

Chesterfield Borough, Bolsover District and North East Derbyshire District

Retail and Centres Study

April 2018

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1.0 Introduction

Instruction

- 1.1 Nexus Planning (Nexus) was commissioned by Bolsover District Council, Chesterfield Borough Council and North East Derbyshire District Council ('the Councils') in November 2015, commencing May 2016, to undertake a Retail and Centres Study for the three Council areas.
- 1.2 This Retail and Centres Study updates two previous studies, the first completed in 2008 by Nathaniel Lichfield and Partners (NLP) for Chesterfield Borough Council and North East Derbyshire District Council and the second in 2010 by Roger Tym and Partners for Bolsover District Council. This Retail and Centres Study (the Study) will form part of the evidence base upon which the emerging Local Plans for the three Council areas will be established.
- 1.3 A fundamental objective of this Study is to deliver an appraisal of the retail/leisure needs and capacity in the period to 2033, and to review the current performance of Bolsover, Shirebrook, Clowne, South Normanton, Chesterfield, Staveley, Dronfield, Clay Cross, Eckington, and Killamarsh centres, as well as other designated 'Local Centres' across the District. The comprehensive appraisal of these elements is of particular importance given recent instabilities in the UK economy. The economic recession which spanned the period 2008-2013 (approximately) had a significant impact on many town centres and the UK retail and leisure sectors as a whole.
- 1.4 The approach adopted by Nexus Planning has been refined to reflect the latest Government guidance provided in the National Planning Policy Framework (NPPF) (March 2012) and National Planning Practice Guidance (NPPG) (2014).
- 1.5 Nexus has engaged NEMS Market Research Limited (NEMS) to undertake surveys of 1,500 households within a defined Study Area in November 2016. The Study Area for the household survey encompasses 14 zones, which are based on postcode sectors grouped to reflect areas that are expected to exhibit similar patterns of shopping behaviour.
- 1.6 To complete this Study, Nexus has completed a wide-ranging examination of existing operators within the District and studied available published data sources, such as Experian GOAD and Venuescore. Nexus has also referred to the latest Experian population and expenditure data (published by Experian in 2016) in order to establish the up-to-date position with regard to both convenience and comparison goods capacity.

Structure of Report

1.7 This report is split into two parts, Stage 1 and Stage 2 as follows:

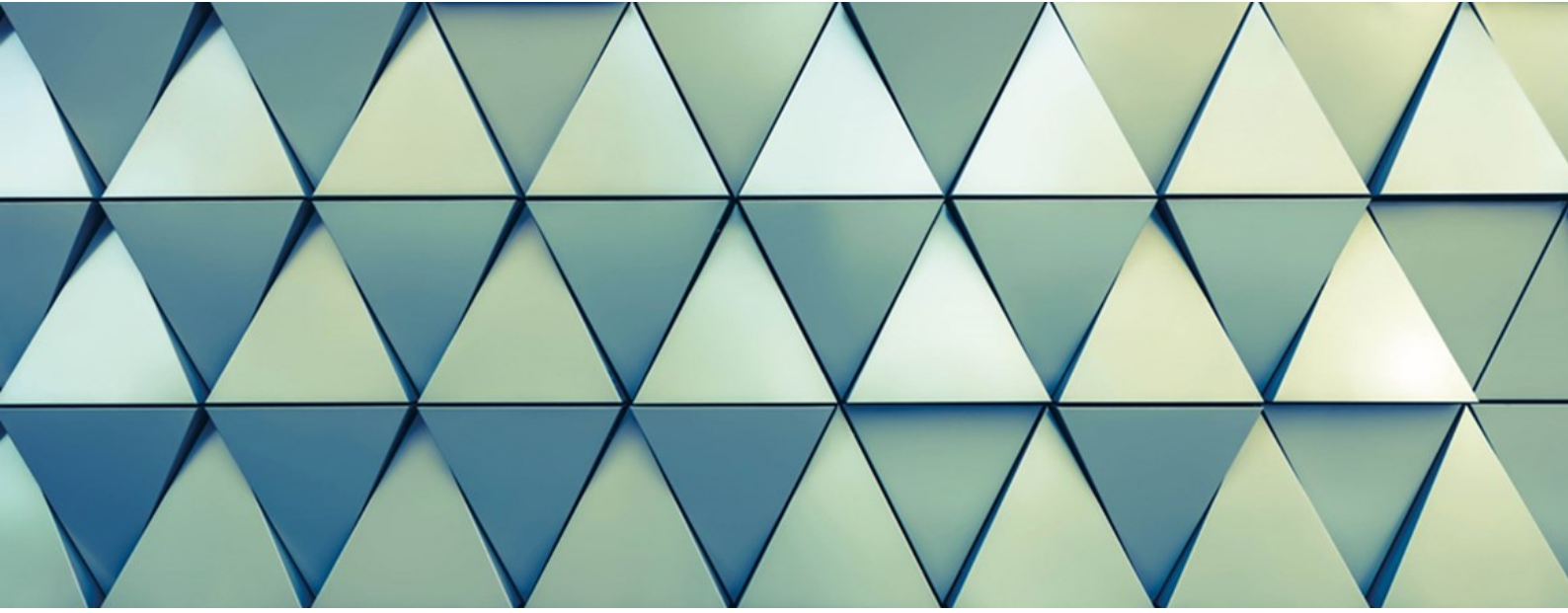
Stage 1:

- **Section 2** summarises key current and future retail and leisure trends, therefore, providing the context for this Study and how it can be used to guide plan-making
- **Section 3** provides an abridged explanation of relevant national and local planning policy as it relates to retail and leisure;
- **Section 4** details our assessments of the current and future population and expenditure levels within the Study Area;
- **Section 5** comprises a review of the survey research and considers the key findings with regard to shopping trip patterns throughout the Study Area;
- **Section 6** provides our analysis in respect to the quantitative need for further convenience and comparison goods retail floorspace over the assessment period (to 2033);
- **Section 7** details the existing leisure provision in Chesterfield Borough, Bolsover District and North East Derbyshire District and considers future leisure capacity over the plan period; and
- In **Section 8** we identify our recommendations in respect of the Council's future floorspace capacity in terms of qualitative and quantitative need.

Stage 2:

- **Section 9** comprises a synopsis of the vitality and viability of Chesterfield, Bolsover and North East Derbyshire's centres;
- **Section 10** details our analysis of the qualitative retail provision across the Study's centres; and
- In **Section 11** we identify our recommendations for town centres and future retail, leisure and other town centre development.

Stage 1



2.0 Current and Emerging Retail Trends

2.1 Nexus has reviewed recent research completed by a number of retail research providers, including but not limited to; Office for National Statistics (ONS), Colliers International, Experian, and Verdict. Through the analysis of this research we can ascertain information on recent trends and future forecasts for the UK retail market.

2.2 Since the 1950's, the UK retail market has, in general, experienced expansive growth. The rate of which the growth is occurring has increased in speed in recent years. The level of growth is resultant of several influencing factors. These factors are summarised in brief below:

- a. Improving standards of living;
- b. A population with higher disposable incomes;
- c. The popularity of obtaining fiscal credit;
- d. Changes in modes of transport; and
- e. New (digital) technologies, including online retailing.

2.3 The key identified trends are summarised in brief below, and expanded within the subsequent sections:

- i. An economic climate that prevailed during the recent recession (circa 2008 to 2013) had substantial impacts on the retail market by restricting resident incomes and reducing standards of living. In consequence, the level of spending retracted. Since 2013 (recognised as being the end of the recession in the UK) the economy has been slowly regaining momentum and economic reports released in 2016 indicate a return to pre-recession levels.
- ii. As with the retail market, the retail property landscape in the UK has dramatically developed over the last 50 years. The post-war years saw a significant redevelopment effort focused on town centres. However, in more recent times, and most notably during the 1990s', the retail landscape changed following the introduction of expansive out-of-town regional shopping malls as well as retail parks. But as will be explained later in in this section, new retail development is once again becoming more focused on town centre locations.
- iii. The physical location of where consumers are spending has also undergone a significant

shift over the past 15 years. Findings of Verdict Retail demonstrate this shift. Verdict's 2013 research identified that spending within town centres as a proportion of overall spending declined over the decade from 50.7% in 2003 to 45.0% at 2013. In contrast, spending in out-of-centre locations increased over the same period (2003 to 2013); rising from 31.5% in 2003 to 36.2% in 2013¹. The movement towards out-of-centre locations has directed recent Governments to endorse their commitment to UK town centres through the nationwide promotion of the 'town centre first' policy approach. The 'town centre first' approach is outlined at Paragraph 23 of the National Planning Policy Framework (NPPF) (March 2012). Further Government support for directing new retail development towards town centres is set out in the March 2014 publication of the Ensuring the Vitality of Town Centres National Planning Practice Guidance.

- iv. Another factor that has led to notable changes in the retail market is the rise in "E-tailing" (or "E-commerce"). The popularity and increased availability of the internet, as well as the growing confidence of consumers in making purchases online, has led to a distinctive change in the way in which goods and services are purchased. Reports on "E-tailing" suggest that online spending currently accounts for somewhere between one in every five to ten pounds that are spent in the UK² (taking account of monthly fluctuations). The ONS update report released in December 2016 stated that 15.1% of all retail spending is carried out over the internet (excluding automotive fuel), compared with 13.1% in December 2015³.
- v. Consumer expectations are also continually evolving, producing a dynamic and unstable retail market. Retail providers are required to evolve as a result of numerous dynamic factors, including – the characteristics of the UK population, consumer demands, popularity in private car ownership, planning policy and digital advances. The diverse nature of the factors which form consumer expectations is forcing retailers to pursue new innovative development proposals. Consumers are seeking more out of their shopping experience and wanting it now.

2.4 Additionally, it is important to recognise the recent results of the public referendum for the UK to leave the European Union in late June 2016 ('Brexit'). Following the result of Brexit in June 2016 the Pound fell dramatically to 1.09 euros in October, having been 1.30 euros pre-referendum⁴. In many respects, the impacts of Brexit on the economy have not been as bad as some economists were predicting. GfK's consumer confidence index - which had returned to

¹ 'British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence', Economic and Social Research Council and the University of Southampton, March 2015

² 'UK online retail sales to reach £62.7bn in 2020', Verdict Retail, 17 September 2015

³ 'Retail sales in Great Britain: Dec 2016, ONS, 20 January 2017

⁴ 'How has the economy fared since Brexit vote?', BBC News, 17 January 2017

pre-referendum levels in September - went up in December by one point but was still down compared with the start of the year, while its Major Purchase Index was five points higher than a year earlier⁵. This indicates a level of market uncertainty which is expected to continue until the economic impacts of Brexit are understood following the presumed transition period. The ongoing impact on the UK economy, and in particular the retail and leisure markets, is currently unknown and commentary on the topic is variable. As such, it may be appropriate to issue an Addendum to this Study report at the time the effects (positive or negative) are more developed and predicted trends can be supported by observed evidence.

Current Retail Picture

Household Spending and Labour Trends

- 2.5 In their Midsummer Retail Report 2017, Colliers International recognised that headline figures from the UK retail property sector are, on the face of it, positive with prime rents up 1.8% year-on-year – the best increase since 2008⁶. Overall, prime vacancy has decreased by 0.2%, the first nationwide movement since 2014. The Office of National Statistics (ONS) identified that the UK economy grew 0.3% in Q2 of 2017⁷. The Centre for Retail Research published their Retail Forecast for 2016-2017 in January 2016, which confirm the UK retail sector has enjoyed uninterrupted growth since 2013⁸.
- 2.6 In April 2017, median gross weekly earnings for full-time employees in the UK were £550, up 2.2% from £539 in 2016⁹. However when adjusted for inflation, full-time workers' weekly earnings decreased by 0.4% compared with 2016. This is the first time since 2014 that there has been a fall in this measure which reflects a higher level of inflation in April 2017 (2.6%).
- 2.7 Domestic economic drivers of UK retail performance are linked to two key factors:
- i. Low inflation – drives growth in real wages, strengthens household confidence and disposable income.
 - ii. Low interest rates – lead to low mortgage rates, which in turn results in more money in the pockets of borrowers.
- 2.8 Both of the factors set out above have a significant impact on the public's general confidence, and in turn their tendency to spend their earnings on retail goods.

⁵ 'UK Confidence,' GfK, 30 November 2016

⁶ 'Midsummer Retail Report', Colliers, August 2017

⁷ 'Economic Review, October 2017', ONS, 19 October 2017

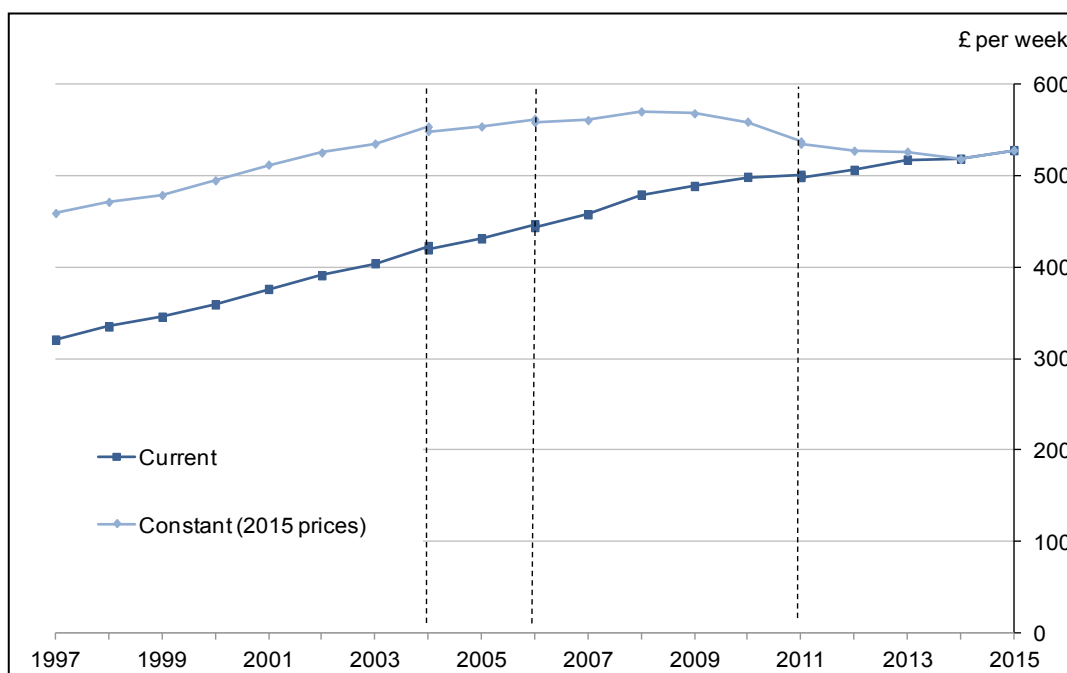
⁸ 'The Retail Forecast for 2016-2017', Centre for Retail Research, 5 January 2016

⁹ 'Statistical bulletin: Annual Survey of Hours and Earnings: 2017 Provisional Results', ONS, 26 October 2017

2.9 Also of note are current trends in the labour market. This information is sourced from the ONS.

2.10 The median gross earning for full-time employees in the UK has increased and as at April 2016 sat at £528 per week, an increase of 1.9% from £518 per week a year earlier (April 2015)¹⁰. Figure 2.1 illustrates how earnings have increased since 1997, and further exemplifies the deceleration in year-on-year growth that occurred since the start of the recession in 2008.

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



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

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

2.12 Employment rate's (the proportion of people aged from 16 to 64 who were in work) for the period August to October 2017 was 75.1%, lower than for the period between May to July 2017 (75.3%) but higher than for a year earlier (74.4%)¹¹. The May to July rate was the highest rate since records began in 1971. The unemployment rate for the UK was recorded as being 4.3% at

¹⁰ 'Statistical bulletin: Annual Survey of Hours and Earnings: 2015 Provisional Results', ONS, 18 November 2015

¹¹ 'UK Labour Market' ONS, 13 December 2017

October 2017 down from 4.8% for a year earlier and the joint lowest since 1975.

UK Retail Property Market

- 2.13 In 2011 Colliers CRE reported that economic conditions were resulting in significant structural changes to the UK High Street, with many retailers displaying signs of caution by decreasing the size of their property portfolios, completely abandoning weaker towns and putting a concerted effort into acquiring sites in city centres and major regional shopping centres¹². At this time comparison goods retailers were finding it increasingly difficult to justify being represented in every town in the UK however, over the five years to 2016, the circumstances inflicted upon UK town centres have changed dramatically. More recent reports, including those published by Colliers, Verdict, PwC, provide a more positive picture for high street retail. Most notably, Colliers declare that high streets are 'no longer dead or dying'. Representative of this is the fact that in 2014 investment into high street assets jumped by circa 30% to £2.39 billion on the previous year¹³. There have been fewer retailer failures on the high street and its retailers' requirements continue to increase, report Colliers.
- 2.14 In 2014, Colliers acknowledged that recent improvements to the economic outlook were beginning to show positive results for town centres¹⁴. For example, increased consumer confidence and retailer expansion was resulting in a reduction in vacant retail space. However, Colliers remained cautious at this time (2014). In their 2014 report they explained that even though the speed at which a significant amount of vacant space was being taken off the market and the positivity of the current economic indicators suggested a return to normalcy, as during the recession online retailing flourished and high street stores struggled. As such, they warned retailers to continue with caution when deciding to build upon their existing physical store networks in light of online competition¹⁵.
- 2.15 It is important to remember that despite pressure from a growing internet shopping market and continued investment in shopping centre developments, 80% of retail spend still happens within High Street shops¹⁶. Across the country, local groups and Business Improvement Districts (BID) are making a concerted effort to ensure the viability and vitality of their High Streets.
- 2.16 In terms of current vacancy rates, the UK average rate of retail shopping pitches as at January 2017 was identified by Experian as 11.2%¹⁷. The rate of vacancies is described by Colliers as being 'stubbornly high' as it is not typical or reflective of the total economic or retail climate.

¹² 'Great Britain Retail: Autumn 2011', Colliers CRE, 2011

¹³ 'Midsummer Retail Report: 2015', Colliers, August 2015

¹⁴ 'National Retail Barometer: Summer 2014', Colliers, September 2014

¹⁵ 'National Retail Barometer: Winter 2013', Colliers, 2013

¹⁶ 'Midsummer Retail Report: 2017', Colliers, August 2017

¹⁷ 'Experian Category Report', Experian January 2017

Colliers explains that in light of recent advances in the performance of the UK economy it should have improved a lot more against its 2012 peak of 16.3%.

- 2.17 Overall vacancy rates (in terms of floorspace) fell from 9.7% to 9.5% between April 2016 and April 2017. This represents the first annual reduction since 2014. While on the face of it this appears to be positive, it is tempered with a long-term level of persistent vacancies, which continues to be of concern. It is important to distinguish that this high level of vacancy is driven mainly by non-prime units. Colliers identify, in their Midsummer Report, that the prime unit vacancy rate (floorspace) sits around 5.4% while non-prime is as high as 12.8% as at April 2017.
- 2.18 In terms of actual quantities, reports suggest some 46,000 UK shops lie unoccupied, and around a third of those have been empty for more than three years¹⁸.
- 2.19 In short, the incessantly high average vacancy rate, despite improving economic conditions, is representative of a discernible divergence between in-demand high quality units and diminishing demand for secondary premises in smaller 'non-prime' locations.

Other Factors Influencing the Improving Town Centre Environment

- 2.20 The improving high street environment is not solely driven by 'pure' retail offerings. The food and beverage sector is a significant contributing factor to the growth of UK high streets as town centres adapt to the changing way that people live and shop. Colliers explains the desire of UK shoppers to 'graze' while they shop has seen a significant boost in the quantity of coffee shops, restaurants, bars and grab-and-go convenience food outlets on UK high streets. We are also seeing a growing number of multi-faceted stores, such as a barber shop that also sells clothing, or a vape shop that also serves coffee. In addition to this, the growing popularity of going out to eat brings more visitors to the town centre¹⁹.
- 2.21 Further to this, as digital technologies continue to advance the importance of understanding and operating within the digital world of retail shopping is becoming just as essential as trading in the traditional physical shopping world. The challenges and competition set by online retailing are irrefutable. However, large cities, towns, or shopping centres, which offer an 'experience' and choice for continue to be attractive to customers. Growing investments in physical retail development is indicative of retailers' acknowledgment that shoppers desire to have a physical retail experience and not just make all of their retail purchases online.
- 2.22 UK town centres and high streets provide highly visible and empirical evidence of the scale of the economic downturn (2008 to 2013). Recent improvements in the economy (as evident when

¹⁸ 'Where have all Britain's shoppers gone?', The Guardian, 26 April 2016

¹⁹ 'UK Economic Outlook', PwC, March 2016

reviewing household spending and average earnings statistics) have seen increased investment into town centre retail stores and a drop in prime unit vacancy rates.

Trends in Comparison Goods Retailing

- 2.23 Available research suggests that the comparison retail sector saw the biggest drop in trade during the 2008 – 2013 economic recession. The Economic and Social Research Council, in their March 2015 report, attribute the drop in sales to two corresponding factors – (1) consumers’ general reluctance to spend on comparison ‘big-ticket’ items, and (2) the fact comparison retailers are often more susceptible to online price comparison²⁰. In recent years, consumers are growing more confident in making online purchases of comparison goods and town centre comparison stores continue to suffer in consequence. The strong performance of comparison online retailing is supported by reports showing high levels of year-on-year growth in the sector.
- 2.24 There are two types of comparison goods retailers that are identified as suffering the most – (1) those whose trade has been fundamentally changed by competition from online providers (e.g. music and video retailers, book shops – which consumers happily use in a virtual form) and (2) those whose products are bulky and space-consuming, meaning high operational costs for high street stores has left them uncompetitive in contrast to out-of-centre and online retailers with much lower tenancy rates and overheads²¹. That said certain types of comparison-goods retailers have increased their share of town centre trade. For example, Verdict data indicated that clothing and footwear retailers increased their share from 20.5% to 25.4% from 2007 to 2013, and department stores saw their market share increase from 7.4% to 9.5%²².
- 2.25 Against this background, Colliers predicts that comparison retailers are searching for high quality retail units with high floor plates where they can provide a wider range of items²³. This is driven by the need to provide consumers with a high-quality shopping environment, coupled with their expectations for a wide selection of goods being available in store. Retailers must meet these demands in order to compete with the rise of E-tailing for comparison goods.
- 2.26 The liquidation of British Home Stores (BHS) in April 2016, further illustrates the struggles facing comparison retailers, and provides a significant amount of available town centre units in larger centres across the UK. Reports on the reasons for the failure of BHS identify the

²⁰ ‘British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence’, Economic and Social Research Council and the University of Southampton, March 2015

²¹ ‘British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence’, Economic and Social Research Council and the University of Southampton, March 2015

²² ‘British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence’, Economic and Social Research Council and the University of Southampton, March 2015

²³ ‘Colliers Midsummer Retail Report’, Colliers, August 2015

following issues facing the company – (1) the internet, (2) international competition, (3) the on-going impacts of the recession and (4) their failure to keep up with the demands of consumers for innovation in retailing²⁴.

- 2.27 In summary, comparison retailing is fuelled by fierce competition, in particular that made possible by the internet. Companies operating in the comparison market need to fight for their sales through adapting to the new and modern desires and needs of the consumer, and most importantly acknowledge the fact they are likely to compare prices over the internet. How to combine a physical and online store is essential to success, as will be established later on under the sub-title “E-Tailing”. The option of ‘click and collect’ is one such combination being introduced in response to growing popularity²⁵. In order to attract customers into a physical store it is vital that it is both (1) physically and aesthetically pleasing and exciting, making for an enjoyable experience for the shopper, as well as (2) providing for a wide array of different products that they can see and touch.

Trends in Food and Grocery Retailing

- 2.28 A 2015 study by Retail Economics reported that spending on food accounted for approximately 40% of all retail spend nationwide²⁶. As a consequence, trends in food retailing have a significant influence on retail trends in general.
- 2.29 Instability currently prevails in the food retailing market and supermarkets are most affected. Numerous supermarket chains are currently in the process of consolidating their assets; selling stores, pulling construction programmes, and letting go of sites already with planning permission. As explained below, instability and structural change in food and grocery retailing has been occurring for a number of years, and predates the recent challenges presented by the recession (2008 to 2013).

Food Retailing Back in the Heart of Town Centres

- 2.30 The structure of food and grocery retailing has changed significantly since the departure from large format out-of-centre foodstores. It was during the 1990’s that a significant number of out-of-centre foodstores with large floorplates were developed and provided cheap rent when compared to town centre locations²⁷. The success of these developments was dependent on the dominant transport culture, which at that time was much more accepting of the reliance on

²⁴ ‘Mary Portas: how I would have saved BHS’, Mary Portas, The Guardian Online, 25 April 2016

²⁵ ‘The Deloitte Consumer Review – Digital Predictions 2015’, Deloitte, 2015

²⁶ ‘UK Retail Sales’, Retail Economics, March 2016

²⁷ BIS Research Paper No.188 – ‘Policy Implications of Recent Trends in the High-Street/Retail Sector’, Department for Innovations and Skills, December 2014

the motorcar and people were generally happy to travel greater distances to shop.

- 2.31 As out-of-centre foodstores thrived, town centres suffered. However, following recognition of these detrimental impacts, central Government enforced stricter local planning rules which make these types of development harder to gain planning permission for. Foremost was the 'town centre first' approach prescribed by the NPPF in 2012 and NPPG in 2014. Application of this policy considerably reduced the number of new out-of-town foodstores obtaining planning permission.
- 2.32 Food and grocery retailers have had to return to town centres and adopt alternative methods of retailing. The most common approach taken is to offer lower cost product ranges. Following that, we also see retailers offering much more flexible models, including protracted opening hours (sometimes staying open 24 hours), online shopping, home delivery, as well as 'click and collect'. Some retailers have also diversified into non-food items including fuel. Also in a bid to keep and win new customers many retailers have opted to put a concerted effort into branding, marketing, including presence on social media. Tapping in to the modern consumers desire to purchase food on the go, several food retailers now have a presence in dense town centre locations where their stores are accommodated over much smaller floor plates (Sainsbury's Local, Tesco Express, Morrisons M Local Stores now My Local).
- 2.33 Growth figures in sales in food and grocery within UK town centres are evidence that food and grocery stores are reasserting their presence within the town centre. Verdict Research identified that sales made in UK town centres on the food and groceries has developed from 16.9% in 2007 to 24.2% in 2013²⁸.

The Rise of the Food Discounter

- 2.34 In 2013, Mintel reported that the recession, along with a period of high inflation, impacted on consumer behaviours and the wider dynamics of grocery retailing. Consumers who have less disposable income are likely to seek out food and grocery items that are offered at the lowest price, or more importantly, food and groceries which represent the best value for money²⁹. Therefore, in order to attract shoppers, food retailers have to compete not just on price points but by also offering the best in high quality good value products. The complex nature of consumer demands results in a dynamic market that is often difficult to negotiate. The rise of online food retailing adds yet another dimension to this market. Reports by Retail Economics suggest that while the general retail food market suffered, the number of online food purchases

²⁸ Verdict research as reported in 'British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence', Economic and Social Research Council and the University of Southampton, March 2015

²⁹ 'Food & Drink Retailing', Mintel, March 2013

- rose by 10.3% year-on-year in January 2016³⁰.
- 2.35 The scene set above indicates the food sector is facing a number of unique structural challenges, which is causing issues for food operations and subsequently restricting growth in this sector. One of the overriding challenges comes from the intense price competition created by the foremost food discounters (Aldi and Lidl), which are taking market share away from the big four grocers (Tesco, Sainsbury's, Morrisons, Asda)³¹.
- 2.36 Illustrating the dynamic nature of the struggling food and grocery environment at present is the number of recent sales of a significant number of food and grocery outlets by major food retailers. For example Morrisons let go of 140 of Morrisons M Local Stores nationwide in late 2015. A decision forced upon Morrisons due to struggling profit ratios even though convenience stores are the fastest-growing format in the UK³². Making the sale of the Morrisons M Local Stores even more surprising are the 2013 reports from providers such as Mintel who suggested there has been a massive shift away from superstores to more convenient shopping³³. The first Morrisons M Local Store was only opened in 2011 but after reporting an annual operating loss of £36m on the stores; contributing to the company's total annual loss of £792m, the decision to sell was made³⁴. Some of the stores have since been rebranded in a bid to compete with other centrally located top-up convenience stores meeting the demand driven by consumer's increasingly 'hectic' lifestyles. Additionally, in early 2016 Sainsbury announced they would be closing down all 16 of their Netto discount grocery stores nationwide³⁵. The majority of the stores are located in the north of England and their closure illustrates that this time of uncertainty still prevails.
- 2.37 These larger chains have since begun assessing their significant property portfolios and, in particular, their pipelines of large format stores across approved previously committed developments. Marks and Spencer³⁶ have been forthright in their decision to re-review all new store developments, whilst the 'Big 4', previously hailed as anchor retailers catalysing new regeneration schemes, have been pulling out of expensive and risky town centre sites in order to focus investment on consolidating their existing store network.
- 2.38 Retailers are instead seeking to increase the efficiency of operations across their logistics and distribution routes and supply-chains. This has led to recent mergers between Sainsbury's and Argos, and Tesco and Booker. Rather than growing their reach and market share, they are

³⁰ 'UK Food and Grocery', Retail Economics January 2016

³¹ 'UK Retail Sales', Retail Economics, March 2016

³² 'Morrisons sells its chain of convenience stores', BBC Online, 9 September 2015

³³ 'Food UK', Mintel, April 2016

³⁴ 'Morrisons sells its chain of convenience stores', BBC Online, 9 September 2015

³⁵ 'Sainsbury's to close Netto stores', BBC Online, 4 July 2016

³⁶ 'Why Marks & Spencer is right to review new store developments', HDH, December 2017

- cutting costs, focussing on efficiencies and taking advantage of available distributor networks in order to (belatedly) respond to the discounters.
- 2.39 While the food retail market is still generally described as struggling, up-to-date March 2016 research produced by Retail Economics showed that grocery sales are continuing with their recent run of better performance with sales up 1.5%, year-on-year, the strongest since February 2014. March 2016 sales represent the third consecutive month of growth³⁷.
- 2.40 Notwithstanding this, the food and grocery market is predicted to remain fiercely competitive, meaning retailers will be forced to keep their sales margins as compressed as possible.
- 2.41 Dating back to September 2015, Retail Economics reported on the struggles of the UK's largest retailer, Tesco. Retail Economics considered competition from the discounters Aldi and Lidl, an forecast that they would continue to diminish Tesco's market share. While broader market trends, such as consumers' desire to eat-out and purchase only 'grab and go' food at their convenience, will stifle growth across Tesco's core large format superstores – reducing as much as 50% of sales³⁸. In April 2016 the Tesco Chief Executive hailed the supermarkets £162 million statutory pre-tax profit for the 2015/2016 as "significant progress" when compared to the retailers reported £6.2 billion loss of the previous year. However, the Chief Executive stressed that recovery would not be a straight process as the food retailing market remained "challenging, deflationary and uncertain"³⁹. In order to be successful in the market retailers are forced to cut prices. This means discount food retailers remain the fastest growing supermarkets in UK town centres at present⁴⁰.
- 2.42 When analysing the performance of Aldi, who are considered a food and grocery discounter, Retail Economics describes that they have "attacked the heartland of UK grocery" by undercutting the 'big four' with highly competitive prices and investing in more high quality premium produce. This approach has broadened Aldi's appeal to more affluent customers. In the same way, Lidl has adopted an aggressive growth programme including ambitious store expansion. To date, the strategy has achieved what it has intended by growing Lidl's market share. The widening of product ranges assists to broaden market appeal of the stores while a focus on stocking more alcohol helps to support sales for their stores⁴¹.
- 2.43 In late 2015, reports on Lidl and Aldi's success suggested their joint share of the groceries market doubled to 10% in just three years. Even so, Tesco remained the UK's largest supermarket with a 27.9% market share, while Sainsbury's has 16.6%, with Asda on 16.4%.

³⁷ 'UK Retail Sales', Retail Economics, March 2016

³⁸ 'UK Food and Grocery', Retail Economics, September 2015

³⁹ 'Tesco shares hit by warning profit growth to slow', BBC Business Online, 13 April 2016

⁴⁰ 'Tesco shares hit by warning profit growth to slow', BBC Business Online, 13 April 2016

⁴¹ 'UK Food and Grocery', Retail Economics, September 2015

Followed by – Morrisons 10.8%, The Co-operative 6.3%, Aldi 5.6%, Waitrose 5.2%, and Lidl 4.4%⁴².

Consumer Behaviours When Making Food and Grocery Purchases

- 2.44 The UK food market has been shaped in recent years by the broad change in shopping habits with many customers opting to complete smaller but more frequent grocery shops. Fewer households now complete the traditional once-a-week “big shop”. In their March 2015 report, the University of Southampton (published as part of an Economic and Social Research Council study) predicts that forecasts for 2019 will see the convenience store grocery sector account for almost a quarter (24.1%) of total UK grocery sales, up from 21.4% in 2014⁴³.
- 2.45 An additional demand-driven factor shaping the UK food retail market relates to consumers’ desire to purchase locally sourced food. A 2013 Ethical Consumers Market report provides⁴⁴ evidence to suggest that the number of shoppers specifically looking to buy local produce increased from 15% in 2005 to 42% in 2012.
- 2.46 Of particular note, the survey found more than 40% of local shoppers said they were prepared to pay a premium for locally produced foods. Tesco benefited from this trend through the promotion of a ‘Love British Food’, which in 2011/2012 saw Tesco sales of local produce reach of £1 billion and over 50% of Tesco customers purchasing more locally sourced food than they were five years ago⁴⁵. Other larger chain supermarkets have recognised the desire of shoppers to buy locally. Sainsbury released a British classic range of ready meals, while Morrisons promoted a range called the ‘Best of British’.
- 2.47 To summarise, the competitive nature and price driven market for food and grocery retailing continues to force supermarkets to adapt and seek out how they can do things differently in order to attract consumers.

Trends in Leisure

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

⁴² ‘Aldi and Lidl double market share in three years’, BBC Online, 17 November 2015

⁴³ ‘British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence’, Economic and Social Research Council and the University of Southampton, March 2015

⁴⁴ ‘Ethical Consumer Market Report’, Ethical Consumer Research Association, 2013

⁴⁵ ‘Love British Food’, <http://www.lovebritishfood.co.uk/taking-part/retailers>, 2012

growing desire to engage in leisure activities.

- 2.49 Figure 2.2 illustrates changes in UK average weekly household spending on leisure before the recession (2006), during the recession (2011) and immediately after the recession (2014). ONS have adjusted all the figures to strip out the effects of inflation, so that true like-for-like comparisons can be made.

Figure 2.2 | ONS Weekly Household Spending Data on Leisure Items

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

Sources:

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

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

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

- 2.50 ONS data has identified that an average household would spend £38.50 on leisure activities, including; £6.90 on 'sports admissions, subscriptions, leisure class fees and equipment hire' and £2.80 on going to 'cinemas, theatres and museums'⁴⁶. This is out a total of £531.30 spent on average per week by UK households. It is interesting to assess the data on average household spending from the ONS for the years both preceding (2006) and during the recession (2011). The ONS average household spending figures for 2011 identify that out of the average weekly spend of £483.60, households spent – £6.70 on 'sports admissions, subscriptions, leisure class fees and equipment hire', £2.40 on going to 'cinemas, theatres and museums'. What is more, ONS data from 2006 confirms that on average households spent £455.90 per week, and of that £5.80 was spent on 'sports admissions, subscriptions, leisure class fees and equipment hire' and £2.00 on the 'cinema, theatre and museums' etc. The significant increases in spending from 2006 illustrate the popularity of spending on leisure activities.
- 2.51 Research completed by the Economic and Social Research Council assessing the diversity of uses within 1,100 centres and high streets during 2000 to 2006 (the years preceding the

⁴⁶ 'Consumers spending more on cars and leisure, says ONS', Brian Milligan, BBC Business News Online, 8 December 2015

recession) provides a clear indication that during this time, when the economy was strong the leisure service industry was thriving. They found that the total number of leisure service units within UK town centres increased by 23% between 2000 and 2006⁴⁷.

- 2.52 As evident when assessing consumer spending figures (recorded by the ONS) as at 2014 the leisure industry had strengthened since previous years (2006). Mintel calculated that this industry was estimated as worth £80 billion in 2015, approximately 15% higher than the 2010 total expected worth⁴⁸.
- 2.53 A significant challenge that may soon face the industry is anticipated to occur in response to the introduction of the National Living Wage. From 1 April 2016, the UK government introduced a new mandatory National Minimum Wage (NMW) for workers aged 25 and above, initially set at £7.20 - a rise of 50p relative to the previous National Minimum Wage rate. That represents a £910 per annum increase in earnings for a full-time worker on the current National Minimum Wage. A National Minimum Wage rate of £6.70 continues to apply for those aged 21 to 24.
- 2.54 So, while the increased base level wage will improve living standards for low-paid workers but in the process seems certain to push up leisure operators' wage costs, since they largely rely on unskilled workers.

Out-of-Centre

- 2.55 The Portas Review, among other reports, highlighted that in the last decade (2001 to 2011) the amount of out-of-town retail floorspace has risen by 30% whilst that in-town has fallen by 14%⁴⁹.
- 2.56 However, growth of out-of-centre retailing has been constrained by the 'town centre first' policy regime enforced through the NPPF since its publication in March 2012. As a consequence of the prevailing policy regime, traditionally out-of-centre retailers (for example supermarkets) are being re-focussed back into the centre of UK centres. Most notable, are the number of larger food retailers who now occupy smaller units within the high streets and local centres of the UK⁵⁰, for example Sainsbury's Local, Tesco Extra, and Little Waitrose.
- 2.57 In 2013, Deloitte highlighted that there is a limit to how much an out-of-centre shopping centre can fully meet the daily needs of consumers⁵¹. Deloitte reported the drive of consumers to out-

⁴⁷ 'British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence', Economic and Social Research Council and the University of Southampton, March 2015

⁴⁸ 'Leisure Review', Mintel, October 2015

⁴⁹ 'Portas Review – An independent review into the future of our high streets', Mary Portas, 2012

⁵⁰ 'British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence', Economic and Social Research Council and the University of Southampton, March 2015

⁵¹ 'The Deloitte Consumer Review – Role of the High Street', Deloitte, 2013

of- centre locations is primarily motivated by their desire to seek out lower prices, convenience and the wide range of goods available at out-of-centre locations by virtue of their larger store formats⁵². However, changes in consumer habits has driven a return to smaller format shops in more centrally located and accessible locations. As consumer habits become more aligned, the draw of out-of-centre shopping venues is weakened.

- 2.58 One obvious result of new consumer behaviours has led to larger retailers opting to provide 'click and collect' services within their smaller retail units. This service enables consumers to have a much wider variety of goods available to them, but for collection to take place in an easily accessible and convenient location suitable for their busy lifestyles – likely to be a town centre location. Similarly, the Economic and Social Research Council reported that rising numbers of consumers are less convinced by the costs versus benefits balance available at an out-of-centre superstore/retail park and now value convenience at the local/community level⁵³.

Shopping Centre Development and Investment

- 2.59 Since the 2012 Retail Need Assessment was completed, the level of shopping centre development in the UK has seen some progression, following a number of years of very minimal development. In 2011, Colliers reported that shopping centre development was at a standstill and little activity was anticipated over the next four years to 2015⁵⁴.
- 2.60 More recent reports suggest that we should not expect an inundation of new shopping centres to open in the UK (i.e. we will not see the peak levels of new development that were reached during the 1980's to 1990's). Colliers research reported that the shopping centre market has assumed a dramatic shift, changing from an investment no one was interested in procuring to a "must-have" for investors within a very short time period⁵⁵.
- 2.61 However, some caution is still advised as demand and investment in shopping centre units is focused on prime and regionally dominant assets. In this current climate, it is only those high quality tenants that can deliver the much desired high-quality shopping experience.
- 2.62 Shopping centres considered to be in the secondary market (i.e. not 'A' Grade or prime shopping centre) should be addressed with a lot more caution. Tenants are currently seeking shorter lease terms and secondary shopping centres have been described as being in structural decline.

⁵² 'The Deloitte Consumer Review – Role of the High Street', Deloitte, 2013

⁵³ 'British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence', Economic and Social Research Council and the University of Southampton, March 2015

⁵⁴ 'Midsummer Retail Report', Colliers CRE, 2011

⁵⁵ 'Colliers Midsummer Retail Report', Colliers, August 2015

2.63 As eluded to above, the draw of shopping centres includes the experience, and not the retail offer alone. Consumers' willingness to travel to larger out-of-town shopping centres for an overall shopping experience and to use the leisure facilities appears to be increasing. In response to this, the split between retail and leisure units present within UK shopping centres is shifting; with more experiential offers of leisure now being provided. In 2012, the Portas Review recognised this shift highlighting that:

"...Epic and immersive experiences offered by today's new breed of shopping mall. Modern shopping centres; for example Westfields, bring together cinema premieres, worldclass restaurants, bowling alleys, art galleries and luxury brands – replacing the lightless, soulless experiences of the past"⁵⁶.

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

"Shopping centres and other out-of-town formats often have the advantage of single ownership. The landlord is able to create an identity for the centre, choose the retail mix, manage the centre so that it reinforces the brand, co-ordinate marketing and refresh the centre through regular reinvestment. Single ownership is rare on our high streets, but that should not stop some of these elements being replicated. Our high streets need to plan their identity and shape their retail offer accordingly. They need leadership, business plans and day-to-day delivery."

2.65 It is this '*managed*' experience delivered by a shopping centre that continues to prove attractive to customers. Therefore, as consumers continue to seek out high quality shopping experiences the growth and success of prime shopping centres is set to continue. In consequence town centre managers and local authorities will need to continue to monitor the impact of the draw of such centres, whether within their District or within adjoining authorities, may have on the health of their centres.

2.66 However, as clarified within Experian's October 2016 Retailer Planner Briefing Note, as people work longer hours the idea of completing a weekly shop at an out-of-centre superstore had become less attractive⁵⁷. As we have addressed earlier in this section, the rise of smaller and more regular shopping trips has risen in recent years.

Local Centres and Neighbourhood Shopping

2.67 Limited retail research is available on current trends and forecasts addressing the performance

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

⁵⁷ 'Retail Planner Briefing Note 14' Experian, November 2016

- of “neighbourhood parades”, as defined by the Department for Communities and Local Government⁵⁸ (DCLG).
- 2.68 The very term for neighbourhood shopping areas often varies, making it difficult to track and predict trends. Illustrating this point is the fact that what research is available makes reference to a myriad of terms; *‘neighbourhood retailing’*, *‘parades of shops’*, *‘local shopping centres’*, *‘local shops’*, *‘convenience retailing’*, and *‘secondary retailing’*. Nexus consider the best place to start is the report produced by DCLG entitled ‘Parades of Shops - Towards an understanding of performance and prospects’, in which they explain that for the purposes of consistency they adopt the terminology of ‘neighbourhood parade’⁵⁹. The justification being based on the predominance of a locally focused role. In addition to the fact that, in many cases, the original core functions for ‘shopping’ has become differentiated.
- 2.69 The DCLG explain most neighbourhood parades offer a diverse and complementary occupier mix, providing essential goods and services which are, in most cases, highly valued by the resident community they serve. Neighbourhood parades tend to be dominated by convenience stores. In these locations, convenience retail stores are typically found alongside local service outlets including pubs, take-away outlets, personal services (nail and hair salons) and other niche operators specific to that location.
- 2.70 The banking sector is continuing to adapt to the emergence of online banking and competition from the growing market of smart phone applications. This is emerging as the sectors continues to implement cost cutting measures as an ongoing response to the global financial crisis. As such, banks and building societies are increasingly consolidating services towards higher-order centres to complement the use of smart phone applications for day-to-day services.
- 2.71 2012 research by Verdict suggests the market share held by neighbourhood parades has been remained relatively stable over the past ten years and this is generally reliant on the fact that they serve a very vital role in the provision of local needs to a local catchment⁶⁰. Verdict released data in 2013 confirming that in 2003 17.9% of all UK retail sales took place at the neighbourhood level, and in 2013 this is relatively the same at 18.8%⁶¹. Accordingly, very little physical change has occurred on these types of parades over those ten years.
- 2.72 In terms of the type of uses typically found in local and neighbourhood centres, in consequence

⁵⁸ ‘Parades of shops - Towards an understanding of performance & prospects’, Department for Communities and Local Government, 2012

⁵⁹ ‘Parades of shops - Towards an understanding of performance & prospects’, Department for Communities and Local Government, 2012

⁶⁰ BIS Research Paper No.188 – ‘Policy Implications of Recent Trends in the High-Street/Retail Sector’, Department for Innovations and Skills, December 2014

⁶¹ ‘British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence’, Economic and Social Research Council and the University of Southampton, March 2015

to the average needs/desires of a shopper coming to such a centre, convenience remains the dominant retail type. Illustrating this point is the fact 70% of expenditure in neighbourhood centres is taken by food based retailers, including convenience stores⁶². Furthermore, 2012 research by Verdict suggested that almost 55.0% of retail expenditure undertaken at a neighbourhood level is in convenience stores⁶³.

- 2.73 Neighbourhood retailing as a whole is predicted to grow but it is expected that there will remain considerable pressure on independent shops. Supporting the success of neighbourhood shops is the desire of consumers to do a lot less shopping in terms of volume but on a much higher frequency. In particular it is those neighbourhood parades that are close to transport hubs and links that are benefiting the most, as workers often shop close to home and on their way back from work for the day⁶⁴.
- 2.74 The DCLG, in 2012, reported that even though some parades remain specifically focused shopping locations, a number of other parades have advanced and now comprise new local services, including health, education, leisure and other community facilities. The plethora and diversity of uses increasing their role as 'community hubs'. This has had the effect of extending their role and increasing their value in local 'place-shaping'⁶⁵. Leisure uses are particularly beneficial for positively contributing to the vitality and vibrancy of a neighbourhood centre during the evening as many operate after retail outlets shut their doors for the day. These add to the draw and diversity of neighbourhood parades, extending their role as a focus for residential communities.
- 2.75 In summary, the essential role and function of neighbourhood parades has endured over recent years. This is particularly interesting given structural shifts and drastic changes in consumer trends impacting on a number of retail sectors. Essentially, neighbourhood parades continue to operate not only as a shopping destination but as a 'hub' which people come for leisure services as well providing public space in which social exchanges and events occur⁶⁶. Finally, the size of these centres has remained stable, suggesting that overall, they have undergone little or modest physical change in response to broader trends, such as the recession⁶⁷.

⁶² 'Parades of shops - Towards an understanding of performance & prospects', Department for Communities and Local Government, 2012

⁶³ Research by Verdict on Neighbourhood Retail Markets as detailed in 'Parades of shops - Towards an understanding of performance & prospects', Department for Communities and Local Government, 2012

⁶⁴ 'British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence', Economic and Social Research Council and the University of Southampton, March 2015

⁶⁵ 'Parades of shops,' Department for Communities and Local Government, 2012

⁶⁶ 'British High Streets: from Crisis to Recovery? - A Comprehensive Review of the Evidence', Economic and Social Research Council and the University of Southampton, March 2015

⁶⁷ BIS Research Paper No.188 – 'Policy Implications of Recent Trends in the High-Street/Retail Sector', Department for Innovations and Skills, December 2014

Growth in E-Tailing (or 'E-Commerce')

- 2.76 As has already been established in the preceding sections, the rise of “E-tailing” has significantly altered the way in which the average consumer makes purchases across multiple retail sectors. Between 2008 and 2016, online sales as a proportion of total retail spend (excluding fuel) rose by more than 2.5 times – from under 4.7% in June 2008 to 11.7% in mid-2016 (as reported by the ONS⁶⁸).
- 2.77 In the current retail environment, reports on “E-tailing” suggest it accounts for one in every five to ten pounds that are spent in the UK⁶⁹. To keep up with the spending patterns of the typical consumer, almost all retailers now have an online presence. Over time online shops are becoming more and more advanced and easy to use. This supports the growing attraction for consumers to make their purchases online.
- 2.78 It is important to acknowledge that there is a substantial variation between the kinds of purchases that are most likely to be made online. The ONS report that 14.3% of all ‘food’ purchases were made online in 2017, whereas 12.1% of all ‘textile, clothing, and footwear’ purchases and 6.3% of ‘household good purchases’ were made online⁷⁰. Figure 2.3 illustrates the penetration of online sales by sector based on 2013 data. Most notable is the large proportion of music and video, books and electrics that are purchased online.
- 2.79 The popularity of making online purchases is predicted to not only continue but to grow. Experian predict that by 2020 online (non-store) purchases will account for 17.7% of total retail expenditure, rising to 20.9% in 2035.
- 2.80 However, it is important to recognise that the increasing internet user base which drove the significant leaps in online sales observed each year from the mid-2000s will no longer be the key contributing factor as 91.6% of the UK population are now internet users (or 59.3 million people)⁷¹. Nevertheless, growth is expected to be maintained, although through new more portable technology such as smartphones and tablets. This trend is, however, less pronounced in more rural areas and those with a lower penetration of high speed internet services.
- 2.81 In addition, a more co-ordinated approach to retail offers is expected with the online and physical world working together – an approach which is coined “omni-channel”. Indicative of the relationship between an online retail presences producing in-store purchasing is research produced by Deloitte in 2015, which estimated that digital technology influenced 33% of in-store

⁶⁸ ‘Experian Retail Planner Briefing Note 14’, Experian, November 2016

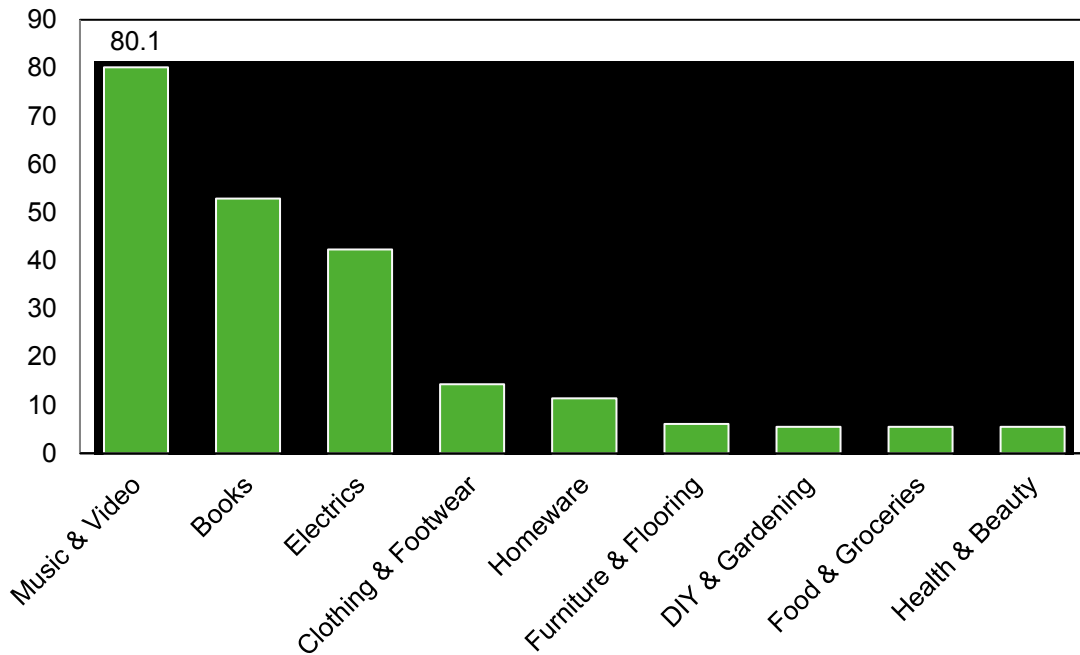
⁶⁹ ‘UK online retail sales to reach £62.7bn in 2020’, Verdict Retail, 17 September 2015

⁷⁰ ‘Statistical bulletin: Retail Sales’ ONS, December 2017

⁷¹ ‘Experian Retail Planner Briefing Note 13’, Experian, October 2015

retail sales in the UK in 2014, equivalent to £100 billion. In future, Deloitte predict this will continue to grow with 50% of all in-store purchases being influenced digitally at the end of 2015⁷².

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



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

2.82 The rise in popularity in ‘click and collect’ is another example of online influenced sales resulting in visits to a physical store. Deloitte estimates that approximately one third of all online shoppers make use of ‘click and collect’ services⁷³. A variety of retail research providers suggest that the popularity in ‘click and collect’ is set to grow exponentially in next few years. Interestingly, the ONS highlight that ‘click and collect’ as a complementary service to the success of the UK high street⁷⁴.

2.83 As recently as 1 September 2016 Amazon released a new kind of purchasing passage – called Amazon ‘Dash’, which provides customers with a small ‘Dash button’ to have in their home, which when pressed orders refills of a certain product to be delivered to their home (usually the next day). Product suppliers such as ‘Play-Doh’, ‘Finish’ dishwashing liquid, ‘Whiskers’ cat food, and ‘Pedigree’ dog food have all joined the range. The buttons were launched in the United States in 2015 and have seen swift success since their release with many more brands joining

⁷² ‘The Deloitte Consumer Review – Digital Predictions 2015’ Deloitte, 2015

⁷³ ‘The Deloitte Consumer Review – Digital Predictions 2015’, Deloitte, 2015

⁷⁴ ‘ONS Statistical Bulletin (2014) Internet Access – Households and Individuals’, ONS, 2014

over time⁷⁵. Their success in the UK is yet to be confirmed⁷⁶.

- 2.84 In summary, the rise of the online retail world is unquestionable. As the influence of “E-Commerce” continues to accelerate, we can expect retailers to react and start prioritising how they will make sure the relationship between real world retail stores and their online presence become more integrated.

Conclusion

- 2.85 In summary, the retail market has experienced significant changes in recent years. The prevailing retail environment continues to be volatile and unstable. In response to the unpredictability those operating in the market are forced to adapt quickly or otherwise face failing profits and potential collapse altogether.
- 2.86 Poor economic conditions facing the UK (i.e. the economic downturn over the period 2008 to 2013) led to a marked deterioration in established town centres as well as other retail formats, of note secondary shopping centres. The overarching cause of decline resulted from restrictions in available expenditure due to suppressed disposable incomes.
- 2.87 However, 2017 has to date brought a return to economic conditions more akin to pre-recession times (pre 2008). In consequence, consumers are recovering their confidence. The main drivers are considered to be (1) the improved economic outlook (as a result of decreasing unemployment and rise in real wages) and (2) the availability of credit, which has seen expenditure growth rates rising. So, whilst forecasts are still below pre-recession levels, they are significantly higher than those recorded over the last three to four years.
- 2.88 The evolution into “E-tailing” has reduced the recognised need for new tangible floorspace in recent years. However, with the retail industry embracing innovative ‘omni-channelling’ strategies, that are not restricted but supported by online-influenced sales, this provides an opportunity for town centres to regain some of the custom they have lost. To make sure the growing spend actually takes place within UK town centres, it is critical that town centres embrace digital solutions whilst also providing well-maintained retail floorspace that provides for a high quality shopping experience.
- 2.89 It is well recognised that town centres must be open to a holistic retail strategy if they are to secure future vitality and viability.
- 2.90 To conclude, as the Councils progress with their new Local Plans it will be vital that they take

⁷⁵ ‘Amazon Dash Button Continues Rapid Growth—Orders Increase; Brands, Categories and Selection Expand’, Business Wire, 28 June 2016, <http://www.businesswire.com/news/home/20160628005870/en/>

⁷⁶ ‘Amazon Dash: does the world really need more little pieces of plastic?’, Senay Boztas, The Guardian online, 2 September 2016

account of retail and leisure trends. Of note, the Local Plans should appropriately address the rise of internet retailing and how planning policies could support a positive relationship between town centres and this new form of making purchases. One such way could be through the promotion of internet collection points in prime locations, as this is likely to draw a significant amount of people to visit a centre.

3.0 Planning Policy Context

Introduction

- 3.1 This Retail and Centres Study provides evidence that will support and inform the production of the emerging Local Plans for Chesterfield Borough, Bolsover District and North East Derbyshire District. As such, it is important to analyse and understand how the adopted and emerging national planning documentation may impact upon the context of Local Plan policy, in particular those policies that relate to retail and leisure.
- 3.2 The following section of this report establishes the planning policy and regeneration context for the Study Area. Relevant documents from the Council's local planning policies, supporting documents, studies, and appraisals have been reviewed and a summary is provided below.

National Planning Policy Framework

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

to meet the development needs of business and support a “21st century economy”. Further to this, Paragraph 21 explains that investment in business should not be over-burdened by the requirements of planning policy.

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

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

Ensuring the Vitality of Town Centres Planning Practice Guidance

- 3.12 National Planning Practice Guidance (referred to as the NPPG) entitled 'Ensuring the Vitality of Town Centres' was published in March 2014 and replaced the previous Planning for Town Centres Practice Guidance. The online tool provides a succinct synopsis of how retail and main town centre planning policy should be applied in practice.
- 3.13 In short, the specific objectives of the NPPG remain similar to those of its predecessor. For example, it directs local planning authorities to plan positively and support town centres. In addition to setting out objectives that aim to generate local employment, promote competition within and between town centres, and create attractive and diverse places for users.
- 3.14 In addition to the enforcement of a 'town centre first' approach in order to meet local needs, the NPPG sanctions this should be delivered through a positive vision or strategy which is communicated through the development plan. In summary, local authorities should use development plan documents, policies and supporting guidance documents to address the following matters:
- a. The appropriate and realistic role, function and hierarchy of town centres in the area for the duration of the plan period. This should involve an audit of the vitality and viability of existing town centres and their ability to accommodate new development;
 - b. Encapsulate a clear vision for the future of each town centre and the most appropriate mix of uses;
 - c. Ability for the town centre to accommodate the scale of assessed need through new development;
 - d. Timeframe for the delivery of new retail floorspace;
 - e. Any other complementary approaches which are necessary or appropriate to enhance the town centre to deliver the vision for its future; and
 - f. How the car parking provision can be enhanced in order to encourage town centre vitality.
- 3.15 Of specific relevance to this Retail and Centres Study, Paragraph 005 categorises a series of key indicators to be used when assessing the health of a centre over time. It is these indicators that we have based our health checks of the vitality and viability of Chesterfield, Bolsover and North East Derbyshire centres on, as set out in detail in Section 5 of this Report.
- 3.16 Paragraph 005 also explains that it is often the case that successful town centre regeneration

initiatives involve a range of improvements such as renewed public realm, parking, and accessibility and other partnership mechanisms, rather than being purely led by retail schemes or focused on substantial new development.

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

- 3.17 The Portas Review was published in December 2011 and since that time has been referenced as a key guiding document for town centre planning policy and regeneration efforts. The Review was undertaken by Mary Portas, as an independent adviser and retail expert, and assessed, on behalf of central Government, the state of Britain's high streets and town centres.
- 3.18 The review provided a critical assessment of the factors contributing to a third of high streets degenerating or failing. In addition, to analysing the reasons why over the previous decade out-of-town retail floorspace had increased by 30% while in town floorspace had actually shrunk by 14%. As part of the Review Portas made 28 recommendations, including actions that Government, businesses and other organisations should take in order to bring back life into their high streets and town centres. Portas put out a challenge to re-imagine them as social hubs, not only just for shopping but also for learning, socialising and fun.
- 3.19 In March 2012 the Government issued a formal written response to the Portas Review. In their response the Government (Rt. Hon Grant Shapps MP, Minister for Housing and Local Government) acknowledged that in retort to the challenges being faced by the UK high street; including shoppers going to out-of-centre retail development, in addition to online retailing, the high street must provide something new and different for its visitors. As part of this response, the Government acknowledged a number of recommendations, including:
- i. Introduction of Town Teams (defined by Portas to be visionary, strategic and strong operational management teams for high streets) – Town Teams should not restrict their imagination;
 - ii. Funding for pilot areas (known as Portas Pilots) which are judged to have the best concepts town centres and high streets improvements;
 - iii. A £10 million High Street Innovation fund allocated to councils in areas blighted by empty voids;
 - iv. Support for a new National Market Day to be held on 23 June; and
 - v. £500,000 investment into the development of new Business Improvement Districts.

- 3.20 It is interesting to look back on this response now, given a number of these recognised initiatives are no longer being actively pursued by the Government.
- 3.21 In summary, the Government's response sought to encourage local planning authorities to adopt inspirational thinking in order to ascertain concepts for town centre enhancement and improvement. The overriding goal local authorities were tasked with is to encourage their residents back into the town centre, in both the daytime and night-time hours. However, given on-going challenges and competing priorities for both the Government and local authorities a number of the schemes are not currently considered feasible.

Relaxation of Permitted Development Rights

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

notably, the change of use must relate to no more than 150 sq m of floorspace.

- 3.27 Further extensions to the permitted development rights came into force two years later on 4 April 2016. The key changes introduced by this 2016 Order include:
- a) Removal of the 31 May 2016 deadline altogether (being the end of the previously identified three year period), thereby making the permitted rights permanent; and
 - b) Allowing laundrettes to change to residential uses.
- 3.28 The intended consequence of such measures is to secure the redevelopment and reuse of premises and diminish long-term vacancies. To this end, the rights are expected to support town centres to be comprised of well-utilised units.

Chesterfield Borough Council Planning Policy

Chesterfield Borough Council Local Plan: Core Strategy

- 3.29 The Chesterfield Borough Council Local Plan: Core Strategy (herein referred to as the Core Strategy) was adopted by Chesterfield Borough Council on the 24th July 2013.
- 3.30 The Core Strategy is the fundamental Local Development Framework document that prescribes the overarching framework for all local development documents. The Core Strategy includes a number of Development Management Policies on key issues that will need to be taken account of when assessing proposed new development.
- 3.31 The content of the Core Strategy identifies the settlements to which new development will be directed and the amount of new housing and employment land that will be provided in these areas up to 2031.

Settlement Hierarchy

- 3.32 In respect to the role and function of the District's local centres, the Core Strategy Key Diagram identifies the centres of growth for the Borough.
- 3.33 Figure 3.1 illustrates the adopted settlement hierarchy in the District and sets out the framework for the scale and distribution of development in each of these centres.

Figure 3.1 | Chesterfield Hierarchy of Centres from the adopted Core Strategy

Settlement Classification	Settlement
Sub-Regional Centre	Chesterfield Town Centre
Town Centre	Staveley Town Centre
District Centre	Chatsworth Road Whittington Moor
Local Services Centre	Brimington Hasland Holme Hall
Local Centres	Abercrombie Birdholme Derby Road North Grangewood Inkersall Green Littlemoor Loundsley Green New Whittington Newbold Old Whittington Staveley and Rother Valley Corridor Storrs Road Walton Waterside
Retail Parks	Lordsmill Street Ravenside Retail Park Sheffield Road Wheatbridge Road
Out of Centre Foodstores	Sainsbury's, Rother Way Tesco, Lockoford Lane Aldi, Sheffield Road

Source: Chesterfield Core Strategy, Pages 69-70

- 3.34 The Core Strategy includes several settlement specific policies which support the settlement hierarchy by providing further detail to ensure the vision and objectives for each settlement are achieved during the plan period (to 2031).

Replacement Chesterfield Local Plan 2006 and Supplementary Planning Policies

- 3.35 The majority of policies in the Replacement Chesterfield Borough Local Plan 2006 have been replaced by the Core Strategy. A number of policies from the Replacement Chesterfield Borough Local Plan have been saved until the adoption of the new Local Plan.

3.36 Supplementary planning documents provide additional planning guidance and include the following:

- Advertisements SPD
- Shop front SPD
- Residential design SPD
- Designing out crime SPD
- Historic environment SPD

3.37 The Replacement Chesterfield Borough Local Plan will be replaced by the emerging local plan as outlined below.

Emerging Local Plan

3.38 Section 15 of the Planning and Compulsory Purchase Act 2004 (as amended by the Localism Act 2011) requires every Local Planning Authority in England and Wales to prepare, maintain and publish a Local Development Scheme (LDS). A key requirement of the act is to ensure the LDS is kept up to date.

3.39 On 20th October 2016 Chesterfield Borough Council LDS took effect. The LDS identifies the desire to adopt the new Chesterfield Borough Local Plan in full by March 2018.

Evidence Base

3.40 The Council's evidence base (used to inform the preparation of emerging local plan policies) includes a range of studies and supplementary documents. The studies and supplementary documents cover a range of topics including the economy, employment, housing, and the physical/built environment.

Retail Needs Assessment

3.41 As already referenced above, this Retail and Centres Study is an update on the 2008 Chesterfield Borough Council and North East Derbyshire District Council Retail Study prepared Nathaniel Lichfield and Partners (NLP). We have looked to the 2008 Assessment in order to establish an understanding of the predictions and recommendations that were made at this time.

3.42 The 2008 Assessment contained a review of the relevant parts of the local policy framework, an analysis of the findings of a household telephone survey, qualitative health checks, commitments, and economic capacity forecasts, and subsequently set out scope for new retail development in the District through capacity analysis for bulky goods, as well as comparison

and convenience goods.

- 3.43 Key findings from the 2008 Assessment are set out below and provide an indication of the District's retail performance as at 2008.
- 3.44 Furthermore, in 2010 an update of the 2008 Study was undertaken by NLP on behalf of Chesterfield Borough Council following the economic downturn of 2008.
- 3.45 As part of their Retail Study, NLP produced expenditure forecasts and these are set out in Figure 3.2.

Figure 3.2 | Chesterfield Expenditure Forecasts produced by NLP in 2008

Expenditure Forecasts	2011 £m	2016 £m	2021 £m	2026 £m
Convenience Goods	226.27	239.03	251.02	263.13
Comparison Goods	394.26	471.01	575.46	701.98

Source: Nathaniel Lichfield & Partners, Retail Study Update (2010) page 68 and page 71

- 3.46 In their report NLP explained that at the time of writing, Experian's recommended growth rate for convenience goods was 0.75% per annum, while the recommended growth rate for comparison goods was 2% to 2.5%.
- 3.47 Estimated convenience expenditure in Chesterfield Borough was projected to exceed the benchmark turnover of existing convenience floorspace and commitments in the Borough by £53.01 million in 2016 and by £71.45 million in 2026.
- 3.48 Similarly, comparison expenditure in the Borough was projected to exceed the benchmark turnover of existing comparison floorspace and commitments by £107.57 million in 2016 and £280.19 million in 2026.

Capacity Analysis

- 3.49 The capacity analysis completed by NLP for Chesterfield Borough identified that there was:
- Capacity for 8,994 sq m net additional convenience goods floorspace in the period to 2026.
 - Capacity for 36,825 sq m net additional comparison goods floorspace in the period to 2026.
 - Large format retail floorspace capacity of 12,010 sq m bet additional floorspace in the period to 2026.

Retail Study Update 2010

- 3.50 In 2010, NLP was engaged by Chesterfield Borough Council again to provide an update on the

2008 retail study following the aftermath of the Global Financial Crisis.

- 3.51 The update identified that development in the Northern Gateway was expected to accommodate new comparison retailing by 2016 and should have been a priority. If the Northern Gateway includes a large food store, it is likely this store will include an element of comparison sales. The implementation of the Northern Gateway development was flagged as a priority before 2016.
- 3.52 The update also identified that meeting the projections between 2010 and 2016 should have been a priority, while long term forecasts up to 2021 and 2026 were more susceptible to change.

Bolsover District Council Planning Policy

Bolsover District Local Plan

- 3.53 The Bolsover District Local Plan (February 2000) contains local and site specific policies on general development issues, housing, employment, shopping and town centres, community facilities, recreation, leisure and tourism, transport, conservation of the historic and built environment. It also allocates sites for specific development.
- 3.54 Whilst not part of the Development Plan, certain policies of the Bolsover District Local Plan are currently supported by the following supplementary planning documents:
- Affordable Housing SPG (adopted February 2002)
 - Historic Environment SPD (approved 1st March 2006)
 - New Bolsover Model Village Planning Guidelines SPG (adopted November 2002)
 - Successful Places SPD (adopted October 2013)
- 3.55 Bolsover District identifies that the major shopping centres within the district are South Normanton, Shirebrook, Bolsover and Clowne. Other local centres within the district are Barlborough, Creswell, Pinxton, Tibshelf and Whitwell.
- 3.56 Bolsover District Local Plan's retail and centre related policies reflect the important roles that the four major shopping centres within the district play in the success of the District as a whole. However, the policies are general considered to be outdated and in need of replacement.

New Local Plan for Bolsover District

- 3.57 The Draft Local Plan for Bolsover District was released for consultation between 31 October and 12 December 2016. Once adopted, the Local Plan for Bolsover District will replace the

Bolsover District Local Plan.

Evidence Base

3.58 The Council's evidence base (used to inform the preparation of emerging local plan policies) includes a range of studies and supplementary documents. The studies and supplementary documents cover a range of topics including the economy, employment, housing, and the physical/built environment. The evidence base is used to inform the development of the New Local Plan.

Retail Needs Assessment

3.59 As referenced previously, the Bolsover Retail Capacity Assessment was most recently updated in 2010 by Roger Tym & Partners (RTP). The original retail study was undertaken by White Young Green (WYG) in 2006. The updated retail study took into account the impacts of the 2008 Global Financial Crisis.

3.60 The retail study provided up to date analysis of the policy context for retail and town centres, summarised the vitality of town centres within the district and assessed shopping and spending habits of residents in the District. Furthermore, the study assessed the need for additional convenience and comparison floorspace within the town centres and assessed the capacity for the town centres to accommodate that forecasted need.

3.61 The study identifies steady growth in expenditure across the district between 2010 and 2026, as identified in Figure 3.3.

Figure 3.3 | Bolsover Expenditure Forecasts produced by RTP in 2010

Expenditure Forecasts	2010 £m	2016 £m	2021 £m	2026 £m
Convenience Goods	110.68	118.21	126.40	134.90
Comparison Goods	163.30	202.58	248.14	302.81

Source: RTP Retail Study 2010 pages 59 and 61

3.62 The capacity analysis completed by RTP for also Bolsover District identified that there was:

- Capacity for 2,456 sq m net additional convenience goods floorspace in the period to 2026.
- Capacity for 8,354 sq m net additional comparison goods floorspace in the period to 2026.

3.63 The RTP study identified that the additional floorspace will be accommodated across the district and recommends the following distribution of net additional comparison floor space between

2010 and 2026:

- Bolsover Town Centre – between 500 sq m and 3,300 sq m
- Shirebrook Town Centre – between 350 sq m and 2,500 sq m
- Clowne Town Centre – between 250 sq m and 1,700 sq m
- South Normanton Town Centre – between 100 sq m and 850 sq m

3.64 According to the study there is little quantitative need for comparison floorspace between 2010 and 2016, with the majority of comparison floorspace deliverable after 2021.

3.65 The study further recommended that there was a requirement for additional medium to large-format foodstores in Bolsover and Shirebrook.

North East Derbyshire District Council Planning Policy

North East Derbyshire District Local Plan 2001-2011

3.66 The North East Derbyshire District Local Plan 2001-2011 (NED Local Plan) was formally adopted on 28th November 2005.

3.67 The NED Local Plan identifies that the district includes four towns of Clay Cross, Dronfield, Eckington and Killamarsh, and a large number of medium and small settlements and villages, with no currently defined local centres. The northern part of the district has good transport connections to Sheffield.

3.68 The Local Plan identifies that the main retailing and commercial areas in North East Derbyshire of Clay Cross, Dronfield, Eckington and Killamarsh. Chapter 6 – Town Centre and Retailing, identifies that nearby centres of regional and sub-regional significance have a significant impact on the centres within North East Derbyshire, which are of a modest size by comparison.

3.69 The Plan recognises that the retail centres not only remain the natural focus for shopping facilities but also support other functions including banks, libraries and other services. The Plan seeks to direct new retail and other development considered appropriate to a town centre, including commercial and leisure uses, to these locations and to ensure that the vitality and viability of these centres is maintained and enhanced.

New North East Derbyshire Local Plan 2013-2033

3.70 The New North East Derbyshire Local Plan 2013-2033 (New NED Local Plan) is in the process

of being developed. Public consultation was announced as being carried out in February 2017. The Council has published as 'Position Statement' to support the progression of the New Local Plan.

- 3.71 This retail and centres study will inform the development of the New NED Local Plan.

Evidence Base

- 3.72 The Council's evidence base (used to inform the preparation of emerging local plan policies) includes a range of studies and supplementary documents. The studies and supplementary documents cover a range of topics including the economy, employment, housing, and the physical/built environment.
- 3.73 As already referenced above, this Retail and Centres Study is an update on the 2008 Chesterfield Borough Council and North East Derbyshire District Council Retail Study prepared by Nathaniel Lichfield and Partners (NLP). We have looked to the 2008 Assessment in order to establish an understanding of the predictions and recommendations that were made at this time.
- 3.74 The 2008 Assessment contained a review of the relevant parts of the local policy framework, an analysis of the findings of a household telephone survey, qualitative health checks, commitments, and economic capacity forecasts, and subsequently set out scope for new retail development in the District through capacity analysis for bulky goods, as well as comparison and convenience goods.
- 3.75 Key findings from the 2008 Assessment are set out below and provide an indication of the projections for the District's retail performance as at 2008.

Retail Needs Assessment

- 3.76 As part of their Retail Study, NLP produced expenditure forecasts and these are set out in Figure 3.2.

Figure 3.2 | North East Derbyshire Expenditure Forecasts produced by NLP in 2008

Expenditure Forecasts	2011 £m	2016 £m	2021 £m	2026 £m
Convenience Goods	92.90	97.90	102.61	107.52
Comparison Goods	44.10	52.52	64.02	78.02

Source: NLP, Retail Study Update (2010) page 68 and page 71

- 3.77 In their report NLP explain that in convenience goods, Experian’s recommended growth rate was 0.75% per annum, while the recommended growth rate for comparison goods was 2% to 2.5%.
- 3.78 Estimated convenience expenditure in North East Derbyshire is projected to exceed the benchmark turnover of existing convenience floorspace and commitments in the District by £10.12 million in 2016 and by £17.07 million in 2026.
- 3.79 Surplus expenditure is converted into retail floorspace based on an average sales density at 2007 of £3,443 per sq m net increased by 1.5% per annum in North East Derbyshire.
- 3.80 The capacity analysis completed by NLP for North East Derbyshire District identified that there was:
- Capacity for 2,876 sq m net additional convenience goods floorspace in the period to 2026.
 - Capacity for 6,834 sq m net additional comparison goods floorspace in the period to 2026.
- 3.81 This Retail and Centres Study aims to provide an update to the NLP Retail Study, considering the most up to expenditure forecasts, capacity and trends.

North Derbyshire and Bassetlaw SHMA, November 2013/October 2017 (GL Hearn)

- 3.82 Bassetlaw District Council, Bolsover District Council, Chesterfield Borough Council and North East Derbyshire District Council jointly commissioned GL Hearn in 2013 to produce a joint Strategic Housing Market Assessment (SHMA), which considers future housing need over the period to 2031. In their report GL Hearn explain that on the basis of their assessment there is an objectively assessed need (OAN) for 1,065 homes per annum in the housing market area (HMA) to 2031 in order to support population growth including increasing employee figures. Of note, GL Hearn recognise that a quarter of homes in the assessed area contain older persons.
- 3.83 This assessment was subsequently updated over the course of preparing this Study, and the October 2017 update identifies an increased OAN of 1,124 per annum across the HMA to 2035.

- 3.84 The updated growth figures in the latest SHMA have been reviewed and align with the population growth forecasts utilised in this Study.

Conclusion

- 3.85 The NPPF recognises and stresses the importance of promoting the vitality and viability of town centres through a 'town centre first' approach to developing a defined retail hierarchy. Town centres play an essential contributing role in the nation's economy as well as acting as the heart of local communities – where both social and commercial exchanges take place.
- 3.86 As a direct result of the NPPF coming into force, all planning applications for main town centre uses must provide a full assessment of the impact of the proposal on the vitality and viability of protected centres (for applications greater than 2,500sq m, or a locally set threshold). It is on the basis of this impact assessment that local planning authorities consider the overall impact of the planned development on their existing retail provision as well as pipeline retail developments.
- 3.87 As part of the production of their new Local Plans, the Councils are gathering a suite of new technical studies and reports to form the evidence base upon which the new Local Plans will be based. This Retail and Centres Study will form part of the evidence base and influence those policies which relate to retail and leisure and most importantly those policies which influence and support the vitality and vibrancy of the centres and settlements in Chesterfield Borough, Bolsover District and North East Derbyshire District Council areas.

4.0 Population and Expenditure

Introduction

4.1 We identify below how we assess the current population and available convenience and comparison retail expenditure within the Study Area, as well as the methodology for forecasting the available expenditure across the plan period. This data has informed our quantitative model of available retail capacity in the Study Area, along with the NEMS Market Research household telephone survey, which we go on to discuss in Section 5.

Methodology

4.2 As we go on to detail through this Study at Paragraph 6.5, our assessment utilises a robust and well established methodology that is widely accepted across the industry:



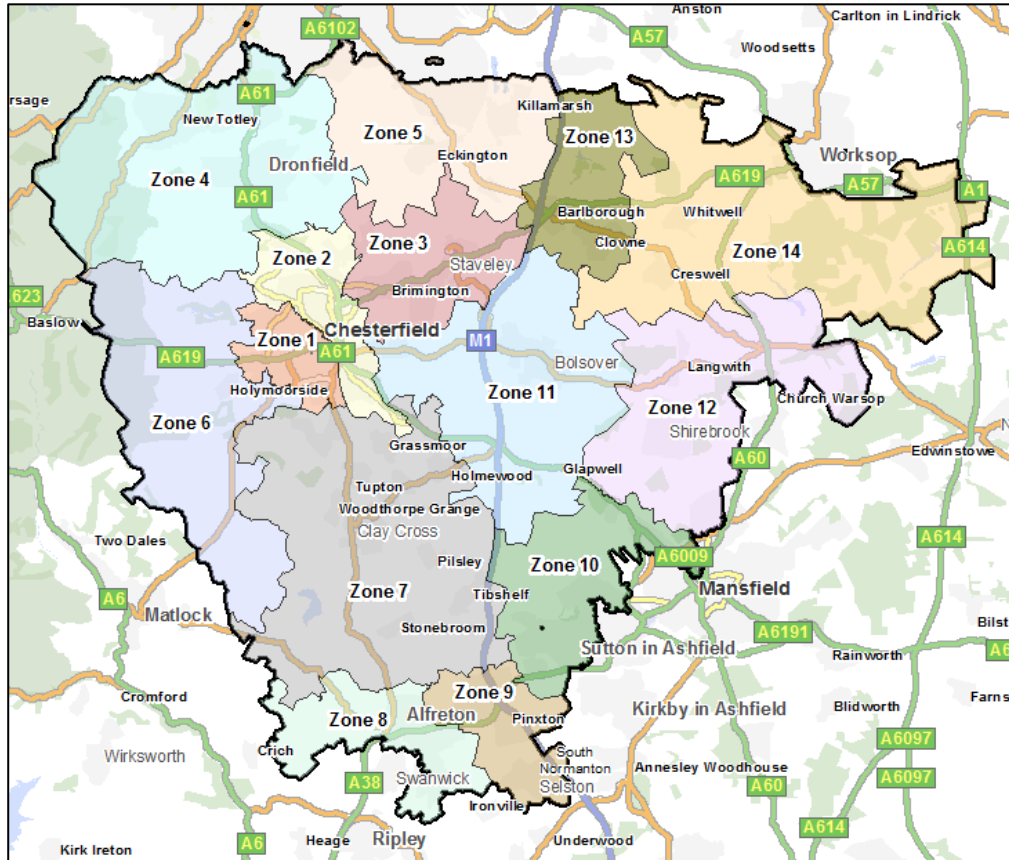
Study Area

- 4.3 A key task of this Study is to review previous findings relating to shopping patterns within each of the authority areas, utilising the household surveys undertaken by NEMS Market Research in September 2007 and August 2010 to inform the previous Chesterfield Borough Council and North East Derbyshire District Council Retail Study in 2008, the 2010 Update (which focused on Chesterfield Borough) and the Bolsover Retail Capacity Assessment, produced in 2010. We go on to identify any significant variations in shopping patterns that may have resulted from recent retail investments in the vicinity of the Study Area or wider changes in nationwide shopping habits.
- 4.4 We then went on to identify a suitable Study Area of 14 zones, within which residents of the authority areas and beyond might look to facilities within Chesterfield, Bolsover and North East Derbyshire for their retail and leisure needs.
- 4.5 We reviewed and adapted the Study Areas adopted for the previous studies where possible in order to enable before and after comparisons and to allow us to robustly identify any emerging trends in shopping patterns across the Study Area.
- 4.6 Zones 1 to 3 of the adopted Study Area, which broadly make up Chesterfield Borough, are consistent with the boundaries of Zones 1 to 3 of the 2008 Chesterfield Borough Council and North East Derbyshire District Council Retail Study.
- 4.7 Zones 4 to 7 of the Study Area are defined as representing shoppers focussed towards North East Derbyshire District. Zones 4 (Dronfield) and 5 (Eckington / Killamarsh) are consistent with the boundaries of Zones 6 and 7 of the 2008 Study, whilst the boundary of Zones 6 (Peak District Fringe) and 7 (Clay Cross) make up zone 5 of the previous Study.
- 4.8 Zones 9, 11, 12, 13 and 14 are broadly defined as Bolsover District. We are not able to fully utilise previous zonal boundaries from the 2010 standalone Bolsover Study, since the previous Study did not utilise Postal Sector boundaries and adopted customised zones. Notably, however, the boundary of Zone 11 (Bolsover) is consistent with the definition of Zone 4 (Bolsover) in the combined Chesterfield Borough Council and North East Derbyshire District Council Retail Study 2008 and Zone 2 in the Bolsover Retail Needs Assessment 2006. Zone 12 (Shirebrook) is also broadly consistent with Zone 3 of the Bolsover Retail Needs Assessment 2006.
- 4.9 Figure 4.1 shows the definitions of the survey zones by postal sector, whilst Figure 4.2 shows the geographical extent of the Study Area (**Appendix A**).

Figure 4.1 | Definitions of Survey Area Zones

Survey Zone	Postcode Sectors	Survey Zone	Postcode Sectors
1 Chesterfield West	S40 1, S40 2, S40 3, S40 4	8 Alferton	DE55 4, DE55 7
2 Chesterfield East	S41 0, S41 7, S41 8, S41 9	9 South Normanton	NG16 6, DE55 2, DE55 3
3 Staveley/ Brimington	S43 1, S43 2, S43 3	10 Mansfield Fringe	NG17 1, NG17 2, NG17 3, NG17 6, NG19 7
4 Dronfield	S8 7, S8 8, S17 3, S17 4, S18 1, S18 2, S18 3, S18 4, S18 7, S18 8	11 Bolsover	S44 5, S44 6
5 Eckington / Killamarsh	S12 3, S20 3, S20 4, S20 5, S21 1, S21 2, S21 3, S21 4, S21 5	12 Shirebrook	NG19 8, NG20 8, NG20 9
6 Peak District Fringe	S42 7, S45 0	13 Clowne	S26 7, S43 4
7 Clay Cross	S42 5, S42 6, S45 8, S45 9, DE55 5, DE55 6	14 Whitwell / Creswell	S80 3, S80 4

Figure 4.2 | Survey Area Zones



Source: Appendix A

Study Area Population

- 4.10 Nexus has utilised in-house data sourced from the Experian Micromarketer G3 system to calculate the baseline population data (2015 estimates). Experian's population dataset utilises the 2011 Census release, and projects forwards using growth rates derived from ONS population projections and current age and gender estimates. These are accepted as the industry standard basis for long term retail planning.
- 4.11 We have taken a base date of 2016, calculating population and retail expenditure forward to 2021, 2026, 2031 and 2033, in accordance with NPPF guidance.
- 4.12 At 2016, the defined Study Area is estimated to contain a resident population of approximately 432,170, rising by 6.2% to 458,942 at 2033 (equating to 26,772 additional residents). We have assessed the Experian derived population growth (7.4% between 2014 and 2035) against the population scenario utilised by GL Hearn for the 2017 SHMA update (7.8% over the same period, excluding population growth within Bassetlaw District).
- 4.13 Noting that the Study Area projects beyond the three authority areas and includes more rural areas that will experience a lower level of population growth, depressing the overall percentage increase, it is considered that the Experian Micromarketer G3 population data is a suitably robust data source for the purpose of this Study.

Figure 4.3 | Population across the Study Area by Zone

Zone	2016	2021	2026	2031	2033
1 Chesterfield West	35,835	36,204	36,521	36,810	36,915
2 Chesterfield East	37,086	37,727	38,359	38,869	39,046
3 Staveley / Brimington	30,515	31,076	31,719	32,259	32,474
4 Dronfield	67,062	68,202	69,330	70,394	70,689
5 Eckington / Killamarsh	44,448	45,339	46,369	47,429	47,890
6 Peak District Fringe	6,744	6,828	6,937	6,964	6,960
7 Clay Cross	51,428	52,543	53,460	54,219	54,555
8 Alfreton	18,180	18,699	19,154	19,514	19,674
9 South Normanton	22,675	23,241	23,742	24,117	24,268
10 Mansfield Fringe	39,959	41,062	42,017	42,883	43,284
11 Bolsover	22,153	22,510	22,971	23,320	23,470
12 Shirebrook	28,005	28,530	29,085	29,509	29,719
13 Clowne	12,700	12,982	13,243	13,471	13,572
14 Whitwell / Creswell	15,380	15,731	16,053	16,305	16,426
Total	432,170	440,674	448,960	456,063	458,942

Source: Appendix D, Table A1

- 4.14 The resident population (and by extension, the resident expenditure available to facilities within Chesterfield, Bolsover and North East Derbyshire) is not distributed evenly across the Zones of the defined Study Area, which is to be expected of any sample of a population. This is because

residential housing is typically focussed towards urban areas within the zones and across the Study Area. By way of an example, 15.5% and 11.9% of the residents across the Study Area reside in Zone 4 (Dronfield) and Zone 7 (Clay Cross) respectively, whilst the zone with the lowest proportion of residents is Zone 6 (Peak District Fringe) with just 1.6%. This growth is based on population projections and does not account for planned distribution such as housing allocations.

Retail Expenditure

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

Figure 4.4 | Retail Expenditure Forecasts

Year	Convenience growth rates	Comparison growth rates
2015	-1.1%	4.6%
2016	0.0%	3.3%
2017	-0.2%	1.4%
2018	-0.9%	1.0%
2019	0.0%	3.0%
2020	0.0%	3.0%
2021	0.0%	3.0%
2022	0.0%	3.0%
2023	0.0%	3.0%
2024	0.1%	3.2%
2025	0.1%	3.2%
2026	0.1%	3.2%
2027	0.1%	3.2%
2028	0.1%	3.2%
2029	0.1%	3.2%
2030	0.1%	3.2%
2031	0.1%	3.2%
2032	0.1%	3.2%
2033	0.1%	3.2%

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

- 4.18 As identified in Figure 4.4, Experian forecasts suggest that convenience goods expenditure has

fallen in 2015, as a result of a trend towards more price conscious shopping patterns and the growth of high street discounters such as Lidl and Aldi, as discussed in further detail in Section 2. No change, followed by marginal growth, is now anticipated in the convenience goods sector with a consistent 0.1% growth per annum forecast from 2024 to 2033.

- 4.19 Comparison expenditure is shown to have risen by 4.6% in 2015 respectively, before levelling off between 2019 and 2023. Experian forecasts a steady growth of 3.2% per annum over the period 2024-2033 as comparison retailers incorporate newer technologies, innovations and formats (including 'click and collect' and other future trends such as omni-channel retailing) in order to complement online and mobile shopping rather than competing.
- 4.20 Experian note that long term forecasts should be treated with caution and subject to regular reviews, given the wide range of factors that can impact on the broader national economy, such as the fallout from the EU referendum vote, changes in migration and associated spending patterns, changes in import and export costs and town centre investment, as well as planned intervention such as housing growth through Local Plan allocations.

Non-Store Retailing or Special Forms of Trading

- 4.21 Special forms of trading (SFT) are defined by Experian as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies and are discussed in detail in 'Growth in E-Tailing (or E-Commerce)' in Section 2.
- 4.22 Experian Retail Planner Briefing Note 14 (November 2016) provides estimated forecasts of internet and other SFT, which allows for us to 'strip out' any expenditure that survey respondents suggest is made by SFT and instead utilise Experian's forecasts. This ensures that the proportion of SFT accounted for in our modelling increases in line with Experian forecasts as opposed to remaining constant at current levels.
- 4.23 Many stores offer online sales, but source goods from regular stores' stock as is often the case for foodstores where employees will carry out online orders from stores' shelves each morning before they open to the general public. These orders are then delivered by dedicated vans at each store and as such the online expenditure is attributed to tangible stores.
- 4.24 Experian provides forecast figures, cited at Figure 4.5, which forecasts the proportion of online sales derived from the shelves of physical stores, so as to ensure that this expenditure is counted as 'available' spend within the Study Area.

Figure 4.5 | 'Adjusted' Special Forms of Trading Market Share Forecasts

Year	Convenience SFT growth rates	Comparison SFT growth rates
2016	3.0%	13.2%
2021	3.9%	15.6%
2026	4.6%	16.1%
2031	5.0%	16.3%
2033	5.1%	16.4%

Source: Appendix D, Experian Retail Planner Briefing Note 14, November 2016

Convenience Goods Expenditure

4.25 Projecting forward available expenditure per capita and population growth for each survey zone in 2016, 2021, 2026, 2031 and 2033, we are able to estimate the total available convenience and comparison goods expenditure.

Figure 4.6 | Total Available Convenience Goods Expenditure across the Study Area

2016	2021	2026	2031	2033	Growth 2016-2033
£885.8 m	£884.9 m	£897.6 m	£912.4 m	£919.0 m	£33.2 m

Source: Table 2a, Appendix D

4.26 As identified in Figure 4.6, in 2016 it is estimated that the resident population of the Study Area spent £885.8m on convenience goods, which is expected to increase by £33.2m (3.8%) to £919.0m by 2033.

4.27 For the purpose of the Study this total available convenience expenditure is split across two sub-categories, with a Study Area average of 80.2% of spending attributed to 'main food' shopping trips and 19.8% attributed to 'top-up' shopping trips (as derived from the NEMS household survey on a zone by zone basis).

Comparison Goods Expenditure

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

Figure 4.7 | Total Available Comparison Goods Expenditure across the Study Area

2016	2021	2026	2031	2033	Growth 2016-2033
£1,185.2 m	£1,314.8 m	£1,552.4 m	£1,841.1 m	£1,970.5 m	£785.3 m

Source: Table 8, Appendix D

4.29 Applying the increases in population and comparison goods expenditure per capita, Figure 4.7 above estimates that the resident population of the Study Area generated £1,185.2m of comparison goods expenditure in 2016, rising to £1,970.5m in 2033 (an increase of £785.3m or 66.3%). Of this, bulky goods are shown to make up 31.7% of comparison goods spending, whilst non-bulky goods make up the remaining 68.3%.

Summary

4.30 The Study Area has a resident population of 432,170 at 2016, rising to 458,942 by 2033. It is estimated that, at 2016, the population generates a total of £885.8m (convenience goods) and £1,147.3m (comparison goods) of retail expenditure, which is expected to increase to £919.0m and £1,907.6m (respectively) at 2033.

4.31 The base data in this section is then utilised, in conjunction with our analysis of the market shares of retailers across the Study Area in Section 5 below, to inform our subsequent analysis of retail expenditure capacity in Section 6.

5.0 Original Market Research

Introduction

- 5.1 In carrying out this Study, we have gathered empirical evidence through undertaking a household telephone survey of 1,500 respondents in November 2016 in order to provide up-to-date information on local shopping patterns across the Survey Area, including the trade draws of particular town centres, leisure destinations and markets.
- 5.2 Nexus has partnered with specialist consultancy NEMS Market Research Ltd in order to identify shopping patterns, preferences and trends through a comprehensive household telephone survey of residents across the Study Area. This data provides the underlying structure of our quantitative retail capacity modelling, which is used to calculate the capacity for new retail floorspace across the Study Area over the plan period.
- 5.3 It is acknowledged that there are potential limitations with such datasets, which are restricted by the number of surveys that can be carried out across the Study Area, as well as the length of the household questionnaire itself. The results of the survey were then weighted according to the population profile in each zone, as set out in Section 1.4 at **Appendix D**. As such, the results are understood to provide a broad, representative indication of the market shares of retail and leisure destinations across the Study Area.

Household Telephone Survey

- 5.4 The previous Chesterfield Borough Council and North East Derbyshire District Council Retail Study (2008) and the 2010 Update (which focused on specifically on Chesterfield Borough) utilised a household telephone survey undertaken by NEMS Market Research in September 2007 across a Study Area of seven zones. The Bolsover Retail Capacity Assessment (2010) was informed by a NEMS household survey undertaken for the previous Retail Needs Assessment (2006) and redistricted across seven customised zones that do not match up with current postal sector boundaries.
- 5.5 As discussed in Section 4, where possible, we have adapted zones from the previous Study Area from the 2008 Chesterfield Borough Council and North East Derbyshire District Council Retail Study in order to compare and assess the changes in local trends in shopper preferences between 2007 and 2016.
- 5.6 The shopping patterns that result from the household survey provide the basis of the calculations of the retail expenditure at each retail destination by extrapolating the total

available expenditure provided by Experian MMG3 (as discussed in Section 4, above). The household survey also provides details of linked trips between various destinations, the use of other town centre facilities, the most popular means of travel to each centre and the frequency of visits.

- 5.7 As noted above, a limitation of the household survey is that the results may underestimate trade to smaller centres and retail facilities. In order to counter this, we ask respondents for the destination that they last made a purchase so as to record more infrequent purchases including drive-by and impulse shopping that are more likely to be at smaller centres and stand-alone stores.
- 5.8 The full tabulations of the results of the household telephone survey are provided at **Appendix C**.

Convenience Shopping Patterns

Figure 5.1 | Convenience Goods - Study Area Market Share (%)

Destination	Convenience Market Share
Chesterfield TC	3.1%
Staveley TC	4.4%
<i>Others in Chesterfield Borough</i>	24.5%
Chesterfield Borough Sub-Total	32.0%
Bolsover TC	1.2%
Shirebrook TC	2.5%
Clowne TC	6.0%
South Normanton TC	1.2%
<i>Others in Bolsover District</i>	0.7%
Bolsover District Sub-Total	11.6%
Dronfield TC	6.9%
Clay Cross TC	4.7%
Eckington TC	0.7%
Killamarsh TC	1.6%
<i>Others in North East Derbyshire District</i>	3.6%
North East Derbyshire District Sub-Total	17.5%
<i>Others in Study Area</i>	18.1%
<i>Outside the Study Area</i>	20.9%
Total	100.0%

Source: Appendix D

Figures may not total due to rounding

- 5.9 Convenience spending is categorised by Experian as low-cost, everyday food, beverages and perishable items that consumers are unlikely to be willing to travel far to buy. Convenience shopping trips are divided into two sub-categories, main food shopping and top-up shopping, which is more likely to be sourced locally to resident's homes or place of work.
- 5.10 We go on to consider the market share and notable convenience goods draws across each of the ten key centres across the authority areas (being Chesterfield and Staveley in Chesterfield Borough, Bolsover, Shirebrook, Clowne and South Normanton in Bolsover District and Dronfield, Clay Cross, Eckington and Killamarsh in North East Derbyshire) at Figure 5.1. It is important to note that these market shares only take into account town centre facilities, and do not consider edge and out-of-centre provision, which is picked up as '*Others in ...*'.
- 5.11 Notably, Chesterfield Town Centre receives a relatively small proportion of convenience goods trade from across the Study Area (3.1%) due to the provision of a number of large foodstores outside of the town centre. The proportion of spending at the key foodstores serving the Chesterfield area, such as Tesco Extra, Lockoford Lane (which accounts for 8.3% of all convenience goods spending across the Study Area), Morrisons, Chatsworth Road (5.9%) and Sainsbury's, Rother Way (5.1%), dwarfs the draw of the town centre provision in Chesterfield. It is worth noting that the Morrisons is located within the Chatsworth Road District Centre, and would not be considered 'out-of-centre' in retail terms.
- 5.12 Staveley Town Centre is significantly smaller than Chesterfield Town Centre, yet draws a larger proportion of convenience goods trips to the centre, almost entirely provided for by the Morrisons in Staveley (4.3%), located within the town centre.
- 5.13 Turning to Bolsover District, Clowne Town Centre is the most popular centre in the District, with both Aldi, Mill Green Way (2.0%) and Tesco, Mill Street (4.0%) attracting a significant proportion of convenience trade to the town centre.
- 5.14 Shirebrook, Bolsover and South Normanton each attract over 1% of convenience expenditure from across the Study Area, indicating that the local town centre convenience stores in each centre cater for the day-to-day local needs of residents, rather than drawing trade from across residents across the wider Study Area.
- 5.15 Dronfield and Clay Cross in North East Derbyshire both attract a relatively high proportion of convenience goods spending, with the centres anchored by Sainsbury's, Wreakes Lane, Dronfield (5.4%) and Tesco Extra, Bridge St North, Clay Cross (4.2%) respectively. Aldi, Sheffield Road (3.1%) was also identified to attract a relatively high proportion of trade from an out-of-centre location some 400m outside of the Dronfield Town Centre boundary. Killamarsh and Eckington both cater for a smaller proportion of convenience goods trade from across the

Study Area, anchored by Aldi, Parkside Shopping Centre (1.2%) and Co-op, Pinfold Street (0.5%) respectively.

5.16 At Figure 5.2 below, we extract the convenience goods market shares from the relevant zones of the 2007 Chesterfield and North East Derbyshire Study to facilities across the Study Area. Whilst we have not been able to directly compare the latest market share figures with the previous 2010 Bolsover Study due to the differences in the zone boundaries, the 2007 Study does account for convenience trade to facilities in each of Chesterfield Borough, Bolsover District and North East Derbyshire District from Zones 1 to 7, as well as Zone 11. This survey did not cover residents across the whole of Bolsover District and, as such, is not directly comparable. Nonetheless, it is useful to compare these market share figures with the updated household survey in order to assess any broad changes in the market share patterns (from the relevant zones) over the past nine years.

5.17 Notably, convenience spending to each of Chesterfield Borough, Bolsover District and North East Derbyshire from the 2007 Study Area zones has grown over the last nine years, with trade to other facilities outside of the authority areas falling from 34% to 24% by 2016.

Figure 5.2 | Convenience Goods - 2007 Study Area Market Share (%)

Zone	Chesterfield TC		Bolsover TC		NE Derbyshire TC		Other		Total	
	2007	2016	2007	2016	2007	2016	2007	2016	2007	2016
1 Chesterfield West	95	96.7	0	0.0	0	1.1	5	2.2	100	100
2 Chesterfield East	89	98.3	0	0.5	1	0.0	10	1.2	100	100
3 Staveley/ Brimington	91	96.9	0	0.6	0	0.5	9	2.0	100	100
4 Dronfield	14	4.4	0	0.0	41	62.5	45	33.2	100	100
5 Eckington / Killamarsh	11	6.2	0	1.1	14	26.0	75	66.8	100	100
6 Peak District Fringe & 7 Clay Cross	39	34.2	0	2.7	12	35.4	49	27.8	100	100
11 Bolsover	51	35.4	28	54.8	0	2.0	21	7.9	100	100
Total (2007 Study Area)	49.2	46.0	2.0	4.9	14.4	25.2	34.4	23.9	100	100

Source: Appendix D and NLP, CBC & NEDDC Retail Study 2008 (Appendix B, Table 3B)

Figures may not total due to rounding

5.18 The proportion of convenience goods spending to facilities in Chesterfield Borough from Zones 1 to 3 (which broadly makes up Chesterfield Borough) has grown to over 95% over the past nine years. Whilst Chesterfield attracts a greater proportion of local resident's trade, its market share from residents across the other authority areas has fallen significantly since the 2007 survey, with spending from residents of Zone 11 (Bolsover) in particular falling from 51% to 35% at the time of the updated survey.

- 5.19 Bolsover’s market share of the convenience spending of residents of Zone 11 has grown significantly over the last nine years, with facilities in the District now retaining 55% of spending from residents of the zone, from 28% in 2007. However, as referenced above, this could be accounted for by the differences in the geography of the household survey.
- 5.20 Equally, North East Derbyshire’s market share of convenience goods trade grew across the majority of zones, with trade from Zone 4 (Dronfield) increasing from 41% to 63% and spending from Zones 5 to 7 more than doubling over the past nine years.
- 5.21 Figure 5.3 identifies market shares across each of the Study Area Zones based on the latest, 2016 household survey. This data is useful in identifying convenience goods shopping patterns across the Study Area but, as population and retail expenditure varies considerably from zone to zone, Figure 5.3 on its own does not provide a complete and standalone picture when assessing the overall draw of the centres.

Figure 5.3 | Convenience Goods - Shopping Patterns by Zone (%)

Destination	Chesterfield Areas			North East Derbs Areas				Bolsover Areas					Other Areas	
	1	2	3	4	5	6	7	9	11	12	13	14	8	10
Chesterfield TC	13.3	14.1	2.6	0.0	0.7	5.1	2.3	0.0	1.5	0.0	0.0	0.0	0.0	0.0
Staveley TC	0.0	0.9	42.8	0.0	1.5	0.0	0.0	0.4	16.9	0.0	6.6	1.7	0.0	0.0
Bolsover TC	0.0	0.5	0.0	0.0	0.2	0.0	0.0	0.0	21.6	0.1	0.0	0.0	0.0	0.0
Shirebrook TC	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.6	32.0	0.0	0.0	0.0	0.9
Clowne TC	0.0	0.2	0.4	0.0	0.9	0.0	0.0	0.0	31.2	5.1	66.5	54.8	0.0	0.0
South Normanton TC	0.0	0.0	0.0	0.0	0.0	0.0	0.7	20.5	0.0	0.0	0.0	0.0	0.5	0.0
Dronfield TC	0.0	0.0	0.0	44.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Clay Cross TC	0.0	0.0	0.0	0.0	0.0	6.8	36.9	0.0	1.6	0.0	0.0	0.0	0.6	0.0
Eckington TC	0.0	0.0	0.0	0.0	6.5	0.0	0.0	0.0	0.0	0.0	0.7	1.1	0.0	0.0
Killamarsh TC	0.0	0.0	0.0	0.0	15.6	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.0
Others	86.7	84.3	54.2	55.2	74.7	88.0	60.2	79.0	19.7	62.7	25.5	42.4	98.9	99.1
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: Appendix D

Figures may not total due to rounding

- 5.22 As identified in Figure 5.1, the majority of convenience goods provision supporting Chesterfield Town Centre is located outside of the centre boundary. Nonetheless, 13.3% and 14.4% of residents of Zones 1 (Chesterfield West) and Zone 2 (Chesterfield East) visit Chesterfield for

their convenience goods shopping, respectively. No other centres pick up any significant trade from the zones, suggesting that the majority of spending is focussed towards the out of centre provision such as Tesco Extra and Sainsbury's (as well as the Morrisons within the Chatsworth Road District Centre) as discussed above. Staveley Town Centre retains a significant proportion of trade from its own Zone 3 (42.8%), as well as attracting 16.9% of trade from residents of Zone 11 (Bolsover) to the south.

- 5.23 In Bolsover District, a further 21.6% of the convenience goods spending of residents of Zone 11 is directed to Bolsover Town Centre, whilst a notable proportion is to the adjacent centres of Clowne (31.2%) and Shirebrook (7.6%). This would suggest that Zone 11 residents are willing to travel further afield to larger facilities in nearby centres to undertake their main food shopping. Shirebrook Town Centre (32.0% from Zone 12) and Clowne Town Centre (66.5% from Zone 13) each also attract a significant proportion of their own zones' convenience spending, with Clowne also attracting the majority of convenience goods expenditure from residents of Zone 14 including Whitwell and Creswell to the east (54.8% from Zone 14). South Normanton is a relatively outwards facing centre to the south of the District, serving a resident population beyond the District (and Study Area), attracting just 20.5% of convenience goods trade from Zone 9 (in which it is located) and very little from the rest of the Study Area.
- 5.24 Turning to North East Derbyshire District, the two largest towns of Dronfield to the north and Clay Cross to the south retain the largest proportion of convenience spending from their own zones (44.8% to Dronfield from Zone 4 and 36.9% to Clay Cross from Zone 7). Equally, Eckington and Killamarsh attract the majority of trade from their own Zone, with the remainder of spending attracted to out-of-centre facilities such as those on the outskirts of Chesterfield to the south and Sheffield to the north.

Comparison Shopping Patterns

- 5.25 Experian provides expenditure estimates divided into eight sub-categories of comparison goods, which can be grouped as bulky goods: 'DIY', 'Electrical' and 'Furniture', and non-bulky goods: 'Books, CDs and DVDs', 'Chemist Goods', 'Clothing & Footwear', 'Small Household Goods' and 'Toys and Recreational Goods'.
- 5.26 Figures 5.4 and 5.5 identify the market share of comparison goods spending based on the latest 2016 household survey, broken down by town centre and per zone.
- 5.27 The NEMS household survey identified that the authority areas retain 45.5% of comparison goods spending across the Study Area, with facilities within Chesterfield Town Centre attracting a total of 37.0% of all comparison expenditure. Bolsover and North East Derbyshire Districts

each attract 5.4% and 3.1% of comparison goods spending respectively.

- 5.28 Notably, a total of 9.0% of comparison spending was to other facilities in Chesterfield Borough, such as the Ravenside Retail Park on the outskirts of the town centre, which attracts 7.8% of all comparison goods spend across the Study Area. Other facilities in Bolsover also accounted for 2.2% of comparison goods spending, on account of the draw of the East Midlands Designer Outlet Centre.

Figure 5.4 | Comparison Goods - Study Area Market Share (%)

Destination	Comparison Market Share
Chesterfield TC	27.3%
Staveley TC	0.6%
<i>Others in Chesterfield Borough</i>	9.0%
Chesterfield Borough Sub-Total	37.0%
Bolsover TC	0.7%
Shirebrook TC	1.0%
Clowne TC	1.3%
South Normanton TC	0.1%
<i>Others in Bolsover District</i>	2.2%
Bolsover District Sub-Total	5.4%
Dronfield TC	1.3%
Clay Cross TC	1.3%
Eckington TC	0.2%
Killamarsh TC	0.0%
<i>Others in North East Derbyshire District</i>	0.3%
North East Derbyshire District Sub-Total	3.1%
<i>Others in Study Area</i>	14.7%
<i>Outside the Study Area</i>	39.8%
Total	100.0%

Source: Appendix D

Figures may not total due to rounding

- 5.29 As identified in Figure 5.5, Chesterfield Town Centre captured the greatest proportion of comparison expenditure market share of any of the key centres for residents of Zones 1 (Chesterfield West), 2 (Chesterfield East), 3 (Staveley / Brimington), 4 (Dronfield), 6 (Peak District Fringe), 7 (Clay Cross) and 11 (Bolsover).
- 5.30 Notably, only a small proportion of resident spending from Zone 5 (Eckington / Killamarsh) to the north of Chesterfield is attracted to the town centre, with 94.1% of comparison spend

directed towards other facilities such as Sheffield City Centre (32.4%) and Crystal Peaks Shopping Mall & Retail Park, Sheffield (43.4%), as per Appendix D.

- 5.31 Each of the other centres of Staveley, Bolsover, Shirebrook, Clowne, South Normanton, Dronfield, Clay Cross and Eckington within the authority areas attracted the greatest proportion of comparison goods trade from residents of their own zones, respectively, as would be expected.

Figure 5.5 | Comparison Goods - Shopping Patterns by Zone (%)

Destination	Chesterfield Areas			North East Derbs Areas				Bolsover Areas					Other Areas	
	1	2	3	4	5	6	7	9	11	12	13	14	8	10
Chesterfield TC	59.2	59.4	42.7	29.1	3.1	49.0	35.0	4.1	45.8	3.6	11.8	5.2	2.4	2.0
Staveley TC	0.0	0.0	7.3	0.0	0.6	0.0	0.0	0.0	0.4	0.0	0.7	0.5	0.0	0.1
Bolsover TC	0.0	0.0	0.4	0.0	0.0	0.2	0.0	0.0	12.5	0.1	0.5	0.4	0.0	0.0
Shirebrook TC	0.0	0.0	0.3	0.0	0.0	0.0	0.4	0.0	1.3	13.4	1.7	1.1	0.6	0.3
Clowne TC	0.0	0.0	0.1	0.0	0.3	0.0	0.0	0.0	8.0	0.9	12.6	11.8	0.0	0.0
South Normanton TC	0.6	0.5	0.8	0.3	0.0	0.2	4.3	11.7	1.1	1.5	1.0	0.5	4.1	4.0
Dronfield TC	0.0	0.0	0.0	7.6	0.5	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0
Clay Cross TC	0.0	0.1	0.3	0.0	0.0	2.1	9.2	0.1	0.3	0.0	0.0	0.0	2.6	0.0
Eckington TC	0.0	0.5	0.2	0.0	1.3	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0
Killamarsh TC	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Others	40.2	39.5	47.8	63.0	94.1	48.5	51.1	83.9	30.3	80.5	71.7	80.5	90.3	93.5
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: Appendix D

Figures may not total due to rounding

Figure 5.6 | Comparison Goods - 2007 Study Area Market Share (%)

Zone	Chesterfield TC		Bolsover TC		NE Derbyshire TC		Other		Total	
	2007	2016	2007	2016	2007	2016	2007	2016	2007	2016
1 Chesterfield West	87	82.2	0	1.6	0	0.0	13	17.2	100	100
2 Chesterfield East	86	81.3	0	1.3	0	0.7	14	16.6	100	100
3 Staveley/ Brimington	82	72.8	0	2.5	0	0.6	18	24.1	100	100
4 Dronfield	25	32.0	0	0.3	7	7.6	68	60.0	100	100
5 Eckington / Killamarsh	16	4.6	0	0.3	5	3.5	79	91.6	100	100
6 Peak District Fringe & 7 Clay Cross	61	51.9	0	4.0	8	8.9	31	35.1	100	100
11 Bolsover	59	53.8	11	23.7	1	0.6	29	21.8	100	100
Total (2007 Study Area)	53.4	50.2	0.8	3.1	4.1	4.3	41.7	42.4	100	100

Source: Appendix D and NLP, CBC & NEDDC Retail Study 2008 (Appendix C, Table 3C)

Figures may not total due to rounding

- 5.32 The proportion of comparison goods spending to Chesterfield Borough from the zones that make up the 2007 Study Area has fallen from 53.4% to 50.2% over the past nine years, with the exception of spend from residents of Zone 4 (Dronfield), which has increased over the period.
- 5.33 Trade to facilities within Bolsover District has increased since 2007, with the proportion of trade from residents of Zone 11 (Bolsover), in particular, more than doubling from 11% to 23.7%. As with convenience goods patterns, however, this may be accounted for by the differences in geographies of the respondents between the two surveys.
- 5.34 Comparison retailers in North East Derbyshire District, however, maintained a relatively consistent share of comparison goods expenditure across the zones that make up the 2007 Study Area.

Market Share Analysis

Figure 5.7 | All Retail - Market Share by Destination (%)

Destination	Market Share by Category (%)												Total Market Share (all retail)
	Convenience			Comparison									
	Main Food	Top-up	Total	Clothing	Books etc.	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total	
Chesterfield TC	1.9	7.9	3.1	33.6	30.7	28.1	26.6	31.3	16.3	20.9	26.3	27.3	16.8
Staveley TC	4.8	2.6	4.4	0.3	2.1	0.5	0.3	1.8	0.4	0.2	1.2	0.6	2.2
Others in Chesterfield	26.3	17.2	24.5	3.4	0.2	5.3	12.9	1.3	24.5	20.8	6.1	9.0	15.7
Sub Total Chesterfield	33.0	27.8	32.0	37.3	33.0	34.0	39.7	34.4	41.2	41.8	33.6	37.0	34.8
Bolsover TC	0.4	4.3	1.2	0.6	0.6	0.4	0.0	1.8	1.7	0.2	1.0	0.7	0.9
Shirebrook TC	2.2	3.9	2.5	0.4	0.2	1.4	1.4	1.3	0.5	1.4	1.9	1.0	1.7
Clowne TC	6.7	3.4	6.0	0.3	2.5	2.6	0.5	4.0	0.8	2.2	0.7	1.3	3.3
South Normanton TC	0.7	3.2	1.2	0.1	0.1	0.0	0.1	0.6	0.4	0.1	0.3	0.1	0.6
Others in Bolsover	0.0	3.2	0.7	5.6	1.3	1.9	1.3	1.3	0.2	1.4	0.3	2.2	1.6
Sub Total Bolsover	10.0	18.0	11.6	7.0	4.8	6.3	3.4	9.0	3.5	5.2	4.1	5.4	8.0
Dronfield TC	5.1	14.1	6.9	0.0	1.2	1.2	1.3	7.7	1.3	4.3	1.1	1.3	3.7
Clay Cross TC	4.8	4.4	4.7	0.5	4.4	1.5	1.5	2.4	1.0	0.6	1.4	1.3	2.8
Eckington TC	0.3	2.3	0.7	0.1	0.4	0.1	0.0	0.8	0.1	0.1	0.8	0.2	0.4
Killamarsh TC	1.6	1.3	1.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7
Others in NE Derbyshire	3.7	3.4	3.6	0.1	0.0	0.2	0.0	3.2	0.4	0.4	0.4	0.3	1.7
Sub Total NE Derbyshire	15.5	25.5	17.5	0.7	6.0	3.0	2.9	14.1	2.7	5.4	3.6	3.1	9.3
Others in Study Area	18.5	16.4	18.1	14.6	20.0	12.6	11.9	21.2	14.8	18.8	15.2	14.7	16.2
Outside the Study Area	23.0	12.3	20.9	40.5	36.3	44.2	42.2	21.4	37.9	28.8	43.4	39.8	31.7
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: Appendix D

Convenience Goods

5.35 Across the Study Area, Figure 5.6 illustrates that convenience facilities in the combined authority areas cater for 58.5% of main food trips (with Chesterfield accounting for 33.0%, Bolsover 10.0% and North East Derbyshire 15.5%) and 71.3% of top-up trips of residents across the Study Area (of which Chesterfield takes 27.8%, Bolsover 18.0% and North East Derbyshire 25.5%).

5.36 Of this, the majority of convenience expenditure is spent in out-of-centre stores in Chesterfield (24.5%), while Dronfield receives 6.9%, Clowne 6.0% and Clay Cross 4.7%.

- 5.37 Staveley, Clowne, Clay Cross and Killamarsh are identified as having either a lower or similar top-up market share as for main food shopping (as do out-of-centre facilities in Chesterfield), suggesting that they serve as the primary convenience destination for their local resident populations.
- 5.38 Chesterfield, Bolsover, Shirebrook, South Normanton, Dronfield and Eckington, however, cater for a greater proportion of top-up spending than on main food, reflecting the smaller convenience offer in the centres, and that local residents are willing to travel further afield to benefit from a wider convenience goods offer.

Comparison Goods

- 5.39 As identified in Figure 5.6 above, and as would be expected, Chesterfield captures a greater comparison goods market share than all other facilities in the authority area combined, with the other key centres offering very little to counter the significant comparison goods draw of Chesterfield Town Centre and the out-of-centre retail parks.
- 5.40 Whilst Chesterfield Town Centre caters for the highest proportion (33.6%) of clothing and footwear spending from residents across the Study Area, Other facilities in Bolsover attract a notable 5.6%, predominately due to the draw of facilities at the out-of-centre East Midlands Designer Outlet.
- 5.41 In terms of other comparison goods, Clay Cross attracts a greater proportion of books and other media spending than other centres, whilst a higher proportion of household spending is to Clowne (accounting for over a quarter of such spending from Zones 13 and 14). Dronfield caters for a notable proportion of spending on both chemist and DIY goods, though less than Chesterfield. Whilst it did not appear in the household survey, Sports Direct at Brook Park (located outside of Shirebrook) provides a significant sports and leisure goods offer.
- 5.42 Of the other key centres in the authority areas, Staveley in Chesterfield Borough, Bolsover in Bolsover District and Eckington and Killamarsh in North East Derbyshire District do not provide a significant proportion of any one category of comparison retail goods, instead providing a broad variety of comparison goods which is indicative of the more day-to-day function of the centres.

Leakage

- 5.43 Notably, in terms of leakage, the authority areas are bordered to the north by Sheffield, as well as Mansfield to the east and Nottingham to the south, whilst the west of the Study Area borders the Peak District National Park.

5.44 38.9% of convenience goods expenditure made by residents of the Study Area is 'lost' from retailers within the authority areas, while 54.5% of all comparison goods expenditure from residents of the Study Area is spent outside Chesterfield Borough, Bolsover District and North East Derbyshire District. This is referred to as 'Study Area Leakage'.

Figure 5.8 | Study Area Leakage by Destination at 2016 (%)

Destination	Study Area Leakage by Category (%)												Total Leakage (all retail)
	Convenience Spending			Comparison Spending									
	Main Food	Top-up	Total	Clothing	Books etc.	Household	Recreation	Chemist	Electrical	DIY	Furniture	Total	
Sheffield	12.6	9.3	11.9	29.1	27.0	25.0	28.2	14.2	20.1	17.2	22.7	24.8	19.2
Mansfield	9.7	4.4	8.7	10.2	11.2	9.7	8.2	7.2	14.7	8.7	7.2	9.9	9.4
Amber Valley	9.7	6.0	9.0	2.2	5.6	2.3	2.9	9.1	5.5	4.3	4.4	3.6	5.9
Ashfield	6.8	5.9	6.6	3.0	3.8	4.0	2.0	5.5	1.5	10.9	5.8	3.8	5.0
Nottingham	0.1	0.2	0.1	1.8	1.9	7.3	4.1	0.1	1.2	0.4	9.1	3.9	2.2
Bassetlaw	1.4	0.8	1.3	2.0	1.5	1.5	1.4	1.1	3.4	3.6	3.2	2.2	1.8
Others outside Authority Areas	1.2	2.2	1.4	6.8	5.3	6.9	7.2	5.3	6.2	2.6	6.2	6.3	4.2
Total Leakage	41.5	28.7	38.9	55.1	56.3	56.7	54.0	42.6	52.6	47.6	58.6	54.5	47.8

Source: Appendix D

5.45 Convenience goods leakage was focussed towards Sheffield, Amber Valley and Mansfield, each attracting 11.9%, 9.0% and 8.7% of convenience goods spending from residents across the Study Area.

5.46 Each centre attracted a higher proportion of main food spending than top-up goods spending, suggesting that residents are regularly making the journey to these centres for their convenience goods shopping (as opposed to carrying out this shopping alongside other activities such as work commutes). Interestingly, a closer proportion of convenience goods expenditure to facilities in Ashfield (and to a lesser extent, Nottingham and Bassetlaw) was made through top-up shopping, indicating that this spending was more likely to be associated with other activities. This can also be partially explained by the overlap in geographies across the Study Area, with residents of Zone 10 located within Ashfield District.

5.47 Leakage to physical retail stores is relatively consistent across each of the comparison goods categories, ranging from 52.6% to 58.6%, with the exception of chemist and DIY goods, where

42.6% and 47.6% (respectively) of spending at physical retail stores by residents across the Study Area is spent at destinations outside of the Study Area.

5.48 In terms of comparison goods retail destinations outside of the Study Area, Sheffield draws spending on a wide variety of comparison goods, while residents travel to Mansfield for clothing, media (such as books and CDs) and electrical goods. Nottingham draws a higher proportion of spending on small household goods and furniture from residents across the Study Area, whilst Ashfield would appear to have a more niche offering to residents of the Study Area, with a notable draw of DIY goods.

Summary

5.49 The proportion of convenience goods expenditure from residents of the Study Area spent in the authority areas is 61.0%, with Chesterfield catering for 32.0%, Bolsover 11.6% and North East Derbyshire 17.5%. Comparison goods spending to Chesterfield makes up 37.0% of all spending across the Study Area, with Bolsover and NED providing for 5.4% and 3.1%, respectively. In total, the authority areas retain 45.5% of comparison goods spending across the Study Area.

5.50 The majority of convenience goods spending in Chesterfield Borough was to facilities outside of the town centre, such as Tesco Extra, Lockford Lane (8.3%), Morrisons, Chatsworth Road District Centre (5.9%) and Sainsbury's, Rother Way (5.1%), with just 3.1% falling to town centre stores. Clowne Town Centre attracted the highest proportion of convenience goods spending in Bolsover District, anchored by Aldi, Mill Green Way (2.0%) and Tesco, Mill Street (4.0%). In North East Derbyshire District, Dronfield Town Centre and Clay Cross Town Centre both attract a high proportion of convenience goods spending, anchored by Sainsbury's, Wreakes Lane, Dronfield (5.4%) and Tesco Extra, Bridge St North, Clay Cross (4.2%) respectively.

5.51 In terms of comparison goods spending, facilities in Chesterfield Town Centre capture a greater market share (27.3%) than all other facilities in the authority area combined.

5.52 Nonetheless, South Normanton attracts a notable proportion of clothing and footwear spending (through the out-of-centre East Midlands Designer Outlet) from the Study Area.

5.53 Other key centres attract a greater proportion of specific comparison spending, with Clowne attracting a greater proportion of spending on household goods, Clay Cross a higher proportion on books and other media and Dronfield attracting a notable proportion of spending on both chemist and DIY goods (all excluding Chesterfield).

5.54 Focussing on changes in spending patterns for residents of the narrower 2007 Study Area

(Zones 1 to 7 and 11) to each of the authority areas, convenience spending to Chesterfield Borough fell from 49.2% in 2007 to 46.0% in 2016, whilst comparison goods spending fell from 53.4% to 50.2% over the same period. Bolsover District's market share grew from 2.0% to 4.9% (convenience) and 0.8% to 3.1% (comparison) over the past nine years. North East Derbyshire District's market share grew in convenience terms since 2007 (from 14.4% to 25.2%), whilst remaining relatively constant for comparison goods spending over the same period.

- 5.55 In terms of leakage, 38.9% of convenience goods trips from across the wider Study Area are made to facilities outside of Chesterfield Borough, Bolsover District and North East Derbyshire District (with Sheffield, Amber Valley and Mansfield accounting for 11.9%, 9.0% and 8.7%, respectively).
- 5.56 A total of 54.5% comparison goods expenditure from residents across the wider Study Area is spent outside of the authority areas, with Sheffield (including Crystal Peaks Shopping Mall and Retail Park) and Mansfield the most popular destinations, accounting for 24.8% and 9.9% of leakage respectively.

6.0 Quantitative Retail Capacity Assessment

Introduction

- 6.1 One of the key aims of this Study is to provide recommendations on the capacity for new retail floorspace to 2033. The use of long term projections should be treated with caution and reviewed regularly in order to test the accuracy of the forecasts against emerging datasets. External national and international factors can influence the wider performance of the economy, which can have trickle down effects on local shopping patterns. One such example has been the trend towards convenience discounters (such as Lidl and Aldi) in response to the period of economic downturn between 2008 and 2013.
- 6.2 We would also note that any identified quantitative retail capacity across the Study Area does not necessarily equate to a need for new retail floorspace in and of itself. Overtrading of stores within town centres may be beneficial to the overall health of a centre, particularly if there is no specific qualitative need. Any such development would be required to be assessed in line with national policy in terms of impacts on the vitality and viability of town centres, the potential to prejudice emerging town centre developments, and the 'town centre first' sequential approach to site selection.
- 6.3 Stage 2 of this Study goes on to consider the vitality and viability of the centres, including a qualitative assessment of the current retail offer and the qualitative need in the three authority areas.
- 6.4 Detailed quantitative retail capacity tables are enclosed at **Appendix D**.

Methodology

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

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

- 6.6 Experian MMG3 census software is used to provide localised expenditure per capita per annum for various forms of retail spending. These figures are then projected forwards on the basis of population growth, changes in expenditure over time and Special Forms of Trading (SFT) such as internet shopping.
- 6.7 The turnover of existing retailers across the Study Area is calculated on the basis of average sales densities, or turnover, per square metre. Various retail planning sources such as Verdict

UK Food & Grocery Company Briefing Reports and Mintel Retail Rankings provide average (or benchmark) sales densities for all national multiple retailers.

- 6.8 The surplus or deficit equates to the difference between the available retail expenditure across the Study Area and the turnover of the existing facilities within the Study Area. If the total turnover is greater than the available expenditure then the model would identify an oversupply of retail floorspace, whilst a surplus of expenditure would suggest capacity for additional retail floorspace.
- 6.9 Once the surplus or deficit of expenditure is calculated, it is then presented in floorspace figures (using average sales density assumptions) in order to demonstrate the findings within a 'real world' context. Often surplus figures are presented under a number of different scenarios representing various retailers, for example, considering convenience spend, discount retailers (such as Aldi and Lidl) operate at a lower sales density than the 'big 4' (Tesco, Asda, Sainsbury's and Morrisons).

Capacity for Future Convenience Goods Floorspace

- 6.10 For robustness, when assessing the capacity for new convenience retail floorspace we adopt a constant market share in line with findings of the latest household survey (i.e. that stores across the authority areas will continue to draw 61.1% of all convenience goods spending across the Study Area) on the basis of the comparable strength of offer of the surrounding centres.
- 6.11 In addition to allowing for growth in retail expenditure over the plan period (as considered in Section 4), we utilise data provided within the Experian Retail Planner Briefing Note in order to take account of forecast growth in efficiencies in retailers' trading (for example, through the adoption of new technologies and more efficient use of available floorspace). Floorspace efficiencies are estimated to have a greater impact on comparison retailers than convenience retailers over the plan period as the rise of food discounting continues to subdue projected efficiencies in turnover of existing convenience retail floorspace.
- 6.12 We go on to make a number of statistical assumptions through the quantitative capacity exercise in order to account for a number of variables:
- Utilising a 'goods based' approach, we strip out expenditure for non-food comparison goods such as clothing, household goods, CDs, DVDs and other media that are now commonly sold at major foodstores. These assumptions are made in line with floorspace figures sourced from Verdict UK or, where data is not available, Nexus' professional judgement based on site visits.

- We also make assumptions as to the gross to net sales floorspace of each store, again utilising online planning records where available, Verdict UK Food & Grocery Retailers 2015 or Nexus' professional judgement.
 - Finally, we consider whether foodstores are likely to attract any additional 'inflow' from outside of the Study Area. Based on the localised nature of convenience food shopping and the significant extent of the Study Area it is unlikely that convenience destinations draw any significant amount of trade from outside of the Study Area. As such, we do not assume any inflow of trade from residents beyond the Study Area.
- 6.13 We then go on to calculate the anticipated turnover of all major convenience goods operators on the basis of the published company sales data, referred to as 'benchmark' turnover. 'Benchmark' turnover is calculated from national average 'sales densities' (turnover per square metre) from sources such as Verdict UK Food & Grocery Company Briefing Reports and Mintel Retail Rankings. By comparing the turnover estimates derived from the findings of the household survey (total available expenditure distributed on the basis of each destinations market share) to the benchmark turnovers, we are able to establish where stores are trading above (overtrading) or below (undertrading) company averages. For stores located outside of designated town centres, surplus expenditure over and above benchmark turnover is considered to be available as this suggests that existing convenience goods providers in the Study Area are stretched and overproviding to meet the existing need.
- 6.14 As smaller convenience retailers and local traders may not publish annual turnover figures and there is not a standardised dataset available, local town centre stores are assumed to be trading in line with the findings of the household survey (at 2016), or 'at equilibrium'. We provide a detailed assessment of this benchmark exercise measuring the performance of convenience retailers at Table 5, **Appendix D**.
- 6.15 Discount convenience retailers have traditionally served a different market and customer base to traditional supermarkets, such as the 'big 4'. However, since the recession, there has been a growing trend towards shopping at discount retailers, or combining trips to both formats which has reduced traditional retailer's turnover, whilst increasing spending at discounters. This blending of the two markets has been reflected in the gradual decrease in the sales density (and profit margins) of the big 4 retailers over recent years, and the increase of the sales densities of discounters such as Aldi.
- 6.16 On the basis of the household survey, we identify that convenience retailers within the authority areas turnover an estimated £534.8m, more than the benchmark turnover of £440.4m at 2016. This overtrade equates to a surplus of £100.4m of expenditure across the Study Area, or 22.8%

above company averages. Notably, the trading performance of convenience stores in each of the authority areas suggest an overtrade above company averages, often as a result of either undersupply of convenience retailers, or the dominance of one or two particular stores.

- 6.17 Convenience retailers serving residents of Chesterfield Borough are found to be overtrading by a combined £30.5m (12.1%). In particular, the Morrisons at Chatsworth Road District Centre and Aldi at Lockoford Road are identified as overtrading by £26.6m (107.5%) and £9.6m (137.5%), respectively, whilst the Marks & Spencer and Tesco Metro in the town centre are seen to be undertrading by £-7.4m (-66.4%) and £-8.7m (-44.7%), respectively.
- 6.18 Bolsover District retailers were seen to be trading £23.0m (22.8%) above company averages, with Aldi in Clowne (£10.6m, or 146.9%) and Shirebrook (£10.3m, or 146.8%) performing particularly well, whilst a number of local Co-op stores across the District were undertrading.
- 6.19 We calculated that convenience stores within North East Derbyshire District were trading £47.0m (43.6%) above company averages, primarily due to a significant level of overtrading at Aldi (£20.5m, or 292.0%) and Sainsbury's (£29.7m, or 164.9%) in Dronfield, whilst the Tesco Extra in Clay Cross was seen to be undertrading by £-7.9m (-17.4%).
- 6.20 Full details of the overtrading / undertrading performance of each store is detailed at Table 5, **Appendix D**.

Figure 6.1 | Convenience Goods Surplus in Bolsover District, Chesterfield Borough and North East Derbyshire District

Year	Turnover (£m) ¹	Available Expenditure (£m) ²	Inflow (£m)	Surplus Expenditure (£m)
2016	440.4	540.8	0.0	100.4
2021	436.8	540.3	0.0	103.4
2026	437.3	548.0	0.0	110.7
2031	439.5	557.0	0.0	117.6
2033	440.3	561.1	0.0	120.7
Study Area Market Share (%)		61.0		

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

² Assumes constant market share claimed by Bolsover District, Chesterfield Borough and North East Derbyshire District facilities at 61.0% from Study Area (allows for no inflow uplift)

Source: Table 6a, Appendix D

- 6.21 Tying the methodology together, Figure 6.1 above identifies a surplus of £100.4m expenditure in 2016 on the basis of current levels of overtrading, rising to £103.4m in 2021 taking account of increases in population and expenditure. A surplus of £110.7m available expenditure is estimated by 2026, growing to £117.6m at 2031 and £120.7m at 2033.

6.22 This surplus in resident spending is contrary to the turnover forecasts for convenience goods retailers across the Study Area over the same time period, which are forecast to fall to 2021, with a slight uplift at 2026 to 2033. This is due to continued pressures to cut costs and further reduce pricing (in response to the rising market share of discount operators), in spite of an allowance for increases in floorspace efficiency and extensions in floorspace.

Figure 6.2 | Convenience Goods Floorspace Capacity in Bolsover District, Chesterfield Borough and North East Derbyshire District

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2016	100.4	75.3	25.1	1,900	2,800
2021	103.4	74.7	28.7	2,200	3,300
2026	110.7	74.8	35.9	2,800	4,100
2031	117.6	75.2	42.4	3,300	4,800
2033	120.7	75.3	45.4	3,500	5,100

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

² Average sales density assumed to be £8,850 per sq m (rounded) based on the average sales density of discount operators as identified by Verdict 2015 and Mintel 2016

Source: Table 6d, Appendix D

6.23 We go on to consider committed, emerging and extant permissions (as well as any significant current planning applications) for new convenience retail floorspace across the authority areas that could come forward over the next few years. These equate to a net convenience floorspace of 8,484 sq m and an estimated turnover of £75.3m.

6.24 Notably, these commitments include proposed developments for new retail floorspace, as well as floorspace that is proposed to be lost where occupiers have announced that they are to cease trading.

6.25 Taking account of all committed turnover, we identify a residual turnover of £25.1m at 2016, rising to £45.4m at 2033. Using average sales densities to cater for minimum (a large supermarket operator) and maximum (a combination of discount foodstores and larger supermarket operators) scenarios, we calculate that there is capacity for between 3,500 sq m and 5,100 sq m of new (net) convenience retail floorspace, should all of the committed developments come forward as identified in **Appendix D** (Table 6d).

6.26 As shown in Figure 6.3, we then go on to consider the 'likely scenario' and the committed retail floorspace that is likely to come forward over the next few years. Our assumptions are based on discussions with planning officers, company statements and local media reports where applicable.

6.27 In producing a 'likely scenario', we disregard current undetermined applications, such as the former Walton Works and Perrys Ford Garage in Chesterfield, thereby reducing the convenience turnover of the committed floorspace in 2016 from £75.3m to £52.3m.

Figure 6.3 | Likely Convenience Goods Floorspace Capacity in Bolsover District, Chesterfield Borough and North East Derbyshire District

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2016	100.4	52.3	48.1	3,700	5,400
2021	103.4	51.9	51.5	4,000	5,900
2026	110.7	52.0	58.7	4,600	6,700
2031	117.6	52.2	65.3	5,100	7,400
2033	120.7	52.3	68.4	5,300	7,800

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

² Average sales density assumed to be £8,850 per sq m (rounded) based on the average sales density of discount operators as identified by Verdict 2015 and Mintel 2016

Source: Table 6f, Appendix D

6.28 Across the authority areas as a whole, taking account of the turnover of commitments that are likely to come forward over the plan period, we identify a total residual expenditure surplus of £48.1m at 2016, rising to £68.4m by 2033. Given minimum and maximum average sales densities, we calculate that there will be capacity for between 3,700 sq m and 5,400 sq m of new convenience goods floorspace at 2016, rising to between 4,000 sq m and 5,900 sq m at 2021, between 4,600 sq m and 6,700 sq m at 2026, between 5,100 sq m and 7,400 sq m at 2031 and between 5,300 sq m and 7,800 sq m at 2033.

6.29 We then go on to consider the location of the convenience floorspace capacity, sub-divided between each of Chesterfield Borough, Bolsover District and North East Derbyshire District on the basis of the available expenditure and current market shares from the resident population of the Study Area.

Figure 6.5 | Likely Convenience Goods Floorspace Capacity in Chesterfield Borough

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2016	30.5	16.2	14.2	1,100	1,600
2021	32.2	16.1	16.1	1,300	1,800
2026	36.0	16.1	19.9	1,600	2,300
2031	39.5	16.2	23.3	1,800	2,600
2033	41.1	16.2	24.8	1,900	2,800

Assumes constant market share claimed by Chesterfield Borough facilities at 32.0% from Study Area (no inflow uplift)

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

² Average sales density assumed to be £8,850 per sq m (rounded) based on the average sales density of discount operators as identified by Verdict 2015 and Mintel 2016

Source: Table 6l, Appendix D

Figure 6.6 | Likely Convenience Goods Floorspace Capacity in Bolsover District

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2016	23.0	8.7	14.3	1,100	1,600
2021	23.5	8.6	14.9	1,200	1,700
2026	24.9	8.6	16.3	1,300	1,900
2031	26.2	8.7	17.6	1,400	2,000
2033	26.9	8.7	18.2	1,400	2,100

Assumes constant market share claimed by Bolsover District facilities at 11.6% from Study Area (no inflow uplift)

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

² Average sales density assumed to be £8,850 per sq m (rounded) based on the average sales density of discount operators as identified by Verdict 2015 and Mintel 2016

Source: Table 6t, Appendix D

Figure 6.7 | Likely Convenience Goods Floorspace Capacity in NE Derbyshire District

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2016	47.0	27.4	19.6	1,500	2,200
2021	47.7	27.2	20.5	1,600	2,300
2026	49.8	27.2	22.6	1,800	2,600
2031	51.9	27.4	24.5	1,900	2,800
2033	52.8	27.4	25.4	2,000	2,900

Assumes constant market share claimed by NE Derbyshire District facilities at 17.5% from Study Area (no inflow uplift)

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

² Average sales density assumed to be £8,850 per sq m (rounded) based on the average sales density of discount operators as identified by Verdict 2015 and Mintel 2016

Source: Table 6p, Appendix D

6.30 Having taken account of the projected turnover of local commitments in **Chesterfield Borough**,

we find an identified residual expenditure of £14.2m in 2016, which equates to a convenience goods floorspace capacity of between 1,100 sq m and 1,600 sq m. In line with forecast population, expenditure and retail efficiency growth, this available capacity is projected to rise to between 1,300 sq m and 1,800 sq m of net convenience goods floorspace in 2021, between 1,600 sq m and 2,300 sq m at 2026, between 1,800 sq m and 2,600 sq m at 2031 and between 1,900 sq m and 2,800 sq m at 2033. We would suggest that this capacity available over the study period could be met through the development of new convenience retail floorspace in Chesterfield Town Centre, having specific regard to the potential to 'claw back' trade from the overtrading of facilities located outside of the town centre.

- 6.31 In calculating the available convenience floorspace capacity in **Bolsover District**, we identify an available expenditure of just £14.3m in 2016, which is forecast to rise marginally to £18.2m by 2033. This equates to a convenience goods floorspace capacity of between 1,100 sq m and 1,600 sq m at 2016, rising to between 1,400 sq m and 2,100 sq m by 2033. In purely quantitative terms, this capacity is considered to be sufficient to support the provision of new convenience retail floorspace over the plan period.
- 6.32 **North East Derbyshire District** is calculated to have an available residual expenditure of £19.6m at 2016, rising to £25.4m by 2033 due to projected population growth over the plan period, as well as overtrading of existing retailers. This gives rise to a net available capacity for between 1,500 sq m and 2,200 sq m of convenience goods floorspace at 2016, rising to between 2,000 sq m and 2,900 sq m at 2033. In light of the relative strength of the convenience retail provision in Dronfield, we would consider that North East Derbyshire District would, in quantitative terms, have capacity to support new convenience goods floorspace by 2033. Notably, this does not account for any planned intervention such as the emerging housing allocations and would allow for a plan-led approach to providing new retail floorspace within major housing allocations, where appropriate.

Capacity for Future Comparison Goods Floorspace

- 6.33 The methodology for calculating capacity for comparison goods floorspace differs from that used to model capacity for convenience goods floorspace. The principal reason for this is that there are no robust, industry standard benchmark sales densities for calculating the turnover of smaller independent retailers that typically make up the majority of the comparison provision of town centres (although it is noted that Mintel Retail Rankings do provide published sales densities for national multiple comparison retailers). Moreover, the trading levels of comparison retailers can fluctuate significantly depending on a number of localised variables, most notably the location of the retailer relative to similar providers (as customers are likely to link multiple comparison goods trips and retailers in close proximity to each other provide a greater draw).

- 6.34 As such, we adopt the approach that comparison goods retailers across the Study Area are trading 'at equilibrium' at 2016 (which adopts the survey derived turnover) and examine capacity by measuring the growth in available expenditure to 2033.
- 6.35 Based on the survey findings, we estimate that (at 2016) comparison goods retailers within Chesterfield Borough, Bolsover District and North East Derbyshire District turnover £571.4m, or 45.5% of available comparison goods expenditure in the Study Area. We adopt a constant market share, assuming that the performance of comparison retailers within the authority areas continues to be commensurate with its current market share. This equates to a total turnover of £815.8m by 2033.
- 6.36 We also make the assumption that facilities in Chesterfield Town Centre derive 10% of additional turnover from tourists, commuters and other visitors from outside of the surveyed Study Area. This additional expenditure, or 'inflow', equates to £32.4m of additional turnover, or 6.0% of additional expenditure.
- 6.37 Taking account of population and expenditure growth and forecast floorspace efficiencies, we identify a surplus expenditure of £6.7m at 2021, rising to £47.8m by 2026, £106.5m by 2031 and £134.1m at 2033.

Figure 6.8 | Comparison Goods Surplus in Bolsover District, Chesterfield Borough and North East Derbyshire District

Year	Turnover (£m) ¹	Available Expenditure (£m) ²	Inflow (£m)	Surplus Expenditure (£m)
2016	571.4	539.0	32.4	0.0
2021	627.1	597.9	35.9	6.7
2026	700.5	705.9	42.4	47.8
2031	781.1	837.3	50.3	106.5
2033	815.8	896.1	53.9	134.1
Study Area Market Share (%)		45.5		

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

² Assumes constant market share claimed by Bolsover District, Chesterfield Borough and North East Derbyshire District facilities at 45.5% from the Study Area

Source: Table 26a, Appendix D

- 6.38 As with convenience capacity modelling, we have taken account of committed comparison retail goods floorspace (as well as notable pending planning applications) across the authority areas, which equates to a total of 23,722 sq m, or an initial £63.7m of committed comparison goods turnover at 2016, rising to £90.1m by 2033.

Figure 6.9 | Comparison Goods Floorspace Capacity in Bolsover District, Chesterfield Borough and North East Derbyshire District

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2021	6.7	69.9	-63.2	-10,500	-16,500
2026	47.8	78.1	-30.3	-4,500	-7,100
2031	106.5	87.1	19.4	2,600	4,000
2033	134.1	91.0	43.2	5,500	8,600

¹ Average sales density assumed to be £5,500/sq m which Nexus considers to be towards the upper end of what could be achieved in the authority areas

² Average sales density assumed to be £3,500/sq m which Nexus considers to be towards the lower end of what could be achieved in the authority areas

Source: Table 26d, Appendix D

- 6.39 Figure 6.9 identifies a residual expenditure deficit of £-63.2m at 2021, rising to a surplus of £19.4m at 2031 and £43.2m at 2033.
- 6.40 We go on to utilise average sales densities for high street retailers (the upper end of what could be achieved) to provide assumed minimum floorspace estimates and average sales densities for bulky goods retailers (the lower end of what could be achieved) to provide assumed maximum comparison goods floorspace capacity estimates.
- 6.41 This available residual spend equates to a negative comparison goods floorspace capacity at 2021, rising to between an estimated 2,600 sq m and 4,000 sq m at 2031 and between 5,500 sq m and 8,600 sq m at 2033.
- 6.42 We also look at the 'likely scenario' following an assessment of the likelihood of committed developments coming forward over the study period (identified at Table 26e at **Appendix D**), again 'stripping out' potential turnover of schemes that have yet to be determined, namely the former Walton Works and Perrys Ford Garage in Chesterfield, the extension to Sports Direct at Brook Park, Shirebrook and the proposed Park 38 Scheme, South Normanton in Bolsover District amongst others. This has the effect of reducing the committed turnover by 38.0% to £39.5m.
- 6.43 Considering only the turnover of the comparison goods retail commitments likely to come forward over the study period provides a residual expenditure deficit of £-39.5m at 2016, rising to £-36.6m at 2021 and £-0.6m at 2026. By 2031, we estimate a residual expenditure surplus of £52.5m, rising to £77.7m at 2033.
- 6.44 This available expenditure would provide a negative comparison goods floorspace capacity to 2026. By 2031, the surplus of residual expenditure would allow for an estimated comparison

goods floorspace capacity of between 7,000 sq m and 11,000 sq m, rising to 9,900 sq m and 15,600 sq m at 2033.

- 6.45 This growth in new comparison goods floorspace capacity is due to forecast increases in turnover efficiency including more efficient reconfigurations to store layouts, improvements in stores supply chains and the incorporation of new technologies (such as self-scan checkouts) in retailers over the plan period.

Figure 6.10 | Likely Comparison Goods Floorspace Capacity in Bolsover District, Chesterfield Borough and North East Derbyshire District

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2021	6.7	43.4	-36.6	-6,100	-9,500
2026	47.8	48.4	-0.6	-100	-100
2031	106.5	54.0	52.5	7,000	11,000
2033	134.1	56.4	77.7	9,900	15,600

¹ Average sales density assumed to be £5,500/sq m which Nexus considers to be towards the upper end of what could be achieved in the authority areas

² Average sales density assumed to be £3,500/sq m which Nexus considers to be towards the lower end of what could be achieved in the authority areas

Source: Table 26f, Appendix D

- 6.46 As with the convenience floorspace capacity assessment above, we go on to assess the capacity for net additional comparison goods floorspace across each of Chesterfield Borough, Bolsover District and North East Derbyshire District, taking account of the forecast population and expenditure growth on the basis of existing market share shopping patterns.

Figure 6.11 | Likely Comparison Goods Floorspace Capacity in Chesterfield Borough

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2021	5.6	8.5	-3.0	-500	-800
2026	39.4	9.5	29.8	4,400	7,000
2031	87.7	10.6	77.1	10,300	16,100
2033	110.5	11.1	99.4	12,700	19,900

Assumes constant market share claimed by Chesterfield Borough facilities at 37.0% from Study Area

¹ Average sales density assumed to be £5,500/sq m which Nexus considers to be towards the upper end of what could be achieved in Chesterfield Borough

² Average sales density assumed to be £3,500/sq m which Nexus considers to be towards the lower end of what could be achieved in Chesterfield Borough

Source: Table 26l, Appendix D

Figure 6.12 | Likely Comparison Goods Floorspace Capacity in Bolsover District

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2021	0.8	27.3	-26.5	-4,400	-6,900
2026	5.3	30.5	-25.2	-3,700	-5,900
2031	11.9	34.0	-22.1	-2,900	-4,600
2033	14.9	35.5	-20.6	-2,600	-4,100

Assumes constant market share claimed by Bolsover District facilities at 5.4% from Study Area

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

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

Source: Table 26v, Appendix D

Figure 6.13 | Likely Comparison Goods Floorspace Capacity in NE Derbyshire District

Year	Surplus Expenditure (£m)	Commitments (£m)	Residual Expenditure (£m)	Floorspace Capacity (sq m net)	
				Min ¹	Max ²
2021	0.4	7.5	-7.1	-1,200	-1,800
2026	3.1	8.4	-5.3	-800	-1,200
2031	6.9	9.4	-2.4	-300	-500
2033	8.7	9.8	-1.0	-100	-200

Assumes constant market share claimed by NE Derbyshire District facilities at 3.1% from Study Area

¹ Average sales density assumed to be £5,500/sq m which Nexus considers to be towards the upper end of what could be achieved in NE Derbyshire District

² Average sales density assumed to be £3,500/sq m which Nexus considers to be towards the lower end of what could be achieved in NE Derbyshire District

Source: Table 26p, Appendix D

- 6.47 **Chesterfield Borough** generates a total residual expenditure deficit of £-3.0m in 2021, rising to £99.4m by 2033 (having regard to the likely comparison goods commitments within the zone). This available expenditure would provide a significant estimated net comparison goods floorspace capacity of between 4,400 sq m and 7,000 sq m by 2026, rising to 10,300 sq m and 16,100 sq m at 2031 and between 12,700 sq m and 19,900 sq m at 2033.
- 6.48 **Bolsover District** is calculated to have an available residual expenditure deficit of £-26.5m at 2021, rising to £20.6m by 2033. This does not provide any capacity for additional comparison goods floorspace across the District over the plan period, primarily on the basis of the forecast turnover of the comparison goods commitments that are likely to come forward over this period.
- 6.49 The residual expenditure generated within **North East Derbyshire District** provides a deficit of £-7.1m in 2016, rising marginally to just £-1.0m by 2033. On this basis, we estimate that North East Derbyshire District would not have any capacity for new comparison goods floorspace by 2033.

Summary

- 6.50 Under the scenario where only the retail floorspace commitments that are likely to come forward are considered, we identify capacity for the delivery of between 5,300 sq m and 7,800 sq m of net additional convenience floorspace and between 9,900 sq m and 15,600 sq m of net additional comparison floorspace across the authority area by 2033, on the basis of current market share patterns.
- 6.51 Of this, Chesterfield Borough is estimated to provide for the majority of convenience goods floorspace (between 1,900 sq m and 2,800 sq m by 2033), whilst Bolsover District capacity is forecast between 1,400 sq m and 2,100 sq m by 2033. North East Derbyshire is estimated to provide between 2,000 sq m and 2,900 sq m of capacity for new retail floorspace over the plan period (by 2033).
- 6.52 In terms of comparison goods floorspace capacity, Chesterfield Borough is the only authority area to demonstrate any quantitative capacity for new floorspace (between 12,700 sq m and 22,600 sq m by 2033), whilst Bolsover District and North East Derbyshire District are not forecast to generate any capacity for comparison goods floorspace (in addition to the comparison good commitments) over the study period to 2033.

7.0 Leisure and Other Town Centre Uses

Introduction

- 7.1 The leisure market has undergone drastic structural changes over the past few years. The economic downturn of 2008 to 2013 significantly changed consumers' spending behaviours. Even though overall spending was down, the popularity of going to the cinema or theatre has steadily increased, as has eating out at restaurants, cafés, or purchasing takeaway meals. Additionally, as the health and fitness world flourishes, the number of fitness centre memberships has steadily increased. ONS reported that in 2006 average weekly spend on 'sports admissions, subscriptions, leisure class fees and equipment hire' was £5.80 and in 2014 it had increased to £6.90. Further commentary on recent and emerging leisure trends is included in Section 2 of this report.
- 7.2 This section of the Retail and Centres Study provides a concise analysis of current and predicted trends influencing the leisure sector, as well as an examination of the performance of the existing leisure base in the joint Council area.

Methodology

- 7.3 The results of the NEMS household survey offer an indication of locations/facilities where residents of the Study Area satisfy their leisure and cultural needs. As such, the survey enables us to analyse patterns of travel and potential deficiencies (those that are qualitative in nature) in the joint Council area of provision.
- 7.4 The modelling of future commercial leisure needs cannot be based upon the same quantitative model used to estimate retail need (as we have done in Section 6 by estimating future expected expenditure). We therefore appraise existing provision against recognised sector 'standards' or 'benchmarks'. The completion of this 'benchmarking exercise' allows us to establish deficits and where gaps in the provision of existing facilities may be.
- 7.5 There is a limited collection of uses within the leisure market for which reliable data can be obtained. These include; gyms and leisure centres, cinemas, and ten pin bowling. These uses require proportionally larger properties, and by virtue of their size land parcels/sites may need to be identified through the development plan process and land allocated accordingly.
- 7.6 Public houses, restaurants, clubs, are typically accommodated in smaller units. By nature of their smaller size, the market can generally deliver units of this size unaided by intervention by the development plan process through allocations.

Existing Market Share by Leisure and Cultural Sector

- 7.7 The NEMS household survey (completed in November 2016) asked respondents to describe their leisure and cultural activities and habits. The responses to these questions (Questions 36 to 54) inform our understanding of leisure trends and needs. The breakdown of the answers to these questions is set out in full within **Appendix C** and we extrapolate the key results in this Section.
- 7.8 In the following sections we summarise and interpret the responses given to the household survey, paying particular attention to distance travelled in order to identify any gaps in provision, as well as general levels of satisfaction with the areas provision of leisure and cultural facilities.

Participation in Leisure Activities

- 7.9 In the first instance it is important to have an understanding of the participation rates and general popularity of leisure activities across the Study Area. In Question 36 of the household survey NEMS asked respondents to identify all of the leisure activities they participated in (respondents were allowed to identify as many options as they wished).
- 7.10 As evident in Figure 7.1, the most popular leisure activity across the Study Area is to go to a restaurant, which 58.6% of Study Area respondents indicated they do on at least an occasional basis. The second most popular activity is visiting bars or pubs, which 43.9% of the respondents to Question 36 identified as an activity they partake in. Following this, 38.3% of respondents visit the cinema, while 36.4% visit theatres and concert halls. Visiting nightclubs (6.7%) and Bingo halls (7.2%) are found to be least popular activities for respondents to partake in. In general, based on our work elsewhere in the country, we would note that leisure participation rates are generally lower in this Study Area than elsewhere. For example, cinema trips are usually undertaken by over half of any given study population, but is just 38.3% in this instance.
- 7.11 We also isolate the figures for each authority area in Figure 7.1. Some differences worthy of note are as follows:
- Residents in the Chesterfield area are generally more likely to undertake indoor or outdoor sports activities.
 - Social activities (restaurants, bars and pubs, nightclubs and social clubs) are all most popular with residents in the North East Derbyshire area.
 - Cultural activities (theatre/concert halls/museums/art galleries) are less likely to be

undertaken by residents in Bolsover.

Figure 7.1 | Participation in Leisure Activities (%)

Activity	Study Area Average	Chesterfield Area (Zones 1-3)	North East Derbs Area (Zones 4-7)	Bolsover Area (Zones 9 & 11-14)
Indoor Sports	16.8	22.1	14.9	15.2
Cinema	38.3	35.1	44.0	35.3
Restaurant	58.6	59.7	60.3	56.8
Pubs and Bars	43.9	45.0	48.7	40.9
Nightclub	6.7	3.4	10.5	4.3
Social Club	7.5	5.1	9.5	9.4
Ten Pin Bowling	13.0	16.0	14.1	11.4
Bingo	7.2	9.2	5.6	7.9
Theatre / Concert Hall	36.4	39.6	41.9	30.1
Museum / Art Galleries	20.4	24.4	23.5	13.6
Outdoor Activities	22.2	24.4	23.4	15.9
(None Mentioned)	19.8	22.0	17.6	20.4

Source: Question 36 of NEMS Household Survey, Appendix C

Leisure Destinations

7.12 NEMS then asked a series of questions to understand where residents of each zone usually undertook their chosen leisure activity. Notably, when considering resident of each authority area, we exclude Zones 8 and 10 which are largely outside of the authority areas.

7.13 These results are summarised in Figure 7.2 below. In each case, we have focused on the most popular three venues.

Figure 7.2 | Most Popular Leisure Destinations by Zone (%)

Activity	Study Area Average	Chesterfield Area (Zones 1-3)	North East Derbs Area (Zones 4-7)	Bolsover Area (Zones 9 & 11-14)
Indoor Sports	<i>Queens Park Sports Centre, Chesterfield</i>	<i>Queens Park Sports Centre, Chesterfield</i>	Dronfield Sports Centre	Creswell Leisure Centre
Cinema	<i>Cineworld, Chesterfield</i>	Cineworld, Chesterfield	Cineworld, Chesterfield	Odeon, Mansfield
Restaurant	<i>Chesterfield</i>	Chesterfield	Sheffield	Chesterfield
Pubs and Bars	<i>Chesterfield</i>	Chesterfield	Sheffield	Bolsover
Ten Pin Bowling	<i>Chesterfield Bowl</i>	Chesterfield Bowl	Chesterfield Bowl	Chesterfield Bowl
Bingo	<i>Mecca, Chesterfield</i>	Mecca, Chesterfield	Mecca, Sheffield	Other, Zone 12
Theatre /Concert Hall/Museum/Gallery	<i>Sheffield</i>	Chesterfield	Sheffield	Nottingham
Outdoor Sports	<i>Chesterfield</i>	Chesterfield	Sheffield	Bolsover

Source: Questions 36-51 of NEMS Household Survey, Appendix C

7.14 Figure 7.2 highlights that Chesterfield is largely self-sufficient when it comes to meeting the majority of its own resident’s needs. Bolsover, and particularly NE Derbyshire, are far less self-sufficient when it comes to meeting their own resident’s needs. This is perhaps not unexpected given the circle of larger sub-regional centres, including Sheffield, Nottingham and Mansfield, which are readily accessible to residents.

7.15 We consider below a more in-depth analysis on a sector-by-sector basis of where residents are carrying out their trips.

Indoor Sports & Health and Fitness

7.16 As set out in Figure 7.1, the survey highlighted that 16.8% of Study Area residents participate in health and fitness centre activities. Participation rates are broadly similar across the Study Area, though are notably higher in the Chesterfield area, reflecting the nearby availability of a number of facilities.

7.17 The results to Q37 at **Appendix C** show that popular destinations for Chesterfield area residents are the Queens Park Sports Centre (33.4% of all trips), the Healthy Living Centre (12.1%) and Nuffield Health (11.1%); all in Chesterfield itself. Overall, 76.1% of all health and fitness trips made by residents of Chesterfield, are made to leisure destinations within the Borough itself.

- 7.18 Travel patterns are different in NE Derbyshire (44.9%) and Bolsover (50.6%), where retention rates are considerably lower. Nevertheless, for the relative size of the towns present in each case, and given the relative size of nearby towns and cities, we do not consider this too concerning. It is quite common for residents to exercise close by their place of work, and we would expect out-commuting to be greater from NE Derbyshire and Bolsover, then from Chesterfield.
- 7.19 Notwithstanding this, the largest single attractor of visits in each case was within the District itself. In NE Derbyshire this was Dronfield Sports Centre (29.5% of all trips), and in Bolsover it was Creswell Leisure Centre (21.7%).
- 7.20 Q38 suggests that residents of the Study Area who undertake health and fitness visits, do so around 2 times a week.

Cinemas

- 7.21 38.3% of Study Area residents make cinema trips. The Cineworld in Chesterfield is the only multiplex cinema within the combined Council areas, and so understandably attracts the majority of all trips. The complex attracts 53.6% of all trips, broken down by 95.6% of trips made by Chesterfield residents, 53.7% of trips made by NE Derbyshire residents, and 32.7% of trips made by Bolsover residents.
- 7.22 This makes the Cineworld the most popular destination for both Chesterfield and NE Derbyshire residents. However, Bolsover residents are just as likely to turn towards the Odeon in Mansfield, which currently attracts 38.5% of all cinema trips made by residents of the District.
- 7.23 Q40 shows that, on average, residents of the District who undertake a cinema trip, do so around once every 6 weeks.

Restaurants

- 7.24 58.6% of Study Area residents make restaurant trips. Q41 shows that Chesterfield provides for 64.0% of its own residents needs within the Borough itself. Sheffield is the next most popular destination for residents travelling farther afield (15.9% of trips).
- 7.25 Residents in NE Derbyshire are though much less likely to dine out locally, with only 22.3% of trips being carried out within the District itself. Dronfield (15.2%) accounted for the majority of those trips. Larger numbers of residents though preferred to travel to Sheffield (35.2%) or to Chesterfield (22.4%).

- 7.26 The pattern in Bolsover is similar, with only 21.1% of residents choosing to dine out locally. Residents in Bolsover District though travel to a wide range of destinations. Similar number of people travel to Chesterfield (14.1%), Mansfield (12.3%), Sheffield (8.4%), Nottingham (8.0%) and Worksop (6.6%).
- 7.27 Q42 suggests that, on average, residents of the Study area who visit restaurants, do so around once every fortnight.

Bars, Pubs, Social Clubs and Nightclubs

- 7.28 Q43 of the survey again shows residents of Chesterfield Borough (80.9%) as being more likely to socialise within the Borough than residents in either NE Derbyshire District (47.4%) or Bolsover District (47.0%). Notably though, Bolsover (town) is the most popular destination for residents of Bolsover District.

Ten Pin Bowling

- 7.29 Only 13.0% of Study Area residents play ten pin bowling. Of those that do, 61.7% do so at the only dedicated Ten-Pin Bowling facility within the combined Council areas; The Chesterfield Bowl. This is the most popular destination for residents of all three Council areas.
- 7.30 The Hollowood Bowl facility in Sheffield also proves popular though with residents of NE Derbyshire (35.8% of all trips), whilst the Mansfield Superbowl (31.5%) and Strikes in Alfreton (22.5%) are also popular with residents in Bolsover District.
- 7.31 Q46 suggested that those who undertake ten-pin bowling trips, do so on average around every 3 months.

Bingo

- 7.32 Only 7.2% of Study Area residents play bingo regularly. The Mecca in Chesterfield accounts for nearly all participation in Chesterfield Borough (95.4%). Residents in NE Derbyshire prefer though to travel to Sheffield, with the Gala and Mecca sites there accounting for over 55% of all trips. 'Other destinations in Zone 12' accounted for 42.2% of most recent bingo trips from residents of Bolsover, which could be in reference to local events from Shirebrook Town Council and Langwith Parish Council. Alternatively, given the wording of the question referring 'the centre of facility that was last visited', this could refer to other long derelict facilities in Shirebrook.
- 7.33 Q48 suggests that those residents in the Study Area who play bingo, do so on average around

once a fortnight.

Theatres, Galleries and Museums

- 7.34 Only 21.5% of cultural trips made by residents of the combined District areas, are carried out within the Council areas themselves. Chesterfield (19.6%) accounts for the vast majority of those trips.
- 7.35 Sheffield is though the most popular destination for residents within the Study Area (38.2%). Nottingham (11.5%) and London (9.7%) are also notable destinations.
- 7.36 Q50 of the survey suggested that residents undertake a trip to cultural facilities around once every three months.

The Need for Additional Leisure Facilities

- 7.37 Question 54 of the household survey found that the majority of respondents across the three Council areas (71.2%) did not identify any leisure facilities that they wished to see more of. This suggests that residents are largely happy with the provision of facilities. Such a response is at the higher end of typical responses to such a question in our experience.
- 7.38 In Figure 7.3 we isolate the responses of each Council area to identify what the main requests for new leisure facilities were from residents in each area. More than one suggestion was allowed.
- 7.39 The results show that a new swimming pool was the most requested leisure facility (8.2% across the Study Area), with a leisure centre (2.9%) and outdoors sports facilities (2.8%) showing up as the third and fourth most popular requests.
- 7.40 To the greatest extent, these figures derive from requests from residents in Bolsover District, where there is clearly a feeling that a new sports facility, to include a swimming pool, is required. At the time of our survey though, the Council had not yet opened its new Go! Active Leisure Centre at Clowne, which includes a swimming pool. This facility is now open, though there are concurrent plans to re-purpose the existing Creswell Leisure Centre, which may also be a factor.
- 7.41 The request for additional children's facilities is also a notable response in all three Council areas.

Figure 7.3 | Leisure Facilities residents wish to see more of (%)

Activity	Study Area Average	Chesterfield Area (Zones 1-3)	North East Derbs Area (Zones 4-7)	Bolsover Area (Zones 9 & 11-14)
None or Don't Know	71.2	75.6	74.4	69.8
Swimming Pool	8.2	6.0	3.6	24.1
More Children's Facilities	6.1	4.9	6.6	9.7
Leisure Centre	2.9	1.3	1.2	8.5
Outdoor Sports Facilities	2.8	3.6	2.4	2.7
Outdoor Play Areas	2.2	1.8	2.5	2.1
Cycle Paths	2.2	6.1	0.8	1.3

Source: Question 54 of NEMS Household Survey, Appendix C (multiple responses allowed to this question)

Capacity for Additional Leisure Facilities

- 7.42 Having identified existing market shares and examined the demand for new facilities from the authority area's residents, we consider here the potential supply-side issues for the provision of new leisure facilities. The purpose of this assessment is to examine the realism of actually providing for new facilities.
- 7.43 Due to the nature of the leisure market we have chosen to adopt a different assessment methodology from that used to analyse the quantitative capacity in the retail market. The reason for this primarily relates to the degree to which the leisure market is disaggregated. However, the lack of reliable data for a number of leisure uses (public houses, clubs etc.) is also an influencing factor; as the data available is not sufficient and would not represent credible information from which we can base our assessment.
- 7.44 The findings of the NEMS household survey allow us to assess the market share secured by facilities within the Council areas and the wider Study Area for a variety of leisure sectors. As such, we have completed a 'benchmarking' exercise by referencing the estimated increases in the Study Area population. The results of the 'benchmarking' exercise have been used to inform our conclusions with regards to the prospective future need for additional commercial leisure facilities.

Estimated Study Area Population

- 7.45 In Section 4 of this Retail and Centres Study, we set out our assessment of how the Study Area's population will grow at regular year intervals from 2016 to 2033 (i.e. at 2016, 2021, 2026, 2031 and 2033). We have calculated the population within each postal code sector using Experian Micromarketer G3 data.
- 7.46 The results are shown earlier in Figure 4.3.

Health and Fitness Capacity

- 7.47 A February 2015 report from Savills⁷⁷ identified that the level of health and fitness clubs in the UK is higher than it has ever been before, with more clubs and more members. In terms of membership rates across the whole of the UK, Savills estimate that 13.2% of the UK's population are registered members of private health and fitness clubs. In 2014, the membership rate was 12.6%. As at February 2015 Savills estimated that there were 6,112 fitness facilities in the UK.
- 7.48 Similarly, the Leisure Database Company's most up to date research (of June 2015)⁷⁸ suggests that there were in the region of 6,312 health and fitness clubs operating across the UK at 2015. We have taken an average of these two estimations, which gives a figure of 6,212.
- 7.49 At the time these estimations were produced the UK population was projected at 65.1 million⁷⁹, and therefore, we calculate there to be on average one club for every 10,480 persons. Our calculations are summarised in Figure 7.4 below.
- 7.50 When estimating the potential requirement for additional health and fitness facilities in the authority areas, we have considered only the capacity within the combined Council areas themselves, rather than the wider Study Area (so, excluding Zones 8 and 10). The reason for this is because the average person is likely to seek out and attend such facilities that are close to home (i.e. typical customer behaviour). Moreover, such trips are likely to be completed by a single person on a regular basis - i.e. one to two times a week, as shown by the household survey. The type and frequency of trips varies greatly to cinema or ten pin bowling activities. Visits to these kinds of leisure facilities are typically completed on a much less frequent basis and undertaken by groups of people and/or families. As a consequence, participants in cinema or ten pin bowling activities are more willing to travel further distances.

⁷⁷ 'The UK's health and fitness sector', Savills online, 27 February 2016

⁷⁸ State of the UK Fitness Industry 2015, Leisure Database Company, June 2015

⁷⁹ As identified by the Office for National Statistics' UK Population mid-year estimate 23 June 2016 data release

- 7.51 Accordingly, the combined Council area has an identified estimated population of 374,031 at 2016, increasing to 395,984 at 2033. Based on the assumed benchmark identified above, we calculate that the authority areas could support around 17 health and fitness clubs at 2016, increasing to around 21 clubs at 2036.
- 7.52 There are a total of six publically owned and operated leisure centre complexes in the combined Council area – Queens Park Sports Centre (Chesterfield), Dronfield Sports Centre (NE Derbyshire), Eckington Swimming Pool and Fitness Centre (NE Derbyshire), Sharley Park Leisure Centre (NE Derbyshire), Go! Active Leisure Centre (Bolsover) and Creswell Leisure Centre (Bolsover).
- 7.53 Furthermore, there are larger private members clubs run by Nuffield Health and Lifestyle Fitness in Chesterfield.
- 7.54 The research completed by Nexus has also identified a number of small private health and fitness clubs in the combined Council areas (18 in total). These are of varying sizes, though most are at the smaller end of the scale, with none being operated by UK chains.
- 7.55 This brings the total health and fitness centre provision to 26 different facilities across the combined area. It is also important to note that there may be a limited number of smaller clubs which have not been identified as part of our assessment.

Figure 7.4 | Health and Fitness Centre Requirement

Year	Combined Council Area	Typical Population Required to Support Centre	Potential No. of Clubs Supported by the Area
2016	374,031	10,480	36
2021	380,913	10,480	36
2026	387,503	10,480	37
2031	393,666	10,480	38
2033	395,984	10,480	38

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

- 7.56 Taking account of the fact the assessment considers more mainstream facilities with larger memberships; it would appear that the current provision of 26 facilities is broadly sufficient for meeting likely demand (estimated at 36-38 clubs). We are also mindful that there are a number of higher order centres (e.g. Sheffield, Nottingham, Mansfield) on the borders of the Study Area which have a wide range of facilities available, and so a number of residents will inevitably link their health and fitness activities with their workplace.

- 7.57 Notwithstanding, our earlier assessment of potential latent demand amongst local residents suggested that there might be an opportunity to provide more comprehensively for residents in Bolsover in particular. The opening of the new facility in Clowne should therefore be monitored over time to examine whether this appeases local demand.

Cinema Capacity

- 7.58 The combined Council area has one multi-screen cinema complex – the Cineworld in Chesterfield (10 screens) – which attracts 53.4% of all cinema trips made by residents of the Study Area.
- 7.59 In 2015, data kept by the British Film Institute specified a total of approximately 171.9 million cinema admissions in the UK in 2015 – the third highest annual admission count for the past decade⁸⁰. Taking account of this spike in admissions, we have looked back at the data kept by the British Film Institute since 2006 to produce an average. This calculation delivers an average of 166.5 million cinema admissions per year. In order to estimate the average number of admissions per year we have taken the approximate UK population in 2015 of 65.1 million⁸¹, which suggests there were on average 2.6 admissions per person per year over the last decade.
- 7.60 The UK Cinema Association specifies that in 2015 there were a total of 4,115 cinema screens throughout the UK⁸². Again, we have looked back at the past ten years of data held by the UK Cinema Association in order to produce a ten-year average. This average allows us to produce a figure which may, in reality, better represent the ‘right’ number of screens to meet market demand. Our calculations result in an average figure of 3,790 screens.
- 7.61 Taking into account the estimations provided by both the British Film Institute and the UK Cinema Association, it is suggested that on average each cinema screen commands 43,931 admissions per year.
- 7.62 Through the application of our benchmarking exercise we have produced an estimate that from the areas 2016 population (374,031) there would be on average 972,480 cinema admissions, and that by 2033 this would increase to around 1,029,558 admissions. Following this, we have taken the assumed number of visits per screen and produced a finding that around 23 screens could be supported over the period to 2033. Figure 7.5 below sets out our findings.
- 7.63 This exercise suggests that the existing provision of 10 full-time cinema screens is considerably

⁸⁰ ‘The Box Office 2015 - BFI Research and Statistics’, British Film Institute, April 2016

⁸¹ As identified by the Office for National Statistics’ 2015-Based National Population Projections 23 June 2016 data release

⁸² ‘UK cinema industry infrastructure’, UK Cinema Association, Retrieved online in April 2016

below that which the population could support. Again though, we are cognisant of the existence of a number of multiplex cinemas in nearby higher-order centres. Popular facilities include the Odeon in Mansfield (14.7% market share), the Odeon in Sheffield (9.1%) and the Cineworld in Sheffield (7.2%).

- 7.64 Nevertheless, given the large number of visits involved (over 1 million independent trips), there is merit in considering the potential for a greater element of this demand to be met locally. Whilst we would stop short of advocating a specific allocation (as market demand from operators is unproven), we would recommend the Councils encourage the provision of a further cinema, should an operator come forward.

Figure 7.5 | Cinema Screen capacity

Year	Combined Council Area Population	Number of Cinema Visits Per Person	Attendance	Number of Admissions Required to Support Screen	Screens Supported by the Area
2016	374,031	2.6	972,480	43,931	22
2021	380,913	2.6	990,374	43,931	23
2026	387,503	2.6	1,007,508	43,931	23
2031	393,666	2.6	1,023,532	43,931	23
2033	395,984	2.6	1,029,558	43,931	23

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

Ten Pin Bowling

- 7.65 Mintel is a global provider of Market Research, who provides information on trends and insight in the leisure sector. In terms of data on ten pin bowling trends in the UK, they are one of the only providers. As such we have looked to Mintel research to provide a general indication of the average number of ten pin bowling lanes per resident in the UK.
- 7.66 In 2011 Mintel identified a total of 5,773 bowling lanes throughout the UK⁸³. Taking into account the UK population at the time this data was produced (63.3 million) and assessing this against the 2011 provision of ten pub bowling lanes; results in a figure of one bowling lane per every 10,965 persons. We set this analysis out at Figure 7.6.
- 7.67 There is currently just one ten-pin bowling facility in the area, the Chesterfield Bowl (16 lanes).
- 7.68 Figure 7.6 below indicates that, based on the assumed benchmark, we calculate that around 36 lanes could be supported in the area in the period up to 2033. This significantly exceeds the

⁸³ 'Tenpin Bowling – UK', Mintel, November 2011

current level of provision.

- 7.69 It is generally accepted, however, that ten pin bowling patronage in the main is reducing. Therefore, it seems likely that the existing level of provision is enough to cater for demands to the end of the Plan period. Perhaps in evidence of this, only 0.7% of respondents to Q54 of the household survey identified ten-pin bowling as a facility that they would like to see more of. Our recommendation therefore would be to continue to monitor for any upturn in demand, but otherwise not to plan for any additional provision.

Figure 7.6 | Ten Pin Bowling capacity

Year	Combined Council Area Population	Typical Population Required to Support One Ten Pin Bowling Lane	Potential Number of Lanes Supported in the Area
2016	374,031	10,965	34
2021	380,913	10,965	35
2026	387,503	10,965	35
2031	393,666	10,965	36
2033	395,984	10,965	36

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

Summary

- 7.70 As part of this Retail and Centres Study, Nexus has measured the popularity and scale of existing leisure provision against 'benchmarks' in order to ascertain whether there are any gaps in the market where demand is not being met by existing provision.
- 7.71 In terms of existing market shares, there is a notable outflow of visits to higher-order centres in most categories. This is generally to be expected, but is most notable in NE Derbyshire and Bolsover where opportunities should generally be explored to improve access to leisure facilities. Whilst any new proposals for such facilities should be considered on their own merits, we would encourage officers across NE Derbyshire and Bolsover to carefully weigh the benefits associated with such development. This includes the potential for more sustainable travel patterns, as well as the increased draw to the local area and associated spending from linked trips.
- 7.72 Turning to consider the requests for new facilities (Question 54 of the household survey); there were no substantial numbers in any one category, with 71.2% of respondents unable to identify any particular need. In our experience of similar studies across the UK, this is above the average of what might be expected, and suggests that provision in the area generally meets its resident's expectations. Residents of Bolsover were notably concerned with the provision of a

new swimming pool, but the opening since of the new leisure facility in Clowne is assumed to have quelled this demand. The Council will no doubt monitor this over time.

- 7.73 In light of our findings, we do not think that it is necessary for the Councils to plan for any significant new major leisure or community facilities over the Plan period by way of specific site allocations. Whilst capacity is shown to exist in terms of both health and fitness clubs and cinema screens, it seems evident that the presence of a number of facilities in higher-order centres nearby the Study Area is ample to satisfy demand. Nevertheless, in line with the general provision of the NPPF and reduced trip distances, the Councils should always be open to the provision of additional facilities in sustainable locations.

8.0 Recommendations for New Retail Floorspace

Introduction

8.1 This Retail and Centre Study has been commissioned in order to form part of the evidence base to support the emerging Local Plans for the three authority areas of Chesterfield Borough, Bolsover District and North East Derbyshire District (up to 2033) in accordance with national policy requirements.

8.2 Specifically, Paragraph 23 of the NPPF indicates that local planning authorities should:

- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- Define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- Promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- Allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;
- Allocate appropriate edge-of-centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge-of-centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre; and
- Set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres.

- 8.3 In addition, Paragraph 26 of the NPPF indicates that local planning authorities may set their own local threshold for retail, leisure and office developments outside of town centres for which an impact assessment would be required.
- 8.4 The Council has therefore appointed Nexus Planning to provide a robust quantitative base for their retail and leisure capacity projections to 2033.
- 8.5 In addition to this quantitative assessment, Nexus Planning has also undertaken health checks of the vitality and viability of the authority area's key centres, which consider at Stage 2 of this Study. We will then go on to provide recommendations for potential opportunity sites, the hierarchy of centres, town centre boundaries and local impact thresholds.
- 8.6 In conjunction with both Stage 1 and Stage 2, we have conducted and analysed a household telephone survey that enables us to understand existing market share patterns, and the performance of existing centres and stores.

Quantitative Capacity Assessment

- 8.7 Stage 1 of this Retail and Centres Study established the Study Area and the projected changes in population, expenditure and special forms of trading, as well as the market shares arising out of the Household Telephone Survey of 1,500 households in the Study Area. This work culminated in a model forecasting the quantitative capacity for new retail development on the basis of available expenditure over the plan period.
- 8.8 This assessment takes full account of the considerable number of extant commitments already in the system, which absorb a significant proportion of the available expenditure projected from the population and expenditure growth.
- 8.9 In Chesterfield Borough, notable commitments include the Chesterfield Waterside mixed-use regeneration scheme on the edge of the town centre (estimated to account for £13.1m convenience spend and £5.3m in comparison goods spending) and extensions and alterations to Spire Walk Business Park. Proposed developments at Walton Works and Perrys Ford Garage have been modelled, but not taken into account in calculating final capacity figures as the planning applications are undetermined at the time of the Study.
- 8.10 Commitments in Bolsover District include a new Lidl foodstore at the former White Swan Public House in Shirebrook (estimated to attract £8.0m in convenience trade) and the extension to Sports Direct at Brook Park, Shirebrook (accounting for £20.4m in comparison goods trade). As with Chesterfield, we have modelled the potential turnover of all identified extant permissions and commitments.

- 8.11 We also consider notable current planning applications, which in this case would include the significant mixed-use development proposed at Berristow Farm, South Normanton, where we assume that approximately 20% of comparison goods turnover (equating to £11.0m) would be derived from destinations within the Study Area on the basis of the application documentation. However, we go on to exclude this proposal when calculating available capacity, as the application is yet to be determined and therefore should not be taken into account.
- 8.12 North East Derbyshire currently has a number of discount foodstores in the pipeline including two Aldi's in Eckington (£11.9m of combined convenience and comparison goods turnover) and Clay Cross (£13.4m), and a further Lidl foodstore in Clay Cross (£9.0m).

Destination	Convenience Goods Floorspace Capacity (2033)		Comparison Goods Floorspace Capacity (2033)	
	Min	Max	Min	Max
Chesterfield Borough	2,500 sq m	3,600 sq m	12,700 sq m	19,900 sq m
Bolsover District	1,400 sq m	2,100 sq m	-2,600 sq m	-4,100 sq m
NE Derbyshire District	2,000 sq m	2,900 sq m	-100 sq m	-200 sq m
Combined Authorities	5,900 sq m	8,600 sq m	9,900 sq m	15,600 sq m

Source: Appendix D
Figures may not total due to rounding

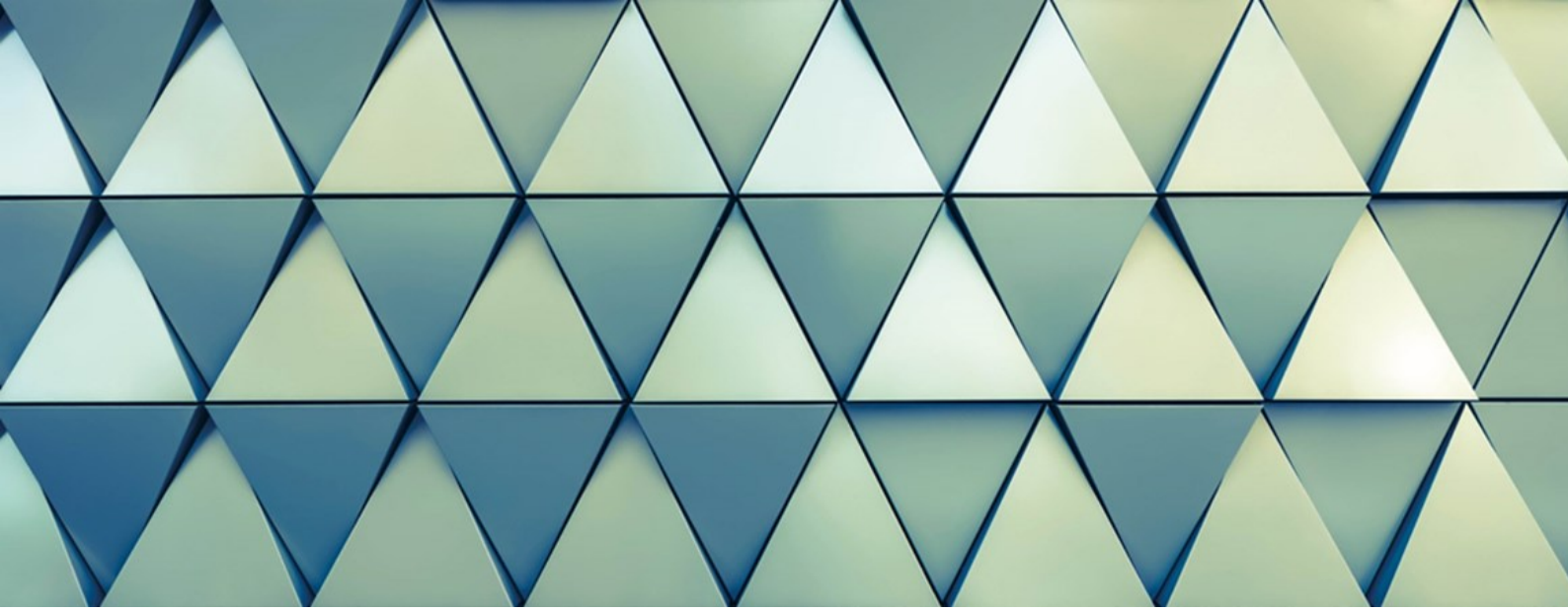
- 8.13 We estimate a total residual convenience goods expenditure of £68.4m, which would provide capacity for between 5,900 sq m and 8,600 sq m of new convenience goods floorspace across the Study Area by the end of the plan period. On the basis of the available expenditure and current market shares from the resident population of the Study Area, we go on to identify the location of the convenience floorspace capacity across the three authority areas.
- 8.14 We find the greatest proportion of available residual expenditure is projected for Chesterfield Borough, based on current market shares and population distribution, which allows for between 2,500 sq m and 3,600 sq m (net) of new convenience goods floorspace by the end of the plan period. Bolsover District is forecast to generate capacity for between 1,400 sq m and 2,100 sq m (net) new convenience goods floorspace by 2033, whilst we find sufficient capacity in North East Derbyshire to allow for between 2,000 sq m and 2,900 sq m over the same period.
- 8.15 Turning to comparison goods capacity, based on projected population and expenditure growth and forecast changes in floorspace efficiencies over time, we identify £77.7m of available residual expenditure by 2033 across the Study Area, or between 9,900 sq m and 15,600 sq m (net) of new comparison goods floorspace.

- 8.16 Based on current market share and population distribution, Chesterfield Borough accounts for the only positive forecast of quantitative comparison goods capacity, equating to between 12,700 sq m and 19,900 sq m (subject to the sales density and turnover of the proposed retailers).
- 8.17 In light of the emerging commitments for new comparison goods floorspace across Bolsover and North East Derbyshire, we do not forecast any quantitative capacity for new comparison retailer floorspace over the plan period.
- 8.18 We go on to consider qualitative need, retailer requirements and opportunity at Stage 2 of this Study.
- 8.19 It is important to point out, as noted at Paragraph 6.2, that an identified quantitative retail capacity across the Study Area does not necessarily justify the allocation of new retail floorspace in and of itself (especially in out-of-centre locations) where they may not be a qualitative need.
- 8.20 By way of an example, a successful town centre foodstore may well trade above company average 'benchmark' levels. In such a scenario, the quantitative retail capacity modelling exercise would consider this spending above benchmark levels to be 'excess' expenditure that should be available as capacity for allocations for new retail floorspace. This could inadvertently lead to the allocation of unnecessary out-of-centre facilities, which would compete with town centre facilities that are otherwise fully meeting the needs of local residents.
- 8.21 Any allocations for new retail floorspace should also take into account the assessment of the performance, vitality and viability of the qualitative health of a centre to ensure that any identified capacity meets both a quantitative and qualitative need.
- 8.22 Equally, in relation to decision taking, the lack of significant demonstrable quantitative capacity should not necessarily prevent the Councils from allowing new applications for retail development in existing designated centres, particularly where such developments would bolster the draw of such centres and encourage growth in line with Council's aspirations and the centre's position within the retail hierarchy.
- 8.23 We would also stress that, in accordance with national planning policy and guidance, applications for retail developments above the locally set threshold and outside of the designated primary shopping area boundaries would need to be considered in accordance with the sequential approach and retail impact assessment methodology

Leisure

- 8.24 In terms of leisure facilities, Section 7 does identify potential quantitative capacity for activities that we are readily able to forecast (being health and fitness clubs, cinema screens and ten-pin bowling lanes).
- 8.25 However, our market share analysis and the fact that almost three quarters of respondents were unable to identify any particular need for new local facilities suggests that this capacity is currently suitably satisfied by facilities across higher order centres beyond the Study Area (in particular for residents of Bolsover and North East Derbyshire).
- 8.26 Whilst a high proportion of respondents were content with the provision of leisure facilities, there was an indication of public demand for a swimming pool in Clowne, though this demand is likely to have been met by the opening of The Arc leisure centre.
- 8.27 Nonetheless, it is important to recognise that this is subject to market forces dictating demand in order to meet any identified gaps in leisure provision across the three authority areas. Bolsover and North East Derbyshire Councils in particular are likely to welcome proposals to expand the range and quality of leisure provision, particularly through mixed-use developments that would increase the draw of town centres, subject to adherence and support of the policies of the emerging Local Plans.

Stage 2



9.0 Assessment of Key Retail Centres

- 9.1 This Stage of the Retail and Centres Study details our analysis of the vitality and viability of Bolsover, Chesterfield and North East Derbyshire's town centres.
- 9.2 The analysis focuses on the ten towns of Bolsover, Shirebrook, Clowne and South Normanton in Bolsover District; Chesterfield and Staveley in Chesterfield Borough; and Dronfield, Clay Cross, Eckington and Killamarsh in North East Derbyshire District. These ten centres perform an important role in Bolsover, Chesterfield and North East Derbyshire, serving the needs of the local community and the Study Area.
- 9.3 The physical extent of each town centre has been determined by the extent of Experian Goad Plan boundaries. The use of consistent Experian Goad Plans is a standard methodology that enables comparison with the previous 2008 Retail Capacity Study by Nathaniel Lichfield and Partners for Chesterfield Borough Council and North East Derbyshire District Council (updated for Chesterfield Borough Council in 2010), as well as the Retail Capacity Assessment completed by Roger Tym and Partners in 2010 for Bolsover District Council. A manual counting exercise of units within the adopted Town Centre boundaries was carried out where Experian Goad Plans were not available for smaller centres.

Methodology

- 9.4 The National Planning Policy Framework (NPPF, March 2012) states that local planning authorities should:
- i. Set out policies for the management and growth of town centres over the plan period;
 - ii. Recognise town centres as the heart of their communities; and
 - iii. Pursue policies to support their viability and vitality.
- 9.5 Paragraph 23 of the NPPF recognises that town centres are the heart of communities and local planning authorities should pursue policies to support their viability and vitality, in addition to promoting competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of each town centre.
- 9.6 While the NPPF does not provide a list of criteria to be used to assess the health of a centre, the Government's 'Ensuring the Vitality of Town Centres' National Planning Practice Guidance (NPPG), March 2014 provides a helpful set of indicators. Further, the NPPG explains these

indicators should be monitored on a regular basis in order to judge the health of a centre and its performance over time.

9.7 Below is a list of the indicators that have been used by Nexus Planning to complete their assessment of the health of the Bolsover, Chesterfield and North East Derbyshire centres:

- **Diversity of Uses** - Data on the diversity of uses in each of the town centres was collated during the Retail Surveys completed by Nexus Planning in November 2016. This survey data includes the number, type and quantum of floorspace provided in these locations, and is in tables in the following section which provide comparison with previous studies and national averages.
- **Proportion of Vacant Street Level Property** - Vacant properties were identified during the November 2016 Retail Surveys and the proportion of units was compared to national averages to provide an indication of the health of each centre.

The volume of vacant floorspace within a town centre can provide an indication of how that centre is performing. However, it is important to acknowledge that a degree of vacancy is inevitable and sometimes desirable. Some 'churn' is expected in the market as units alter and change, as new businesses enter a town and others leave. In this context, vacant units are commonly found in even the strongest of town centres.

Equally, a low vacancy rate does not necessarily mean a town centre is performing well; as the quality and performance of the occupied units may be relatively poor.

- **Commercial Yields on Non-Domestic Property** - Whilst this can be an indicator of town centre performance over time, data on commercial yields in the ten centres is not publically available at this time.
- **Customers' Views and Behaviour** - Information on customers' views is based on the results of the comprehensive NEMS household telephone survey (completed in November 2016). These results provide an indication of how a centre is both used and viewed by local residents.
- **Retailer Representation and Intentions to Change Representation** - Information on the current strength of centres and retailer representation has been derived from Javelin Venuescore UK Shopping Venue Rankings, Experian GOAD Category Reports and from other published sources.
- **Commercial Rents** - Zone A rental data can provide information on historic trends, however, data on commercial rent is not publically available for the centres at this time.

- **Pedestrian Flows** - General footfall and pedestrian flows were observed by Nexus Planning during site visits to the Bolsover, Chesterfield and North East Derbyshire centres in November 2016. The centres were visited on different days of the week and at different times of the day. Therefore, Nexus Planning was able to obtain a comprehensive understanding of pedestrian flows through observation at these varying times.
- **Accessibility** - Consideration of access to and around each centre was informed by the Nexus Planning site visits. This was in addition to information gathered during the NEMS household telephone survey and a desktop review of data detailing access to public transport and parking facilities.

The accessibility of a centre is determined by the ease and convenience of access by a variety of transport means; including that which is provided to pedestrians, cyclists and disabled people – and the ease of access from the main arrival points to the principal attractions in the centre.

- **Perceptions of Safety and Occurrence of Crime** – General perceptions of safety were gathered during the site visits and from a review of existing data.
- **State of Town Centre Environmental Quality** – Consideration of the quality of the buildings and public realm in each of the centres was informed by Nexus Planning’s site visits to each of the centres and the NEMS household telephone survey.

9.8 The following sections of the report provide details of the Nexus Planning assessment of the health of Bolsover, Chesterfield and North East Derbyshire centres in respect to the above indicators derived from the NPPG.

9.9 Experian Goad Plans (where available) have been updated by Nexus Planning and are provided at **Appendix B**. Goad plans are defined by Experian, and whilst they are broadly in line with Town Centre boundaries shown on Proposals Maps, they are not always identical. However, the use of Goad plans allows for a constant approach when comparing with historic data and national averages.

9.10 As referenced above, where Goad Plans were not available for smaller centres, a manual survey of the adopted Town Centre boundaries was carried out and provided as tables to inform the vitality and viability assessment.

9.11 Nexus also undertook stakeholder engagement with local representatives (where available) to complement the views received through the household telephone survey, which included a series of qualitative questions to assist our understanding of the local context, including issues

and concerns affecting local residents and businesses.

- 9.12 Whilst these discussions did not specifically alter our impartial assessments, anonymous information from town centre groups, and Town and Parish Councils covered the vitality and viability of the centres, vacancies, mix of retail, parking, street environment, crime and security and town centre events.

Sub-Regional Hierarchy

- 9.13 The plan included as Figure 5.2 in Section 5 (and in a larger format at Appendix A) illustrates the location of the Study Area relative to the main settlements in the sub-region.
- The Bolsover District Local Plan (2000) defines the settlements of Bolsover, Shirebrook, Clowne and South Normanton as major shopping centres.
 - The Chesterfield Local Plan: Core Strategy (2013) defines Chesterfield as a Sub Regional centre and Staveley as a town centre.
 - The North East Derbyshire Local Plan 2001-2011 identifies Clay Cross, Dronfield, Eckington and Killamarsh as major retail centres.
- 9.14 Figure 9.1 ranks the principal centres across the surrounding area that are likely to serve as destinations or competing centres, based on the Javelin Venuescore UK Shopping Venue Rankings 2014/15.
- 9.15 Javelin Venuescore's index ranked 3,079 retail venues within the UK for the 2014/15 period (including town centres, stand-alone malls, retail warehouse parks and factory outlet centres) based on the strength of their current retail provision. Towns and major shopping centres are graded using a scoring system taking account of the presence of multiple retailers in each location – including anchor stores, fashion operators and non-fashion multiples. It is important to acknowledge that the Venuescore index does not include an assessment of independent operators, or other town centre health indicators, identified in the NPPG i.e. these factors do not affect the score.
- 9.16 Venuescore information is available for five of the ten centres (Chesterfield, Clowne, Clay Cross, Bolsover and Staveley), as well as another six retail venues within the study areas, including the East Midlands Designer Factory Outlet. Shirebrook, Eckington, Killamarsh, South Normanton and Dronfield were all not included in the Venuescore data.
- 9.17 As illustrated in Fig 4.1, Chesterfield (Centre) is the highest scoring of the retail venues and classes as a regional centre by Venuescore. The centre is ranked 160th of all the centres

surveyed, yet has fallen slightly since 2010.

- 9.18 Nottingham and Sheffield are the closest major city centres to the study area, and were ranked 7th and 22nd respectively in 2014/15. The towns of Derby and Mansfield also performed well in the 2014/15 Venuescore rankings coming in at 27th and 121st respectively. Furthermore, Meadowhall Mall in Sheffield also performed well in the overall rankings for 2014/15 being ranked 38th, one of the highest ranking malls in the country. Shopping patterns in the Study Area are therefore influenced to some degree by the greater strength, diversity and attractiveness of the retail offer at these higher-order centres.

Figure 9.1 | Javelin Venuescores for Bolsover, Chesterfield and NED and Competing Centres

Centre	Classification	2014-2015 Score	2014-2015 Rank	2013-2014 Rank	2010 Rank	Market Position Classification	Market Position Index (Average 100)
Nottingham Centre	Major City Centre	506	7	7	7	Upper Middle	112
Sheffield	Major City Centre	350	22	25	21	Middle	96
Derby	Major Regional Centre	322	27	27	21	Middle	100
Sheffield (Meadowhall)	Major Regional Mall	293	38	31	34	Upper Middle	118
Mansfield	Regional Centre	173	121	134	132	Lower Middle	90
Chesterfield (centre)	Regional Centre	148	160	154	148	Middle	92
Worksop	Sub-regional Centre	108	235	246	231	Lower Middle	89
Alfreton, East Midlands Designer	Major District Outlet	62	468	433	549	Upper Middle	123
Chesterfield Ravenside/ Markham	Minor District Retail Park	28	1,096	1,155	1,234	Middle	91
Matlock Centre	Minor District Centre	25	1,207	1,108	1,128	Lower Middle	88
Clowne	Local Centre	18	1,599	1,684	1,873	Lower Middle	86
Clay Cross	Local Centre	18	1,599	1,907	9,043	Lower Middle	85
Alfreton, Tibshelf North Motorway Station	Local Centre	15	1,895	n/a	n/a	Middle	108
Chesterfield (Wheatbridge Rd)	Local Retail Park	14	2,010	2,216	3,281	Lower Middle	85
Bolsover	Local Centre	13	2,146	n/a	n/a	Lower	80
Chesterfield (Chatsworth Rd)	Local Centre	13	2,146	2,428	2,196	Middle	102
Chesterfield (Meltham Ln / Lockoford Ln)	Local Centre	12	2,306	2,428	n/a	Middle	96
Staveley	Local Centre	11	2,557	n/a	n/a	Lower Middle	86

Source: Venuescore, 2010, 2013/14, and 2014/15 (Centres in Bolsover District, Chesterfield District and North East Derbyshire District are shown in black)

- 9.19 All destinations within the Study Area have improved in ranking since 2010 (with the exception of Chesterfield Town Centre). This would suggest that (across the larger centres covered by

Venuescore) national multiple retailers are increasingly seeking to locate within the Study Area and that the centres are seen as increasingly attractive locations for investment.

Previous Studies

- 9.20 For the purpose of this assessment, comparisons have been drawn with the findings of the previous retail studies.
- 9.21 Retail studies have previously been carried out by Nathaniel Lichfield and Partners for Chesterfield Borough Council and North East Derbyshire District Council, and by Roger Tym and Partners for Bolsover District Council. Some reference can be made between the previous studies and the current study in order to draw comparisons between the towns since the last study was undertaken. However, it is noted that the retail studies were undertaken with different methodologies, some differences in the definitions of retail categories, and in some instances different town centres were included. As such, direct comparisons are difficult to make.
- 9.22 The 2010 Bolsover Retail Capacity Assessment provides a health check report for the District's four main towns (Bolsover, Clowne, Shirebrook and South Normanton) as well as the five main villages (Barlborough, Creswell, Pinxton, Tibshelf and Whitwell).
- 9.23 The 2008 study prepared by NLP included information for Chesterfield, Clay Cross, Staveley, Eckington, Killamarsh, and Dronfield. Comparisons against the 2008 Retail Study enable us to gauge an understanding of the change of retail composition within those centres over time.
- 9.24 Notably, the NLP Retail Study that was undertaken in 2008 included 120 units for the Dronfield Town Centre. This included parts of the town that would not, in our view, generally be considered to be part of the town centre. An extract from the NLP Retail Study (2008) states:
- In our view Dronfield does not provide a compact or coherent centre. It is difficult to define a centre boundary based on the guidance in PPS6. The Council could consider defining a more compact centre boundary around the existing Somerfield store and adjacent parade and the Sainsbury store. Other shopping areas in Dronfield could be defined as separate local parades. (Page 115)*
- 9.25 The most recent Experian Goad data includes only 34 retail units, including only the comprehensive retail centre core south of the Sainsbury's referenced in the extract above. This Study does not consider retail units from outside the town centre core, a response to the recommendation of the Study undertaken by NLP in 2008.
- 9.26 In the following sections we individually assess the vitality and viability of the ten centres based

on a combination of: updated Goad assessments; Nexus Planning health checks undertaken in November 2016; discussions with local stakeholders; and, the qualitative results of our household telephone survey where it considers respondents' likes and dislikes of each centre.

Bolsover

Address	Town End, Market Place
Description	<p>Bolsover is identified as one of Bolsover District’s main towns and service centres, providing a range of services and amenities not widely available in the other smaller settlements within the District and surrounding areas.</p> <p>The historic townscape of the centre makes Bolsover an attractive place to live and visit. The town is fittingly included within a Conservation Area. The town is bounded by Bolsover Castle to the west and the Hornscroft recreation ground to the south east.</p> <p>Competing centres within 10km include Chesterfield, a centre of sub-regional significance, and Shirebrook, Clowne, Staveley and Eckington, all of which are retail and service centres of more local significance. Accordingly, Bolsover competes with the services provided by those centres.</p>
Current Status	Major Shopping Centre (Bolsover District Plan) / Local Centre (Venuescore classification)

Photos



Figure 9.2: Castle Street, Bolsover



Figure 9.3: Castle Street, Bolsover



Figure 9.4: Cavendish Walk, Bolsover



Figure 9.5: Market Place, Bolsover



Figure 9.6: Cotton Street, Bolsover



Figure 9.7: Castle Street, Bolsover



Figure 9.8: Cotton Street, Bolsover



Figure 9.9: Market Place, Bolsover

Figure 9.10 | Diversity of uses

Bolsover	Units (no.) 2010	Units (%) 2010	Units (no.) 2016	Units (%) 2016	Floorspace (%) 2016	Units UK Avg. (%)	Floorspace UK Avg. (%)
Convenience	10	12.7	11	15.1	23.3	8.6	15.2
Comparison	28	35.4	24	32.9	37.4	32.0	35.9
Retail Services	12	15.2	9	12.3	4.3	13.9	6.7
Leisure Services	14	12.7	19	26.0	26.1	23.3	24.4
Financial and Professional Services	7	8.9	5	6.9	4.2	10.6	8.0
Miscellaneous	1	1.3	2	2.7	1.2	0.1	0.1
Vacant	7	8.9	3	4.1	3.4	11.2	9.0
TOTAL	79		73	-	-	-	-

Source: Nexus Planning surveys (2016-17), Experian Goad Data (2016) and Roger Tym & Partners (2010)

Overall Composition	<p>Bolsover had a Venuescore ranking of 2,146 (out of a possible 2,775) in 2014-15, which is considered to be a low ranking when compared against other major shopping destinations within the Study Area.</p> <p>The town is anchored by a Co-operative foodstore in the south east part of the centre, and The Original Factory Shop department store towards the north of the town centre. Other National Multiples include Rowlands Pharmacy, Ladbrokes Betting Office, Betfred Betting Office, Farmfoods Frozen Foods, Fultons Frozen Foods, and Ashgate Hospice Charity Shop.</p> <p>The total number of units within the town centre has decreased from 79 to 73 between 2010 and 2016. While there was an overall decrease in the number of units dedicated to comparison retail and retail services, there was an increase in the number of units within the leisure services category, which includes food and drink outlets.</p>
Convenience	<p>At the time of the Nexus Planning site visits, there were 11 convenience units within the town centre, an increase of 1 unit since 2010. The number of convenience units represents 15.1% of all units in the town centre, which is above the UK average of 8.6%.</p> <p>The convenience retail units offer a range of shops including butchers, bakers, grocers and frozen foods. There is only one major supermarket in the town centre, this being a Co-operative foodstore, and 2 frozen food specialists – Fulton Foods and Farmfoods.</p>

The proportion of convenience floorspace in the centre is 23.3% of the overall floorspace, which exceeds the UK average of 15.2%. This indicates a strong convenience retail offer. Notably, the Co-operative foodstore has a floor area of 1,170 sq m, equating to 57.0% of the total convenience floorspace.

The NEMS household survey identified that 6.7% of respondents from Zone 11 (Bolsover) carried out their last convenience shop at the Co-op in Bolsover (including both main food and top-up trips), with a further 14.9% in other local stores within Bolsover Town Centre. This indicates that respondents were more likely to carry out convenience shopping at centres other than Bolsover.

Notably, Q15B of the NEMS household survey identified that 87.4% of respondents from Zone 11 (Bolsover) who undertook food shopping at a specialist store such as a butcher, baker or greengrocer, visited local stores in Bolsover. This suggests that the local facilities meet a specific requirement, but may not necessarily provide a wide enough offer to fully cater for local residents' convenience needs.

The survey showed that 18.8% of respondents from Zone 12 (Bolsover) undertook their last convenience shop at Tesco, Clowne, 16.7% at the Morrisons, Staveley, and, 12.4% at Aldi, Clowne.

It would appear that the convenience floorspace within Bolsover Town Centre does not meet all of local residents' needs, which we go on to consider in further detail in the following section. This could possibly explain why there is such a high number of respondents who undertake their convenience shopping elsewhere. This could also be explained by the wide geographical makeup of Zone 11 – whereby respondents within the zone actually live nearer to Morrisons at Staveley, Tesco and Aldi in Clowne, or to Chesterfield Town Centre.

Comparison

At present, comparison units account for 32.9% of all Bolsover's retail units. This is marginally higher than the UK average of 32.0%.

The representation of comparison units has dropped from 35.4% to 32.9%, or 28 units to 24 units, since 2010. The comparison offer makes up 37.4% of overall floorspace, which is slightly higher than the UK average of 35.9%.

The comparison offer is made up of a variety of product specific stores, including chemists, a jeweller, florists, charity shops, a pet shop and a department store. The Original Factory Shop represents a large portion of the comparison offer, having 1,390 sq m of floorspace, equating to approximately 42.0% of overall comparison retail floorspace across the town centre.

There is a cluster of comparison units in the north east corner of the centre, although there are generally comparison units located across the centre.

Services

Services (retail, leisure, and financial and professional) make up a total of 45.2% of units in Bolsover. Of these categories, leisure services represent 26.0% (19) of the units. Leisure services within the town centre include public houses, betting offices, restaurants and cafes. Leisure services also make up 26.1% of the overall floorspace of all units. Notably, leisure services have increased from 14 units to 19 units since 2010. Spatially, there is a general trend towards leisure services being located in the western part of the town centre. In particular, there were four Public Houses in the western half of the

	<p>town centre at the time of the Nexus survey.</p> <p>There are 9 retail service units in the town centre, which make up 12.3% of the overall number of units within the Bolsover Town Centre, but only 4.3% of the overall floorspace across the town.</p> <p>Financial and Professional Services account for 6.9% (5) of the units. There is only 1 bank in the town centre, this being a TSB. Since the last retail study was undertaken in 2010, Halifax, Lloyds and Natwest banks have all closed. Other financial and professional services within the town include estate agents, an accountant and wedding services.</p>
Vacancies	<p>At the time of the Nexus site visits, in November 2016, Bolsover had three vacant units. This represents a vacancy rate of just 4.1% of all units, which compares favourably to the UK average of 11.2%. The same is true of the amount of vacant floorspace (3.4%), which compares favourably to the UK average of 9.0%.</p> <p>During the Nexus site visits, it was noted that there were 2 additional vacant units along Station Road which were outside of the Experian Goad Plan boundaries.</p>
Pedestrian Flows	<p>During the Nexus site visits there was little pedestrian activity throughout the town. It is noted that parts of the town centre are pedestrian only streets. Specifically, there is no access to vehicles along Cotton Street. As identified below, 25.3% of respondents in the NEMS household survey who visited Bolsover, travelled by walking.</p>
Accessibility	<p>Bolsover is not serviced by a train station and public transport is limited to bus services connecting with Chesterfield, Mansfield, Sheffield, Clowne, Shirebrook, Langwith and Eckington.</p> <p>There are 4 car parks located in the centre, all of which are free of charge and without time restrictions, they include:</p> <ul style="list-style-type: none"> • Castle Street, Bolsover (32 spaces) • Cotton Street, Bolsover (27 spaces) • Middle Street, Bolsover (32 spaces) • Town End, Bolsover (133 spaces) <p>Opportunities for parking appeared to be plentiful within the town, making the centre easily accessible by car.</p> <p>The NEMS household survey indicates that the majority of patrons travel to Bolsover by car as the driver (60.5%), or walk (25.3%).</p>
Perception of Safety	<p>During the Nexus site visits the perception of safety within the town centre was high. At no point were there any issues noted, and generally there were people present. No antisocial behaviour was observed.</p>
Environmental Quality	<p>The urban environment within the town centre is generally of a reasonably high quality. The pedestrianised zones within the centre of town allows for straightforward access to most shops on foot. The historic townscape significantly enhances the overall aesthetic of the town centre.</p>

Customer Views and Behaviours

The Market Place offers a high quality surfaced area, catering for visitors and local residents. The Market Place would benefit from some investment to incorporate benches and shelter.

Equally, the bus stopping and vehicle turning area in the centre of town at the end of Market Place is well landscaped. Bins are provided throughout the town to promote cleanliness.

The NEMS household survey results identify that much of the convenience and comparison goods shopping undertaken by Zone 11 residents is outside of Bolsover Town.

The survey identifies that Chesterfield is the second favourite shopping destination for Zone 11 residents, offering a wider variety of retailers. 57.3% of respondents from Zone 11 identified that they visited Bolsover the most out of all the centres, while 29.6% stated they visited Chesterfield the most. 86.2% of respondents stated they visited Bolsover Town Centre either daily, at least twice a week or at least once a week. 46.1% of respondents identified they visited Bolsover because of the choice and range of shops, while 18.4% stated that it is close to home.

In terms of measures that would encourage more frequent visits to Bolsover Town Centre, 19.3% of respondents stated improved food shops within the town centre, whilst 12.9% stated that better/more public facilities such as toilets and seating.

Summary

- Bolsover had a relatively low Venuescore ranking of 2,146 in 2014-15
- The total number of units within the town centre has decreased from 79 to 73 between 2010 and 2016
- There are 11 convenience retail units in the town centre
- The Co-operative foodstore accounts for 57.0% of the total amount of convenience floorspace
- The representation of comparison units has dropped from 28 units to 24 units since 2010
- Services (retail, leisure, and financial and professional) make up a total of 45.2% of units in Bolsover
- Retail service units make up 12.33% of the overall number of units within the Bolsover Town Centre, but only 4.3% of the overall floorspace across the town
- Financial and Professional Services account for 6.9% of the units. There is only one bank in the town centre, this being a TSB. Since the last retail study was undertaken in 2010, Halifax, Lloyds and Nat West banks have all closed
- The NEMS household survey indicates that the majority of patrons travel to Bolsover by car as the driver (60.5%), or walk (25.3%).

Key Issues

- Closure of business and finance services units

- Improvements required to the urban environment in the form of benches and shelter on the Market Square.
- Improvements to the range and quality of food stores within the centre
- The centre has a slightly higher than average proportion of convenience and comparison goods stores, however, the range and quality of the offer does not provide a sufficient draw to local residents, a significant proportion of whom shop in other centres.

Conclusion

Overall, Bolsover performs well, with a diverse convenience and comparison offering catering well to its resident population and providing a relatively vital and viable centre.

Given its proximity to larger centres, Bolsover serves as a more local centre than Clowne, with residents shown to shop at Bolsover for more day-to-day 'top-up' items. The could potentially support additional retail facilities and growth (particularly to the north) as we go on to discuss in more detail in the following sections.

There has, however, been a notable reduction in the proportion of services (particularly financial and professional services), this has been a trend in smaller centres across the country, with technological advance reducing the requirements for local branches and banks and building societies consolidating services to larger regional centres (such as Chesterfield and Mansfield).

Shirebrook

Address	Market Street, Market Place, Victoria Street and Station Road
Description	<p>Shirebrook is the largest town centre in Bolsover District and the second largest of the centres identified in the Study in terms of number of units. Shirebrook provides a range of services and amenities not widely available in the smaller settlements within the study area.</p> <p>Shirebrook Town Centre is principally arranged around a market square in the centre of town.</p> <p>Competing centres within 10km include Mansfield and Sutton-in-Ashfield which are classed as centres of sub-regional significance, as well as Bolsover and Clowne which are retail and service centres of more local significance.</p>
Current Status	Major Shopping Centre (Bolsover District Plan) / Major District (Venuescore classification)

Photos



Figure 9.11: Station Road, Shirebrook



Figure 9.12: Co-operative Foods Supermarket, Victoria Street, Shirebrook



Figure 9.13: Shirebrook Markets



Figure 9.14: Portland Road, Shirebrook

Figure 9.15 | Diversity of uses

Shirebrook	Units (no.) 2010	Units (no.) 2010	Units (no.) 2016	Units (%) 2016	Floorspace (%) 2016	Units UK Avg. (%)	Floorspace UK Avg. (%)
Convenience	16	14.5	13	12.4	26.5	8.6	15.2
Comparison	35	31.8	29	27.6	25.2	32.0	35.9
Retail Services	17	15.5	13	12.4	8.7	13.9	6.7
Leisure Services	17	15.5	17	16.2	12.1	23.3	24.4
Financial and Professional Services	6	5.5	4	3.8	3.2	10.6	8.0
Miscellaneous	3	2.7	4	3.8	3.9	0.1	0.1
Vacant	16	14.5	25	23.8	20.4	11.2	9.0
TOTAL	110		105	-	-	-	-

Source: Nexus Planning surveys (2016-17), Experian Goad Data (2016) and Roger Tym & Partners (2010)

Overall Composition	<p>Of the 10 centres included within the study, Shirebrook is the second largest in terms of number of units, comprising a total of 105 units. This figure has decreased from 110 in 2010.</p> <p>Shirebrook Town Centre is anchored by an Aldi, a Co-operative foodstore (Figure 9.11) and a central Market Place. The central market place is surrounded by smaller scale shops, many independent, offering convenience and comparison goods, and a variety of services. National multiples include the two supermarkets mentioned above, William Hill betting office, Fultons Foods, Market Pharmacy, Ladbrokes betting office, Rowlands Pharmacy, Lloyds bank, Ashgate Hospice charity shop.</p> <p>Despite its size, Shirebrook does not feature a sufficient proportion of national multiple retailers to qualify for the Venuescore rankings.</p> <p>There is a strong Polish community in Shirebrook, as reflected in the mix of shops dedicated to Polish foods and goods.</p>
Convenience	<p>There are a total of 13 convenience stores in the centre, having decreased by 3 units since 2010. Convenience floorspace accounts for 26.54% of the total floorspace across the town centre, which is significantly higher than the UK average of 15.2%. The Aldi and Co-operative foodstores equate to a combined floorspace of 2,270 sq m, which represents 76.4% of the total convenience</p>

retail across the centre.

The NEMS household survey showed that 27.1% of respondents from Zone 12 (Shirebrook) did their main grocery shopping at Aldi, Carter Lane in Shirebrook, 23.5% at Asda on Old Mill Lane in Mansfield, and 15.2% at the Tesco Extra in Mansfield. (Overall, 45.1% of Zone 12 respondents undertook such shopping in Mansfield compared to 35.5% in Shirebrook.)

The most popular locations for top-up shopping were the Aldi in the town centre (33.3%), the Co-operative foodstore in the town centre (16.5%) and other local shops in Shirebrook (19.3%). This indicates that generally, residents are able to do their necessary top-up shopping within the centre.

Markets are held on Tuesdays, Wednesdays, Fridays and Sundays within the Market Place of the town centre as shown in Figure 9.12.

Comparison

There are 29 comparison units in Shirebrook Town Centre. The number of comparison units in the centre decreased by 6 units between 2010 and 2016. In 2016 the proportion of comparison units was 27.6%, slightly lower than the UK average of 31.8%.

Shirebrook has a strong supply of independent retailers within the town centre, and there are limited national multiple stores in the town.

The NEMS household survey results indicate that 55.2% of respondents from Zone 12 (Shirebrook) undertook their last purchase of clothing or footwear in Mansfield. Only 3.4% of respondents identified they purchased their last clothing or footwear in Shirebrook. Similarly, Mansfield was the most popular choice for purchasing other comparison goods including recreational goods, household goods, and books, CDs and DVDs.

Services

Service uses account for 32.4% of units within Shirebrook, including 16.2% (17 units) leisure service units. The majority of the leisure services are cafes, restaurants and fast food and takeaway restaurants. The number of leisure services units has remained the same since 2010.

Since 2010, there has been a reduction of retail services, from 17 units to 13 units, accounting for 12.4% of the overall number of units in Shirebrook. This is slightly lower than the UK average of 13.9%. Notably, the health and beauty sector accounts for 12 of the 13 retail services units within the town.

The provision of financial service units is particularly low in the town centre, accounting for just 3.8% (or 4 units) of the overall number of units at the time of the Nexus site visits.

Planning permission has been granted (reference 16/00345/FUL) for a new Lidl supermarket at land off Portland Road (the former White Swan Public House). The proposal is for 2,270 sq m of gross internal floor area at the ground floor, 200 sq m of gross internal floor area at the first floor, and 122 car parking spaces. The previous buildings on the site have been demolished to make way for future development. The site is located on the edge of Shirebrook Town Centre.

Miscellaneous	At the time of the Nexus site visits, Shirebrook had 4 miscellaneous units; including a post office, petrol filling station and an undertaker. Miscellaneous units make up 3.8% of all units and 3.9% of overall floorspace.
Vacancies	Shirebrook had the highest levels of vacancy of the 10 centres included in the study, accounting for 23.8% of units, or 25 of the total 105 units. This is above the UK average vacancy rate of 11.2%. Furthermore, vacant units accounted for 20.4% of floorspace within the town centre, significantly higher than the UK average of 9.0%.
Pedestrian Flows	At the time of the Nexus site visits the majority of pedestrian footfall was focussed towards the Market Place in the centre of town. Notably, there is a large amount of car parking within the centre of town in this area, particularly when the market square is not being utilised for markets.
Accessibility	<p>Shirebrook Train Station is located to the east of the main shopping area in Shirebrook and offers regular services to Nottingham, Worksop and Mansfield. The station is served by East Midlands Trains.</p> <p>Shirebrook is also serviced by a number of bus routes, which provide regular services to Mansfield, Bolsover and Chesterfield.</p> <p>There are a number of car parks located in the town centre all of which are free of charge and without time restrictions. The car parks are:</p> <ul style="list-style-type: none"> ● Ashbourne Street (77 spaces) ● Church Drive (14 spaces) ● Main Street (59 spaces) ● Patchwork Row (20 spaces) ● Portland Street (59 spaces) ● Sookholme Road (55 spaces) <p>The NEMS household survey indicates that those visiting Shirebrook generally travel by car as the driver (61.6%), as the passenger (19.5%), or walk (14.3%).</p>
Perception of Safety	At the time of the Nexus site visits the perception of safety was reasonably high. The Market Place offers a focal point for the town, with pedestrians and vehicles congregating in this area. No anti-social behaviour was noted.
Environmental Quality	<p>The town centre features a central market place that offers an excellent opportunity for a central, high quality public space. At present the square is considered to be dated, with limited aesthetic appeal. It was also noted that on occasion the square is used as a car parking space for local vendors. The square would benefit from being pedestrian focussed, with limits being placed on the movements of vehicles onto the paved square area, with exceptions for market days.</p> <p>With investment for updated planting and paving, the overall attractiveness of the town centre would result in improvements to the space. The square, and town centre in general is lacking in public street furniture such as seating, benches and tables. Additional landscaping would also improve the overall aesthetics of the town centre.</p>

Customer Views and Behaviours

The household survey undertaken by NEMS sought to identify how frequently respondents visited a particular centre and what their views were in respect of the centres they visit.

The NEMS household survey results identified that 70.7% of respondents from Zone 12 visited Shirebrook Town Centre the most. 67.6% of those respondents identified that they visited the centre at least once or twice a week, while 9.3% stated they visited the centre on a daily basis.

Respondents from Zone 12 tended to travel by car, with 61.6% of the respondents identifying that they travelled to Shirebrook by car as the driver. There is a reasonable representation of respondents travelling by foot (14.3%) and by bus (4.1%).

When asked what measures would encourage respondents to visit the town centre more often, 9.9% stated that a new/better market place would be valuable, 10.8% stated more independent shops, and 6.8% stated improved leisure facilities.

Summary

- Shirebrook town centre comprises a total of 105 units and is anchored by an Aldi and a Co-operative foodstores
- There are a total of 13 convenience stores in the centre
- The Aldi and Co-operative foodstores equate to a combined floorspace of 2,270 sq m, which represents 76.4% of the total convenience retail across the centre.
- The NEMS household survey showed that 27.1% of respondents from Shirebrook did their main grocery shopping at Aldi, Carter Lane in Shirebrook
- There are 29 comparison retail units in Shirebrook
- The health and beauty sector accounts for 12 of the 13 retail services units within the town
- The provision of financial service units is particularly low in the town centre, accounting for just 3.8% (or 4) of overall units at the time of the Nexus site visits
- Leisure services accounted for 16.2% or 17 units in the town centre
- Shirebrook had the highest levels of vacancy of the 10 centres included in the study, accounting for 23.8% of units

Key Issues

- Limited national multiple retailers
- Loss of comparison business to larger centres
- Very high vacancy rates within the town
- Investment is required to contribute to the overall environmental quality of the town centre, which currently presents as run down
- Market improvements
- Proposed Lidl supermarket at an edge of centre site on Portland Road

Conclusion

Shirebrook, as the second largest centre in Bolsover District, serves provides a strong convenience and comparison goods offer (particularly independent retailers) and a number of retail and leisure services to local residents.

Nonetheless, the relatively high vacancy rate and the dated and unappealing market square suggests that the centre would benefit from investment to take advantage of the strong performance of the centre's convenience retailers and complementary services. The proposed Lidl development on the edge of the centre will further contribute to Shirebrook's notable convenience offer.

Clowne

Address	High Street, Mill Street, Mill Green Way and North Road
Description	<p>Clowne is one of the main towns and service centres for Bolsover District, providing a range of services and amenities not widely available in the smaller settlements surrounding Clowne. The town centre is predominantly surrounded by residential land uses.</p> <p>The town centre is arranged around the B6418, which runs from the south-west to the north-east of the town centre. The town centre appears to be split with large modern floor plan units occupied by national multiple retailers clustered in the north-west of the town centre and, small scale independent units predominantly located in a linear fashion along Mill Street.</p> <p>Competing centres within 10km include Worksop, a centre of sub-regional significance and Shirebrook, Clowne, Crystal Peaks, Eckington, Killamarsh and Staveley, all of which are retail and service centres of more local significance.</p>
Current Status	Major Shopping Centre (Bolsover District Plan) / Local Centre (Venuescore classification)

Photos



Figure 9.16: Aldi, Mill Green Way



Figure 9.17: Vacant building, Rectory Road



Figure 9.18: The Cross, High Street



Figure 9.19: Portland Optical Group, Mill Street



Figure 9.20: Wilko, Clowne



Figure 9.21: Aldi, Clowne



Figure 9.22: The Anchor Public House



Figure 9.23: Clowne Miners Welfare Group Hall (out-of-centre site with planning permission for redevelopment as C2 residential care home)

Figure 9.24 Diversity of uses

Clowne	Units (no.) 2010	Units (%) 2010	Units (no.) 2016	Units (%) 2016	Floorspace (%) 2016	Units UK Avg. (%)	Floorspace UK Avg. (%)
Convenience	4	7.0	4	7.0	n/a	8.6	15.2
Comparison	15	26.3	8	14.0	n/a	32.0	35.9
Retail Services	9	15.8	18	31.6	n/a	13.9	6.7
Leisure Services	13	22.8	16	28.1	n/a	23.3	24.4
Financial and Business Services	7	12.3	2	3.5	n/a	10.6	8.0
Miscellaneous	3	5.3	2	3.5	n/a	0.1	0.1
Vacant	6	10.5	7	12.3	n/a	11.2	9.0
TOTAL	57		57	-	-	-	-

Source: Nexus Planning surveys (2016-17), Experian Goad Data (2016) and Roger Tym & Partners (2010)

Overall Composition	<p>Clowne Town Centre currently consists of 57 units, the same number of units as in 2010. The town is anchored by a Tesco supermarket, an Aldi and a Wilko, all of which are located in the northwest corner of the town centre with significant car parking.</p> <p>In addition to the three major stores listed above, national multiples include Lloyds Pharmacy, Ashgate Hospice Charity Shop, and Dominos Pizza.</p> <p>There is no Experian Goad floorspace data for Clowne; however, the town centre was included in Venuescore rankings for 2014/15 with a ranking of 1,599. Nexus has manually surveyed the centre and considered the overall composition of uses against the UK averages for each town centre category (as defined by Experian Goad).</p> <p>The town centre is predominantly located on the southern side of the railway line; however, part of the town centre does extend to the northern side. This part of the centre incorporates the community centre, library and health centre. It was also noted that there were a significant number of dwellings within the bounds of the town centre which do not contribute towards the retail offer.</p>
Convenience	<p>The NEMS household survey identified that for those surveyed from Clowne who identified that they usually did their shopping within Clowne, their main reason for visiting Clowne was choice and range of shops (44.5%), strength of supermarket provision (21.2%) and is close to home (16.2%).</p> <p>There are a total of 4 convenience retail units in Clowne Town Centre. This figure makes up 7.0% of overall units. This is below the UK average for convenience retail of 8.6% of units. The main convenience retail outlets are the Tesco and Aldi foodstores.</p> <p>The Tesco superstore is large and incorporates significant parking and a petrol filling station.</p> <p>The NEMS household survey identified that 45.2% of respondents from Zone 13 (Clowne) did their last food shopping at the Tesco at Mill Street, Clowne, 21.1% did their last food shopping at the Aldi in Clowne Town Centre, and 4.5% did their last shopping outside of Clowne, at the Morrisons at Oxclose Park.</p> <p>According to the household survey results, a further 4.8% of respondents in Zone 13 undertook their convenience goods shopping at the Co-op, Union Street in Sheffield.</p>
Comparison	<p>There are 8 comparison retail units in Clowne, equating to 14.0% of overall retail units. This is significantly lower than the UK average of 32.0%. There has been a significant decline in the number of comparison units, from 15 units in 2010 to 8 units at the time of the Nexus site visits.</p> <p>The comparison retailers are made up of a combination of charity shops, antique shops and independent stores.</p> <p>The NEMS household survey identified that 26.0% of respondents from Zone 13 (Clowne) identified that their last clothes or footwear shopping was undertaken at Crystal Peaks Shopping Mall & Retail Park (with Meadowhall Shopping Centre in Sheffield and Sheffield City Centre accounting for a further 13.8% and 10.8%, respectively), while Clowne itself only accounted for 6.3%.</p>

Services	<p>Overall, services equate to more than 60% of the units in Clowne. There are 18 retail services units, 16 leisure service units and 2 finance/business services units.</p> <p>There has been a significant increase in the number of retail services units within the town centre, from 9 in 2010, to 17 in 2016. Of the retail services, the health and beauty category accounts for 9 units. Retail units account for 29.8% of all units, which is well above the UK average of 13.9%.</p> <p>The number of leisure services in Clowne has increased by 3 since 2010. Of the 16 identified leisure services units, the majority are fast food and takeaway, public houses and restaurants.</p> <p>Clowne has only 2 finance/business services units, both estate agents. There are no banks within the town centre. Whilst there are other businesses located within the town centre, not all business uses are defined within the Experian Goad categories (which we have adopted for consistency and to allow comparisons with UK averages). There has been a reduction in financial and business services units within the town when comparing the current unit makeup to the unit makeup recorded in 2010, when there were 7 units in this category.</p>
Vacancies	<p>At the time of the Nexus site visits there were 7 vacancies in the centre making up 12.3% of overall units. The number of vacancies has increased by 1 unit since 2010 and is just higher than the UK average of 11.2%.</p> <p>A notable vacant site, located outside of the town centre boundary, is the former Clowne Miners Welfare Group Hall, which has since gained planning permission to be redeveloped to provide a residential care home.</p> <p>This introduces employment and a resident population to the town centre and the re-use of this building will likely benefit the vitality and viability of the centre.</p>
Miscellaneous	<p>At the time of the Nexus site visits Clowne had 2 miscellaneous units including a veterinarian clinic and a petrol filling station.</p>
Pedestrian Flows	<p>There was limited pedestrian activity within the town centre at the time of the Nexus site visits. The majority of footfall was observed in the north west part of the town centre where the Aldi, Tesco and Wilko are located. There is also extensive car parking in this area resulting in many patrons visiting this part of the town by vehicle.</p> <p>Parts of the southern areas of the town centre appear to be more pedestrian friendly including Mill Street and Rectory Road being part of the Clowne Conservation Area.</p>
Accessibility	<p>Clowne does not have a train station but is serviced by bus routes which provide regular services to Worksop, Bolsover, Mansfield and Sheffield.</p> <p>There are 3 car parks located in the town centre all of which are free of charge and without time restrictions. The car parks are:</p> <ul style="list-style-type: none"> ● Church Street (64 spaces) ● North Road (26 spaces) ● Recreation Close (21 spaces)

	<p>A further 320 car parking spaces are provided by Tesco which is free for customers only.</p> <p>It was also noted that according to NEMS household survey the majority of respondents visiting Clowne travelled to the centre by car or van, as the driver (66.8%) or passenger (18.0%). 8.8% of respondents identified that they usually walked into the town centre.</p>
Perception of Safety	<p>At the time of the Nexus site visits, the perception of safety was high. There was no noticeable graffiti or litter, and no antisocial behaviour observed.</p>
Environmental Quality	<p>At the time of Nexus site visits, Clowne appeared clean and well kept, with little evidence of litter or graffiti. The town centre contains a pleasant mixture of stone and brick buildings, and the Conservation Areas are particularly pleasant. The town centre would benefit from additional investment in landscaped areas that would improve the overall quality of the built environment.</p>
Customer views and behaviour	<p>The household survey undertaken by NEMS sought to identify how frequently respondents visited a particular centre and what their views were in respect of the centres they visit.</p> <p>The survey results indicate that of those respondents who generally visited Clowne the most, 12.5% visited daily, 36.5% visited at least twice a week, 26.1% visited at least once a week and 16.0% visited once a fortnight.</p> <p>The responses generally indicated that respondents from Clowne were reasonably satisfied with Clowne Town Centre, with 76.3% that there was nothing else that would encourage them to visit the centre more often.</p>
Summary	<ul style="list-style-type: none"> • The Clowne Town Centre currently consists of 57 units and is anchored by a Tesco Supermarket, an Aldi and a Wilko • The town centre was included in Venuescore rankings for 2014/15 with a ranking of 1,599 • There are a total of 4 convenience retail units in the Clowne Town Centre • There are 8 comparison retail units in Clowne, equating to 14.0% of overall retail units, significantly lower than the UK average of 32.0% • Overall, services equate to more than 60% of the units in Clowne • There are 17 retail services units, 16 leisure service units and 2 finance/business services. There are no banks in the town centre. • There has been a significant increase in the number of retail services units within the town centre, from 9 in 2010, to 17 in 2016 • The number of leisure services in Clowne has increased by 3 since 2010 • The NEMS household survey responses generally indicated that respondents from Clowne were reasonably satisfied with Clowne town centre, with 76.3% that there was nothing else that would encourage them to visit the centre more often.

Key Issues

- Decline in the number of comparison retail units
- Loss of financial and business services units within the town
- Dwellings located within the town centre
- Improvements to the urban environment through additional investment in street furniture and landscaping

Conclusion

Clowne Town Centre is defined by its significant convenience goods offer, with Tesco and Aldi serving a significant catchment area and supporting the overall good health of the centre. Whilst the number of convenience goods retailers is lower than the national averages, the stores perform significantly above UK average benchmarks, as we describe in further detail in the following chapter.

Whilst Clowne is noteworthy for its convenience retail, there is also a lack of national multiple comparison goods retailers (with the notable exception of Wilko) as residents tend to travel to nearby facilities at the retail parks across Sheffield.

The provision of services, including the community centre, library and health facilities to the north of the centre, demonstrate the wider offer of Clowne. Whilst the centre would benefit from improvements to the walkability of the centre, the range of retailers within Clowne suitably complements the offer of the larger surrounding centres and make for a vital and vibrant centre.

South Normanton

Address	High Street, Market Street, Market Place
Description	<p>South Normanton is one of the main towns and service centres for the District of Bolsover providing a range of services and amenities not widely available in the smaller settlements surrounding South Normanton.</p> <p>South Normanton Town Centre consists of one major street (Market Street, Market Place and High Street) and is primarily limited to one stretch of road, minus a couple of stores to the west of the main street including the Co-operative foodstore, Co-operative pharmacy, and veterinary surgery.</p> <p>Competing centres within 10km include Mansfield, a centre of sub-regional significance, the East Midlands Designer Outlet Centre, and Sutton in Ashfield, Alfretton, Clay Cross, all of which are retail and service centres of more local significance.</p>
Current Status	Major Shopping Centre (Bolsover District Plan) / No Venuescore information

Photos



Figure 9.25: Co-operative Foods Supermarket, South Normanton



Figure 9.26: Market Place, South Normanton (looking south)



Figure 9.27: High Street, South Normanton



Figure 9.28: Market Place, South Normanton (looking north)



Figure 9.29: High Street, South Normanton



Figure 9.30: High Street, South Normanton

Figure 9.31 Diversity of use

South Normanton	Units (no.) 2010	Units (%) 2010	Units (no.) 2016	Units (%) 2016	Floorspace (%) 2016	Units UK Avg. (%)	Floorspace UK Avg. (%)
Convenience	5	9.1	7	16.7	36.9	8.6	15.2
Comparison	17	31.0	12	28.6	22.8	32.0	35.9
Retail Services	8	14.6	8	19.1	13.3	13.9	6.7
Leisure Services	15	27.3	7	16.7	10.7	23.3	24.4
Financial and Professional Services	3	5.5	1	2.4	1.0	10.6	8.0
Miscellaneous	2	3.6	4	9.5	10.0	0.1	0.1
Vacant	5	9.1	3	7.1	5.3	11.2	9.0
TOTAL	55		42	-	-	-	-

Source: Nexus Planning surveys (2016-17), Experian Goad Data (2016) and Roger Tym & Partners (2010)

Overall Composition

South Normanton is one of the smallest centres included in the Study.

At the time of the Nexus site visits, there were 42 retail units in South Normanton, a reduction of 13 retail units since 2010 when compared against the previous study prepared by Roger Tym & Partners. The study completed by Roger Tym & Partners included a secondary part of South Normanton Town Centre to the south of the one included in the current Study. This secondary area is made up of a Petrol Filling Station and a series of approximately 7 individual shops.

Convenience

The core South Normanton Town Centre is anchored by a Co-operative foodstore, and this is the only major convenience retailer in the town centre. The only other national multiple stores are a Heron Foods Convenience store and a NISA Local convenience store.

South Normanton has not yet featured in the Venuescore rankings.

There are 7 convenience retail stores in the centre, an increase of 2 units since 2010.

Convenience units make up 16.7% of the overall composition of South Normanton which is above the UK average of 8.6%. The percentage of convenience floorspace is 36.9%, which is also above the UK average of 15.2%.

The main foodstore in South Normanton is the Co-operative foodstore (Figure 9.24), located to the west of Market Place. There are a series of additional local convenience goods stores including NISA Local and Heron Foods convenience stores, a bakery and a butcher.

The NEMS household survey data reflects that the majority of respondents from the South Normanton zone undertook their main food and grocery shopping outside of South Normanton, with 26.1% identifying they undertook their shopping at Tesco in Alfreton and 13.0% identified the Aldi at Alfreton.

There are markets held every Tuesday and Friday within the town centre, providing an assortment of additional convenience goods.

Comparison

There are 12 comparison units located in South Normanton, a reduction of 5 units since 2010. The comparison offer makes up 28.6% of the centre, below the UK average of 32.1%. The majority of comparison units are independent stores offering a variety of goods.

The NEMS household survey results identified that 29.3% of respondents from Zone 9 (South Normanton) purchased their last clothing or footwear goods from the East Midlands Designer Outlet, while 10.2% made the purchase at Sutton-in-Ashfield. Only 0.7% of respondents purchased their last clothes or footwear from within South Normanton Town Centre.

Services

There are 14 service units in South Normanton which is a reduction of 10 units since 2010, showing that the majority of units lost in that six-year period were services. Leisure services in particular have seen a reduction from 15 units in 2010 to 7 in 2016. However, notably, the 2010 Study included an additional secondary area of the centre to the north which contained 4 hot food takeaway units and would partially explain the extent of the reduction. Of the 7 service units in South Normanton at the time of the survey, the majority are food and drink outlets.

There are 8 retail services units in the town centre, all of which are included in the health and beauty category. In addition, there is 1 financial and professional services unit, being the South Normanton Business Centre. There are no banks located within the town centre.

There is a notable spatial pattern of retail services being located towards the middle of the town centre. A total of 4 retail services units are located adjoining

	each other to the south of Hilcote Street.
Vacancies	<p>The number of vacant units has reduced from 5 in 2010 to 3 in 2016. Vacant units account for 7.1% of the total number of units and 5.34% of floorspace, both well below the UK averages.</p> <p>There are vacant units at both the northern and southern edges of the centre, demonstrating that units around the town centre core may generally perform more strongly.</p> <p>There are also a number of dwellings located on the eastern side of Market Place towards the southern end of the town centre.</p>
Miscellaneous	<p>At the time of the Nexus site visits South Normanton had 4 miscellaneous units, accounting for 9.5% of the total number of units, significantly higher than the UK average of 0.13%. Miscellaneous units include a Post Office, Veterinary Surgery, Funeral Service and a taxi company.</p>
Pedestrian Flows	<p>At the time of the Nexus site visits, there was limited footfall along Market Street. South Normanton presented as a quiet village town with little activity within the town centre.</p>
Accessibility	<p>Although South Normanton does not have a train station, Alfreton station is located 3km away and there is a direct bus service to the station from South Normanton. Bus routes provide services to Nottingham, Chesterfield and Mansfield.</p> <p>There are 3 car parks located in the town centre all of which are free of charge and without time restrictions. The car parks are:</p> <ul style="list-style-type: none"> • Eastfield Drive (9 spaces) • Market Place (45 spaces) • Princess Avenue (8 spaces) <p>At the time of the Nexus site visits, there were car parking spaces available within these car parks.</p> <p>The NEMS household survey results identified that residents of South Normanton who generally travelled to South Normanton the most, travelled via car as either the driver (53.1%) or as a passenger (7.6%). Notably, 32.6% of respondents walked to the centre, indicating that many of the respondents lived nearby to the centre.</p>
Perception of Safety	<p>When Nexus carried out their site visits the perception of crime was low. There was limited pedestrian or vehicular activity within the town on this day.</p>
Environmental Quality	<p>The urban environment of the South Normanton Town Centre is of a reasonable quality. There is an opportunity to invest in a more pedestrian focussed urban environment to ensure a pleasant experience for visitors. For example, footpaths along High Street and Market Place were narrow. A more pronounced and more clearly demarcated pedestrian environment would improve the overall urban environment within the town centre.</p>
Customer views and	<p>The household survey undertaken by NEMS sought to identify how frequently respondents visited a particular centre and what their views were in respect of</p>

behaviours

the centres they visited.

Respondents from South Normanton stated that their main reason for visiting South Normanton was the choice and range of shops (45.7%), and vicinity to their homes (16.4%).

The household survey identified that measures that would encourage residents of the South Normanton zone to visit South Normanton more were an increased general choice and range of shops (18.0%) and providing a better range of services (7.9%).

Summary

- There are 42 retail units in South Normanton.
- The core South Normanton Town Centre is anchored by a Co-operative foodstore, and this is the only major convenience retailer in the town centre.
- There are 12 comparison units located in South Normanton, a reduction of 5 units since 2010.
- Only 0.7% of respondents purchased their last clothes or footwear from within South Normanton Town Centre.
- There are 14 service units in South Normanton, which is a reduction of 10 units since 2010, showing that the majority of units lost in that six-year period were services.
- Leisure services in particular have seen a reduction from 15 units in 2010 to 7 in 2016.
- There is only 1 financial and professional services unit, being the South Normanton Business Centre.
- The household survey identified that measures that would encourage residents of the South Normanton zone to visit South Normanton more often were an increased general choice and range of shops (21.4%) and providing a better range of services (7.7%).

Key Issues

- Lack of national multiple comparison shopping options
- Low footfall and activity
- Lack of night time activity and associated leisure services
- Lack of business and financial services
- Whilst a healthy 45.7% of respondents identified that they visited because of the choice and range of shops, 18.0% suggested that a better choice and range of shops would encourage them to visit more often. This suggests that the centre caters for some, but not all, goods and services that residents would expect of their local centre (as noted by the lack of comparison goods retailers and leisure services).

Conclusion

South Normanton serves as a traditional high street, functioning as the main retail and service offering for a number of surrounding rural communities.

As a small centre, catering to local 'day-to-day' needs, South Normanton is relatively well provided for in terms of convenience goods retailers that serve a top-up function in conjunction with the wider offer of centres such as Alfreton.

South Normanton has a relatively low vacancy rate, a range of service uses and a pleasant urban environment that contribute to a vital and viable centre, commensurate with its scale and its position in the retail hierarchy.

Chesterfield

Address	W Bars, South Street, Knifesmithgate, Glumangate, Burlington Street
Description	Chesterfield is classed as a sub-regional centre which provides retail and services for the Borough of Chesterfield as well as the surrounding areas in north east Derbyshire. Chesterfield has an 800-year market tradition which enhances the visitor experience. Chesterfield is located 39km north of Derby and 18km south of Sheffield.
Current Status	Sub-regional centre (Local Plan: Core Strategy 2013) / Regional Centre (Venuescore classification)

Photos



Figure 9.32: Vacant ex Co-operative foodstore



Figure 9.33: Holywell Street, Chesterfield



Figure 9.34: Chesterfield Market Place Markets



Figure 9.35: The Pavement Shopping Centre



Figure 9.36: Pavement Shopping Arcade and signage



Figure 9.37: Ravenside Retail Park



Figure 9.38: Vicar Lane, Chesterfield



Figure 9.39: Holywell Street nightlife

Figure 9.40 Diversity of use

Chesterfield	Units (no.) 2008	Units (%) 2008	Units (no.) 2016	Units (%) 2016	Floorspace (%) 2016	Units UK Avg. (%)	Floorspace UK Avg. (%)
Convenience	32	7.9	30	7.0	8.4	8.6	15.2
Comparison	185	45.6	157	36.9	40.3	32.0	35.9
Retail Services	39	9.6	53	12.4	5.0	13.9	6.7
Leisure Services	78	19.2	98	23.0	22.3	23.3	24.4
Financial and Professional Services	57	14.0	50	11.7	9.4	10.6	8.0
Miscellaneous	*	*	5	1.2	1.9	0.1	0.1
Vacant	15	3.7	33	7.8	12.7	11.2	9.0
TOTAL	406	-	426	-	-	-	-

Source: Nexus Planning surveys (2016-17), Experian Goad Data (2016) and Nathaniel Lichfield & Partners (2008)
*figure not included in 2008 retail study

Overall Composition	<p>Chesterfield is significantly larger than any other centre included in the Study in terms of units and floor space.</p> <p>There are currently 426 retail units in Chesterfield, (an increase of 20 retail units since 2008). Chesterfield (centre) has a ranking of 160 in Venuescore rankings, the highest ranking of any centre included in the Study.</p> <p>In addition to the town centre, there are a number of additional retail parks in close proximity to the town including Chesterfield Ravenside/Markham Retail Park, Wheatbridge Road, Chatsworth Road and Meltham Lane / Lockoford Lane. All are included in the Venuescore rankings.</p> <p>Chesterfield offers the largest number of national multiple retail stores of all the town centres included in the study. This is reflected in its popularity with residents across the Study Area, as indicated by the NEMS household survey results.</p>
Convenience	<p>There are 30 convenience stores in the centre, a reduction of 2 units since 2008.</p> <p>Convenience units make up 7.0% of the overall composition of Chesterfield. The percentage of convenience floorspace is 8.4%, which is well below the UK average of 15.2%.</p> <p>The main foodstores in Chesterfield Centre are the Co-operative foodstore and the Tesco Metro supermarket. Chesterfield is further serviced by convenience retail supermarkets located at edge-of-centre and out-of-centre locations.</p>

Comparison

Spatially, convenience units are generally spread throughout the town centre.

At the time of the Nexus site visits, a market was being held within the Chesterfield Town Centre Square (Figure 9.34). The Visit Chesterfield website identifies that the general market occurs every Monday, Friday and Saturday, and a Farmers Market happens on the second Tuesday of each month. The markets provide additional convenience shopping options.

The NEMS household survey data reflects the popularity of the Morrisons on Chatsworth Road, Chesterfield for respondents from Zone 1 (Chesterfield West) (43.1%) and the Tesco Extra, Lockoford Lane, Chesterfield for respondents from Zone 2 (Chesterfield East) (41.3%). Both of these supermarkets are located outside of the town centre, with respondents generally preferring larger out-of-centre supermarkets to undertake their regular convenience shopping.

Local shops within Chesterfield Town Centre were popular for top-up shopping, with both a significant number of respondents from Zone 1 (Chesterfield West) (20.2%) and Zone 2 (Chesterfield East) (36.4%) identifying that Chesterfield local shops were where they did their top up shopping.

There are 157 comparison units located in Chesterfield Town Centre, a reduction from 185 units in 2008. The comparison offer makes up 36.9% of the centre, which exceeds the UK average of 32.0%. The comparison offer ranges from large national multiple stores as well as a strong presence of independent stores offering a variety of goods.

Comparison retail units are generally located around the central and southern portions of the centre, particularly near the Market Place. There is a focus of comparison units around the pedestrian focussed streets of the central part of the town centre.

Chesterfield Town Centre was the most popular centre for purchasing comparison goods such as clothing and footwear. Of all respondents across the zones 32.0% identified that they last purchased clothing or footwear from Chesterfield.

National multiples and Experian Top 31 major retailers present within the town centre include H&M, Primark, River Island, Topshop, Boots, Dorothy Perkins, New Look, Argos, Marks & Spencer, Superdrug, Clintons, Clarks, Carphone Warehouse, O2, Vodaphone and Waterstones.

There is significant additional comparison retail offer at edge-of-centre and out-of-centre locations within Chesterfield Borough. For example, the Ravenside Retail Park, which is located at the edge of Chesterfield Town Centre contains Debenhams, Hobby Craft, Next, ASDA Living, Maplin, Currys PC World, Pets at Home, B&M, Carphone Warehouse and Poundland.

Services

There are 201 service units in Chesterfield Town Centre which is an increase of 27 units since 2008.

The strongest service sector is the leisure services sector, which makes up 48.8% of the service offer (98 units). The makeup of leisure services within Chesterfield is predominantly cafes, restaurants, takeaways, bars, betting offices and public houses. There was a notable prominence of bars and clubs in the north east corner of the town centre along Holywell Street and Corporation

Street. There are also 2 theatres in this area, adding to the leisure offer within the town.

The NEMS household survey indicated that Chesterfield was the most popular destination for restaurants with 28.3% of all respondents identifying that they last went to Chesterfield to visit a restaurant.

The retail services sector makes up 26.4% of all services units and 12.4% of all retail units within Chesterfield (53 units).

The financial and professional services makeup is fairly strong, comprising 24.8% of services units, and 11.7% of all units within Chesterfield. By comparison, this is a higher proportion of financial and professional services than the UK average. Of the financial and professional services units, 9 are banks, including an HSBC, Santander, Natwest, Barclays and Lloyds. Financial and professional services are generally focussed around the north west part of the town centre.

Interestingly, despite the prominence of financial services, there are 5 vacant banks/financial institutions within the town centre. Whilst there is a trend of banks across smaller centres closing down and consolidating services to higher order centres, it is somewhat unexpected in a centre the size of Chesterfield. Nonetheless, Chesterfield continues to feature a relatively high proportion of banks and financial institutions.

Vacancies

At the time of the Nexus site visits there were 33 vacant units recorded. This equates to a vacancy rate of 7.8% of all units, and 12.7% of floorspace. The comparable UK averages are 11.2% and 9.0% respectively, showing that while Chesterfield has a lower proportion of vacant units, the town has a higher proportion of vacant floorspace than the UK average.

There were two key retail vacancies within the town at the time of the Nexus site visits. The first was the former BHS store building at Vicar Lane, which consists of two floors of vacant floorspace. The second was the former Co-op foodstore, which is 4-storeys of vacant floorspace located on the corner of Elder Way and Knifemithgate. This site benefits from planning permission for redevelopment to provide a hotel, gym and modern flexible retail units that will likely be considered more attractive to occupiers than the former use.

Miscellaneous

At the time of the Nexus site visits Chesterfield had 5 miscellaneous units, equating to 1.2% of all units.

Pedestrian Flows

In terms of pedestrian activity, Chesterfield was by far the busiest town centre of the 10 included in the study, as noted during the Nexus site visits.

The Market Square in the centre of the town was particularly busy considering the markets that were present during the day. Equally, foot traffic was also present in this area at night, indicating a reasonable night time economy.

Further, pedestrian traffic was busy for the majority of areas between Beetwell Street in the south and Saltergate in the north.

Despite the proximity of Chesterfield Town Centre to Ravenside Retail Park, there is limited pedestrian connectivity between the two. Additional signage would improve pedestrian legibility and likely increase the number of linked trips

Accessibility

on foot between the two.

Chesterfield Train Station is located to the north east of the main shopping area and offers direct services to Derby, Leeds, Liverpool, Norwich, Nottingham and Sheffield. The station is served by East Midland Trains, CrossCountry and Northern.

There are a number of car parks located in the town centre including:

Short stay / shopper car parks (paid)

- Holywell Cross car park (255 spaces)
- Rose Hill car park (242 spaces)
- Soresby Street car park (208 spaces)
- St Mary's Gate (66 spaces)

Long stay/commuter car parks (paid)

- Albion Road car park (30 spaces)
- Ashgate Road (150 spaces)
- Derbyshire Times (55 spaces)
- Devonshire Street (73 spaces)
- Durrant Road (69 spaces)
- Hollis Lane (38 spaces)
- New Beetwell Street multi storey (265 spaces)
- Old Queen's Park Leisure Centre – North (120 spaces)
- Old Queen's Park Leisure Centre – South (43 spaces)
- Queen's Park Annexe (43 spaces)
- Saltergate multi storey (529 spaces)
- Spa Lane (56 spaces)
- Station Rd (59 spaces)
- Theatre Lane (50 spaces)
- West Street (15 spaces)

There is also paid on-street parking along Rose Hill, Rose Hill West, Rose Hill East and Glumangate.

At the time of the Nexus site visits, car parks generally appeared to be busy. The majority of car parking within the town centre requires payment.

The NEMS household survey results identified that 68.9% of respondents travelling to Chesterfield travelled by car as the driver, while 8.0% travelled as the passenger. 12.6% of respondents travelled by bus, and 5.5% walked.

Perception of Safety

When Nexus carried out their site visits the perception of crime was low. The centre was perceived to be busy, with high levels of footfall along most streets within the centre.

There appeared to be reasonable street lighting within the main pedestrianised area of the town.

Environmental Quality

Chesterfield was one of the more attractive town centres of the 10 included in the study, with a large pedestrianised high street and market square. The market square in the centre of town contributes to a sense of unity within the town, and overall this area was of a high quality urban design, with adequate lighting, bench seating and rubbish bins.

Customer views and behaviours

While environmental quality was perceived to be high, the NEMS household survey results illustrated that environmental quality was far from the primary reason that respondents visited Chesterfield, with only 0.7% of respondents identifying they visited the centre because of the environmental quality.

The NEMS household survey identified that the measures which would encourage respondents to visit Chesterfield more often are increased general choice and range of shops (19.1%), and cheaper / free parking (14.7%). No other centre had such an issue with parking as in Chesterfield.

Chesterfield presents the most diverse range of retail units and services of all centres across the study area. Fittingly Chesterfield was the most popular town centre within the study area. The NEMS household survey identified that of those respondents who stated they visited Chesterfield the most, 53.3% indicated that this was because of the choice and range of shops. Notably, only 12.3% of respondents indicated they visited Chesterfield because it was close to home, showing that patrons come from across the Study Area to undertake their shopping in the Chesterfield Town Centre.

Discussions with stakeholders confirmed the appeal of the centres market, with the general market, indoor market, and monthly farmers and artisan markets drawing shoppers from beyond the immediate area and differentiating the centre from the neighbouring higher order centres. This success has also been shown by the popularity of available stalls, with very few vacancies across the markets.

Whilst the attraction of edge and out-of-centre foodstores was acknowledged, the attraction of the markets, comparison goods retails and the offer of the out-of-centre retail parks was considered a positive combination of attractions, with local residents and businesses excited about the future Chesterfield Waterside regeneration development to the north of the centre.

Summary

- There are currently 426 retail units in Chesterfield Town Centre
- Chesterfield Town Centre has a ranking of 160 in Venuescore rankings, the highest ranking of any centre included in the study
- There are 30 convenience units within the town centre
- While out-of-centre supermarkets were popular with Chesterfield residents, local shops within Chesterfield Town Centre were found to be popular for top-up shopping
- There are 157 comparison units located in Chesterfield Town Centre
- There are 201 service units in Chesterfield Town Centre which is an increase of 27 units since 2008
- The strongest service sector is the leisure services sector which makes up 48.8% of the service offer (98 units)
- There was a notable prominence of bars and clubs in the north east corner of the town centre along Holywell Street and Corporation Street
- The financial and professional services makeup is fairly strong, making

Key Issues	<p>up 11.7% of all units within Chesterfield</p> <ul style="list-style-type: none"> • At the time of the Nexus site visits there were 33 vacant units recorded, equating to a vacancy rate of 7.8% of all units • The NEMS household survey results identified that 68.9% of respondents travelling to Chesterfield travelled by car as the driver, while 8.0% travelled as the passenger • Only 12.3% of respondents indicated they visited Chesterfield because it was close to home, showing that patrons come from across the Study Area to undertake their shopping in the Chesterfield Town Centre. <ul style="list-style-type: none"> • Free or cheaper parking required • Reduction in comparison units since 2010 • Prominent vacant units • Accessibility to provide better links between Chesterfield Town Centre with edge-of-centre and out-of-centre retail parks such as Ravenside Retail Park
Conclusion	<p>Chesterfield Town Centre, as the largest centre in the Study, serves a more regional function than the other centres that have been assessed. In addition to the outdoor and indoor markets, the centre is supported by a number of large Out-of-Centre foodstores and retail parks (including Ravenside, which adjoins the Town Centre, separated by the A619, Markham Road). This significant retail offer and the large proportion of national multiple retailers demonstrate the draw of the centre to residents across the Study Area.</p> <p>By virtue of its prominence and location in the retail hierarchy, Chesterfield also features a number of services that are not widely available across the Study, such as banking facilities, further evidencing the strength of the town in the context of the surrounding centres.</p> <p>The number of vacant units at the time of the Nexus Planning surveys were not large enough to be considered a cause for concern, but did include a couple of prominent buildings that detracted from the otherwise high quality urban environment, supported by the presence of the popular general and farmers markets.</p> <p>In light of Chesterfield Town Centre's strong performance and the planned growth in floorspace over the plan period, the centre can be considered vital and viable.</p>

Staveley

Address	High Street and Market Place
Description	Staveley is classified as a town centre in the Chesterfield Borough and is located to the north east of Chesterfield Town Centre. Staveley primarily caters for the eastern part of the local area, although a Morrison's supermarket situated in Staveley attracts trade for areas further afield.
Current Status	Town centre (Local Plan: Core Strategy, 2013) / Local Centre (Venuescore rankings)

Photos



Figure 9.41: Morrison's, Staveley



Figure 9.42: The Original Factory Shop, Staveley



Figure 9.43: Market Place, Staveley



Figure 9.44: Vacant Cinema, Church Street, Staveley



Figure 9.45: High Street, Staveley (looking south)



Figure 9.46: The Elm Tree Inn, High Street, Staveley

Figure 9.47 Diversity of use

Staveley	Units (no.) 2008	Units (%) 2008	Units (no.) 2016	Units (%) 2016	Floorspace (%) 2016	Units UK Avg. (%)	Floorspace UK Avg. (%)
Convenience	3	8.8	6	10.9	n/a	8.6	15.2
Comparison	11	32.4	19	34.6	n/a	32.0	35.9
Retail Services	4	11.8	8	16.4	n/a	13.9	6.7
Leisure Services	4	11.8	9	16.4	n/a	23.3	24.4
Financial and Business Services	7	20.6	3	5.5	n/a	10.6	8.0
Miscellaneous	*	*	7	10.9	n/a	0.1	0.1
Vacant	5	14.7	3	5.5	n/a	11.2	9.0
TOTAL	34		55	-	-	-	-

Source: Nexus Planning surveys (2016-17), Experian Goad Data (2016) and Nathaniel Lichfield & Partners (2008)
*figure not included in 2008 retail study

Overall Composition	<p>There are currently 55 retail units in Staveley Town Centre. Nexus utilised the categories of retail uses as defined by Experian Goad. This approach allows a consistent approach to the definition of each use for comparing against the UK averages and previous data.</p> <p>Notably, the previous Retail Study undertaken by NLP in 2008 identified just 34 units within the town. Given that the 2008 figures do not include miscellaneous uses (including post offices, vets and animal grooming facilities) this inconsistency is likely due to a difference between the Experian Goad definitions of uses that we have utilised and the definitions adopted by NLP. As such, we would recommend treating any small inconsistencies between the two datasets with caution.</p> <p>The centre is anchored by a large Morrisons supermarket (refer to Figure 9.40). There is also a well-defined high street with good pedestrian connections through the centre of the town. Other national multiples include Peak pharmacy, Lloyds bank, Ladbrokes betting office, Barnados charity shop, William Hill betting office and Natwest bank.</p> <p>There is currently no Experian Goad data for floor areas within Staveley, however the town is included in Venuescore data, having a ranking of 2,557 in 2014/15, the lowest ranking of the town centres included in this Study. Staveley had not been included in Venuescore rankings previously, showing growth in the number of national multiples in the town centre.</p>
Convenience	<p>Convenience retail accounts for 6 units or 10.9% of all units within the town centre. This is an increase of 3 units since the previous Study was undertaken in 2008 by NLP. Convenience retail makes up a slightly higher proportion of units in</p>

	<p>Staveley than the UK average of 8.6%.</p> <p>Staveley Market is held in the Market Place on Tuesday and Friday mornings, and a flea market is held on Saturday mornings.</p> <p>The NEMS household survey indicated that Morrisons in Staveley was the most popular destination for Staveley respondents to undertake food and grocery shopping, with 44% of respondents identifying this was the location for their main food and grocery shop. Respondents from Zone 3 (Staveley / Brimington) also indicated that they regularly undertook food shopping at both the Tesco Extra in Chesterfield and the Sainsbury's at Rother Way in Chesterfield.</p> <p>25.5% of respondents from Zone 3 identified that if they undertook specialist food shopping, it was in Staveley Town Centre. 26.5% of respondents identified they undertook specialist food shopping outside of Staveley Town Centre but within Zone 3, 35.4% identified they went to the local shops at Chesterfield.</p>
Comparison	<p>There are 19 comparison units located in Staveley. The number of comparison stores has increased from 11 units in 2008. The comparison offer makes up 34.6% of the centre, which exceeds the UK average of 32.0%. The majority of comparison units are independent stores offering a variety of goods.</p> <p>The NEMS household survey identified that only 4.0% of Staveley respondents last bought clothes or footwear in Staveley, while 52.9% identified they went to Chesterfield. 13.1% of respondents identified they went to Meadowhall Shopping Centre in Sheffield. There were similar results for purchase of household goods, toys and recreational goods, and other comparison retail goods.</p>
Services	<p>There are 20 service units in Staveley which is a reduction of 2 units since 2008. The breakdown of services is:</p> <ul style="list-style-type: none"> Retail services – 9 units Leisure services – 9 units Financial and business services – 3 units <p>Of the 8 retail services units, 5 were included in the health and beauty category.</p> <p>The leisure services category was primarily made up of fast food and takeaway, public houses and betting offices. The NEMS household survey identified that generally respondents from Staveley went to centres other than Staveley for restaurants, including Chesterfield (37.2%) or Sheffield (31.1%). Similarly, Sheffield and Chesterfield were the most popular destinations for other leisure services.</p> <p>It was noted during the site visits that there is a large Healthy Living Centre on the opposite side of Market Street, just outside of the town centre boundaries. The Healthy Living Centre is generally busy during the evenings.</p> <p>The finance and business services sector is particularly weak in Staveley. 2 banks are located on the high street (Lloyd's and NatWest).</p>
Vacancies	<p>The number of vacant units has reduced from 5 in 2008 to 3 at the time of the Nexus site visits. This equates to a 5.5% vacancy rate. Of note is the vacant old cinema building which offers fairly significant floor area (Figure 9.44).</p>

Miscellaneous	At the time of the Nexus site visits, Staveley had 6 miscellaneous units including a post office, veterinarian, and funeral home.
Pedestrian Flows	At the time of the Nexus site visits, the majority of footfall was observed in proximity Morrisons and at the lower end of High Street. Foot traffic was also noted within the Market Place which forms a link between High Street and the Morrisons.
Accessibility	<p>Staveley does not have a train station but is serviced by bus routes with services to Chesterfield, Clowne, Worksop, Bolsover and Markham Vale.</p> <p>The car park within the town centre is attached to the Morrisons supermarket, which provides 420 free parking spaces (for customers only). There is some other parking located on streets in and surrounding the town centre.</p>
Perception of Safety	The northern part of High Street and Church Street was lacking in appropriate lighting. It was noted that there are a number of dwellings located in this space, reducing the amount of foot traffic through this area, in comparison to the southern end of High Street which was more adequately lit and provided a better perception of safety.
Environmental Quality	<p>The lower part of High Street and Market Street offers a very pleasant urban environment which promotes pedestrians rather than the vehicle. Trees, bench seats and rubbish bins are located regularly along the lower part of High Street. The street is one-way for vehicles, which is a successful traffic calming method.</p> <p>A pedestrianised square is located between the Morrisons car park and High Street which is pleasantly landscaped and provides bench seats and rubbish bins. During the summer months this square is likely to be popular.</p>
Customer views and behaviours	<p>The household survey undertaken by NEMS sought to identify how frequently respondents visited particular centre and what their views were in respect of the centres they visit.</p> <p>When asked about the main reason they visited Staveley, 41.2% of respondents identified that the choice and range of shops, and 34.5% identified that the centre is close to home. When asked what measures would encourage them to visit the centre more often 12.0% identified a new/better market, and 10.0% identified increased general choice and range of shops.</p>
Summary	<ul style="list-style-type: none"> • There are currently 55 retail units in Staveley • The town is included in Venuescore data, having a ranking of 2,557 in 2014/15, the lowest ranking of the town centres included in this study • Convenience retail accounts for 6 units or 10.9% of all units within the town centre • The NEMS household survey indicated that Morrisons in Staveley was the most popular destination for Staveley respondents, with 44.0% of respondents identifying this was the location for their main food and grocery shop • There are 19 comparison units located in Staveley

Key Issues	<ul style="list-style-type: none"> • The leisure services category was primarily made up of fast food and takeaway, public houses and betting offices • The finance and business services sector is particularly weak in Staveley • When asked what measures would encourage them to visit the centre more often 12.0% of respondents from Staveley identified a new/better market, and 10.0% identified increased general choice and range of shops <ul style="list-style-type: none"> • Disjointed centre, with the northern part separated from the southern part by residential units • Lack of restaurants within the town centre resulting in residents going elsewhere • Better market indicated as a potential improvement for the centre • Lack of choice of comparison stores
Conclusion	<p>Staveley is anchored by the strong performing convenience offer (Morrisons) supported by more local (and independent) comparison and service retailers focussed on 'day-to-day' provision, particularly given the centre's proximity to Chesterfield Town Centre, which offers a more substantial retail offer.</p> <p>The draw of Morrisons, the attractive and pedestrian-friendly urban environment and the low vacancy rate provide for a vital and vibrant centre that provides well for its local resident population, given its scale.</p>

Dronfield

Address	High Street, Civic Centre
Description	<p>Dronfield is considered to be one of the major shopping destinations in North East Derbyshire District and serves the needs of local residents along with the needs of residents in villages between the two major settlements of Chesterfield and Sheffield.</p> <p>The town has a number of listed buildings and the town centre is within a Conservation Area.</p>
Current Status	Major Retail Centre (Local Plan 2001-2011) / No Venuescore information

Photos



Figure 9.48: Sainsbury's, Dronfield



Figure 9.49: Dronfield Civic Centre



Figure 9.50: Corner of High Street and Church Street



Figure 9.51: The Blue Stoops, Public House

Figure 9.52 Diversity of use

Dronfield	Units (no.) 2008	Units (%) 2008	Units (no.) 2016	Units (%) 2016	Floorspace (%) 2016	Units UK Avg. (%)	Floorspace UK Avg. (%)
Convenience	10	8.3	5	14.7	52.2	8.6	15.2
Comparison	37	30.9	12	35.3	8.3	32.0	35.9
Retail Services	10	8.3	5	14.1	27.9	13.9	6.7
Leisure Services	21	17.5	6	17.7	4.9	23.3	24.4
Financial and Professional Services	23	17.5	4	11.8	4.1	10.6	8.0
Miscellaneous	*	*	0	0	0	0.1	0.1
Vacant	19	15.8	2	5.9	2.7	11.2	9.0
TOTAL	120	-	34	-	-	-	-

Source: Nexus Planning surveys (2016-17), Experian Goad Data (2016) and Nathaniel Lichfield & Partners (2008)
*figure not included in 2008 retail study

**Overall
Composition**

Whilst Dronfield is the largest town in North East Derbyshire District, it is the smallest in terms of units and floorspace of all 10 centres included in this Study.

The NLP Retail Study that was undertaken in 2008 included 120 units across the town. This study included parts of the town that would not necessarily be considered to be part of the town centre. An extract from NLP Retail Study (2008) states:

In our view Dronfield does not provide a compact or coherent centre. It is difficult to define a centre boundary based on the guidance in PPS6. The Council could consider defining a more compact centre boundary around the existing Somerfield store and adjacent parade and the Sainsbury store. Other shopping areas in Dronfield could be defined as separate local parades. (Page 115)

The most recent Experian Goad data includes 34 retail units, including only the comprehensive retail centre core south of the Sainsbury's referenced in the extract above. This study does not consider retail units to the east of the railway line, which is a response to the recommendation of the study undertaken by NLP in 2008. It is also noted that the previous study did not provide data for miscellaneous uses, and as such, the definitions of uses may not directly align with the Experian Goad category definition utilised throughout this study.

There is a large Sainsbury's in the north of the town centre, which is popular across the Study Area. Other national multiples include Co-operative foodstore, Lloyds pharmacy, Barnardo's charity shop, Cooplands bakery, HSBC bank, Co-

	<p>op travel agent, Betfred betting office, Yorkshire building society, and Domino's pizza.</p> <p>Dronfield was not included in Venuescore rankings for 2014-15.</p>
<p>Convenience</p>	<p>There are 5 convenience stores in the centre, representing 14.7% of units, which is higher than the UK average (8.3%). Interestingly, convenience retail represents 52.2% of all retail floorspace. This is primarily due to the large Sainsbury's located within the town centre which has a floor area of 3,850 sq m and includes services such as click & collect, a bakery counter, and a clothing and homewear section.</p> <p>In addition to the large Sainsbury's there is also a Co-operative Foods Supermarket, as well as an out of centre Aldi which is not included in the figures above.</p> <p>The NEMS household survey indicates that the most popular store within the Dronfield area is Sainsbury's within the town centre, with 32.8% of respondents identifying that they undertook their last main food and grocery shopping at the Sainsbury's. The second most popular store for food and grocery shopping (21.4%) was the Aldi at Sheffield Road, which is on the edge of Dronfield Town Centre.</p> <p>Further, the NEMS household survey also identified that top up shopping undertaken by respondents from Dronfield was undertaken at the Sainsbury's (42%) and the Dronfield local shops (36.1%). Equally, specialist shopping by Zone 4 (Dronfield) respondents was generally undertaken at the local shops in Dronfield (69.6%).</p>
<p>Comparison</p>	<p>There are 12 comparison units located in Dronfield, representing 35.3% of the overall number of units. This is reasonably comparable to the UK average of 2.0%. Again, interestingly, the proportion of comparison floorspace in Dronfield (8.3%) is very different from the UK average (35.9%).</p> <p>Comparison units are generally located across the town centre; however, there are 5 in close proximity in the Dronfield Civic Centre shopping complex, including 3 charity shops. When asked where they last undertook shopping for clothes and footwear, respondents from Zone 4 (Dronfield) identified Chesterfield (42.6%), Sheffield City Centre (37.9%) and Meadowhall Shopping Centre (14.2%). No respondent stated they had last purchased clothes and footwear from within Dronfield. This trend is similar across other comparison goods categories, with the exception of chemist goods and DIY and gardening goods.</p>
<p>Services</p>	<p>The town centre is quite small and therefore there are minimal services. There are 15 service units identified in Dronfield, made up of 6 leisure services units, 5 retail services units and 4 financial and professional services units.</p> <p>The majority of financial and professional services are generally located within the Dronfield Civic Centre complex area, while leisure services (except the Dronfield Leisure Centre) are generally located along High Street. The Dronfield Leisure Centre is particularly popular, with 59.8% of respondents from Zone 4 (Dronfield) responding that their last visit for outdoor sports / indoor sports / health and fitness activities was at the Dronfield Leisure Centre. This was the second most popular leisure centre across the study area, second only to the Queens Park Sports Centre in Chesterfield.</p>

	<p>Further, Dronfield respondents overwhelmingly responded that they went to Dronfield to go to bars / pubs / nightclubs / social clubs (50.1%). Dronfield was identified as the third most popular location in this category, behind Chesterfield and Sheffield.</p> <p>While Sheffield was the most popular destination to visit a restaurant, Dronfield restaurants performed reasonably well, with 35.7% of respondents from Zone 4 (Dronfield) identifying they last went to a restaurant in Dronfield.</p>
Vacancies	<p>There were 2 vacant units recorded during Nexus' site visits, representing 5.9% of all units, and 2.7% of the floorspace, both well below the UK averages.</p>
Miscellaneous	<p>At the time of the Nexus site visits, no miscellaneous units were identified.</p>
Pedestrian Flows	<p>At the time of the Nexus site visits, the majority of footfall was witnessed at the Sainsbury's at the north of the town. Some footfall was also witnessed within the Dronfield Civic Centre complex and near the Dronfield Leisure Centre indicating that these are the most popular areas in town. Further, there is significant car parking at both these locations.</p>
Accessibility	<p>Dronfield Train Station is located to the east of the town centre and provides services to Chesterfield and Sheffield. The station is serviced by Northern Trains.</p> <p>There are 3 car parks located in the town centre all of which are free of charge and without time restrictions. The car parks are:</p> <ul style="list-style-type: none"> ● Civic Centre (75 spaces) ● Manor House (34 spaces) ● Soaper Lane (11 spaces) <p>There is additional car parking at the Sainsbury's in the north of the town centre.</p> <p>The NEMS household survey identified that of those respondents travelling to Dronfield 61.4% travelled by car as the driver, and 13.1% by car as a pedestrian. 14.7% of respondents walked into the centre, and 5.5% travelled by bus.</p>
Perception of Safety	<p>When Nexus carried out their site visits the perception of crime was low. While the High Street and Church Street were not particularly well lit, there was reasonable pedestrian footfall. Overall safety could be improved through investment in pedestrian focussed lighting facilities.</p>
Environmental Quality	<p>The environmental quality of Dronfield was observed as being of a reasonable standard. While the Sainsbury's is located north of the majority of other units in the centre, there were adequate pedestrian links and good lighting which contributes to the overall perception of urban quality. There is no pedestrian focussed public square within the town, which would contribute to the overall environmental quality.</p>
Customer views and behaviours	<p>The household survey undertaken by NEMS sought to identify how frequently respondents visited particular centre and what their views were in respect of the centres they visit.</p> <p>According to the NEMS household survey response data, the main reasons for visiting Dronfield Town Centre were the choice and range of shops (33.8%), the centre being close to home (24.4%), and the strength of the supermarket</p>

provision (12.1%).

When asked what measures would encourage respondents to visit the Dronfield town centre more often, the overwhelming response was increased general choice and range of shops (26.9%). Other responses included increased public transport (4.5%) and improved food shops within the town centre (4.5%).

Summary

- There are 34 units in the town centre
- There are 5 convenience stores in the centre. Convenience retail represents 52.2% of all retail floorspace, due to the large Sainsbury's located within the town centre which has a floor area of 3,850 sq m
- There are 12 comparison units located in Dronfield, however it is generally understood that the comparison offer is not of a high quality, as the majority of Dronfield residents travelled outside of Dronfield for the majority of comparison goods
- There are 15 service units identified in Dronfield, made up of 6 leisure services units, 5 retail services units and 4 financial and professional services units
- The Dronfield Leisure Centre is particularly popular, with 59.8% of respondents from Zone 4 (Dronfield) responding that their last visit for outdoor sports / indoor sports / health and fitness activities was at the Dronfield Leisure Centre
- Dronfield respondents overwhelmingly responded that they went to Dronfield to go to bars / pubs / nightclubs / social clubs (50.1%).

Key Issues

- There is a good supply of convenience retail in the town centre, but a lack of high quality comparison units
- Dronfield is a small centre with limited range of shops and therefore people travel to other centres to undertake shopping for comparison goods.
- General improvement of amenity of town centre for pedestrians would be of benefit

Conclusion

The core of Dronfield Town Centre is dominated by Sainsbury's, which anchors the centre, providing a significant proportion of convenience floorspace within the centre and drawing both main food and top-up trade from the local area.

Located equidistant between Chesterfield, Sheffield (including Meadowhall Shopping Centre) and Crystal Peaks Retail Park, Dronfield does not include a significant comparison goods offer, but does include the Dronfield Leisure Centre and other service facilities (such as Dronfield Medical Centre and library). These facilities provide a further draw to Dronfield, however, the core of the centre is divided by train tracks from the adjoining run of shops to the east, which functions as a separate local parade or centre.

The centre is healthy, viable and vital, however, given the lack of accessibility between the two disparate elements of the centre, we go on to consider more suitable boundaries in the following chapters.

Clay Cross

Address	High Street, Market Street
Description	Clay Cross is one of two principal town in North East Derbyshire District and serves the needs of local residents. Clay Cross is located on the main A61 corridor and is 6 miles from Chesterfield.
Current Status	Major Retail Centre (North East Derbyshire Local Plan 2001-2011) / Local Centre (Venuescore classification)

Photos



Figure 9.53: The Three Horseshoes, Public House



Figure 9.54: High Street, Clay Cross



Figure 9.55: The Parade, Bridge Street



Figure 9.56: Market Street, Clay Cross

Figure 9.57 Diversity of use

Clay Cross	Units (no.) 2008	Units (%) 2008	Units (no.) 2016	Units (%) 2016	Floorspace (%) 2016	Units UK Avg. (%)	Floorspace UK Avg. (%)
Convenience	16	16.5	8	9.5	22.1	8.6	15.2
Comparison	36	37.1	23	27.4	26.1	32.0	35.9
Retail Services	8	8.3	15	17.9	8.6	13.9	6.7
Leisure Services	28	28.9	22	26.2	22.9	23.3	24.4
Financial and Professional Services	11	11.3	7	8.3	6.2	10.6	8.0
Miscellaneous	*	*	2	2.4	1.5	0.1	0.1
Vacant	9	9.3	7	8.3	12.6	11.2	9.0
TOTAL	97	-	84	-	-	-	-

Source: Nexus Planning surveys (2016-17), Experian Goad Data (2016) and Nathaniel Lichfield & Partners (2008)
*figure not included in 2008 retail study

**Overall
Composition**

There are currently 84 retail units in Clay Cross, (a reduction of 13 retail units since 2008).

There are two reasonably new retail complexes on the edge of the centre, greatly contributing to the retail offer within Clay Cross. Both developments are located towards the north west of the town centre. While these new developments are not included in the Experian Goad map data, they are within the bounds of the Clay Cross Town Centre.

The first complex is located to the south of the bus terminal and west of Harris Way, and incorporates a Vape HQ, Barnardo's charity shop, Dominos pizza, Card Factory, Fulton Foods, Ashgate Hospice charity shop, Peak pharmacy and the Clay Cross medical centre.

On the northern side of Harris Way and the western side of Bridge Street is a bulk retail centre including a Tesco Extra, Pets at Home and Bargain Buys. The large Tesco Extra includes significant car parking.

In addition to the national multiples identified above, the town centre includes an Iceland frozen foodstore, Ladbrokes betting office, Betfred betting office, William Hill betting office, Age UK charity shop, and an Ashgate Hospice charity shop.

In addition, there are a number of units along the southern side of Market Street that are not included in the Experian Goad plan boundary, but are located in Clay Cross Town Centre.

Convenience	<p>There are 8 convenience stores in the centre, a reduction of 3 units since 2010. Convenience units make up 9.5% of the overall composition of retail units in Clay Cross, discounting the two new developments. This is very similar to the UK average of 8.6%. The percentage of convenience floorspace is 22.1%, which is above the UK average of 15.2%.</p> <p>The main foodstores serving residents in Clay Cross are the Tesco Extra and Iceland discussed above.</p> <p>The NEMS household survey data reflects the popularity of the Tesco Extra, with 33% of respondents from Zone 7 (Clay Cross) responding that this was where they last undertook their main grocery and food shopping. 14.0% of respondents identified they shopped at the Aldi on Nottingham Road, Alfreton, while 11.7% stated the Tesco Extra at Lockoford Lane, Chesterfield. The Tesco Extra in Clay Cross was also identified as the most popular location for top up shopping by Clay Cross respondents.</p>
Comparison	<p>There are 23 comparison units located in Clay Cross. The number of comparison stores has reduced from 34 in 2008. The comparison offer makes up 27.4% of the centre, which is less than the UK average of 32.0%. The majority of comparison units are independent stores offering a variety of goods.</p> <p>Comparison goods retail units are generally located across the centre but are particularly prevalent along High Street and the western end of Market Street.</p> <p>The NEMS household survey identified that the most popular location for the purchase of clothing and footwear by Clay Cross respondents was Chesterfield (38.5%). Comparatively, only 3.8% of respondents identified Clay Cross. Other popular destinations for clothing and footwear were Ravenside Retail Park in Chesterfield (10.7%), and the East Midlands Designer Outlet (10.7%).</p>
Services	<p>Overall, there are 44 service units in Clay Cross which is a reduction of 3 units since 2008.</p> <p>The strongest service sector is the leisure services sector, and in particular food and drink provision which contributed to 19 units. While leisure services were located across the town, they are particularly prevalent in the south east portion of the town centre.</p> <p>The health and beauty sector is also fairly strong equating to 14 of the 15 retail services units.</p> <p>The finance and business sector accounts for seven units, including 1 bank (Lloyds Bank) and 3 real estate agents.</p>
Vacancies	<p>The number of vacant units has reduced from 9 units to 7 units since 2008, equating to 8.3% of units.</p>
Miscellaneous	<p>At the time of the Nexus site visits Clay Cross had 2 miscellaneous units including a post office and a taxi hire company.</p>
Pedestrian Flows	<p>At the time of the Nexus site visits, the majority of footfall within the town centre was witnessed along the High Street. The Tesco Extra was identified as being busier than the town centre itself due to the popularity of the complex and the amount of available car parking.</p>

Accessibility	<p>There is no train station in Clay Cross and there are limited bus services, which run to Alfreton, Chesterfield, Matlock and Derby.</p> <p>There are 5 car parks located in the town centre all of which are free of charge for up to two hours. The car parks are:</p> <ul style="list-style-type: none"> • Eldon Street car park (36 spaces) • Eyre Street (26 spaces) • Holmgate Road car park (21 spaces) • Market Street No. 1 (42 spaces) • Market Street No. 2 (88 spaces) <p>There is a large car park in the Tesco Extra complex catering for a significant number of vehicles.</p> <p>There is a reasonable sized bus interchange located to the north of the Iceland complex, and to the west of Bridge Street.</p> <p>The NEMS household survey identified that 75.6% of respondents travelling to Clay Cross travelled by car as the driver, and another 13.4% as the passenger. Only 1.5% travelled by bus, and 9.5% stated that they walked into the town. Considering the popularity of the Tesco Extra, it is no surprise that the majority of patrons travel to the town by car.</p>
Perception of Safety	<p>When Nexus carried out their site visits the perception of crime was low; however, there were very few people in the town centre itself which could affect shoppers' perception of the level of natural surveillance.</p>
Environmental Quality	<p>The general observation of Clay Cross was that there were some areas that were particularly run down. The majority of building façades along the High Street would benefit from refurbishments.</p> <p>Overall, the urban environment was observed to be more directed towards vehicles than pedestrians. There is no dedicated market place within the town centre, or a pedestrianised high street, with the only pedestrian dedicated section of the town being a small access way between Market Street and Eyre Street.</p>
Customer views and behaviours	<p>The household survey undertaken by NEMS sought to identify how frequently respondents visited particular centre and what their views were in respect of the centres they visit.</p> <p>The NEMS household survey identified that respondents from Clay Cross were generally content with shopping within the town, with 47.4% of respondents identifying the main reason for visiting the centre was the choice and range of shops. Similarly, 18.4% identified they visited the centre for the strength of the supermarket provision, and 12.0% identified they visited Clay Cross as it was close to home.</p> <p>When asked what measures would encourage visits to Clay Cross more often, 11.4% identified a better environment, and 7.9% of respondents identified an improved road system / better access by car.</p>
Summary	<ul style="list-style-type: none"> • There are currently 84 retail units in Clay Cross • There are two reasonably new retail complexes within the town centre of

the centre, greatly contributing to the retail offer within Clay Cross

- Not including the new retail complexes, there are 8 convenience stores in the centre, a reduction of 3 units since 2010
- The NEMS household survey data reflects the popularity of the Tesco Extra, with 33.0% of respondents from Zone 7 (Clay Cross) responding that this was where they last undertook their main grocery and food shopping
- There are 23 comparison units located in Clay Cross, a reduction from 34 in 2008
- The NEMS household survey identified that the most popular location for the purchase of clothing and footwear by Clay Cross respondents was Chesterfield (38.5%). Comparatively, only 3.8% of respondents identified Clay Cross.
- There are 44 service units in Clay Cross which is a reduction of 3 units since 2008
- The strongest service sector is the leisure services sector, and in particular food and drink provision which contributed to 19 units
- The number of vacant units has reduced from 9 units to 7 units since 2008
- The NEMS household survey identified that 75.6% of respondents travelling to Clay Cross travelled by car as the driver, and another 13.4% as the passenger
- When asked what measures would encourage visits to Clay Cross more often, 11.4% identified a better environment, and 7.9% of respondents identified an improved road system / better access by car

Key Issues

- Tesco Extra taking business from other local retailers
- Poor pedestrian connections between the Tesco Extra and other local shops
- The majority of building façades along the High Street would benefit from refurbishments
- Lack of financial and business services
- Lack of restaurants

Conclusion

Clay Cross has undergone significant changes in recent years, with the recent developments of Tesco, Aldi and the potential for further development across the Bridge Street Triangle site providing an uplift in convenience goods floorspace and extending the centre to the north.

This investment is likely a response to the restriction of existing floorplates across existing stores. However, this growth to the north risks the south of the centre being 'left behind without suitable investment in accessibility measures.

The proportion of comparison goods retailers and services is suitable for a centre of this scale and Clay Cross is considered to be relatively vital and viable.

Eckington

Address	High Street (A61), Market Street
Description	Eckington is classed as a secondary town in North East Derbyshire and is located to the east of Dronfield. The town is located close to the northern boundary of North East Derbyshire District. Eckington serves the retail and services needs for the town itself, as well as for the surrounding villages, which include Mosborough and Renishaw.
Current Status	Major Retail Centre (Local Plan 2001-2011) / No Venuescore information

Photos



Figure 9.58: Market Street, Eckington, looking west



Figure 9.59: Southgate, Eckington, looking north



Figure 9.60: The Duke of York Public House



Figure 9.61: Market Street, Eckington, looking east

Figure 9.62 Diversity of use

Eckington	Units (no.) 2008	Units (%) 2008	Units (no.) 2016	Units (%) 2016	Floorspace (%) 2016	Units UK Avg. (%)	Floorspace UK Avg. (%)
Convenience	7	10.8	3	5.9	-	8.6	15.2
Comparison	15	23.1	11	21.6	-	32.0	35.9
Retail Services	9	13.9	12	23.5	-	13.9	6.7
Leisure Services	18	27.7	14	27.5	-	23.3	24.4
Financial and Professional Services	11	16.9	2	3.9	-	10.6	8.0
Miscellaneous	*	*	2	3.9	-	0.1	0.1
Vacant	16	24.6	7	13.7	-	11.2	9.0
TOTAL	65		51	-	-	-	-

Source: Nexus Planning surveys (2016-17), Experian Goad Data (2016) and Nathaniel Lichfield & Partners (2008)
*figure not included in 2008 retail study

Overall Composition	<p>Of the 10 centres identified within this study, Eckington is the second smallest, with a total of 51 retail units within the town centre, a reduction from 65 since the last Retail Study was carried out in 2008.</p> <p>Eckington is anchored by a single Co-operative foodstore comprising approximately 95% convenience goods, and 5% comparison retail. Eckington has not yet featured in the Venuescore rankings or within Experian's Goad data.</p> <p>The town centre is home to a number of national multiples including a Co-operative foodstore, Lloyds Bank, Peak Pharmacy, William Hill Betting Office, Ashgate Hospice Charity Shop, and Age UK Charity Shop.</p> <p>Each category of retail has experienced a reduction in the number of units since 2008, except for retail services, which has grown by 3 units.</p> <p>There has been a series of residential developments within the town centre, which may have contributed to the reduction in the overall number of units.</p>
Convenience	<p>There are 3 convenience stores in the centre including a Co-operative foodstore, a delicatessen and grocer, and a bakery. Convenience units make up 5.9% of the overall composition of Eckington, which is below the UK average of 8.6%.</p> <p>The main foodstore in Eckington is the Co-operative Foods Supermarket (Figure 9.44), located to the north west of the centre.</p> <p>The NEMS household survey data reflects the limits of the Eckington</p>

	<p>convenience offer, with 41.5% of respondents from Zone 5 (Eckington / Killamarsh) identifying that they last undertook their main food and grocery shopping at Morrisons, Oxclose Park Road North, Halfway. Only 1.7% of respondents identified they last went to the Co-operative Supermarket at Eckington, and 14.3% identified the Aldi at Parkside Shopping Centre, Killamarsh. It is noted that Zone 5 includes both Eckington and Killamarsh residents, making it difficult to distinguish between the two.</p> <p>The most popular locations identified for top-up shopping by respondents from the zone were the Morrisons Oxclose Park Road North, Halfway (21.3%), the Co-operative Foods Supermarket in Eckington (17.3%), and local shops in Sheffield (12.7%).</p>
Comparison	<p>There are 11 comparison units located in Eckington. The comparison offer makes up 21.6% of the centre, which is lower than the UK average of 32.0%. The majority of comparison units are independent stores offering a variety of goods.</p> <p>The NEMS household survey identified that 36.9% of respondents from Zone 5 (Eckington / Killamarsh) last bought clothing or footwear goods at Crystal Peaks Shopping Mall, and 27.5% from Sheffield City Centre. No respondents identified that they purchased clothing or footwear goods from Eckington. This trend extended across other comparison goods categories, with very few responses identifying purchases made in Eckington Town Centre.</p>
Services	<p>There are 12 retail service units in Eckington. 9 of these 12 units are classed within the health and beauty category, while repairs, alterations and restorations account for 2 units.</p> <p>The leisure services sector accounts for 14 units within Eckington. The majority of uses include food and drink, restaurants and cafes. Other uses involve a gymnasium and swimming pool, and public houses.</p> <p>The NEMS household survey data identifies that 57.9% of respondents from Zone 5 (Eckington / Killamarsh) travelled to Sheffield city centre to visit a restaurant. Only 4.0% of respondents identified that they last visited a restaurant in Eckington.</p> <p>The finance and business sector is particularly weak in Eckington. There is 1 Lloyds bank and 1 accountancy service within the town centre.</p>
Vacancies	<p>There are 7 vacant units currently in the town centre, equating for 13.7% of retail units. This is slightly higher than the UK average of 11.2%. The number of vacancies within the town has reduced by 9 since 2008.</p> <p>A key vacancy within the town is the Royal Hotel on Station Road. Permission was granted in July 2014 for conversion into 9 residential apartments (ref.: 13/01040/FL).</p>
Miscellaneous	<p>At the time of the Nexus site visits, Eckington had two miscellaneous units (a funeral home and a mini cab service).</p>

Pedestrian Flows	<p>At the time of the Nexus site visits, there was very little footfall within the town centre and a number of the stores were closed, despite it being a week day and within business hours. The majority of footfall was witnessed along Market Street.</p>
Accessibility	<p>There is no train station in Eckington but public transport provision is provided through bus services which run to Chesterfield, Killamarsh, Sheffield and Staveley. There is a bus station along Pinfold Street near the Co-operative foodstore.</p> <p>There are four car parks located in the town centre all of which are free of charge for up to two hours The car parks are:</p> <ul style="list-style-type: none"> ● Ashland Road car park (10 spaces) ● Market Street (36 spaces) ● Pinfold Street (36 spaces) ● Swimming pool car park (72 spaces) <p>At the time of the Nexus site visits, there appeared to be car parking spaces available along Market Street and amongst the back streets.</p> <p>The NEMS household survey results identified that the majority of respondents travelling to Eckington travelled by car as the driver (66.9%). Notably, 17.7% of respondents travelled to the town centre by walking.</p>
Perception of Safety	<p>When Nexus carried out their site visits the perception of crime was low. There was some evidence of street lighting along Market Street, however it is noted that one of the shops along this street had a large crack in the shop front glass which reduced the overall perception of safety within the centre.</p>
Environmental Quality	<p>Eckington has a well structured pedestrian focused main street (Market Street) which creates a nice urban environment. There was little pedestrian activity in this part of the town centre at the time of the Nexus site visits, indicating that the centre is not utilised to its fullest potential.</p>
Customer views and behaviours	<p>The NEMS household survey data identified that the main reasons that respondents visited Eckington was choice of services (33.6%), how close the centre is to home (20.1%), and the choice or range of shops (19%).</p> <p>When asked what would encourage respondents to visit Eckington more often the most common responses were better environment (19%), increased general choice and range of shops (18.7%), and improved food shops within the town centre (14.6%).</p>
Summary	<ul style="list-style-type: none"> ● Eckington has a total of 51 retail units within the town centre ● There are 3 convenience units in the town centre including a Co-operative foodstore, a delicatessen and grocer, and a bakery ● There are 11 comparison units located in Eckington ● The NEMS household survey indicates that respondents from the Eckington and Killamarsh Zone did not generally purchase comparison goods from within Eckington

- There are 12 retail service units in Eckington, 9 of which are classed within the health and beauty category
- The leisure services sector accounts for 14 units within Eckington
- There are only 2 finance and business services units
- There are 7 vacant units currently in the town centre, equating for 13.7% of retail units
- Very little footfall was witnessed within the town centre and a number of the stores were closed, despite it being a week day and within business hours
- When asked what would encourage respondents to visit Eckington more often the most common responses were better environment (19.0%), increased general choice and range of shops (18.7%), and improved food shops within the town centre (14.6%).

Key Issues

- Small centre with limited variety and services
- Low footfall within the town centre
- Urban environment needs improvement
- Better range of leisure facilities, and in particular, restaurants
- Loss of leisure services to residential development

Conclusion

Whilst Eckington is host a number of national multiple retailers, the existing convenience and comparison retail provision serves a purely local 'day-to-day' function by virtue of the centre's proximity to the regional centres of Sheffield and Chesterfield, in addition to the large Morrisons foodstore at Halfway and Crystal Peaks Retail Park.

Whilst the centre is well maintain with a positive urban environment, Eckington (as one of the smallest centres in the Study) attracts the lowest market share across the centres assessed. Given the lack of retail market share, we would consider the centre to be somewhat vulnerable and in need of investment to provide a greater draw. This is somewhat complicated by the constrained floorplates of the units across the centre, which may discourage occupiers seeking a location in the centre.

Eckington does appear to serve a suitable local function, with a higher proportion of services than would be expected of a centre of this scale, which indicates the potential for the centre to develop a unique character and draw, differentiating the Eckington from surrounding centres.

Killamarsh

Address	Bridge Street
Description	Killamarsh is classed as a secondary town in North East Derbyshire District and is located just north east of Eckington, on the border of North East Derbyshire District. The town is located between Sheffield and Worksop, and is also nearby to smaller towns including Harthill, Barlborough and Wales.
Current Status	Major Retail Centre (Local Plan 2001-2011) / No Venuescore information

Photos



Figure 9.63: Northern Bridge Street, Killamarsh



Figure 9.64: Peak Pharmacy



Figure 9.65: Bridge Street, Killamarsh



Figure 9.66: Bridge Street, Killamarsh

Figure 9.67 Diversity of use

Killamarsh	Units (no.) 2008	Units (%) 2008	Units (no.) 2016	Units (%) 2016	Floorspace (%) 2016	Units UK Avg. (%)	Floorspace UK Avg. (%)
Convenience	6	11.3	5	9.1	-	8.6	15.2
Comparison	14	26.4	9	16.4	-	32.0	35.9
Retail Services	11	20.8	17	30.9	-	13.9	6.7
Leisure Services	8	15.1	12	21.8	-	23.3	24.4
Financial and Professional Services	5	9.4	2	3.6	-	10.6	8.0
Miscellaneous	*	*	4	7.3	-	0.1	0.1
Vacant	9	17.0	6	10.9	-	11.2	9.0
TOTAL	53		55	-	-	-	-

Source: Nexus Planning surveys (2016-17), Experian Goad Data (2016) and Nathaniel Lichfield & Partners (2008)
*figure not included in 2008 retail study

Overall Composition	<p>Of a similar size to Eckington, Killamarsh is a small centre, with only 55 retail outlets within the bounds of the town centre. The number of units within the town centre has increased by 2 since 2008 when the last Retail Study was completed. There is no Experian Goad data for the Killamarsh Town Centre.</p> <p>Major retailers within the town include Co-operative Food and Aldi Supermarkets. The Aldi, in particular, forms a focal point of the town centre. Other national multiples include Barnardo's Charity Shop and Peak Pharmacy.</p>
Convenience	<p>There are 5 convenience stores in the centre, a reduction of 2 units since 2008 when the last Chesterfield Borough Council and North East Derbyshire District Council Retail Study was undertaken.</p> <p>Convenience units make up 9.1% of the overall composition of Killamarsh, which is similar to the UK average of 8.6%.</p> <p>The main foodstores in Killamarsh are the Co-operative foodstore, Aldi and Fultonfoods, which are all located within the town centre. The Aldi and Fulton Foods are located within a small retail complex, which provides off street parking. Similarly, the Co-operative foodstore provides free parking for patrons.</p> <p>The NEMS household survey data reflects the limits of the Killamarsh convenience offer, with 41.5% of respondents from Zone 5 (Eckington / Killamarsh) identifying that they last undertook their main food and grocery shopping at Morrisons, Oxclose Park Road North, Halfway. 14.3% identified the Aldi at Parkside Shopping Centre, Killamarsh as their last grocery shopping location. It is noted that Zone 5 includes both Eckington and Killamarsh, making</p>

	<p>it difficult to distinguish between the two.</p> <p>It is noted that 13.0% of respondents identified that if they were to do their grocery shopping somewhere other than their usual grocery shopping location, it would be the Aldi in Killamarsh.</p> <p>The most popular locations for top-up shopping by respondents from Zone 5 were the Morrisons Oxclose Park Road North, Halfway (21.3%), the Co-operative Foods Supermarket in Eckington (17.3%), and local shops in Sheffield (12.7%). 8% of respondents identified they undertook top-up shopping at local shops in Killamarsh.</p>
Comparison	<p>There are 9 comparison units located in Killamarsh. The number of comparison stores has dropped from 15 in 2008. The comparison offer makes up 16.4%, which is well below the UK average of 32.0%. The majority of comparison units are independent stores offering a variety of goods.</p> <p>The NEMS household survey identified that 36.9% of respondents from Zone 5 (Eckington / Killamarsh) last bought clothing or footwear goods at Crystal Peaks Retail park, and 27.5% from Sheffield City Centre. No respondents identified that they purchased clothing or footwear goods from Killamarsh. This trend extended across other comparison goods categories, with very few responses identifying purchases made in Killamarsh town centre.</p>
Services	<p>There are 17 retail services units, 12 leisure services units and 2 finance / business service units within Killamarsh at the time of the survey, making a total of 31 services units across the town.</p> <p>Retail services units were particularly well represented, making up 30.9% of units. The health and beauty category accounted for 11 of 17 of the retail services units.</p> <p>The finance and business sector is particularly weak in Killamarsh. Since the last survey was undertaken by NLP in 2008, the sector has reduced from 5 units to 2 units. There are no banks in the town.</p> <p>The NEMS household survey data identifies that 57.9% of respondents from Zone 5 (Eckington / Killamarsh) travelled to Sheffield City Centre to visit a restaurant. No respondents identified that they last visited a restaurant in Killamarsh. The NEMS Survey identified that residents of Zone 5 were more likely to stay close to home when visiting bars / pubs / nightclubs and social clubs with 30.7% stating they last visited Mosborough, and 10.9% identifying they were went somewhere else in Zone 5. Additionally, 22.2% stated they went to Sheffield City Centre.</p>
Vacancies	<p>At the time of the Nexus site visits there were 6 vacant units in Killamarsh Town Centre, a reduction of 3 since 2008. Vacant units accounted for 10.9% of the total number of units, which aligns with the UK average.</p>
Miscellaneous	<p>At the time of the Nexus Planning site visits Killamarsh had 4 miscellaneous units (a post office, 2 funeral homes and a vet).</p>

Pedestrian Flows	At the time of the Nexus Planning site visits, the majority of footfall was witnessed along Bridge Street and within the Aldi shopping complex where the majority of convenience shopping is located.
Accessibility	<p>There is no train station in Killamarsh but public transport provision is provided through bus services. Killamarsh is located around the same distance to Sheffield, Chesterfield and Rotherham. It has good transport links to Chesterfield and Sheffield via the buses and the Sheffield Supertram network which has its terminus located nearby at Halfway.</p> <p>There are four car parks located in and immediately adjacent to the town centre:</p> <ul style="list-style-type: none"> • Parkside Shopping Centre car park (140 spaces) • Killamarsh Community Campus (60 spaces) • Northern Bridge Street (40 spaces) • Co-op car park (30 spaces) <p>The NEMS household survey results identified that the majority of respondents travelling to Killamarsh travelled by car, either as the driver (57.6%) or as a passenger (24.2%). Notably, 12.4% of respondents travelled by foot into the town centre.</p>
Perception of Safety	<p>When Nexus Planning carried out their site visits the perception of crime was low.</p> <p>The overall observation of the town was that it was quiet, with low footfall.</p>
Environmental Quality	The Killamarsh Town Centre is geographically small. The urban environment appeared to be of a reasonable quality, and in particular the area connecting Bridge Street to the Aldi complex appeared to have been recently landscaped.
Customer views and behaviours	<p>The NEMS household survey identified that the main reasons for visiting Killamarsh were the choice and range of shops (31.5%), the strength of the supermarket provision (25.7%), and how close it was to home (21.6%).</p> <p>When asked what would encourage respondents to visit Killamarsh more often the most common responses were more parking (11.6%), and increased general choice and range of shops (7.3%).</p>
Summary	<ul style="list-style-type: none"> • Killamarsh has 55 retail outlets within the bounds of the town centre • Major retailers within the town include Co-operative Food and Aldi Supermarkets • There are 5 convenience stores in the centre making up 9.09% of the overall composition of Killamarsh • The NEMS household survey data reflects the limits of the Killamarsh convenience offer, with 41.5% of respondents from Zone 5 (Eckington / Killamarsh) identifying that they last undertook their main food and grocery shopping at Morrisons, Oxclose Park Road North, Halfway • There are 9 comparison units located in Killamarsh, a reduction from 15 in 2008

Key Issues	<ul style="list-style-type: none"> • There are 17 retail services units, 12 leisure services units and 2 finance/business service units within Killamarsh • The NEMS household survey data identifies that 57.9% of respondents from Zone 5 (Eckington / Killamarsh) travelled to Sheffield city centre to visit a restaurant. No respondents identified that they last visited a restaurant in Killamarsh • There are 6 vacant units in the town centre <ul style="list-style-type: none"> • Low footfall throughout the town • Lack of services, in particular food and drink / restaurants • Lack of comparison goods variety • NEMS respondents identified a need for more parking in the town centre
Conclusion	<p>Killamarsh is anchored around Aldi and Cooperative foodstores, though these are shown to serve primarily as top-up shopping destinations, used by a large proportion of residents to support their main food shopping from the nearby Morrisons foodstore at Halfway.</p> <p>Like in Eckington, Killamarsh is also underprovided for in terms of comparison goods retailers, with residents visiting the significantly wider offer of facilities at Crystal Peaks Retail Park and Sheffield City Centre.</p> <p>Despite the relatively low proportion of vacant units (which has fallen below UK averages since the previous Study), Killamarsh's low market share and lack of pedestrian flow at the time of our site visits would appear to suggest that the centre is somewhat at risk from the draw of competing destinations.</p> <p>The centre does, however, feature a higher than average proportion of retail services such as hairdressers and beauty salons. This concentration of services in Killamarsh, alongside the medical facilities, library and leisure centre provide the centre's niche, complimenting the more comprehensive convenience and comparison goods offer of the surrounding centres and out-of-centre facilities.</p>

10.0 Qualitative Retail Assessment

Introduction

- 10.1 Paragraph 158 of 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.
- 10.2 Paragraph 161 of the NPPF then goes on to state that local planning authorities should use this evidence base to assess *'...the needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development.'*
- 10.3 Deficiencies and gaps in provision can be considered on the basis of authority areas as a whole and in terms of individual centres. As identified at Section 5 of this report, a number of designated town centres within the three authority areas claim a relatively limited market share of convenience goods expenditure which originates within the Study Area. As we explain below, this is principally as a consequence of some centres having a limited convenience goods offer which is not generally able to support main food shopping trips.
- 10.4 In respect of comparison goods, a relatively large proportion of expenditure which originates within the Study Area 'leaks' to destinations outside. As identified by Figure 5.4 of this Study, 39.8% of comparison goods expenditure from the Study Area leaks to destinations outside, and a further 27.3% is spent in Chesterfield Town Centre. The defined centre in the Study Area that secures the second highest market share of comparison goods expenditure is Clowne Town Centre, which has a market share of just 1.3%. The low levels of comparison goods expenditure secured by smaller town centres arises as a consequence of such centres principally meeting day-to-day convenience goods and service needs.
- 10.5 In considering comparison goods shopping patterns and potential qualitative deficiencies, it is important to recognise that residents of the Study Area generally benefit from relatively good access to retail venues with a strong comparison goods offer outside the Study Area, such as Sheffield and Nottingham City Centres, and the Crystal Peaks and Meadowhall Shopping Centres. Such destinations have an appropriate role to play in meeting some of the needs of residents of the Study Area. Accordingly, whilst there would be benefit in improving the range and quality of the comparison goods offer across the smaller town centres (in order to improve the health of those centres, improve consumer choice and reduce the need to travel), we believe that most residents within the Study Area are able to access a complementary network

of centres which are capable of meeting varied needs.

10.6 We provide further commentary on qualitative needs within each of the authority areas below.

Chesterfield Borough

10.7 As one would expect, Chesterfield accommodates a comprehensive range of convenience goods retailers, including large format Morrisons, Sainsbury's and Tesco stores, a smaller Asda supermarket, an Aldi, and two Lidl foodstores. As such, we do not believe that there is any real qualitative deficiency in respect of **Chesterfield Town Centre's** convenience goods offer that needs to be addressed as a matter of urgency. However, both Aldi and Lidl have outstanding store requirements for Chesterfield, albeit it should be noted that the Lidl requirement is to replace its Foljambe Road store which opened in 1997 and which is now substantially smaller than Lidl's preferred trading format. We understand that the planning application reference CHE/17/00209/FUL, which Chesterfield members resolved to approve at committee on 31 October 2017, provides for this new Lidl store at a site on Chatsworth Road (a short distance to the west of the existing store).

Figure 10.1 | Performance of Convenience Goods Floorspace of Principal Foodstores in Chesterfield (2016)

Zone	Store	Gross Floorspace (sq m)	Net Convenience Floorspace (sq m)	Sales Density (£/sq m)	Benchmark Turnover (£m)	Survey Derived Turnover (£m)	Overtrading (£m)
1.	Marks & Spencer, High Street, Chesterfield	1,751	1,002	11,084	11.1	3.7	-7.4
	Tesco Metro, Middle Pavement, Chesterfield	4,308	1,461	13,306	19.4	10.7	-8.7
	Lidl, Chatsworth Road	947	563	6,995	3.9	4.1	0.1
	Morrisons, Chatsworth Road	5,192	2,117	11,968	25.3	52.6	27.2
2.	Aldi, Lockoford Road, Chesterfield	1,370	649	10,704	7.0	16.5	9.6
	Asda, Sheffield Road, Chesterfield	1,466	650	13,912	9.0	5.1	-4.0
	Sainsbury's, Rother Way, Chesterfield	8,407	2,911	12,541	36.5	45.5	8.9
	Tesco Extra, Lockoford Lane, Chesterfield	11,148	5,669	13,306	75.4	73.9	-1.5
	Lidl, Sheffield Road, Whittington Moor	1,428	663	6,995	4.6	7.4	2.8
3.	Morrisons, Barnfield Close, Staveley	7,376	2,907	11,968	34.8	38.2	3.4

Source: Appendix D

- 10.8 Taken collectively, convenience goods floorspace in Chesterfield Borough turns over an estimated £283.2m at 2016, which is greater than its expected benchmark turnover of £252.7m. Interestingly, the majority of the overtrading which occurs in Chesterfield arises as a consequence of the performance of the Morrisons superstore at Chatsworth Road, which has an estimated convenience goods turnover of £52.6m, substantially greater than its expected benchmark turnover of £25.3m. We also note that the Tesco Extra at Lockoford Lane has an estimated turnover of £73.9m, which makes it by some distance the top performing store in the Study Area. However, we believe that the current discount foodstore provision in Chesterfield will increase substantially in the next few years and that the performance of the existing food superstores is likely to be eroded. Given this, and the generally circumspect nature of the 'main four' foodstores operators in terms of their new store programmes, we believe that improvements in Chesterfield's convenience goods offer are likely to be limited to the discount sector.
- 10.9 There would appear to be a particular opportunity to provide additional choice in convenience goods shopping in **Staveley**, which is currently served by a Morrisons foodstore. In this regard, we note that Lidl currently has a stated requirement for the town. If it is able to locate a suitable site, adding Lidl to Staveley's retail offer would appreciably increase choice in the local area.
- 10.10 Turning to comparison goods, as Figure 5.6 of this report identifies, **Chesterfield Town Centre's** estimated Study Area market share of all such expenditure decreased from 53.4% in 2007 to 50.2% in 2016. This is consistent with the relatively significant reduction in the number of comparison goods units in Chesterfield Town Centre between 2008 and 2016 (there being a reduction from 185 units to 157 units). Whilst national multiple comparison goods retailers are increasingly seeking to serve the country from a lesser number of stores, we believe that the Northern Gateway opportunity in Chesterfield Town Centre has the potential to appreciably increase the centre's attractiveness and help support an improved overall retail offer. In particular, we note that the Northern Gateway Chesterfield Vision document of July 2017 identifies that opportunity sites within the Northern Gateway – most notably, Holywell Cross and Newbold Road – have potential to accommodate new retail (and other main town centre) uses.
- 10.11 As such, we believe that the implementation of appropriate redevelopment schemes on these sites could introduce new retailers to Chesterfield in order to sustain its future vitality and 'claw back' losses in market share in recent years. Accordingly, we believe that there is a clear opportunity to bring about a qualitative improvement in Chesterfield's comparison goods offer.

Bolsover District

10.12 As we set out at earlier in this section, convenience goods retail facilities in the Bolsover administrative area turn over an estimated £103.1m at 2016, which is greater than their expected benchmark turnover of £80.1m. However, as set out below at Figure 10.2, it is evident that the majority of this overtrading arises as a consequence of the strong performance of the Aldi foodstores at Clowne and Shirebrook. The Aldi store in Clowne has an expected benchmark turnover of £7.2m and an estimated survey-derived turnover of £17.9m, whilst Aldi's Shirebrook store has an expected benchmark turnover of £7.0m and an estimated survey-derived turnover of £17.4m.

Figure 10.2 | Performance of Convenience Goods Floorspace of Principal Foodstores in Bolsover (2016)

Zone	Store	Gross Floorspace (sq m)	Net Convenience Floorspace (sq m)	Sales Density (£/sq m)	Benchmark Turnover (£m)	Survey Derived Turnover (£m)	Overtrading (£m)
7.	Co-op, High St, Tibshelf	726	422	8,423	3.6	2.6	-1.0
9.	Co-op, High Street, South Normanton	1,438	453	8,423	3.8	4.4	0.6
11.	Co-op, Town End, Bolsover	1,438	721	8,423	6.1	3.6	-2.5
12.	Aldi, Carter Lane, Shirebrook	1,388	658	10,704	7.0	17.4	10.3
	Co-op, Victoria Street, Shirebrook	1,260	669	8,423	5.6	2.0	-3.6
13.	Aldi, Mill Green Way, Clowne	1,543	676	10,704	7.2	17.9	10.6
	Tesco, Mill Street, Clowne	4,836	1,906	13,306	25.4	35.3	9.9

Source: Appendix D

10.13 In this context, it is perhaps unsurprising that, at the time of our reporting, both Aldi and Lidl have outstanding store requirements in the District, with both operators seeking representation in **Bolsover** itself. This is reflective both of the current food retail market – with discount operators increasingly securing a greater market share and remaining optimistic in respect of their ability to expand further – and the very limited competition, which currently exists in Bolsover. The largest foodstores in the town are the Co-op at Town End and the Farmfoods at Market Place, which, by virtue of their size and general offer, do not meet the majority of residents' main food shopping needs.

10.14 We are aware that the redevelopment of the Sherwood Lodge at the edge of Bolsover Town Centre has been a longstanding priority of Bolsover District Council. Whilst Morrisons has decided not to proceed with the planning permission reference 12/00324/FULMAJ, which provides for the redevelopment of Sherwood Lodge for a large supermarket, the site remains the sequentially preferable location to expand the Town Centre and improve its convenience goods offer. We note that Rothstone Estates held a public exhibition in October 2017 to consult

on a proposal to develop the site for a mid-sized foodstore (which may be suitable to accommodate a discount operator) and four comparison goods units. We believe that such a proposal would materially improve the offer of Bolsover Town Centre and go some way to meeting qualitative deficiencies in the town.

- 10.15 Land at Portland Road, directly to the south of **Shirebrook Town Centre**, is currently being built out as a Lidl foodstore (planning permission reference 16/00345/FUL). Given that the Town Centre currently accommodates Co-op and Aldi foodstores, we believe that the implementation of the Lidl will leave Shirebrook reasonably well provided for in respect of convenience goods provision.
- 10.16 In terms of comparison goods, Shirebrook has seen a relative reduction in the number of comparison goods stores in the centre and as a result of the relative lack of national multiple retailers, suffers from its proximity to the larger draw and comparison goods offer of Mansfield, which is meeting the needs of local residents. Whilst we have not identified a specific quantitative comparison goods capacity for new floorspace in Bolsover, this relative qualitative lack of local comparison goods provision could be taken into account, should any suitable retail applications come forward over the plan period.
- 10.17 In respect of **South Normanton**, whilst the existing Co-op occupies modern premises and is an attractive store, it is of a limited size and there would be a clear qualitative benefit in providing additional convenience goods provision, particularly if such provision supported main food shopping trips. However, we note that the household survey suggests that the Co-op is trading only slightly better than benchmark level (albeit household surveys can sometimes underestimate the trading performance of smaller foodstores, particularly where there is little choice in the local area), and we believe that there is some doubt as to whether South Normanton could support both a larger foodstore and the existing Co-op store. In this regard, we also note that neither Aldi nor Lidl currently has any store requirement for South Normanton. In light of the relative small scale and local function of the centre, we do not necessarily consider there to be a significant qualitative comparison goods deficiency in South Normanton given the proximity to Mansfield. Nonetheless, the centre would benefit from the draw and diversity from additional comparison goods retailers, should such occupiers come forward over the plan period.
- 10.18 In **Clowne**, the level of overtrading of the convenience goods floorspace is significant. However, the existing offer – in the form of the Aldi and Tesco Extra foodstores, and the Wilkinson at Mill Green Way – is reasonably substantial for a town centre of its size. Accordingly, in qualitative terms, it may be preferable for the convenience capacity that arises

as a consequence of the strong performance of the Aldi and Tesco stores to be addressed in other nearby centres; such as Bolsover, where a significant proportion of convenience spending in Clowne originates (Zone 11).

- 10.19 There has also been a significant reduction in the proportion of comparison goods retailers in Clowne in particular. Whilst we note from the findings of the quantitative assessment that the need is not significant enough to warrant specific allocations, as opportunities arise, the provision of additional comparison goods retailers in Clowne would meet local residents qualitative needs.
- 10.20 Alternatively, should the current pending outline planning application for 'Clowne Garden Village' (17/00640/OUT) to the north of Clowne come forward over the plan period, there would be merit in providing additional retail floorspace to meet this qualitative need in a suitably sustainable location, catering to the emerging local population, noting the relevant NPPF policy tests.

North East Derbyshire District

- 10.21 Convenience goods floorspace in North East Derbyshire turns over an estimated £154.7m at 2016, which is substantially greater than the expected benchmark turnover of £107.7m. The vast majority of this overtrading arises as a consequence of the very strong performance of the Sainsbury's and Aldi stores in Dronfield. The former of these has an estimated convenience goods turnover of £47.8m, which is £29.7m greater than the expected benchmark turnover of £18.0m; the latter has an estimated convenience goods turnover of £27.5m at 2016, which is £20.5m greater than the expected benchmark turnover of £7.0m.
- 10.22 The exceptionally strong performance of these two stores suggests that there would be a qualitative benefit in providing additional choice in **Dronfield**, albeit it should be recognised that the Sainsbury's store is located within the town centre and that we are unaware of any further substantial sites to accommodate a new foodstore within the centre itself. As such, it is likely that any additional foodstore development in Dronfield would be subject to the sequential and impact tests.
- 10.23 Elsewhere, the Co-op at **Eckington** is identified as overtrading, with its convenience goods turnover at 2016 being estimated at £4.4m, which is £0.7m greater than its benchmark. In our experience, household surveys can sometimes underestimate the performance of Co-op stores (as the expenditure they attract often falls somewhere between a main and top-up food shop) and, as a consequence, we consider this to be a relatively strong performance. Whilst residents of Eckington are able to access larger food retail facilities in neighbouring centres (such as the

Morrisons on Oxclose Park Road in Halfway), it is considered that both the convenience goods and general retail and service offer in Eckington would benefit from improvement.

10.24 In this regard, we note that the Eckington Town Centre Development Framework SPD (adopted May 2012) identifies a particular redevelopment opportunity at Northgate House, which is currently considered to provide a negative contribution to the centre. Page 48 of the SPD indicates that *‘the replacement of Northgate House with an attractive retail and residential building which complements the retail core and enhances the quality of the Conservation Area is an essential project which will make a significant contribution to delivering the vision for the town centre.’* Whilst we do not believe that Northgate House (even when considered alongside adjacent land, including its service yard and the bus station to the rear) is of a sufficient size to accommodate a food supermarket, the site would be able to provide modern retail units, capable of accommodating operators who might not otherwise be interested in taking space in Eckington. Given Eckington’s current limited offer, we recommend that North East Derbyshire District Council continues to pursue opportunities to bring forward the site’s redevelopment in order to improve and update Eckington’s offer.

10.25 Whilst the below Figure 10.3 identifies that the convenience goods floorspace at the existing Tesco Extra in **Clay Cross** undertrades by an estimated £7.9m, we are aware that, subsequent to the undertaking of the household survey, an Aldi store opened on the High Street in October 2017. We are also aware that Lidl has an outstanding store requirement for Clay Cross and that there is an extant planning permission (reference 14/01109/OL), which could accommodate this as part of the redevelopment of the former Biwater site to the north of the Town Centre. Clay Cross Town Centre has also been the subject of additional retail development in the form of The Parade development. As such, whilst there are a number of site-specific opportunities in Clay Cross that would benefit from redevelopment, we believe that the centre as a whole accommodates most of the types of retailer we would expect to see in a centre of its size.

10.26 Similarly, **Killamarsh** is a relatively small settlement and we believe that its offer is broadly in line with expectations. The Aldi store in the centre has the lowest estimated turnover of all Aldi stores in the Study Area and we therefore do not believe that there will likely be any further proposals in the short term for significant new retail developments.

Figure 10.3 | Performance of Convenience Goods Floorspace of Principal Foodstores in NED (2016)

Zone	Store	Gross Floorspace (sq m)	Estimated Net Convenience Floorspace (sq m)	Sales Density (£/sq m)	Benchmark Turnover (£m)	Survey Derived Turnover (£m)	Overtrading (£m)
4.	Sainsbury’s, Wreakes Lane, Dronfield	3,834	1,438	12,541	18.0	47.8	29.7
	Aldi, Dronfield	1,383	655	10,704	7.0	27.5	20.5

5.	Aldi, Parkside, Killamarsh	1,414	619	10,704	6.6	10.6	4.0
	Co-op, Pinfold Street, Eckington	840	446	8,423	3.8	4.4	0.7
7.	Tesco Extra, Bridge St North, Clay Cross	8,638	3,419	13,306	45.5	37.6	-7.9

Source: Appendix D

11.0 Future Retail Strategy

- 11.1 Tying together the findings of the quantitative retail capacity assessment at Stage 1, as well as the healthcheck assessments and any identified qualitative needs across of each of the Study's centres in Stage 2, we go on to consider potential opportunity sites for retail development, recommendations for the retail hierarchies and town centre designations and boundaries, and suggested local thresholds for retail impact assessments of edge and out-of-centre proposals.

Opportunity Sites

- 11.2 In light of the potential for new retail development as highlighted through the quantitative and qualitative assessments, we have assessed potential opportunity sites for allocations for retail development, where possible. Possible sites have been identified through consideration of previous applications, allocation and discussions with Council officers.

- 11.3 Full assessments of each opportunity site are provided at **Appendix E**.

Sherwood Lodge, Bolsover

- 11.4 Noting the planned residential growth that will likely be directed towards Bolsover District Council's Strategic Sites, the District's centres will be increasingly be required to serve a wider function, in conjunction with the day-to-day offer of any new local centres within the strategic sites.

- 11.5 The prime opportunity within Bolsover District is the potential to extend Bolsover Town Centre to the north, which already benefits from extant permission for a new foodstore (planning reference 12/00324/FULMAJ) submitted on behalf of Morrisons, but has since been announced as shelved. Whilst the 'big 4' foodstore operators have slowed their rollout of new stores, the site remains a key opportunity for a convenience-led development to 'claw back' lost expenditure from the area.

Portland Road, Shirebrook

- 11.6 The site at Portland Road, to the south east of the Town Centre measures 1.1 hectares. Whilst the site is a somewhat irregular shape, it could provide an opportunity for a development of a mix of town centre uses to complement and expand the existing centre. This would be subject to suitable occupier interest and passing the relevant retail tests (sequential and impact).

- 11.7 Given the recently granted Lidl foodstore, we do not note any pressing qualitative need for new developments in Shirebrook and suggest that this site may be more appropriate for a mixed-use

development, incorporating residential and leisure or other ancillary main town centre uses.

Market Street, South Normanton

- 11.8 The 0.9 ha site adjacent to the Co-op in South Normanton remains a potential development opportunity, however, given the edge-of-centre location, any allocation should be subject to operator demand and passing the key sequential and impact retail tests.
- 11.9 We are unconvinced that there is a sufficient catchment to sustain a new foodstore on this site, as well as the existing Co-op store, and note that Bolsover District has other preferable options to meet the identified quantitative capacity given the greater potential to extend Bolsover Town Centre.

Northern Gateway, Chesterfield

- 11.10 This longstanding proposal to the north of Chesterfield Town Centre remains a key opportunity to extend the draw and competitiveness of the centre.
- 11.11 We would encourage the Council to build upon the first stage redevelopment of the former Co-op at Elder Way to continue to deliver the required critical mass of activity as part of the Northern Gateway Chesterfield Vision and to complement the new neighbourhood proposed through the Chesterfield Waterside development.

Bridge Street Triangle, Clay Cross

- 11.12 This site, at 8.4 ha in total, has been partially developed through the recent Aldi foodstore and remains the largest and most suitable opportunity to deliver a retail-led development in North East Derbyshire District.
- 11.13 Given the identified occupier interest in new sites in the area from Lidl, another discount foodstore would be a potential occupier.
- 11.14 Alternatively, the site could deliver a combination of comparison goods retailers, meeting a qualitative rather than strictly quantitative need, supporting the town centre offer in light of the growth proposed through the Egstow Park residential development.

Northgate House, Eckington

- 11.15 Northgate House and the adjoining Bus Station have previously been identified as a potential development opportunity within the Eckington Town Centre Development Framework SPD.

- 11.16 Whilst a number of recent applications for the redevelopment of the site have been refused planning permission on various grounds, the Northgate House site (including the associated service yard and bus station) offers an opportunity for a mixed-use redevelopment to provide modern flexible units to attract investment and better integrate the Co-op to the rest of the Town Centre.
- 11.17 Overall, we have considered the opportunity sites for retail-led development given the readily identified quantitative and qualitative capacity for new floorspace. However, a suitably located leisure development would have the potential to provide a number of spin-off benefits in attracting further investment and clawing back trips to facilities out of the authority areas.
- 11.18 Given the current lack of investment in leisure and difficulty in planning for such uses, we would recommend that any application for leisure uses on these sites be considered on their own merits, as they come forward. In the current market, such developments would be unlikely to proceed unless attached to an interested operator or as part of a larger mixed-use development.

Retail Hierarchy

- 11.19 Each of Chesterfield Borough, Bolsover District and North East Derbyshire District proposes a defined retail hierarchy within the emerging Local Plans.
- 11.20 Whilst there are some small discrepancies in the naming of the centres across the three authority areas, the approach appears to be consistent and we agree with the draft proposed retail hierarchies as follows:
- The Consultation Draft Bolsover Local Plan (2016) defines the settlements of Bolsover, Shirebrook, Clowne and South Normanton as Town Centres on an equal footing.
 - The Chesterfield Borough Local Plan Consultation Draft (2017) defines Chesterfield as a Large Town Centre, and Staveley as a Small Town Centre (on same scale as District Centres).
 - The North East Derbyshire Consultation Draft Local Plan (2017) defines Clay Cross and Dronfield Principal Town Centres, and Eckington and Killamarsh as Secondary Town Centres.
- 11.21 We have identified the following key definitions that have guided our assessment and should inform the definition of any new centres:

- The NPPF fails to provide any clear guidance to differentiate between what should constitute a 'town', 'district' or 'local' centre (providing only a generic definition of a 'town centre'), but does provide definitions of 'primary shopping area' and 'primary' and 'secondary' frontages at the glossary at Annex 2.
- The primary shopping area is the **'Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).'**
- Primary frontages are **'...likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods.'**
- Secondary frontages **'...provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.'**
- The NPPF defines a Town Centre as an **'Area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres.'**
- Notably, the NPPF glossary also clarifies that: **'References to town centres or centres ... exclude small parades of shops of purely neighbourhood significance.'** As such, small neighbourhood parades differ from local centres, and are not necessarily protected in planning terms (unless specifically identified for safeguarding within the retail hierarchy). The DCLG publication 'Parades to be Proud of' defines local neighbourhood parades as **'Typically located in the heart of a residential community, urban and rural, often with around 5-10 units, providing walk in convenience shopping and limited local services.'**
- The NPPF also indicates that the primary shopping area will act as the boundary with regard to whether a site is 'in', 'edge' or 'out' of centre.
- Whilst it has been clearly superseded by the NPPF, in the absence of any other definition, it is pertinent to note that Planning Policy Statement 4: Planning for Sustainable Economic Growth (PPS4) provides an additional qualification to its definition of primary shopping area, stating that: **'Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, therefore the town centre may not extend beyond the primary shopping area.'**

- The Planning for Town Centres Practice Guidance has also been superseded (in this case, by planning practice guidance) and therefore does not directly support current planning policy. However, given that it considers primary shopping areas in greater detail than current national policy and guidance, it is of some interest. Paragraph 6.4 of Planning for Town Centres states that, in identifying the extent of the primary shopping area, key considerations will include ‘...**the extent of existing primary frontages, as defined by prime rental levels, and/or pedestrian flows.**’

Town Centre Boundaries

- 11.22 Having considered the proposed retail hierarchy across each authority area against the definitions and guidance highlighted above, we go on to consider the current and proposed boundaries and designations for each of the Study’s centres.
- 11.23 We also consider the suitability of designating primary and secondary frontages, in light of the evolving role of town centres and the reduction in the reliance on a core of exclusively retail uses to draw visitors to town centres.
- 11.24 We identify the spatial plans and suggested boundary revisions at **Appendix F**.

Bolsover District

Bolsover

- 11.25 Bolsover Town Centre was previously represented in the draft Proposals Map as being extended to the north to include the Sherwood Lodge site, which was the location of the former Morrisons foodstore proposal.
- 11.26 This scheme is no longer proceeding under Morrisons; however, it has been implemented for a retail development and remains a key, previously developed opportunity site for expanding the town centre. Since the former office building was demolished, it does not actively provide a town centre use and should be excluded from the town centre boundary.
- 11.27 Notably, the draft designation currently identifies a single boundary for the town centre. We would suggest that this also serves as the primary shopping area (‘PSA’), taking account of the previous PPS4 guidance that *‘the town centre may not extend beyond the primary shopping area’*.
- 11.28 We would also not suggest that there is any need to differentiate between primary and shopping retail frontages, given the scale of the centre. Such designations are typically

associated with policies limiting the proportion of specific uses. We would, however, suggest that the Council takes a more flexible approach and avoids such overly restrictive policies in order to enable the centre to better adapt to market requirements and attract town centre investment going forward.

Shirebrook

- 11.29 The Council has proposed minor alterations to the current boundary in the draft Proposals Map, excluding a warehouse to the north east of the centre and land to the south of the centre (noting the outline planning permission for residential development, ref: 15/00395/OUT).
- 11.30 As with Bolsover Town Centre, we also recommend a single town centre boundary that serves as the PSA for retail purposes, and would not suggest any requirement for primary or secondary frontage based policies.

Clowne

- 11.31 Since the adoption of the current adopted Proposals Map, the former North Derbyshire Tertiary College site has since come forward as a residential development. The Council's draft boundary proposes to exclude this development from the town centre and extend to the west, fully incorporating the Tesco, and to the north incorporating the Parish Council, Community Centre, Health Centre and library on Recreation Close.
- 11.32 We agree with all proposed amendments to the town centre boundary, with the exception of the extension to incorporate Recreation Close the north. This area is not currently well linked to the rest of the town centre and provides ancillary town centre uses.
- 11.33 As above, we also recommend that the town centre boundary serves as the PSA and that there is no need to differentiate between primary and secondary frontages.

South Normanton

- 11.34 The Council proposes a few minor amendments to the adopted boundary in the draft proposals map, including the Postmill Centre and Joint Service Centre, excluding the separate southern element of the centre in its entirety and removing the depot to the south of the Salvation Army building, which benefits from outline planning permission for a residential development (ref: 13/00431/OUT).
- 11.35 We recommend that the area within the suggested town centre boundary is also designated as the PSA.

Chesterfield Borough

Chesterfield

- 11.36 The current adopted town centre boundary is defined in the 2013 Local Plan, with amendments proposed in the draft consultation Policies Map.
- 11.37 The amendments define the PSA, refining the boundary of the current 'Retail Core' to the east and the west (removing Chesterfield Parish Church, The Rose Theatre and Council offices). The proposed policies map also includes 'secondary shopping areas' and takes into account areas specific policies (designated as 'Place Shaping') and the Northern Gateway site (designated as 'Reserved for Expansion') as identified in Policy PS1.
- 11.38 We note that the draft proposals map does not expressly include a town centre boundary, which we would suggest includes other main town centre uses including offices, civic and administrative functions that support the centre and are included within 'Place Shaping' and other designations.
- 11.39 We agree with the proposed PSA and would suggest that the wider town centre boundary be defined as inclusive of the PSA, 'Secondary', 'Place Shaping' and 'Reserved for Expansion'.
- 11.40 In this context, we also suggest that the proposed Policy PS1 wording '*within Secondary shopping areas of Chesterfield Town Centre planning permission will normally be granted for any main town centre uses' (other than for retail)* applies to the whole of the wider town centre and that the 'secondary shopping area' designation would not be required.
- 11.41 Given the Council's ambitions to attract investment to the centre (particularly at the Northern Gateway); we do not consider that the centre would benefit from overly restrictive and protective frontage policies.

Staveley

- 11.42 The draft policies map does not propose any substantial amendments to the currently adopted boundaries for Staveley other than small refinements to individual units at the eastern boundary to remove residential dwellings. The draft policies map does not identify a PSA.
- 11.43 We would suggest that the town centre boundary suitably functions as a PSA for retail planning application purposes.
- 11.44 As above, we would not recommend any policies designating primary or secondary frontages.

North East Derbyshire District

Dronfield

- 11.45 The proposed town centre boundary identified on the Consultation Draft Local Plan Policies Map for Dronfield reflects the boundary of the previous Local Plan (2001-2011). This extends beyond the boundary of the Experian Goad plan of the centre to include a linear parade of retailers to the east, along Chesterfield Road.
- 11.46 We would suggest that this boundary is significantly refined, echoing the recommendations of the previous 2008 Retail Study that “Dronfield does not provide a compact or coherent centre”.
- 11.47 We would recommend contracting the town centre boundary to cover the proposed area from the Sainsbury’s in the west, to the Forge Shopping Centre in the East. This covers the greater concentration of retailers, whilst the extended parade of units along Chesterfield Road are not very well linked to the rest of the centre, being separated by a bridge crossing the railway line and River Drone. We consider that the Chesterfield Road section of the proposed centre functions more as a series of interconnected local parades or as a single individual local centre spreading from the railway station than as an integral element of Dronfield Town Centre.
- 11.48 We would recommend that the amended town centre boundary also serves as the primary shopping area, and would not require separately designated primary or secondary frontages.

Clay Cross

- 11.49 The Council’s proposed town centre boundary is broadly taken from the previous Local Plan, extending from High Street to the Tesco Extra.
- 11.50 We agree with the proposed boundary, but would suggest that it is extended to incorporate the Bridge Street Triangle to the west of the centre (featuring the recent Aldi development).
- 11.51 We would also recommend that the boundary serve as the PSA, and would not suggest any requirement for primary or secondary frontage based policies.

Eckington

- 11.52 As above, the proposed town centre boundary is based on the boundary adopted through the previous Local Plan, with minor amendments to remove individual units at the boundaries that are not main town centre uses. The centre boundary broadly covers Market Street, extending north to the Co-op and south to the Eckington Swimming Pool and Fitness Centre.

11.53 We do not recommend any amendments to the boundary, but suggest that the town centre boundary also function as the PSA.

11.54 We would not suggest that the authority adopt specific primary and secondary frontages for similar reasons as identified above.

Killamarsh

11.55 The adopted Killamarsh Town Centre boundary was drawn relatively compactly and we recommend a couple of minor amendments to include additional facilities directly adjoining the centre that contribute to the offer and overall vitality and viability of Killamarsh.

11.56 In liaison with Council officers, we propose including the Community Campus (and associated sports and leisure facilities) to north of the centre, and would recommend that the town centre boundary serves the same purpose as the PSA.

11.57 As above, we do not recommend the need for any primary or secondary frontages in this instance.

Local Retail Impact Thresholds

11.58 In accordance with national planning policy, retail, office and leisure developments greater than 2,500 sq m proposed in edge-of-centre and out-of-centre locations will be subject to the assessment of the impact criteria set out by Paragraph 26 of the NPPF.

11.59 Where appropriate, Local Authorities are entitled to identify local thresholds in accordance with the following considerations identified within the NPPG ('Ensuring the vitality of town centres', Paragraph 16):

- scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- likely effects of development on any town centre strategy; and
- impact on any other planned investment.

- 11.60 The three authority areas have previously taken different approaches to proposed local thresholds for requiring Retail Impact Assessments for edge and out-of-centre developments in draft and emerging Local Plans. Chesterfield Borough suggests a variable threshold from the NPPF's 2,500 sq m to 280 sq m (to reflect the definition of a small shop in the Sunday Trading Act 1994), whilst Bolsover District has proposed a blanket threshold of 500 sq m as recommended by the previous 2011 Study.
- 11.61 In addition to the guidance within the PPG, in order to robustly justify any proposed local thresholds we have considered the overall scale and draw of the centres, the number of available opportunity sites and market patterns to establish what scale of proposal would be likely to impact upon the vitality and viability of a centre.
- 11.62 Where Experian Goad data is available, we have calculated the average size of units across the Study's centres. This varies from 302 sq m (Dronfield) to 102 sq m (Clay Cross), with other centres such as Chesterfield (172 sq m) and Bolsover (121 sq m) falling somewhere in between.
- 11.63 We have also had regard to precedent set through recent appeal decisions. Noting the average size of unit per centre identified above, recent decisions are relevant in identifying cases where proposals for smaller units may result in an adverse impact on a centre.
- 11.64 Whilst the significance of levels of impact on town centres should be considered as a matter of fact and degree in each case, it is nonetheless notable that planning appeals in Luton Borough (ref: APP/B0230/A/13/2203864) and LB Tower Hamlets (APP/E5900/A/14/2217680) were dismissed by the Secretary of State for retail proposals of just 121 sq m and 261 sq m, respectively.
- 11.65 With the exception of Chesterfield Town Centre, the Study's centres are typically served and anchored by just one or two small to medium sized foodstores. Whilst the facilities are generally located within the designated town centre, the relative lack of draw to the smaller centres suggests that the centres are vulnerable to competing out-of-centre retail developments.
- 11.66 We consider that these centres are potentially vulnerable to convenience and comparison retail developments of both 'big box' retail park destinations and smaller, 'town centre parade' style units, that can directly compete with the smaller centre's retail offer. Such developments would jeopardise the vitality and viability of the centres and the threshold should reflect the somewhat smaller floorplates of the existing retail facilities across the centres.
- 11.67 We therefore recommend adopting a tiered system of local impact thresholds, as follows:

- A local impact threshold of **200 sq m** (gross) applies for proposals within a 500m catchment of protected local centres and neighbourhood parades;
- We recommend a threshold of **280 sq m** (gross) within the catchment (500m) of Small, Principal and Secondary Town and District Centres; and
- A threshold of **500 sq m** (gross) applies across the remainder of the authority areas, including for sites in proximity to Chesterfield Town Centre.

11.68 We would stress that whilst the locally set threshold would require the submission of an impact assessment for all edge-of-centre and out-of-centre developments exceeding the recommended local thresholds, national guidance dictates that the impact test should be undertaken in a proportionate and locally appropriate way, commensurate to the scale of development proposed.

11.69 The level of detail would typically be agreed with Council officers during the pre-application process in order to avoid overly onerous requirements that may otherwise restrict and delay development opportunities from coming forward.

11.70 In addition, we would recommend that the Councils allow for the amalgamation of units (where there is little, or marginal, loss of net retail floorspace) in order to provide suitable flexibility to encourage investment in the respective authorities' centres.

Glossary of Terms

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

Experian (MMG3):	A population, expenditure and socio-demographic dataset that utilises the 2011 Census release, projected forward by using growth rates derived from Office for National Statistics projections and current age and gender estimates.
Floorplate:	Defined as the physical rentable area on one whole floor; sometimes called the footprint.
Goad Plans:	A plan showing a bird's eye view of a retail centre including the exact location of all retail outlets and vacant premises, fascia name, retail category, and floor space. Key location factors such as pedestrian zones, road crossings, bus stops and car parks are also featured, allowing you to instantly assess the site quality of existing or prospective store locations <i>Source: Experian</i>
Independent Retailers:	Retailers with less than 10 outlets/ stores <i>Source: Experian</i>
Main Town Centre Uses:	Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities) <i>Source: NPPF</i>
Market Share:	The proportion of residents that visit a particular retail destination, derived from household survey results
National Multiple:	Defined as retailers with ten or more stores/ outlets <i>Source: Experian</i>
Prime Unit:	'Prime' is a widely used term within real estate investment circles to describe building and location quality. There are no universally agreed definition, however, and no consistency in the distinctions applied to prime or non-prime property. <i>Source: Colliers</i>
Primary shopping area:	Defined area where retail development is concentrated (generally

comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage)

Source: NPPF

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

Source: NPPF

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

Source: Planning Portal

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

Source: Planning Portal

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

Source: Planning Portal

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

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

Source: Experian

Study Area: The geographical area where the household survey is carried out, based on postal sectors that make up the 14 zones that covers Chesterfield Borough, Bolsover District and North East Derbyshire District, as well as hinterlands within Sheffield, Rotherham, Bassetlaw, Mansfield, Ashfield, Amber Valley and Derbyshire Dales

where shoppers may be attracted to the authority area's retail and leisure offer

Trade draw:

The proportion of trade that a development is likely to receive from customers within and outside its catchment area. It is likely that trade draw will relate to a certain geographic area (i.e. the distance people are likely to travel) and for a particular market segment (e.g. convenience retail). The best way of assessing trade draw where new development is proposed is to look at existing proxies of that type of development in other areas

Source: NPPG

Turnover:

Sales per unit area of retail floorspace

Source: Planning Portal

Town Centre:

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

Source: NPPF

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