good level of choice and distribution of stores across the city, leading to easy access for local residents. So whilst it should be important to ensure that choice and competition are promoted, we do not consider that, on a qualitative basis, there is any particular need to plan for new convenience goods stores or centres.

8.43 One further area of potential future qualitative need could be focused around the development of new communities across the city, as the City Council identifies and allocates land to meet its assessed housing need. Such new communities may not, due to their location, have the same level of accessibility to convenience goods stores as existing residents and therefore, as part of the plan-making process we would encourage the City Council to consider accessibility levels as part of allocations for new homes. Where there is an area with the potential for a significant amount of change and growth in population, there is likely to be merit in ensuring that this growth is delivered alongside new facilities in the form of a new local centre. The City Council should ensure that such centres provide a mix of shops, services and other community uses and that the overall scale of the centre is limited in size and scale to just serve the needs of the local catchment. This can be judged in a number of ways including an examination of the number of individual units within a proposed 'centre', the size of these units and the range of goods and services which will be provided.

Comparison goods floorspace provision

8.44 In relation to the qualitative aspects of comparison goods retail provision in Sheffield, it is useful to start with a global overview of provision within the city. Unlike most towns and some other cities, Sheffield is not limited to a range of retail facilities which are concentrated in a traditional city/town centre and in out of centre retail warehouse park stores. Instead it has another dominant retail destination: Meadowhall. When considered in combination, these three types of location provide a very wide range of comparison goods retailers and there are very few value and mid-market retailers which are not present in at least one of these locations. The range of upper-market retailers is also reasonably good although there are

gaps such as Space NK and Harvey Nichols. These retailers are present in other large cities such as Leeds, Manchester, Bristol and Birmingham.

8.45 Therefore, whilst we do not consider that there is a significant qualitative need on a global basis in Sheffield there are opportunities for improvement and these are likely to lie at the mid and upper-market end of the comparison goods sector.

8.46 The lack of any significant overall qualitative deficiency is supported by the results of the 2016 household survey. Table 8.2 below shows the proportion of comparison goods expenditure, generated by Sheffield residents[32], which is either: retained by all stores across Sheffield, or attracted by internet spending, and finally, attracted other physical stores/centres outside of the Sheffield administrative area.

[32] Zones 1-10 of the study area

Table 8.2 – proportions of comparison goods expenditure from residents of Sheffield flowing to stores in Sheffield, outside Sheffield and internet spending.

Sector	Retained by Stores in Sheffield	Internet Shopping	Other Physical Stores Elsewhere
Clothes and shoes			
1st choice	77%-89%	5%-17%	1%-8%
2nd choice	66%-90%	2%-25%	2%-16%
Furniture and floorcoverings			
1st choice	50%-85%	6%-32%	1%-38%
2nd choice	51%-73%	0%-28%	13-49%
Textiles and soft furnishings			
1st choice	70%-86%	4%-20%	2%-14%
2nd choice	66%-91%	0%-17%	2%-23%
Household appliances			
1st choice	51%-83%	13%-42%	0%-14%
2nd choice	51%-88%	7%-42%	0%-17%
Audio-visual equipment			
1st choice	54%-78%	20%-37%	0%-9%
2nd choice	47%-83%	17%-47%	0%-11%
DIY			
1st choice	91%-99%	0%-5%	0%-7%
2nd choice	74%-96%	0%-10%	0%-25%
Medical goods			
1st choice	88%-96%	0%-8%	0%-10%
2nd choice	88%-99%	0%-8%	0%-12%
Books			
1st choice	40%-67%	29%-56%	0%-7%
2nd choice	45%-87%	5%-53%	0%-19%
Utensils			
1st choice	69%-84%	4%-15%	6%-28%
2nd choice	62%-89%	0%-9%	7%-29%
Luxury goods and sports goods			
1st choice	60%-86%	9%-28%	0%-12%
2nd choice	50%-91%	0%-36%	0%-50%

Source: quantitative need assessment tables, Appendix II

8.47 The data in the above table indicate some high retention rates for different types of comparison goods shopping across Sheffield. These include clothing, DIY and medical goods. Also, where the retention by physical stores in Sheffield appears to be relatively low, this is counter-balanced by high levels of spending on the internet, leading to generally low levels of spending in physical stores outside of the Sheffield area.

8.48 However, where deficiencies and gaps in provision do become apparent is where the City Centre is compared against Meadowhall. Whilst it is common for some retailers to maintain a presence in City Centre and regional shopping centre locations, there are a number of

instances in Sheffield where retailers have chosen to occupy space at Meadowhall and not in the City Centre. These retailers include: Urban Outfitters, Coast, Miss Selfridge, Superdry, French Connection, Boss, Hollister, Ted Baker, Dune, Kurt Geiger and Hobbs.

8.49 This would indicate that there is better choice and competition at Meadowhall, which is likely to be a contributory factor to its higher market share / turnover in terms of comparison goods shopping. It should also be noted, however, that the City Centre has a large John Lewis department store, whereas Meadowhall does not, although the Meadowhall does have a House of Fraser department store instead.

8.50 We have also compared the market shares of the City Centre and stores at Meadowhall (both the shopping centre and retail park) for the different types of comparison goods shopping and this analysis is shown at Appendix VII. The data reveals that the City Centre has generally a better market share in a range of goods categories within the zones which cover the Sheffield administrative area, including: furniture, floorcoverings, soft furnishing, household appliances, audio-visual, medical goods and kitchen utensils. It also has a better market share than Meadowhall for luxury and sports goods in some of these 'core' Sheffield zones although Meadowhall poses stronger competition for these goods. However, the one area where Meadowhall appears to perform stronger than the City Centre is in clothing/fashion goods, where it has a better market share than the City Centre in the majority of the 'core' Sheffield zones.

8.51 In addition, the data at Appendix VII also reveals that, across the wider study area, stores in Meadowhall have a better market penetration rate for some comparison goods categories, including clothing/fashion, luxury/sports goods, soft furnishings, medical goods, kitchen utensils and books. This situation was also highlighted in the 2010 retail study and shows that whilst the City Centre is able to capture a higher market share in several the local 'core' Sheffield zones, it is apparently less attractive than Meadowhall in the wider area suggesting that, overall, it has a smaller geographical catchment.

8.52 In addition to a comparison against Meadowhall, it is also useful to compare the mix of comparison goods retailers in Sheffield City Centre against other large City Centres such as Manchester, Leeds, Nottingham, Birmingham and Newcastle. Attached to this report at Appendix VI is a series of data from Experian GOAD which outlines the proportions of units and floorspace within different food, non-food and service uses, along with vacancy levels. In terms of overall comparison goods uses, Appendix VI shows that Sheffield is well below the national average in terms of the proportion of comparison goods units although floorspace is just above the average. When compared against similar large cities, the picture is mixed with Sheffield City Centre having a higher proportion of comparison goods units than Manchester and Newcastle, but lower than Leeds and Nottingham.

8.53 The table at Appendix VI also highlights, in red, the proportion of units and floorspace occupied by clothing and fashion retailers. Such retailers are particularly important to the health and attractiveness of a City Centre (due to the contribution that they make in terms of expenditure and quantum of visits) and the table shows a significant difference between Sheffield, the UK national average and the comparable City Centres. Only 6% of retail units in Sheffield City Centre are occupied by clothing/fashion retailers, compared to 8% nationally (on average) and 13% in Leeds City Centre. A similar pattern emerges for the amount of floorspace occupied, with 6.5% in Sheffield, compared with 10% nationally, 20% in Leeds and 15% in Manchester.

8.54 A further aspect to consider, in terms of the quality of provision, is the size and age of units in the city. These characteristics vary across the City Centre, with the recent refurbishment and redevelopment at The Moor providing better quality units. However, in other parts of the City Centre, particularly the northern part of the centre, units are older and some small and poorly configured. Examples of this include Next, H&M and New Look. The size of the Next store is circa 700sq m gross, whilst many of their comparable stores in other City Centre locations are over 2,000sq m.

8.55 In light of the foregoing analysis, we consider it reasonable to conclude that there is not a significant qualitative deficiency in comparison goods retailing when the whole of Sheffield is considered. Whilst there remains an opportunity to add to the list of national multiple retailers present in the city, which would improve choice and competition generally, the city is already home to many of the key retailers in all of the comparison goods categories. This will be improved further when the Ikea store at Meadowhall opens. There are also on-going improvement to the quality of existing provision, at The Moor in the City Centre and the current refurbishment of the Meadowhall Shopping Centre.

8.56 However, the particular area of qualitative deficiency lies in the City Centre. Whilst noticeable improvements are being made in The Moor area, the quality and size of comparison goods units in other parts of the City Centre are below standard. In addition, there are a number of retailers present in Meadowhall which are missing from the City Centre and there is also a low proportion of clothing/fashion retailers in the centre when compared with other large cities in the north of England. Such an observation is not a new one, as similar conclusions were reached in the 2010 retail study, although it is important to emphasise that this specific qualitative need remains and should continue to be the focus for the City Council's retail strategy for comparison goods retailing in Sheffield City Centre.

8.57 It is also useful to consider likely retailer demand/representation issues as an aspect of qualitative need. On this issue, we consider that the following is relevant:

- Many national brands are already present in Sheffield, but a number of their stores in the city centre are under-sized against their respective national averages (i.e. Topshop, Next and H&M). The SRQ scheme in the city centre presents an ideal opportunity for these retailers to establish their latest store formats in the city centre, providing a full range of products, and thus continue to contribute to the health and attractiveness of the city centre.
- Research for the recent SRQ outline planning application has shown that there is potential demand from retailers for new floorspace in Sheffield who are not currently represented in the city. This demand is, however, likely to be city-wide and therefore development opportunities in the city centre will compete with other locations such as MSC. Indeed, where proposals exist in the city centre and in out of centre locations, the ability to let space in the city centre is likely to be affected by this competition.
- The SRQ scheme presents an ideal opportunity for one of the key anchor retailers in the city centre – John Lewis – to provide a replacement store and anchor the new SRQ redevelopment. It is likely that John Lewis's requirements will (in part) shape the forthcoming revisions to the SRQ scheme and, if their requirements cannot be accommodated, the loss of John Lewis will be a significant adverse impact upon the health of the city centre.
- In our opinion, the ability to satisfy retailer demand is more sensitive in the city centre than other locations such as MSC and out of centre shopping parks. All retail/leisure schemes require a certain level of demand/pre-lets to make them viable/deliverable although this aspect is likely to be more sensitive in the city centre due to the complexity of redevelopment proposals.

Leisure

8.58 As noted in the previous chapter, assessments of need for leisure facilities generally concentrate upon qualitative factors, although the one exception to this is in relation to cinema screen capacity where a quantitative assessment can be undertaken. We therefore start with our assessment of cinema screen capacity in Sheffield and then go on to consider qualitative issues in relation to food and drink uses, theatre and health and fitness uses.

8.59 Table 11 at Appendix II outlines our assessment of cinema screen capacity for Sheffield based upon existing market shares, taken from the 2016 household survey. The structure of the table was outlined in the previous section of this report and Table 11 indicates that, based upon the amount of visits by those people who visit the cinema in the study area, there is a current requirement for 75 screens in the city. This is shown on the right-hand side of the table,

towards the bottom. If current market shares remain constant, Table 11 indicates that this requirement will rise to 77 screens in 2021 and 79 screens in 2026.

8.60 At present there are 48 permanent cinema screens in Sheffield, although this is set to rise to 57 following the opening of the new cinema at The Moor. However, even with this increased level, Table 11 indicates that there will be still a surplus capacity of 18 screens at 2016, rising to 20 screens in 2021 and 22 in 2026.

8.61 Whilst, on face value, this would suggest that there could be need to plan for another multi-screen cinema in the city in the Sheffield Plan, it is important to note that Sheffield is able to command very good market shares across a large part of the study area. Table 11 indicates that there is virtually no leakage of cinema-going trips from the zones covering the Sheffield urban area (Zones 1-10). Sheffield's cinemas also attract at least 75% of visits from each of the zones covering the Rotherham MBC administrative area and over half of all cinema visits from the Barnsley area.

8.62 The leakage from the Rotherham and Barnsley areas is perhaps unsurprising, given the lack of a cinema in Rotherham and the Parkway cinema in Barnsley having only two screens. In our opinion, these substantial levels of leakage can be minimised if new multi-screen cinema facilities can be provided in these towns. Indeed, we are aware that there are plans for a new cinema in Barnsley and also a new facility in Wakefield.

8.63 An example of how new multi-screen cinema facilities can minimise leakage is in Chesterfield, which is slightly further away from Sheffield than Rotherham but a similar distance as Barnsley. Table 18 shows that only 18% of cinema visits from the Chesterfield area flow to Sheffield, which is due to the attraction of the Cineworld cinema which has 10 screens. This indicates that the availability of several different screens, capable of showing several different films, is a key factor in retaining trips.

8.64 Therefore in order to show what could occur in the future if Rotherham and Barnsley were to get their own multi-screen cinema facilities, we provide a sensitivity test for cinema capacity at Table 12 at Appendix II which reduces Sheffield's market share for cinema-going trips in Zones 15-22 to 20% (to match the experience of Chesterfield). The result is that the level of demand for cinema screens in Sheffield drops from 75 to 58 at 2016 which leaves a residual capacity of 1 screen for Sheffield at 2016, rising to 5 screens in 2026.

8.65 On this basis, and bearing in mind the good quality and choice of facilities in Sheffield, we do not consider that there is a need for the City Council to plan for a net addition in the number of screens in the city. Instead, the focus is clearly on allowing the new cinema at The Moor to open and establish itself and start making a positive contribution to the health of the City Centre.

8.66 Turning now to the qualitative aspects of leisure provision in Sheffield, we have examined the results of the 2016 household survey in terms of patterns of trip for different types of leisure activities and also the level of provision of leisure uses in the City Centre which is highlighted in the development plans as the primary location for such uses.

8.67 In relation to the provision of food and drink floorspace, the analysis referred to earlier in this section (and contained at Appendix VI) which examined the proportion of different land uses in Sheffield City Centre and compared them against other cities and the national average also includes data on food and drink floorspace/units. It shows that whilst the proportion of units within café and restaurant use in Sheffield City Centre is comparable to the national average (for all town centres across the UK) and that of Nottingham, it is well below the proportion of café and restaurant units found in City Centres such as Leeds, Newcastle and Manchester. In addition, the proportion of floorspace in café and restaurant use is below the national average and also the proportions in these other City Centres.

8.68 Against this background, it should also be noted that Sheffield City Centre has increased the proportion of café and restaurant units in recent years, growing from 14.6% in 2010, 16.3% in 2013 and 17.1% in 2015.

8.69 Therefore, whilst there is no suggestion of any severe qualitative deficiency in food and drink retail provision in Sheffield as a whole, given the amount of uses in the City Centre, the various district centres and also the popularity of the food and drink in the Meadowhall shopping centre[33], we do hold the view that the City Centre has fallen behind other comparable centres in terms of the quantity and range of facilities on offer. Within Sheffield City Centre there are certainly areas with a high proportion of food and drink uses. These include Leopold Square, the Devonshire Quarter and in the St Paul's Place development. However, the Devonshire Quarter functions as a separate destination from the main City Centre area and Leopold Square is perhaps more orientated to an evening out rather than as functioning in tandem with City Centre's retail function.

8.70 We also consider that there is the potential to improve the food and drink offer in the City Centre due to many operators not being present, although the size of Sheffield City Centre is such that one would expect such businesses to be present. Indeed, some of these operators, such as Jamie's Italian and Eat are not present in the city at all, whilst some such as Carluccios, Yo Sushi, TGI Fridays, Giraffe and Frankie & Bennys are present at Meadowhall but not the City Centre.

[33] Including the refurbishment of the Oasis food court area in 2011

8.71 The City Centre does, however, have the largest market share of restaurant visits in each of the ten study area zones covering the city's urban area. The shares vary somewhat, from 95% in Zone 7 and 75% in Zone 1, down to 44% in Zone 9 and 55% in Zone 2. These large market shares do indicate the potential catchment on which new food and drink uses in the City Centre have the potential to capitalise. Outside of the City Centre, there are a handful of district centres which attract restaurant trips and these are Chapeltown, Hillsborough, Ecclesall Road and London Road.

8.72 In relation to other leisure uses, the Lyceum and Crucible theatres have a very strong market share across the city, leading to very little leakage of trips. The Lyceum generally has the higher market share, which is likely to be due to amount of different performances available and the number of national touring productions. Indeed, beyond the city's administrative area, both of these theatres have strong market shares across the whole of the study area indicating the importance of these facilities to the attractiveness of the City Centre, particularly in the evenings and at weekends.

8.73 In relation to ten pin bowling, the Hollywood Bowl facility at Centertainment is clearly the most popular destination with a market penetration rate of over 75% in number of the survey zones covering Sheffield. Indeed, it is a popular facility across most parts of the study area and even attracting a higher share of trips in some parts of the Rotherham MBC administrative area than the bowling facility in Rotherham itself. The other bowling facility in Sheffield is the MFA Bowl in the northern part of the city and its core catchment is limited to Zone 3 of the study area and a small amount of trips attracted from Zones 2 and 4.

8.74 Finally, there are numerous different types of health and fitness facilities across the city. These range from a number in the City Centre (Fitness Club Central, Sheffield Hallam Active, Anytime Fitness, Pure Gym) to the large Virgin Active facility at Broadfield Park in the south of the city. In addition, the City Council also operates several leisure centres at Hillsborough, the Springs Leisure Centre and Stocksbridge, along with swimming pools at Chapeltown, Heeley and the King Edwards pool on Clarkhouse Road in the western part of the city.

8.75 Overall, we consider that the quality and quantity of leisure provision across Sheffield to be very good. There are leisure/health/fitness centres spread across the city and the City Centre is a very important destination for theatre-going across the whole of the South Yorkshire area. The same is also true for the city's cinemas, which attract from a very wide catchment, and caused by the quality and choice available in the city and also the lack of facilities in some other surrounding towns, most notably Rotherham. The provision of food and drink uses is also good, with a spread across the city, although the importance of food and drink uses to retail destinations such as Meadowhall and City Centre will mean that there will be pressure for an expanded range of facilities. This will be particularly important for the City Centre as it aims to

improve its overall market share and attract more retailers and food/drink operators, including tenants for the proposed Sheffield Retail Quarter redevelopment scheme. This issue is returned to in our advice on planning policies in Section 10 of this report.

9. Assessment of need for retail and leisure floorspace in Rotherham

9.1 This section reviews and assesses the quantitative and qualitative need for retail and leisure floorspace in Sheffield.

Quantitative Need Assessment for Retail Floorspace

Convenience goods floorspace

9.2 Whilst expenditure/floorspace capacity assessments for Rotherham appear in both capacity scenarios at appendices II and IX, the varying levels of population growth in Sheffield have very little effect upon indicative floorspace capacity levels in Rotherham. Therefore, for the purposes of this section we concentrate upon the forecasts in Appendix II and for convenience goods retail floorspace in Rotherham these can be found in Tables 9c and 9d at Appendix II. In a similar manner to the assessment for Sheffield, two scenarios are presented: one using the market shares of convenience goods stores in the Rotherham MBC administrative area unaltered and another which reduces the amount of expenditure which the Borough's stores gain from the study area zones further afield.

9.3 Table 9c at Appendix II presents the capacity scenario will the unaltered market shares. It indicates that all convenience goods stores within Rotherham MBC currently attract £678m of convenience goods expenditure. Within the wider study area this represents a market share of 11.6%. In common with the assessment we do not make any allowance for expenditure inflow for the Borough's convenience goods stores due to the size of the study area and the nature of convenience goods shopping habits. Therefore, the study area derived turnover of stores also represents the total convenience goods turnover of stores.

9.4 When comparing this level of turnover with the benchmark turnover of existing stores, it is necessary to take into account the turnover associated with relevant commitments. Based upon the contents of Table 8b within Appendix II, Table 9c makes an allowance of £46.8m for commitments, a total which is made up of specific convenience goods store proposals, such as three ALDI's at Muglet Lane near Maltby, Bawtry Road in Bramley and Sheffield Road near Swallownest and the committed retail floorspace within the new community at Waverley.

9.5 Even with the allowance for these commitments, Table 9c shows a considerable level of 'surplus' convenience goods expenditure across the whole of the Rotherham MBC area. The level is equivalent to £127m or circa 10,600sq m of floorspace at 2016. Whilst it must be remembered that this is for the whole of the Borough it is still a sizable amount of expenditure. We have therefore re-examined the market share and 2016 turnover data in tables 4 and 5a

at Appendix II and have identified that use of the market shares from the 2016 household survey leads to a considerable amount of expenditure flowing to the Borough's stores from the Sheffield zones (1-10) and, to a greater extent, Zones 22-27. This is most noticeable in Zone 22 (Barnsley), Zone 23 (Huddersfield, Wakefield, Pontefract) and Zone 27 (Doncaster, Bawtry, Retford). We consider that scale of expenditure flowing to the Borough's convenience goods stores from these three zones in particular is likely to be an over-estimate and therefore we have provided a sensitivity test for the Rotherham capacity assessment at Table 9d which reduces by 70% the amount of convenience goods expenditure that the Borough's stores gain from Zones 1-10 & Zones 22-27.

9.6 Table 9d indicates that this would decrease the Borough's market share to 8.9% and lead to a study derived turnover of £524m. When compared with the benchmark turnover of existing facilities and the turnover of commitments, this provides a 'deficit' in expenditure up to 2026 indicating that there is not an identifiable short to medium term quantitative need for additional convenience goods floorspace within the Borough.

9.7 As a result of the above, we consider that, when a realistic view is taken of the market share of Rotherham MBC's convenience goods stores, and account is made for existing commitments, we do not consider that there is a need for plan for any further (net additional) convenience goods floorspace when the Borough is considered as a whole.

Comparison goods floorspace

9.8 Turning now to the comparison goods assessment for the Rotherham MBC area, this is contained in Table 10c at Appendix II. It is structured in the same way as the Sheffield comparison goods capacity analysis and shows that, based upon the results of the 2016 household survey, stores across the Borough have a 2016 study area derived turnover of £604m. This is equivalent to a 7.1% market share in the study area.

9.9 The 2011 Rotherham MBC retail study by Colliers indicated that the total turnover of stores in the Borough was £465.9m (2009 prices)[34]. Converted to 2014 prices, to match our assessment, this is £471.6m. Therefore, over the period 2010-2016 the Borough has increased its overall comparison goods turnover in real terms. The 2011 study predicted a forecast 2017 turnover for all stores in the Borough of £587.8m and therefore the current turnover is higher than previous expectations. There are, however, some conflicting estimates of the comparison goods turnover of Rotherham town centre. The 2011 retail study forecast the turnover to be £68.7m, although the 2010 Sheffield Retail Study estimated a turnover of £116.8m (2006 prices) (£109.5m expressed in 2015 prices). It is difficult to given preference to one of these figures as

[34] see appendices 6b (Table 6) and 6c (Table 6) – both for low population growth scenarios

there are particular characteristics of the household surveys which underpin the 2010 and 2011 retail studies. For example, the 2011 retail study only included two types of comparison goods shopping questions: bulky goods and non-bulky goods. However, it did ask primary and secondary shopping locations in each of these categories. The 2011 study was also based on a household survey which split Rotherham Borough into several separate zones. In the 2010 study, only one zone covered most of the Borough, which is likely to make this aspect of the survey inferior to the 2011 study. However, the 2010 study did ask a series of more detailed questions over different types of comparison goods categories. However, a comparison of the 2011 and 2016 analyses also indicates that the turnover of out of centre stores in Rotherham, primarily Parkgate Retail Park and Great Eastern Retail Park, has fallen although comparison goods expenditure associated with these out of centre stores remains considerably higher than the town centre.

9.10 We have made a small allowance for expenditure inflow from shoppers travelling from outside of the study area (3% inflow) and this boosts the total turnover of all stores in the Borough to £621m.

9.11 In line with our quantitative assessment in Sheffield, we have assumed that the benchmark turnover of comparison goods stores in the Borough matches the total turnover potential at 2016 (£621m). This is higher than 2011 retail study, which adopted a benchmark turnover of £538.8m for 2017 which, when compared to the year-on-year increases between 2010-2017 on a pro rata basis equates to a benchmark (from the 2011 study) of circa £528m at 2016.

9.12 When arriving at a level of residual comparison goods expenditure, Table 10b includes an allowance for commitments, which are taken from the data in Table 8b. In total, these commitments have a turnover of £72.6m and include planning permissions at Parkgate, Cortonwood Retail Park and the comparison goods elements of two ALDI foodstores.

9.13 Moving forwards into the future, Table 10c models quantitative need on the basis of a constant market share for all stores in the Rotherham MBC area. It shows that without any increase in the Borough's market share there will not be any 'surplus' comparison goods expenditure until 2031, when there will be £63m, rising to £114m at 2034. These totals, which have reduced reliability due to the distance of the forecasts into the future, are equivalent to an indicative floorspace capacity of circa 9,300sq m net at 2031 and circa 15,600sq m net at 2034.

9.14 We have also undertaken a sensitivity test (Table 10c) which considers the effect on future capacity should commitments increase the market share of the Borough. For this sensitivity test we have assumed that one quarter of the turnover of commitments is diverted from comparison goods stores outside of the Borough (particularly Sheffield) which increases the market share of the Borough from 7.1% to 7.3%. This does allow 'surplus' expenditure to arise

at 2026 at £1.6m (or circa 235sq m net). This rises to 10,000sq m net by 2031 and 16,500sq m net by 2034.

9.15 Based upon these capacity forecasts, and assuming that extant commitments are taken up, there does not appear to be an urgent or substantial short term quantitative need for net additional comparison goods floorspace. In terms of a breakdown of these Borough-wide forecasts, the majority of surplus capacity will, as it arises, be directed to Rotherham. This is due to the town's market share within the Borough and, by way of example, set out below is how the 2031 constant market share scenario capacity level would be broken if it were based on existing market shares of the main settlement[35]s:

- Total for Rotherham MBC – 9,255sq m net
- Rotherham – 5,699sq m net
- Wath-upon-Dearne – 194sq m net
- Maltby – 134sq m net
- Dinnington – 180sq m net
- Other (RMBC) – 3,048sq m net

9.16 Clearly this break down is only a starting point and future expenditure/floorspace capacity can be assigned in different ways, including being influenced by qualitative factors, as outlined below.

Qualitative Need Assessment for Retail Floorspace

9.17 To sit alongside our quantitative forecasts, we have undertaken a review of the quality of existing convenience and comparison goods floorspace provision within the main settlements in Rotherham Metropolitan Borough. This is also supplemented by a qualitative review of leisure provision, particularly focusing in on Rotherham itself.

Convenience goods floorspace provision

9.18 The town of Rotherham has a wide selection of convenience goods stores. Most of the national grocery brands are present in the town including two ASDA stores, a large Tesco Extra in the town centre, Morrisons and Marks & Spencer at Parkgate, along with three ALDI and one Lidl discount foodstores. This range of stores in supplemented by smaller convenience stores, frozen food stores (such as Heron and Iceland) and niche/specialist operators in the town centre.

[35] Figures may not add due to rounding

9.19 The 2016 household survey indicates that 86% of first choice main food shopping trips remain within the town (Zone 15), whilst the retention of second choice main food trips and top-up food trips is higher at 90%. Of the remaining spending on main food shopping by Zone 15 residents, the majority is spent on internet food shopping leaving only a very small amount of expenditure which is directed at the Morrisons at Catcliffe and stores in Sheffield. Indeed, given the choice of convenience goods stores in Rotherham, it is unsurprising that the town is also able to attract a large amount of main food shopping trips from Zones 13, 16, 17, 18 and 20 which cover the other remaining parts of the Borough area. On this basis, we find no qualitative deficiency within convenience goods shopping provision within Rotherham.

9.20 The next main settlement which has been examined is Dinnington. The town currently accommodates a Tesco supermarket and an ALDI discount foodstore both of which lie in the town centre. Both stores offer, in combination, a wide range of convenience goods and they are supplemented by a range of smaller convenience goods stores, such as a Heron frozen food store in the town centre and an out-of-centre Co-op convenience store. The ALDI and Tesco stores help the town to retain 70% of first choice trips and 60% of second choice main food shopping trips from Zone 19 residents and the leakage which does occur is relatively small scale in relation to stores in Sheffield, the Morrisons at Catcliffe and Rotherham, along with 6%-11% spending on internet shopping. The contribution that the Tesco and ALDI make towards retaining main and top-up food shopping expenditure in Zone 19 allow them to trade well above their company average benchmark turnover levels. This could suggest a level of qualitative need although our visits to these stores have found that, whilst popular, there are no particular problems in terms of congestion. All of this data indicates that there is a reasonably good level of provision in Dinnington and no particular qualitative deficiency in the town centre.

9.21 Maltby lies to the north of Dinnington and to the east of Rotherham and within Zone 17 of the study area. The results of the 2016 household survey indicate that the largest store in the town, Tesco, is able to retain 25% of first choice and 29% second choice main food shopping trips from residents of Zone 17 (the zone in which Maltby lies). The reasons for this low level of (main food) retention are likely to lie in three main areas. First, there is only one supermarket in the town, which limits choice and competition. Second, the Tesco store is comparatively small by modern supermarket standards, at only 773sq m net, which limits the amount of convenience goods which can be stocked in the store. Third, a large Morrisons supermarket lies a short distance to the west of Maltby in Bramley, on the border of zones 17 and 18. On this basis, the level of retention of convenience goods shopping trips in Zone 17 is unsurprising and, whilst the ideal situation would be for a higher level of main food trip retention, the Morrisons store at Bramley is not a considerable distance from Maltby residents. This does not stop, however, longer main food shopping trips to Rotherham and Dinnington suggesting that there remains a

current modest qualitative issue surrounding convenience shopping in Maltby although the permitted ALDI store on Muglet Lane will improve the quality and choice of provision.

9.22 The final town which has been examined in Wath-upon-Dearne and which lies in Zone 20 of the study area. Wath lies within a network of some closely related settlements including Mexborough, Swinton, Brampton, Wombwell and Elsecar. As such, care needs to be taken when examining data surrounding the qualitative assessment of need.

9.23 The two main foodstores in Wath are a large Tesco Extra supermarket and a smaller ASDA foodstore. These two stores contribute to the retention of 36% of main food trips and 37% of top-up food shopping trips in Zone 20. This suggests that there is leakage of around two-thirds of convenience goods shopping trips and a concern over the quality of provision. However, the Tesco and ASDA stores are, in our opinion, both good quality facilities and the leakage is instead caused by the proximity of other stores including the ALDI in Goldthorpe, the Morrisons in Cortonwood Retail Park and the attractiveness of, easy linkages to, stores in Rotherham. This suggests that whilst it would be advantageous to retain more main and top-up food shopping trips in Wath, the likelihood of doing so is low due to the urban geography of the local area and the distribution (and number) of foodstores.

Comparison goods floorspace provision

9.24 In relation to the type of comparison goods retail provision across the Rotherham MBC administrative area, there is a noticeable difference in the type and scale of provision between Rotherham and the other settlements in the Borough. Rotherham has a much broader and larger scale of comparison goods retail provision, including some national multiple retailers, whilst the other settlements focus more on smaller scale local independent traders. The one exception to this is Cortonwood Retail Park, located at the northern edge of the Borough in Brampton, containing a range of large comparison goods units.

9.25 In terms of provision of comparison goods floorspace within Rotherham, the overall level of provision is reasonably good. A number of the national multiple brands are present and this is supported by a range of local independent traders within the town centre. National brands in the town include Marks & Spencer, Argos, TK Maxx, Currys/PC World, River Island, Next, Boots, H&M and Outfit. However, the key issue in relation to the provision of comparison goods floorspace is the distribution across the town. The quality and scale of comparison goods floorspace is noticeably better at Parkgate than the town centre. Data from Experian indicates that the amount of ground floor area in the town centre given over to comparison goods retailing is circa 250,000sq ft whilst the amount of comparison goods floorspace at Parkgate is over 400,000sq ft.

9.26 Given that Parkgate is dominated by a high number of national multiple comparison goods retailers, along with this noticeably higher amount of floorspace, it is unsurprisingly that it has comparison goods turnover twice the level of the town centre. Analysis of the quantitative assessment at Appendix II indicates that Parkgate is particularly successful in attracting expenditure on clothing/fashion goods. It attracts circa £72m of expenditure on these goods compared with circa £20m being attracted to the town centre.

9.27 Given the proximity of Sheffield City Centre and Meadowhall, it is unsurprising that the 2016 household survey shows that there is a significant amount of leakage from the Rotherham MBC area to Sheffield. The leakage of expenditure is mainly directed at Meadowhall and Table 6 at Appendix II shows that within Zone 15 (the zone that covers the Rotherham urban area), Parkgate has a 35% market share in first choice clothing/fashion trips, followed by 26% for Meadowhall and then 19% for Rotherham town centre. This situation is replicated across other comparison goods categories, although Rotherham town centre has a higher market share in Zone 15 for shopping related to books, kitchen utensils, medical/health/beauty goods and luxury/sports goods.

9.28 Using the results of the quantitative assessment it is also possible to assess how well Rotherham is meeting the needs of its residents in terms of retained expenditure. This exercise was undertaken in the 2010 retail study undertaken by Colliers which found that £1 in every £10 spent by residents of the Borough was being spent in Rotherham town centre. We have revisited this useful exercise for the purposes of this latest study and found that:

- Residents of zones 15-20[36] spend £75.3m of comparison goods expenditure in Rotherham town centre.
- Overall, residents of zones 15-20 generate a total pot of £607m of comparison goods expenditure per annum.
- Therefore, just over £1 in every £10 from the Borough's residents is still being spent in Rotherham town centre[37]. This indicates that there has been no change in the way in which the town centre is meeting the needs of the Borough's residents.

9.29 In contrast, £2.50 in every £10 spent by the Borough's residents is spent at Parkgate and £2 in every £10 is being spent at Meadowhall.

9.30 This illustrates the strong competition that Rotherham town centre faces in the local area and which prompts the need to be realistic over the ability of the centre to improve its offer and

[36] Which broadly equate to the administrative area of Rotherham MBC
[37] The precise figure is £1.20

attract new comparison goods retailers. Indeed, on this issue, we consider that comparison goods retailer demand for the town centre is likely to be subdued. The socio-demographic profile of the town suggests that the centre is likely to appeal to mid-market and value-orientated retailers and a number of these are already present including B&M, Poundstretcher and Primark. Many other comparison goods retailers who would consider the Rotherham catchment are already present at Parkgate and it is very unlikely that these retailers would consider a second store in such close proximity. The same is true for Meadowhall, given its proximity to Rotherham town centre, catchment and accessibility from the main road network.

9.31 Therefore, any qualitative deficiency which exists in comparison goods shopping in Rotherham is primarily directed at the town centre as the town as a whole has a good level of provision via its out of centre retail parks. This level of provision, and market penetration rates, is considered to be reasonably good when the close proximity of Meadowhall is considered although Meadowhall and Parkgate act in combination to place pressure on the market penetration and attractiveness of Rotherham town centre to the extent that the ability for significant qualitative gains in the offer of the town centre are unlikely. Instead, it would appear that the focus for the Council should be on trying to maintain the current comparison goods role of the town centre in the face of this sustained competition and, in particular, carefully examining proposals for new and revised retail floorspace outside of the town centre in the Rotherham and Sheffield areas.

Leisure

9.32 In order to assess the qualitative aspects of leisure provision across the Rotherham Metropolitan Borough area we have considered the supply of existing facilities, spending on different types of leisure activities and the pattern of trips to specific leisure activities. In relation to the supply of leisure facilities we note the following:

- As noted in the previous section of this report, there are no cinemas within the Borough. This leads to trips, from the various parts of the Borough, to the various cinema facilities across Sheffield, including Cineworld at Centertainment and Meadowhall.
- There is a modest selection of eating and drinking establishments within Rotherham. A number of these are located within the town centre (although choice is relatively limited), and some of the out of centre retail parks, particularly Parkgate, also provide restaurants which add to their overall level of attractiveness. Provision in Maltby, Wath and Dinnington is on a much smaller scale.
- The two main bingo halls are the Mecca and Gala facilities in Rotherham. The Mecca bingo hall is located on the western edge of Rotherham town centre, whilst the Gala facility is located on Aldwarke Lane to the north-east of the town centre.

- Rotherham's Civic Theatre is located on Catherine Street in Rotherham town centre. It has a regular programme of theatrical, musical, comedy and other events.
- There are four main leisure centres across the Borough, in Rotherham, Wath-upon-Dearne and Aston-cum-Aughton. These provide pool and gymnasium facilities. In addition, there are several private health and fitness clubs in the Borough, the majority of which are in Rotherham.
- There is one ten pin bowling facility in Rotherham: the Superbowl on Wortley Road, located to the north-west of Rotherham town centre.

9.33 In relation to cinema provision, the lack of a cinema in Rotherham has already been mentioned in the quantitative cinema screen capacity assessment in the previous section of this report. In particular, the leakage of a substantial amount of cinema-going trips from residents of Rotherham's administrative area is contributing to a large requirement for cinema screens in Sheffield. As a consequence, the ability to retain these trips in the Rotherham area will create a level of capacity which is able to support a new local cinema. For example, Table 11 at Appendix II indicates that the cinema-going trips from residents of Zones 15-20 (which cover the Rotherham MBC administrative area) create a demand for 13 cinema screens in Sheffield. However, when the market share of Sheffield in Zones 15-20 is reduced in order to retain these trips in Rotherham, this reduced the remaining demand for Sheffield down to 3 screens. Therefore, if a new cinema facility in Rotherham is able to retain 80% of cinema trips from Zones 15-20, there will be a demand for up to 11 screens and this is shown in Table 13 at Appendix II.

9.34 As noted earlier in this document, the Borough Council is making a significant commitment to deliver a new mixed use scheme (including cinema and leisure uses) in the town centre. In October 2016 the Council's Cabinet and Commissioners' Decision Making committee resolved to purchase the Forge Island site (from Tesco) for this development and the Council is now in the process of proceeding with this purchase. In addition, a set of detailed development proposals and a delivery/implementation plan for the Forge Island site are to be prepared in tandem with a town centre masterplan. This indicates that the Borough Council is proactively seeking to deliver redevelopment at Forge Island for leisure development and we consider that such actions can be classified as planned investment on a sequentially preferable site.

9.35 Section 6 of this report has indicated that Rotherham town centre has a lower than average proportion of service uses and we have investigated this data further in order to understand the amount of units and floorspace in food and drink service use between 2011 and 2015. This is shown in Table 9.1 below.

Table 9.1 – units and floorspace in food and drink use in Rotherham town centre, 2011-2015

	2011	2013	2015
Units – No.	43	43	41
Units – %	12.99%	13.74%	12.62%
UK Average	15.76%	16.41%	17.22%
Floorspace – No.	56,700sq ft	64,600	54,900
Floorspace - %	8.69%	10.83%	7.40%
UK Average	10.85%	11.81%	12.75%

9.36 Table 9.1 indicates that the number of food and drink uses has fallen very slightly between 2011 and 2016 and this has been matched by a small reduction in the proportion of total town centre retail floorspace which is occupied by these uses. Throughout the assessment period the number of food and drink units and the amount of occupied floorspace for these uses has consistently been well below the national average and the difference between these two amounts has been growing as the amount of food and drink space in town centres nationally has been growing. In other words, the national trend has not been matched by the changes over time in Rotherham.

9.37 In terms of participation rates for the various leisure activities, question 20 of the 2016 household survey provides the following information:

- Cinema – 42%-57% participation rate
- Theatre – 16%-41%
- Pubs/bars – 40%-55%
- Restaurants – 51%-61%
- Leisure centre / health & fitness – 19%-37%
- Ten pin bowling – 12%-24%

9.38 The 2016 household survey also provides information on the patterns of trips to leisure facilities, for those people that participate in leisure activities. The key aspects of this data are as follows:

- Cinema. Between 92% and 100% of residents of Zones 15-18 travel to Centertainment and Meadowhall for their cinema-going trips. Sheffield also attracts just over 70% of trips from

Zone 19 (Dinnington), although one quarter of trips from this area also flow to Worksop. In Zone 20 (Wath-upon-Dearne) 87% of trips flow to Sheffield, with a 7% for Wakefield.

- Theatre. The catchment for Rotherham's Civic Theatre extends across zones 15, 16, 17, 18 and 20. Within these zones the market share varies between 23% and 35%, with the highest market shares lying in zones 15 (Rotherham) and 18 (Bramley/Wickersley). Within Zone 19 (Dinnington), Rotherham only attracts 5% of trips, with 88% of trips flowing instead to Sheffield. Generally speaking, Sheffield has the majority market share of theatre-going trips across all of the Rotherham study area zones, although 26% of trips from Rotherham residents (Zone 15) travel to Leeds City Centre.
- Pubs and bars. The answers to question 23 of the 2016 household survey reveal that visits to pubs and bars across the Rotherham administrative area are more localised in nature. Generally, the main town in each zone attracts the most trips. Rotherham is the most popular destination in zones 15 and 16 (with 62% and 50% market shares respectively), Maltby is the most popular destination in Zone 17 (70% market share) whilst Wickersley is the most popular destination in Zone 18 (47% share). Dinnington and Wath-upon-Dearne are the most popular destinations for pubs and bars in zones 19 and 20 respectively. Generally, where leakage outside of the Borough occurs, Sheffield is the main beneficiary although Worksop does attract 15% of trips from Zone 19 residents.
- Restaurants. In contrast to visits to pubs/bars, Sheffield is consistently the most popular destination for restaurant visits across all five Rotherham MBC zones. Within these zones, it has a market share varying from 34%[38] to 51%[39]. Rotherham is the next most popular destination in Zones 15, 16 & 18, although Maltby is able to 22% of restaurant visits in Zone 17 and Dinnington is able to capture 47% of visits in Zone 19.
- Health & fitness. The answers to question 25 of the household survey reveal a wide range of destinations for health and fitness related trips. Around half of all trips from Rotherham residents (Zone 15) go to the Rotherham Leisure Complex with the remaining trips being directed to Parkgate and Rotherham town centre. The leisure complex is also attracting one fifth of trips from Zone 16 although the I-Motion gym in Rotherham and Virgin Active in Sheffield are also popular destinations for residents of this area. Maltby leisure centre is able to attract 70% of trips from Zone 17 residents and also 42% of Zone 18 residents. Within Zone 19, the majority of trips are spread relatively evenly across the Ponds Forge Centre in Sheffield, the Bannatyne health club in Rotherham and the Aston-cum-Aughton leisure centre. Within Zone 20 the most popular destination is the Wath-upon-Dearne leisure centre with a 45% market share.

[38] Zone 18
[39] Zone 17

- Ten pin bowling. The core catchment for the Superbowl in Rotherham extends to zones 15 (45%) and 16 (55%). Beyond this area, and even though some of the other Rotherham zones are further away from Sheffield than Rotherham, the Hollywood Bowl at Centertainment becomes the much more popular ten pin bowling destination.

9.39 When reaching a conclusion on the level of qualitative need for leisure uses in Rotherham Metropolitan Borough we have taken a similar approach to the 2011 retail study by Colliers which classified leisure uses into regional, sub-regional and local in nature. The 2011 study accepted that regional-type uses such as concert halls and ice rinks were not uses which could be attracted to Rotherham and the study concentrated instead on uses such as cinemas, restaurants and leisure centres. We consider that it is sensible to continue this approach and the findings of the 2011 study remain valid insofar as they relate to cinema and food/drink uses.

9.40 In particular, we consider that there is a particular quantitative and qualitative need for a new cinema in Rotherham and there is also scope for a material improvement in food and drink uses. The provision of both of these uses are likely to be hand-in-hand and are increasingly being seen as key to the future diversification and attractiveness of town centres, including the ability to increase vitality and activity in centres throughout the day and into the evening. The identification of these form of need is not new and has been recognised in previous studies and the strategic planning work that is currently being undertaken for Rotherham town centre and the Borough Council will need to carefully consider proposals for this uses which arise in other parts of the Sheffield and Rotherham area in terms of the impact that they may have on the ability to delivery investment for such uses in the town centre.

10. Policy Recommendations

10.1 As part of our instructions on this study, SCC have asked us to provide advice on a suite of existing development plan policies in the Sheffield Core Strategy (2009) and the Pre-Submission version of the City Policies and Sites development plan document. The policies that we've been asked to examine are as follows:

- Core Strategy: policies 14, 15, 17, 18, 19 & 34-39
- Pre-submission City Policies & Sites document: policies B2, B3 & C4.

10.2 Policies 14, 17 and 18 in the Core Strategy deal specifically with Sheffield City Centre. The defined Primary Shopping Area is highlighted as the priority area for new retail development (Policy CS14) and the New Retail Quarter is specifically mentioned as the regeneration project for strengthening this area. Policy CS17 outlines the role and function of 12 different 'quarters' in the City Centre whilst Policy CS18 is effectively a development control type policy for new retail and other development proposals in the City Centre.

10.3 The wording of Policy CS14 is important in terms of the development plan's approach to new retail development in the City Centre and at Meadowhall. At the recent public inquiry into a new retail unit for Next Home at Meadowhall the Inspector noted that the text of Policy CS14 was not consistent with the thrust of the NPPF, as it appeared to place an embargo on new retail development at Meadowhall, although it could be regarded as up-to-date if the policy were read in the context of the sequential and impact tests in the NPPF.

10.4 The role of Meadowhall and its relationship to the City Centre has been explored in some detail in the preceding chapters of this report and our recommendations regarding the policy approach to the Meadowhall area are contained later on in this chapter[40].

10.5 Whilst, when read as a whole, it is clear there is a retail hierarchy in Sheffield, consisting of the City Centre and then district and neighbourhood centres, we consider that the initial retail strategy policy in any replacement plan for the Core Strategy should include a clear indication of the retail hierarchy in the city.

10.6 We also recommend that the initial retail hierarchy / strategy policy provides a clear indication of how the City Council intends to meet the identified retail and leisure needs across the retail hierarchy and also maintain and enhance the health of centres in the hierarchy. In particular, this should include the Sheffield Retail Quarter, which is the key

[40] See paragraphs 10.39-10.43

comparison and leisure strategic allocation and the importance of this development in improving the health and attractiveness of the city centre.

10.7 There is also a need for a development management policy for all retail, leisure and salient main town centre use proposals outside of defined town centres. In order to conform with the NPPF, this policy should include a requirement to conform with the sequential and impact tests. In relation to the sequential test, the policy should:

- Make it clear that the test will apply to all main town centre uses;
- That the sequence of preferred locations is: in-centre sites and premises, then edge-of-centre locations; and then out-of-centre locations;
- That preference will be given to edge-of-centre and out-of-centre sites that are accessible and well connected to 'town centres'; and
- That flexibility, in terms of scale and format, must be employed when considering alternative more sequentially preferable sites.

10.8 Whilst the development management policy cannot introduce a different variation of the sequential test for Sheffield, we consider that the policy should make reference to any specific site allocations for retail and leisure development. The allocation of sites in the Sheffield Plan is designed to meet identified retail and leisure needs and therefore it will be important for proposals for other retail and leisure uses to be assessed in relation to these allocated sites.

10.9 In addition, the Council should consider whether it is appropriate to exempt certain types of retail uses from the normal operation of the sequential test or incorporate additional assessment criteria for such uses. For example, small local shops which are designed to serve limited catchments in residential areas have the potential to be defined as serving a location-specific need and could therefore meet these circumstances.

10.10 In relation to the impact test, the recommended threshold for undertaking impact assessments is contained later in this chapter. Where such tests are required, we recommend that the development management policy outlines that the City Council will expect salient proposals to be assessed against their impact on the health of, and investment within, 'town centres' within the catchment of the proposed development. The impact test should be applied to proposals for retail, leisure and office developments which are located outside of defined 'town centres' in the city.

10.11 In relation to the other aspects of the City Centre-related policies, we would highlight that whilst the outline of the character areas in Policy CS17 is very useful, there are no specific delivery mechanisms for these aspirations. Therefore, the text of Policy CS17 would be equally relevant in the supporting text to the City Centre strategy instead. Alternatively, there are

likely to be some aspirations in this policy which do translate themselves to specific allocations, such as the Sheffield Retail Quarter area (known as the 'New Retail Quarter' area in the Core Strategy) and an allocation for continued improvements to retail and leisure space in The Moor area.

10.12 In relation to the definition of the Primary Shopping Area for the City Centre, we would recommend that such a definition remains although it should be extended to cover The Moor area given the recent (and on-going) improvements to this area and the important positive contribution that they'll make to the health and attractiveness of the City Centre.

10.13 In relation to other aspects of Policy CS18, we appreciate that the Core Strategy was necessarily strategic in nature and development management policies were intended for a separate document. Therefore, on the basis that SCC is now preparing one all-encompassing development plan document, there will be a need for any replacement for Policy CS18 to define the various frontages and boundaries in the City Centre and to provide appropriate policies which deal with proposals in these different areas.

10.14 This was the proposed approach in Policy B2 of the draft City Policies and Sites plan, which defined a Central Primary Shopping Area and a wider Central Shopping Area. Whilst the NPPF asks local authorities to define a Primary Shopping Area, we consider that, due to the size of Sheffield City Centre, it is entirely appropriate for a development plan to identify the primary shopping area in the centre and then a wider boundary. This is, in effect, no different to the definition of primary and secondary retail frontages and how some secondary retail frontages may not necessarily be within a defined Primary Shopping Area[41].

10.15 Policy B2 of the draft City Policies and Sites plan also provided minimum thresholds for the proportion of Class A1 uses should be maintained in the defined Central Primary Shopping Area and Central Shopping Area definitions. These were 70% and 50% respectively. This proposed approach is a traditional approach to the control of A1 retail and other uses in 'town centres' and provides certainty. However, in some instances the provision of a strict minimum threshold can lead to unintended consequences and, therefore, we consider that it may be useful for the next development plan policy to include a series of qualitative criteria which could allow some non-Class A1 uses (i.e. food and drink uses), which can generate as much activity and vitality to a centre as A1 uses, to be provided as an exception to such quantitative considerations. These criteria could include:

- The location and prominence of the premises within the shopping frontage;

[41] The NPPF makes it clear that only those secondary retail frontages which are adjoining and closely related to primary retail frontages should be included in a Primary Shopping Area boundary. However, in some larger centres, such as Sheffield city centre it is common for some secondary areas not to meet these criteria and therefore they will remain beneficial secondary retail frontages outside of the PSA.

- The floorspace and length of the frontage of the premises;
- The number, distribution and proximity to other existing non-A1 premises, or with planning permission for such use, within the frontage in question and throughout the centre;
- The particular nature and character of the use proposed, including the level of activity associated with it;
- The level of vacancies in ground floor properties; and

10.16 In addition, so long as Central Shopping Area boundary is clearly defined, we do not consider that there is a need to carry forward the approach of Policy CS18 which named specific streets outside of the Central Primary Shopping Area.

10.17 Turning now to those other Core Strategy policies which relate to non-retail uses in the City Centre, Policy CS15 deals with the provision of leisure floorspace whilst Policy CS19 deals with the provision and retention of cultural facilities. We would recommend that the broad thrust of Policy CS15 – i.e. 'town centre' first - is taken forward into the new development plan. In particular, we would support the continuation of an approach where the City Centre is clearly identified as the first choice location for major leisure development which draws from a wide catchment. We consider that the provision of new leisure development will help to continue to diversify the attractiveness of the City Centre to ensure that it does not just need to rely on shopping provision for its main source of visits.

10.18 Policy CS15 also identifies the Lower Don Valley area as the sequentially next best location for major leisure schemes after sites in or on the edge of the City Centre. The same approach is taken for the Upper Don and Sheaf Valleys for smaller scale proposals serving smaller catchments. Whilst the approach of Policy CS15 is to add a local dimension to the operation of the sequential test, we do not see this to be inconsistent with the NPPF as it is clearly identified locations which are accessible by a choice of means of transport and so long as it does not stop the proper consideration of the sequential test for all leisure schemes in edge and out-of-centre locations.

10.19 Finally, whilst Policy CS15 does make it clear that leisure uses need to be subject to the sequential test, the NPPF requires all main town centre uses to be subject to the sequential test and, in relation to leisure, culture and tourism, these include:

> *"leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls)……..arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities)".*

10.20 The final area of policy to comment upon is the district and neighbourhood centres policies in the Core Strategy (CS34-39) and proposed Policy C4 in the City Policies and Sites document.

Many of the district centres covered by the Core Strategy policies are not covered by the health checks in this study and therefore we are not able to comment upon the individual strategies for these centres. However, in relation to Core Strategy policies 34 and 39 and Policy C4 of the City Policies and Sites document, the content of these policies needs to be combined in the Sheffield Plan to take account of these recommendations:

- In order to remove any confusion over the role of retail hierarchy and potential conflict with the NPPF, we would recommend that the term 'neighbourhood centre' is changed to 'local centre'. The NPPF indicates that shops of "neighbourhood significance" should not be classified as 'town centres' and we assume that this was not the intention of SCC when identifying these centres in the retail hierarchy in the Core Strategy.
- The Sheffield Plan should, for the avoidance of doubt, list the district and local centres which form part of the retail centre hierarchy.
- We would recommend that the approach in Policy C4 of the City Policies and Sites, which provides development management criteria for proposals in the identified centres, is carried forward in to the Sheffield Plan.
- It would also be useful for the Sheffield Plan's policy in relation to district and local centres to outline the role and function of these centres and the types of use/development which will be appropriate. This will ensure that development in these centres serves a more localised function and proposals which have a much larger catchment are directed to Sheffield City Centre.

10.21 In addition to existing local and district centres, the City Council may decide, as part of any large-scale new residential development areas, to identify the need for a new local centre to serve this new community. Such as approach is to be supported as it would provide local residents with easy and convenience access to day to day retail and service uses. However, in such a scenario, we would strongly recommend that the allocation of any new local centre is defined in terms of its role and function. In particular, there will be a need to ensure that the allocation provides a limit on the scale of any new local centre and controls it to a facility which is designed to serve the local community rather than a much wider catchment. Considerations which should be taken into account in such instances will include the size of the community to be served, the number of separate retail/service units in the proposed development, the size of the retail/service units and the range of goods and services to be sold from the development.

Impact Test Threshold

10.22 As part of the scope of this study, SCC requires advice on an appropriate local floorspace threshold for assessing the impact of retail proposals.

10.23 National guidance on impact assessment thresholds is set out in paragraph 26 of the NPPF. It states that local planning authorities should request an impact assessment for retail, leisure and office development proposals outside of town centres (that are not in accordance with an up-to-date Local Plan) if the scale of development is over a proportionate, locally set threshold. Where there is not a locally set threshold the national default threshold of 2,500sq m gross will apply.

10.24 Whilst there is perhaps some ambiguity in the language used by paragraph 26 of the NPPF (i.e. request for an impact assessment rather than establishing whether impact is a material consideration), the NPPG is clearer. It notes that the impact test only applies to proposals over 2,500sq m gross unless a different locally appropriate threshold has been set.

10.25 Therefore, unless SCC sets a different threshold in its Sheffield Plan, all retail proposals below 2,500sq m gross floorspace in the city will not be assessed against their impact on the health of, and investment within, all defined 'town centres' in Sheffield. This will include the City Centre, district and local centres across the city.

10.26 The NPPG provides guidance on the indicators which should be taken into account by local planning authorities seeking to identify local impact assessments. These relate to the consideration of the following factors:

- Scale of proposals relative to town centres;
- The existing vitality and viability of town centres;
- Cumulative effects of recent developments;
- Whether local town centres are vulnerable;
- The likely effects of development on any town centre strategy;
- The impact on any other planned investment.

10.27 In relation to the scale of proposals relative to 'town centres', the size of the centres in the retail hierarchy varies quite considerably. According to Experian, the total amount of retail floorspace in Sheffield City Centre is circa 142,200sq m[42]. Conversely, whilst there is not any up-to-date land use survey information for the local centres, it is likely that some of the smallest local centres have less than 1,000sq m of floorspace. The national default threshold is equivalent to 0.7% of the City Centre's Class A retail floorspace but two and a half times as high as the likely total size of the smallest local centres. Therefore, in 'scale' terms this would

[42] Experian GOAD April 2016 survey of the city centre

suggest that a very low threshold should be set as it should relate to the 'lowest common denominator' – i.e. local centres.

10.28 However, we consider that other factors should be considered, including the type of retail provision and how modern out-of-centre retail developments compare to retail units in town centres.

10.29 In relation to convenience retail provision, there is a wide range of store sizes from the several large supermarkets to a large number of stores which are below 1,000sq m gross and are located in district and local centres. Indeed many convenience stores in local centres do not extend beyond 400-500sq m gross. In many cases, particularly in district and local centres, small foodstores provide an important contribution to the health of centres and in some cases provide an anchor role. In many cases they are also the largest units in district and local centres.

10.30 Therefore, we consider that a trigger point of 500sq m gross for retail proposals involving the potential sale of convenience goods should be introduced in the Sheffield Plan. This should apply to new stand-alone retail floorspace, proposed extensions to existing stores and applications to vary the range of goods to be sold from existing floorspace. In addition, this threshold should apply consistently across the whole of the Sheffield urban area for both edge of centre and out of centre locations.

10.31 Turning to comparison goods retailing a similar exercise has been undertaken. This has found a wide variety of unit sizes, varying from smaller units in general in local and district centres with a larger average size of unit in the City Centre and the modern district centre at Crystal Peaks. In out of centre locations, Sections 5 and 6 of this report identifies the range of existing unit sizes although our experience across the UK indicates that unit sizes have become increasing smaller in recent years, particularly for non-bulky goods retailers. For example, units at 500-600sq m are common in some retail parks.

10.32 Within Sheffield City Centre, unit sizes can vary quite significantly. For example, the Marks & Spencer store, which is one of the largest in the centre is around 9,600sq m whilst many of the units along Fargate and The Moor are between 300-500sq m.

10.33 Generally speaking, single comparison goods retailers do not provide a lone sole anchor to defined centres, although the range and quality of comparison goods retailers provides a very important contribution to its health and attractiveness. With such a range of retailers present in the Sheffield area it is difficult to be precise over the exact scale of floorspace which could have a detrimental impact upon the health of defined centres. However given trends in the retail sector in recent years and the evolution of the retail warehousing sector, we consider that floorspace of trigger of 500sq m gross should be applied to impact assessments for

comparison goods floorspace. This should apply to new stand-alone retail floorspace, proposed extensions to existing stores and applications to vary the range of goods to be sold from existing floorspace. In addition, this threshold should apply to bulky and non-bulky goods proposals and, like convenience goods uses, be applied consistently across the whole of the Sheffield area for both edge of centre and out of centre locations.

10.34 The need for this lower level of floorspace is also reinforced by factors such as cumulative impact issues, the health of the City Centre and the development plan strategy for the centre. In relation to cumulative impact, whilst it might be that the individual impacts associated with a circa 500sq m retail proposal do not cause any particular cause for concern, the combined effect of this proposal plus others starts to become significant. Therefore, the Council must consider how the cumulative build-up of a certain scale of development could affect the health of town centres. In other words, if it is considered that the individual impacts of say a 500sq m retail proposal are unlikely to ever be significant then this would allow all future 500sq m proposals to avoid the assessment of cumulative impact. Should half a dozen or so of these come forward then this would equate to 3,000sq m of new retail floorspace which would have avoided any consideration of impact despite it being over the national impact threshold.

10.35 A particularly problematical area for this scenario could be retail parks, either existing or committed, where they comprise several units collectively could be over 2,500sq m but individual each unit is, say, between 500-1,000sq. Should a series of separate applications be submitted, with the red line area around just one unit, then the impact test would be avoided.

10.36 As noted above, the health of a centre may not rely on just one retailer but when the cumulative build-up comprises a range of retailers selling different types of goods then the longer term effects on the health of a centre could become an issue. This would be reinforced whether there is potential for store relocations.

10.37 In relation to the consideration of the impact test at the local level and how the impact policy in the Sheffield Plan should be framed, we consider that the following factors are important:

- The test of impact will apply to all convenience and comparison goods proposals outside of the boundaries of defined 'town centres' in Sheffield. This will include proposals for new retail units, extensions to existing floorspace and proposals to vary the terms of planning conditions and legal agreements in relation to the range of goods to be sold.
- It will be important for the Council and applicants to agree the scope of any impact assessment before applications are submitted. This will include: the characteristics of the proposed development (including the various scenarios for its retail offer), the catchment area of the proposal, the 'town centres' whose health could be affected by the proposal (including an assessment of their health), the pattern of trade draw and trade diversion to

the proposal and any restrictions which applicants are willing to accept on the proposed retail floorspace.

- The committed retail development which should be included in the cumulative assessment of retail impact.
- The list of alternative locations which should be included in the sequential test, including an agreement over the approach to flexibility in terms of scale and format.

10.38 We have applied the same considerations to proposals for edge and out of centre leisure uses and have reached the view that the impact threshold should be higher. In particular, we consider that leisure uses which located in edge and out of centre locations and which have a trading overlap with 'town centres' are those such as cinemas, bowling alleys and other family orientated entertainment centres. These are generally accommodated in larger unit sizes and therefore we consider it more appropriate to set the impact threshold for Class D leisure uses at 1,000sq m gross.

Recommendations for City Centre and District Centre Boundaries in Sheffield

10.39 The brief for this Study also requires the provision of advice on the various 'town centre' boundaries for the centres covered by this Study. In particular, we have considered whether any of the retail/shopping boundaries in the city centre should be revised and also whether the boundaries of the district centres should be revised (and supplemented by separate Primary Shopping Area boundaries). We attach plans for the recommended boundaries at Appendix X and describe the recommended changes (if any) below[43]:

- Hillsborough. We recommend that the only change to the 'town centre' boundary should be to remove a small area of land on the northern edge of the centre at Hawkesley Avenue. We also recommend that a primary shopping area is defined in the northern part of the centre (as shown by the area edged in blue on the attached plan).
- Ecclesall Road. We recommend that two blocks of units opposite the Berkeley precinct should be included, along with the blocks either side of Pear Street (thus extending the centre up to Summerfield Street in the east). In addition, the car park adjacent to the Lescar public house should be excluded from the centre boundary. We do not consider that there are any differences between the town centre and primary shopping area boundaries for Ecclesall Road.

[43] The plans attached at Appendix X show the recommended 'town centre' boundary areas edged in red and the recommended primary shopping area for Hillsborough edged in blue.

- London Road. We recommend that the centre boundary is reduced to remove a dwelling on Sharrow Lane and also properties within the Forge student village. We also recommend that there are no difference between the town centre and primary shopping area boundaries for London Road.
- Woodseats. We recommend that some additional retail properties are included in the boundary of Woodseats on the southern side of Abbey Lane and the remainder of the centre should stay the same. We also recommend that there are no difference between the town centre and primary shopping area boundaries for Woodseats.
- Chapeltown. We recommend that the eastern side of the centre boundary is moved to exclude the industrial uses to the east of properties on Station Road. We do not recommend that there should be different town centre and primary shopping area boundaries in this district centre.
- Crystal Peaks. We recommend that SCC considers reducing the size of the town centre boundary at Crystal Peaks district centre to exclude the large retail units to the north of Waterthorpe Greenway. These units (and their adjacent car parking area) are physically separated from the main part of the district centre and linkages between these two areas require a journey through an underpass. We therefore consider that the retail units to the north of Waterthorpe Greenway are best described as an edge of centre location. On this basis, the plan attached at Appendix X shows the revised recommended town centre boundary (which is the same as the primary shopping area). However, if SCC do not agree with our recommendation (and wish to keep the retail park within the boundary) then the main part of the district centre (to the south of Waterthorpe Greenway) should receive a primary shopping area designation.

10.40 In relation to the policies associated with these town centre boundaries, we recommend that SCC provides a specific policy in the Sheffield Plan (which could also encompass local centres also). The policy would supersede Policy S7 of the UDP and would need to set out both the acceptable land uses for district centres and also provide a set of criteria for the assessment of applications proposing the loss of retail uses. This should follow the general approach of the primary and secondary retail frontage policies in the city centre and include a blend of quantitative and qualitative assessment criteria. This approach should apply to the whole of the designated district centre boundaries.

10.41 Hillsborough (and possibly Crystal Peaks) may also have a defined primary shopping area boundary. The main significance of this in relation to planning policy would be the application of the sequential test, with proposals outside of the primary shopping area (but within the district centre boundary) assessed against their ability to be accommodated on sites/premises in the PSA boundary. We do not consider, however, that there is a need for a

different set of change of use policies for the different parts of centres that have a PSA definition.

Policy Approach to Meadowhall

10.42 The final area of our policy advice to SCC relates to the Meadowhall shopping centre. As noted earlier in this section, the text of Policy CS14 of the Sheffield Core Strategy appears to place an embargo the expansion of Meadowhall. As noted by the Inspector at a recent appeal[44], this would not be consistent with the NPPF unless development were also considered in the context of the sequential and impact tests contained within the Framework. Therefore, for the Sheffield Plan, the position adopted by the Core Strategy needs to be amended and we have considered whether any specific approach should be applied to proposals at Meadowhall or whether future proposals are simply assessed in the same way as all other out-of-centre development across the city.

10.43 When undertaking this consideration, we have taken into account the characteristics of Meadowhall both now and over time. In particular, and as noted in the preceding sections of this report, Meadowhall has, according to the available evidence, grown its market share in recent years and now has a comparison goods turnover which is larger than Sheffield City Centre. In addition, it has been able to attract some key retailers which do not have a presence within the City Centre and has a size of catchment which is larger than the City Centre. However, it should also be noted that this catchment brings a large amount of shopping trips and expenditure to Sheffield. It is unclear whether these trips would have come to the city if Meadowhall did not exist, although this is nevertheless a positive impact upon the city. In addition, it provides for a significant amount of employment which will have wider knock-on positive impacts for the city.

10.44 Therefore, we can certainly see why the City Council's previous cautious approach to Meadowhall was adopted. The City Centre was in need of support and regeneration and it was felt, not unreasonably, that Meadowhall was a potential threat to achieving this. Based upon the latest analysis in this Study, we consider that this situation is still generally correct although we consider that it would be unreasonable to suggest that all proposals at Meadowhall have the ability to be harmful to the retail hierarchy in the city and surrounding town centres. Instead, each proposal should be treated on its own merits and in the same way that proposals relating to other out-of-centre locations in the city are considered.

10.45 Therefore, overall, it is difficult to see how or why Meadowhall should, in terms of the basic policy framework, be treated in any different way to other out-of-centre retail floorspace proposals. Therefore, as a starting point, all such proposals will be faced with the universal

[44] See paragraph 14 of Appeal Decision APP/J4423/A/13/2189893

need to comply with the sequential and impact tests. However, beyond this basic framework there is an opportunity for the policy and supporting text to set out guidance and key principles to properly test the acceptability of proposals at Meadowhall and other out of centre locations.

10.46 We recommend that this approach should encompass the following:

- Being clear over the extent of the retail hierarchy in Sheffield and making sure that, where necessary, the Sheffield Plan outlines a clear strategy for the role of 'town centres'
- Applying the sequential and impact tests in a consistent manner to all salient proposals and making it clear that both the impact on the health of, and investment within, salient 'town centres' will be tested.
- Making it clear that edge and out of centre proposals on unallocated sites will be considered against their impact on the delivery of the strategy in the Sheffield Plan which will allocate sites to meet the identified retail and leisure needs and also put in place strategies for maintaining and enhancing the health of defined 'town centres'.
- In relation to Meadowhall, making it clear that this area lies outside the defined retail hierarchy and that retail and leisure proposals at Meadowhall will be scrutinised a detail in relation to the effects on Sheffield city centre and the main town centres in the sub-region (including Rotherham). This scrutiny should encompass the following:
    - The significant trading overlap between Meadowhall and the city centre in terms of both retail and leisure uses. In particular, whether proposals at Meadowhall have the potential to exhibit a disproportionately large effect on the city centre by boosting the wider attractiveness of Meadowhall in relation to both trade diversion and retailer requirement/locational decisions. In other words, there will be a need to look beyond the direct financial impact of a leisure and/or retail proposal and consider whether there will be wider knock-on impacts.
    - The need to ensure that detailed consideration is given to effect of proposals at Meadowhall on investment decisions in the city centre and the delivery of the strategy for the city centre in the Sheffield Plan. In particular, consideration will need to be given to: whether there is competition for the same market opportunity, whether there is available expenditure/demand to accommodate investment in both locations, evidence of concern from investors, the overall combined effect of investment in both locations and the type of effect on the development plan strategy and how important these effects are to the delivery of the overall plan strategy.
- Making it clear (in the text supporting the policy) that, due to its large catchment, proposals at Meadowhall will need to be tested against their impacts on surrounding towns in surrounding administrative areas.

Policy Approach to Parkgate

10.47 Having gone through a similar exercise for Sheffield City Centre and Meadowhall, we can see no reason why the same policy approach should not apply to Parkgate in Rotherham. In similar manner to Meadowhall, Parkgate has in recent years grown its market share particularly in comparison goods shopping and now has a comparison goods turnover which is considerably higher than Rotherham town centre. It also has some high profile national multiple retailers which are not present in the town centre although are of a benefit when the town is considered as a whole.

10.48 However, whilst it is likely that Parkgate has been one reason why Rotherham town centre has performed poorly in recent years, it cannot be assumed that all future proposals will have harmful effects. Therefore, Parkgate should be treated as an out of centre location and proposals for retail and leisure uses within or adjacent to the retail park should be assessed against their compliance with the sequential and impact tests. In particular, proposals at Parkgate, plus all other relevant edge and out of centre site proposals on unallocated sites, should be tested against their effect on the delivery of the development plan strategy and we recommend that the development plan strategy should include specific initiatives which have been identified to regenerate and diversify Rotherham town centre.

11. Summary and Conclusions

Scope and Purpose

11.1 This report has been prepared by GVA in response to a joint instruction by Sheffield City Council ('SCC') and Rotherham Metropolitan Borough Council ('RMBC'), to prepare a Joint Retail and Leisure Study for the administrative areas of Sheffield and Rotherham.

11.2 The objectives of this study, as identified in the brief issued by the Councils are as follows:

- Provide a new survey of household shopping patterns for convenience and comparison goods across the Sheffield and Rotherham catchment areas;
- An assessment of the trends in retail and leisure development and an assessment of demand from operators for representation in the Sheffield and Rotherham area;
- An assessment of the vitality and viability of Sheffield City Centre, Rotherham town centre and also nine of the most important town/district centres across the two settlements
- A quantitative assessment of retail capacity for convenience and comparison goods floorspace across Sheffield and Rotherham up to 2034;
- An assessment of any changes in shopping patterns and the catchment areas of Sheffield and Rotherham since the completion of the previous retail studies in both local planning authority areas;
- An assessment of the leakage of shopping trips/expenditure from Sheffield's and Rotherham's catchments and consideration of how this leakage may be clawed back in the future;
- An assessment of how Rotherham town centre serves the retail and leisure needs of its local catchment population and how this has changed since the completion of the previous similar assessment in 2010;
- Review the effectiveness of the retail and town centre policies in Sheffield's draft City Policies and Sites document and in the adopted Core Strategy.

11.3 The contents of this Study will inform both the development plan making and development management functions of SCC and RMBC and will supersede the contents of the Sheffield Retail Study (March 2010)[45] and the Rotherham Retail & Leisure Study (March 2011)[46].

[45] Prepared by Cushman & Wakefield for SCC
[46] Prepared by Colliers International for RMBC

11.4 This conclusions section summarises the content of this Study in relation to the various 'town centre' health checks, the assessments of need for retail and leisure floorspace and the recommendations for retail, leisure and town centre issues for the SCC and RMBC administrative areas.

Sheffield City Council Health Indicators

City Centre

11.5 Our health check confirms that Sheffield City Centre remains a very important and popular shopping destination, particularly for several different types of comparison goods. It remains able to attract a substantial amount of comparison goods expenditure (£732m) and this is supplemented by a convenience goods turnover of £75m. The biggest contributors of comparison goods expenditure are in relation to clothing and fashion, health and beauty goods and jewellery, game, toys and sporting goods.

11.6 However, as detailed in the previous retail study for SCC in 2010, the City Centre faces a suite of pressures. It is continuing to see a falling number of comparison goods retailers and the vacancy rate (23%) is considerably higher than the national average (12%). The financial performance is clearly being influenced by two factors: the continued success of the Meadowhall Shopping Centre ('MSC') as a comparison goods shopping destination and also the influence of the internet (a phenomenon which is affecting all physical stores whether they be in or out of centre locations). Indeed, our quantitative assessment, which takes into account the results of a survey of household shopping patterns conducted earlier in 2016, indicates that MSC now has a higher comparison goods turnover than the City Centre, which is a reversal of the situation in the 2010 retail study for SCC.

11.7 These recent trends and the current situation reinforce the need for the City Centre to take measures to maintain its role as the primary shopping destination in the city and sub-region and also improve its performance and market share. The first phases of redevelopment and refurbishment at The Moor are likely to make good progress in achieving these aims although there remains a need for the City Centre to continue to improve its retail and leisure offer and key to this is the successful implementation of the SRQ (which is currently at the planning application stage).

District Centres

11.8 This Study has examined the health and key characteristics of the six largest district centres in Sheffield: Crystal Peaks, Woodseats, London Road, Hillsborough, Ecclesall Road and Chapeltown. This review has revealed that each of these centres plays an important role in serving the day-to-day needs of their local communities and a number of the centres are

particularly important in terms of the amount of service uses that they provide. For example, London Road and Ecclesall Road both have an important evening economy role.

11.9 The convenience goods shopping role varies between the different centres. A number, including Chapeltown, Hillsborough and Crystal Peaks have large supermarkets which allow the centres to have a high market share for both main and top-up food shopping in their local areas and, in some cases, allow a district centre to have a wider food shopping catchment. In contrast, Ecclesall Road and Woodseats have smaller foodstores which tend to attract top-up food shopping trips and face particular competition from surrounding large scale out of centre supermarkets in the southern part of the city.

11.10 Most of the six district centres have a limited comparison goods catchment, extending to only the local area and characterised by low market penetration rates. The exception to this is Crystal Peaks, whose covered shopping mall and adjacent retail park combine to provide the centre with the third highest comparison goods turnover of any single destination in Sheffield and a catchment which extends across a large part of the south-east Sheffield urban area.

Other Provision

11.11 In terms of other provision, Sheffield has, like many other large towns and cities, a considerable amount of retail and leisure floorspace in out of centre shopping/leisure parks. These locations provide a particularly important role in selling large bulky comparison goods and also have an element of non-bulky comparison goods sales, and are in some cases supported by convenience goods floorspace.

11.12 However, Sheffield is one of the few cities in the UK to have a large regional shopping centre: Meadowhall. Meadowhall is able to attract a large amount of shoppers to Sheffield from a wide catchment which extends into Derbyshire, Nottinghamshire and other parts of Yorkshire. It also provides a considerable amount of employment opportunities and accommodate a wide range of comparison goods retailers, some of which are not present in Sheffield City Centre. Indeed, the quantitative assessment contained within this Study, and which utilises the results of the 2016 household survey, reveals that Meadowhall now has a higher comparison goods turnover from the study area than the whole of Sheffield City Centre. This is a reversal of the position in the 2010 retail study and also shows that Meadowhall has a wider catchment than the City Centre.

Assessment of Need

11.13 We have undertaken an assessment of the quantitative and qualitative needs for convenience and comparison goods retail floorspace and have reached the following conclusions and recommendations for SCC. Our assessment of quantitative need contains

two scenarios in order to take into account two contrasting levels of population growth in the Sheffield city administrative area[47].

11.14 We do not consider that there is an over-riding and substantial case for concluding that there is a quantitative need in the short term for SCC to plan for new convenience goods floorspace in Sheffield. There is little leakage of trips from the city's urban area and the financial performance shown within the quantitative assessment appears to be driven in part by the survey data showing that convenience goods expenditure is flowing to stores in the city from a considerable distance outside the city. Whether or not this survey data is completely accurate, we would caution against inferring that this expenditure inflow justified a need for more floorspace, because proposals in surrounding administrative areas (outside of the control of SCC) could reduce this expenditure inflow into the city.

Table 11.1 – convenience goods capacity requirements in Sheffield, 2016-2034

	2016	2021	2026	2031	2034
72,000 growth scenario	-4,775sq m net	-2,310sq m net	-229sq m net	1,914sq m net	3,312sq m net
100,000 growth scenario	-4,422sq m net	-1,703sq m net	630sq m net	3,018sq m net	4,559sq m net

11.15 We have also reached the view that there is not a strong qualitative deficiency in convenience goods provision across Sheffield. We consider that there is a good level of choice and distribution of stores across the city, leading to easy access for local residents. As such, whilst it should also be important to ensure that choice and competition are promoted, we do not consider that, on a qualitative basis, there is any particular need to plan for new convenience goods stores or centres.

11.16 Turning to comparison goods provision, our quantitative assessment indicates that the scale of commitments for new retail floorspace across the city will soak up all available 'surplus' comparison goods expenditure by 2021. There will, however, be a substantial amount of 'surplus' comparison goods expenditure by 2026 and this could be equivalent to between 11,500-16,000sq m net new floorspace. This is based upon the market share of all comparison goods floorspace in the city remaining static over the assessment period. .

[47] 72,000 and 100,000 person growth between 2014 and 2034

Table 11.2 – comparison goods capacity requirements in Sheffield, 2016-2034 (constant market share approach)

	2016	2021	2026	2031	2034
72,000 growth scenario	-24,321sq m net	-9,657sq m net	16,116sq m net	45,344sq m net	63,751sq m net
100,000 growth scenario	-24,321sq m net	-11,833sq m net	11,587sq m net	38,130sq m net	54,872sq m net

11.17 In relation to qualitative indicators of need, we have reached the conclusion that there is not a significant qualitative deficiency in comparison goods retailing when the whole of Sheffield is considered. Whilst there remains an opportunity to add the list of national multiple retailers present in the city, which would improve choice and competition generally, the city is already home to many of the key retailers in all of the comparison goods categories. This will be improved further when the Ikea store at Meadowhall opens. There are also on-going improvements to the quality of existing provision, at The Moor in the City Centre and the current refurbishment of the Meadowhall Shopping Centre. However, the particular area of qualitative deficiency lies in the City Centre. Whilst noticeable improvements are being made in The Moor area, the quality and size of comparison goods units in other parts of the City Centre is below standard. In addition, there are retailers present in Meadowhall which are missing from the City Centre and there is also a low proportion of clothing/fashion retailers in the centre when compared with other large cities in the north of England. Such an observation is not a new one, as similar conclusions were reached in the 2010 retail study, although it is important to emphasise that this specific qualitative need remains and should continue to be the focus for the City Council's retail strategy for comparison goods retailing in Sheffield City Centre.

For many years, SCC has adopted a strategy which aims to see a new major retail-led mixed development be brought forward in the City Centre. The latest incarnation of this strategy is the Sheffield Retail Quarter ('SRQ') redevelopment proposals, which have been subject to a recent outline planning application. We estimate that the recent SRQ scheme could deliver around up to 25,000sq m of new Class A1 comparison goods floorspace which would soak up all of the identified capacity at 2026 and large part of the growth between 2026-2031. Whilst the SRQ is unlikely to be delivered in the form proposed in the recent outline planning application scheme (which has been endorsed by SCC) a revised scheme will be brought forward and we consider that, given the strong qualitative need influences identified in this Study, along with the increasing unreliability of retail forecasts in the medium to longer term,

there is a strong case for the Sheffield Plan to allocate the SRQ area as the sole major retail development site. In relation to leisure uses, we consider that the quality and quantity of leisure provision across Sheffield to be very good. There are leisure/health/fitness centres spread across the city and the City Centre is a very important destination for theatre-going across the whole of the South Yorkshire area. The same is also true for the city's cinemas, which attract from a very wide catchment, and caused by the quality and choice available in the city and also the lack of facilities in some other surrounding towns, most notably Rotherham. The provision of food and drink uses is also good, with a spread across the city, although the importance of food and drink uses to retail destinations such as Meadowhall and City Centre will mean that there will be pressure for an expanded range of facilities. This will be particularly important for the City Centre as it aims to improve its overall market share and attract more retailers and food/drink operators, including tenants for the proposed Sheffield Retail Quarter redevelopment scheme.

Rotherham Metropolitan Borough Council Health Indicators

Rotherham Town Centre

11.18 Our health check assessment of Rotherham town centre has outlined the pressures that the centre faces in terms of its position in retail landscape across the RMBC administrative area and its relationship to retailing in Sheffield. Rotherham is at the pinnacle of the retail hierarchy in the Borough but it is not the location with the highest comparison goods turnover. That role has been taken by Parkgate which is, for some types of comparison goods shopping, considerably more attractive than the town centre. In addition its catchment being squeezed by Parkgate, Rotherham town centre also faces considerable competition from Meadowhall, and these factors leave the town centre with a relatively small geographic catchment and a weak market penetration level with this catchment. These pressures also leave the town centre with a vacancy level which is noticeably higher than the national average and also lower than average levels of comparison goods retailing and service uses.

Other 'Town Centres'

11.19 Of the three other town centres in the RMBC administrative area assessed for this Study (Wath, Dinnington and Maltby), Dinnington is the only centre which is able to retain the majority of the convenience goods trips generated by its local residents. Maltby and Wath are positioned in such a way that they have overlapping catchments with stores in other settlements, leading to longer food shopping trips for local residents. All three centres are in reasonable health, although they all are clearly faced with the influence of the strong attractiveness of Rotherham, which limits their comparison goods market share.

11.20 Looking to the future, there is a need to focus on the contribution that convenience goods retailing and service uses can make towards the attractiveness and vitality of these three town centres, on the basis that an increased comparison goods role is unlikely to be achievable.

Other Provision

11.21 Whilst the retail hierarchy in Rotherham Metropolitan Borough is clearly faced with the influences of Meadowhall and, to a lesser extent, Sheffield City Centre, there are several out of centre supermarkets and retail parks which have a considerable influence on local shopping patterns. These include Cortonwood Retail Park in Brampton and Parkgate in Rotherham. Parkgate in particular is now the key comparison goods shopping destination in Rotherham, with a comparison goods turnover which is now well in excess of Rotherham town centre. The success of Parkgate has, in our opinion, led to the health of Rotherham town centre suffering and is a key reason why any future proposals for retail and leisure development in Rotherham and Sheffield will need careful examination by RMBC.

Assessment of Need

11.22 In relation to the assessment of need for convenience and comparison goods floorspace across the Rotherham Metropolitan Borough area, our quantitative assessment has found that, when all commitments are taken into account, there is not a quantitative need for new convenience over the entire assessment period. There is also no urgent or short-term need for comparison goods floorspace. The qualitative review of convenience goods floorspace across the four main settlements in the Borough supports this view with, in our view, a good level of choice and competition.

Table 11.3 – convenience goods capacity requirements in Rotherham MBC, 2016-2034

	2016	2021	2026	2031	2034
Rotherham	-2,300sq m net	-1,261sq m net	-385sq m net	518sq m net	1,107sq m net

Table 11.4 – comparison goods capacity requirements in Rotherham MBC, 2016-2034 (constant market share approach)

	2016	2021	2026	2031	2034
Rotherham	-14,513sq m net	-9,895sq m net	-630sq m net	9,255sq m net	15,669sq m net

11.23 In relation to any qualitative deficiency which exists in comparison goods shopping in Rotherham, this is primarily directed at the town centre as the town as a whole as a good level of provision via its out of centre retail parks. This level of provision, and market penetration rates, is considered to be reasonably good when the close proximity of Meadowhall is considered although Meadowhall and Parkgate act in combination to place pressure on the market penetration and attractiveness of Rotherham town centre to the extent that the ability for significant qualitative gains in the offer of the town centre are extremely challenging. Instead, it would appear that the focus for the Council should be on trying to maintain the current comparison goods role of the town centre in the face of this sustained competition and, in particular, carefully examining proposals for new and revised retail floorspace outside of the town centre in the Rotherham and Sheffield areas.

11.24 In relation to leisure use provision in Rotherham, we consider that there is a particular quantitative and qualitative need for a new cinema in Rotherham and there is also scope for a material improvement in food and drink uses. Our quantitative assessment indicates that if four-fifths of cinema-going trips from the Borough's residents can be retained in the Borough then there could be capacity for up to 11 screens.

11.25 The provision of both of cinema and food/drink uses are likely to go hand-in-hand and are increasingly being seen as key to the future diversification and attractiveness of town centres, including the ability to increase vitality and activity in centres throughout the day and into the evening. The identification of this form of need is not new and has been recognised in previous studies and the strategic planning work that is currently being undertaken for Rotherham town centre. Indeed, the Council is currently taking steps to acquire the Forge Island site in Rotherham town centre and this is likely to be seen as the most sequentially preferable site for such uses in the catchment. In addition, the Borough Council will need to carefully consider proposals for this uses which arise in other parts of the Sheffield and Rotherham area in terms of the impact that they may have on the ability to delivery investment for such uses in the town centre.