



Warrington Borough Council

Warrington Retail and Leisure Study

Final Report

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1.0 Introduction

Instruction

- 1.01 WYG Planning (hereafter referred to as 'WYG') was commissioned by Warrington Borough Council ('the Council') in August 2014 to undertake a Retail and Leisure Study for Warrington Borough.
- 1.02 A key purpose of this Study is to provide an assessment of retail and leisure needs and capacity in the period to 2030, and to review the current performance of Warrington town centre and Birchwood, Stockton Health and Westbrook district centres. The Study will act as the evidence base to assist in the formulation of future development plan policy, as well as providing baseline information to assist in the determination of planning applications for retail development. The Study also provides recommendations in respect to the Council's future strategy for Warrington town centre and the three district centres in order to help safeguard their future vitality and viability.
- 1.03 The Study draws upon new empirical research, with NEMS Market Research Limited (NEMS) undertaking surveys of 1,000 households within the defined Study Area in November 2014. The Study Area for the household survey comprises ten zones which are based on postcode sectors grouped to reflect areas which are likely to exhibit similar patterns of shopping behaviour. The Study is also informed by business surveys undertaken in Warrington town centre, and by in-street surveys undertaken in the town centre and district centres. The Study draws upon the most recent Experian Micromarketer G3 population and expenditure data (published October 2014) in order to establish the up-to-date position with regard to both convenience and comparison goods capacity.

Structure of Report

- 1.04 Our report is structured as follows:
- Section 2 provides a context for the Retail Study by providing an analysis of key retail trends;
 - Section 3 considers the up-to-date position in respect of relevant national retail and town centre planning policy;
 - Section 4 sets out a review of the survey research and considers changes in shopping behaviour that have occurred since the undertaking of the previous Study;
 - Section 5 sets out an overview of the vitality and viability of the Borough's town and district centres;
 - Section 6 identifies current and future population and expenditure levels within the Study Area;



- Section 7 provides our assessment of the quantitative and qualitative need for further convenience and comparison goods retail floorspace over the assessment period;
- Section 8 considers the need for additional commercial leisure development; and
- Section 9 provides a summary of key findings and sets out our recommendations in respect of Warrington's future retail and leisure strategy.



2.0 Current and Emerging Retail Trends

Introduction

- 2.01 The retail property landscape across the UK has evolved significantly over the past 50 years, from post-war redevelopment in town centres, through to the emergence of retail warehouse parks and out-of-town regional shopping malls. For most of this period, the retail and leisure sectors have experienced considerable expenditure growth, which has been attributed to a number of factors, including greater disposable income, availability of credit, new technology and a general overall increase in our standard of living. However, recent economic conditions have had a clear impact on expenditure and convenience goods spending per capita has actually reduced in recent years. The way in which goods are purchased has also altered due to the increased popularity of 'e-tailing', which now claims more than one in every ten pounds spent in the UK.
- 2.02 The retail and leisure market and the need for new development continually evolves as a result of numerous factors including demographics, consumer demands, car ownership, planning policy and technological advancements. The share of retail spending has undergone a significant shift in the decade since 2002, with Verdict identifying that town centre spending as a proportion of overall spending declined from 47.7% to 39.9% at 2012. In contrast, spending in out of centre locations has increased over the same period by 2.1% and non-store locations (principally internet retailers) by 6.6%¹. These changes have had a major impact on the format and location of retail and leisure floorspace, which has led to recent Governments reaffirming their commitment to the 'town centre first' policy approach that is now outlined in the National Planning Policy Framework (NPPF) (March 2012).

Current Retail Picture

- 2.03 A recent report by Colliers² provides information regarding recent trends, together with forecasts for the future of retailing in the UK. The findings confirm that the retail sector has been significantly affected by the wider economic climate and that there is considerable uncertainty about the strength and durability of future growth. However, Colliers reports that the recent improved economic outlook is beginning to result in increased consumer confidence and pockets of retailer expansion which are resulting in a reduction in vacant retail space. Furthermore, it is evident that the UK unemployment rate is currently falling (recorded as being 5.7% between October and December 2014, compared to

¹ 'UK Out of Town Retailing', Verdict Datamonitor, April 2012

² 'National Retail Barometer: Summer 2014', Colliers, September 2014



6.0% between July and September 2014)³ and that average pay for employees in Great Britain increased 2.1% between October and December 2014 compared to the same period 12 months earlier⁴.

- 2.04 Notwithstanding these very recent encouraging signs, the economic conditions of the past few years have had a significant impact on the public's ability and willingness to spend their earnings on retail goods. Since 2010 there have also been increases in taxation (for example in VAT, national insurance contributions and capital gains tax) which also impact upon households' spending. Furthermore, in recent years inflation has consistently been at a level beyond average earnings growth and a delay in reviewing business rates has been identified by both the Portas⁵ and Grimsey⁶ Reviews as a key factor affecting the success of many operators.

- 2.05 Recent economic conditions have resulted in significant structural changes to the high street, whereby the pressure on retailers to remain solvent has meant that many are showing increased signs of caution in their investment decisions. In particular, retailers are rationalising their physical store portfolios by reducing their number of stores, abandoning their representation in weaker centres and concentrating on acquiring sites in city centres and major regional shopping centres. The Grimsey Review identified that the national vacancy rate at 2013 equated to over 22,000 empty shops across the top 650 town centres. The Centre for Retail Research⁷ estimates that overall store numbers will fall by 61,930 between 2012 and 2018, with the main impact being upon non-food stores. The report also estimates that 316,000 people will become unemployed, permanently or temporarily, as a result of these store closures.

- 2.06 To address this, many retailers have sought to re-negotiate their lease terms with landlords in order to enable them to switch from quarterly rents to monthly agreements, with several high street firms (including Monsoon and New Look) trying to ease the cash flow burden of paying rent three months in advance. Furthermore, some retailers are finding it increasingly difficult to justify being represented in every town in the UK and in less profitable markets. As a consequence, demand has reduced considerably for 'poorer quality premises' in secondary locations and in many smaller towns with a commensurate drop in value (and often rent). Large cities and towns are likely to suffer less

³ 'Labour Market Statistics, February 2015 Release', ONS, February 2015

⁴ Ibid

⁵ 'The Portas Review', December 2011

⁶ 'The Grimsey Review – An Alternative Future for the High Street', September 2013

⁷ 'Retail Futures 2018', Centre for Retail Research, May 2013



compared to smaller centres, given that they provide an enhanced choice for customers and offer the greater retail and leisure 'experience' that consumers increasingly desire.

- 2.07 In summary, there has been a marked polarisation and divergence in retailer spending, characterised by diminishing demand for secondary premises in smaller peripheral centres and increasing interest for well located and appropriately configured floorspace in key centres. It is evident that whilst Central London, regional city centres and regional shopping malls are relatively stable, a significant number of small and medium sized towns which serve a localised catchment may need to implement innovative ideas in order to compete for expenditure and reduce trade leakage.
- 2.08 In terms of retail rental values, Colliers⁸ notes that national rates increased by 0.1% in Quarter 1 of 2014, to end 11 consecutive months of decline and to provide evidence that conditions in the retail mark are stabilising. However, Colliers also reports that this position is skewed by growth in London and a small number of other destinations, with towns that have benefitted from growth typically being able to offer: an under-supply of retail floorspace; a tight prime pitch; strong tenant demand; affordable rents; a wealthy demographic; and, limited out of town provision.
- 2.09 Given current spending patterns and the wider uncertain economic climate, it is unsurprising that Experian, which monitors and forecasts retail consumer expenditure in the UK, has in recent years identified significant changes when reviewing its forecast growth rates for both convenience and comparison goods expenditure over the short term. Experian's⁹ forecast annual per capita convenience goods growth rate is -0.5% at 2014, +0.5% at 2015 and +0.4% at 2016. By way of contrast, Experian¹⁰ forecast in 2009 that per capita convenience goods growth would equate to +1.1% per annum across these same three reporting years.
- 2.10 However, Experian's forecast annual per capita comparison goods growth rates are significantly more positive than in the recent years and are similar to those recorded prior to the recession. Experian identifies per capita growth of +5.6% at 2014, +4.4% at 2014 and +3.1% at 2015.
- 2.11 Despite difficulties in recent years across the comparison goods sector, certain types of retail have continued to perform well. The market for recreational goods has, on the whole, performed strongly

⁸ 'Midsummer Retail Report 2014: Coming Up for Air', Colliers, July 2014

⁹ Experian Retail Planner Briefing Note 12.1 (Figure 1a), October 2014

¹⁰ Experian Retail Planner Briefing Note 7.1 (Figure 1), August 2009



in recent years, with healthy growth attributed to supermarket sales together with the growing popularity of online shopping, which continues to see an increase in sales year-on-year. However, the manner in which such purchases are made has changed considerably, with the increasing popularity of the internet to purchase books and music having a notable impact on the composition of town centres, with such stores all but disappearing from the high street. Other businesses have experienced growth in the last two years, with the Grimsey Review¹¹ reporting a 12% increase (equating to an additional 1,100 stores) in 'value-related retailing' outlets, including second-hand, discount and charity shops. The Grimsey Review also makes reference to the expansion of pawnbrokers, pay-day lenders and betting shops which have collectively experienced a 17% growth in the number of such outlets since 2011.

Trends in Comparison Goods Retailing

- 2.12 Whilst it is not anticipated that growth in retail spending over the next ten years will mirror that achieved after the turn of the millennium, there is expected to be some growth in comparison goods expenditure in coming years. Consequently, there is an increasing focus from retailers on achieving more efficient use of their floorspace, particularly given the recent poor performance of certain national multiples, many of which have been affected by the significant increase in e-tailing and increases in rental levels secured before 2008. As a result of the current economic climate, retailers are more reluctant to commit to new development than they have been in previous decades. Instead, they are more selective and are holding out for accommodation that is appropriate both in terms of location and the type of premises provided. Indeed, retailers are seeking to occupy larger units in order to achieve more efficient use of floorspace and attract shoppers from a wider area. These larger floor plates enable operators to provide a greater range of goods; for example, in 2011, when the retail market was generally stagnant, Primark opened one million sq.ft of new retail space.

- 2.13 International market conditions and price deflation in some key sectors have also meant that many high street names are becoming increasingly vulnerable to takeover. This is being pursued through disposals, company voluntary administrations (CVAs), informal arrangements with landlords, lease expiries and break options. More generally, whilst there is likely to be continued demand for larger, modern retail units in the future, increased sensitivity over future viability will mean a cautious approach to new investment for many key national retailers. Marginal locations within centres will increasingly be rejected. Many national retailers, who would have previously considered smaller/lower order centres in order to increase their market share, are now assessing their future strategies given

¹¹ 'The Grimsey Review – An Alternative Future for the High Street', September 2013



the ongoing downturn in the economy. Consequently, many investment decisions will be influenced by the scale of commitment from other retailers; developers will increasingly need to promote large town centre redevelopment schemes with anchor tenants if they are to attract other high quality retailers.

Trends in Food Retailing

- 2.14 In the aftermath of the growth in the number of edge and out of centre large format supermarkets during the 1990s, development of such facilities is now more limited due to stricter planning laws (following the publication of PPS4 and, subsequently, the NPPF) and a lack of suitable sites. As a result, the national multiples in the food retailing sector are finding a range of other measures to improve their market share. These include:
- Offering a wider product range, such as financial and insurance products, petrol and non-food goods;
 - Developing a wide range of retail models, for example small-format convenience stores in town centres (e.g. Sainsbury's Local, Tesco Express), smaller supermarkets mostly in town centres (e.g. Tesco Metro), superstores (e.g. Tesco) and hypermarkets (e.g. Tesco Extra, Asda Supercentres);
 - Extended opening hours;
 - Offering cheap products and no-frills service;
 - Providing an attractive and powerful brand image; and
 - Offering a home delivery service.
- 2.15 Mintel¹² identifies that the recession – allied with a period of higher inflation – has had an impact on consumer behaviour and the wider dynamics of grocery retailing. Price, or specifically value, is now identified as the key issue for consumers, and more shoppers are assessing whether purchases represent value for money. Shoppers now realise that they are able to 'trade down' and switch to own-label ranges or to discount retailer to save money without sacrificing on quality. Indeed, customers are mixing value and premium in the same basket. It is noted that as weekly food budgets fall and consumers alter their shopping habits, growth will be limited and the battle for market share will intensify further. Winning a share of consumer spend will require more than low prices, with shoppers increasingly seeking to source high-quality, good value food.

¹² 'Food & Drink Retailing', Mintel, March 2013



- 2.16 The changing UK demographics are also having a major impact on the food and grocery sector. For example, there has been a rise in single occupancy young professional households who are 'time poor' and relatively 'cash rich'. Though their baskets might be small, they tend to buy higher value items, therefore providing an opportunity to boost volume and value growth. Elsewhere, an ageing population profile is leading to a rise in time rich consumers who are likely to make more frequent small trips rather than do large weekly shops. The contrasting requirements of these markets means that retailers are seeking to open a variety of stores with a particular current focus on discount and small convenience stores.
- 2.17 Verdict¹³ estimates that the food and grocery sector was worth an £139.5 billion in 2014, equating to an annual growth of 2.8%. The four key supermarket chains in the UK have respective market shares of 27.0% (Tesco), 16.3% (Asda), 15.6% (Sainsbury's) and 10.1% (Morrisons). National multiple retailers, which also include operators such as Co-operative Food (5.1%), Aldi (4.2%) and Waitrose (4.0%), represent a total grocery market share of 90.9%.
- 2.18 There has been a recent slowdown in the growth plans of the majority of the principal supermarket operators. Tesco, for example, indicated in April 2013 that it had scrapped plans for major store developments on more than 100 sites and would instead focus on developing medium size units. It then subsequently announced in January 2015 its intention to pull out of a further 49 store development and to close 43 existing stores.
- 2.19 Asda is the second largest supermarket retailer in the UK, with more than 550 stores nationwide. In contrast to Tesco's plans, it announced in February 2015 its intention to invest £600m opening 17 new supermarkets and revamping 62 more. It also intends to open a further number of petrol filling stations and develop locations where shoppers can pick up groceries ordered online. Asda's focus for additional openings is believed to be London and the south of England.
- 2.20 Morrisons also intends to open fewer larger stores once its current pipeline of development is completed. Its recent focus has been on developing the small-scale M Local convenience format store, which has significantly fewer stores than either Tesco Express or Sainsbury's Local. However, the retailer posted disappointing results for the year to 1 February 2015 and announced the closure of 23 M Local store with the loss of 300 jobs. Its current priority is believed to be investment into its existing portfolio of stores.

¹³ 'UK Food & Grocery – Verdict Sector Report', Verdict, October 2013



- 2.21 Sainsbury's announced in October 2014 its intention to further develop the Sainsbury's Local format and to improve its online offering. However, its most significant move is to enter the discount market under the Netto fascia, with Sainsbury's owning a half share in Netto's UK operation. Netto announced the trialling of 15 stores in November 2014 clustered around the M62 corridor between Liverpool and Hull in order to 'test the water'. Two new build openings were announced in March 2015 in Lymm and Hull, which appears to suggest confidence in the venture.

- 2.22 Emboldened by changing convenience goods shopping patterns and significant increases in their market share, Aldi and Lidl have both announced ambitious store opening targets that, if met, will further increase pressure on the 'main four' operators (these being Asda, Morrisons, Sainsbury's and Tesco). Recent announcements suggest that Aldi is seeking to add more than 1 million sq.ft of additional floorspace in 2015 through the opening of around 60 stores and that Lidl will also add around 340,000 sq.ft this year.

- 2.23 More generally, the role of supermarkets has continued to develop in recent years, with the large operators now offering a greater diversity of goods and services, via a larger number of formats and locations. Food and non-food sales are also increasingly being driven by large supermarket growth, with half of town centres competing with five or more supermarkets within a two mile radius¹⁴. Whilst the exact impacts which will arise from the opening of a new supermarket are dependent on local circumstances, BCSC notes that there has been a significant decline in the number of independent food retailers in recent times, including a reduction of 45% between 1996 and 2007 in the number of greengrocers. Over the same time period the market share of total retail sales secured by supermarkets increased from 38% to 42%.

Leisure Sector

- 2.24 The daytime and evening leisure sector has undergone a major shift in the last five years, with the reduction in the income levels of consumers having an impact on their ability to spend on these types of discretionary activities and items. Mintel calculated that the total UK leisure market was worth almost £70 billion in 2012, only 0.2% higher than in 2007¹⁵. A review of the leisure activity participation and frequency levels indicates that eating and drinking out of the home still remain the most popular activities which people do on a monthly basis, with the cinema the next most popular of

¹⁴ 'What Does the Future Hold for Town Centres?', BCSC, September 2011

¹⁵ 'Leisure Review', Mintel, December 2012



the non-food and drink-led activities. Other activities, including going to a theatre, tenpin bowling and visiting a zoo are, on average, undertaken less frequently and this is at least in part reflective of their greater average cost. It is expected that the difficult trading conditions for the leisure sector are set to continue in the immediate future as a result of the shortfall in the amount of money that consumers have available to spend.

- 2.25 The number of leisure centres and swimming pools has increased in the past few years, though many local authorities are currently under budget constraints and there is some evidence that the ongoing operation of such leisure facilities is, on occasion, being threatened. Mintel¹⁶ notes that 38% of adults use a health centre or swimming pool and research by the Leisure Database Company¹⁷ indicates that the health and fitness private sector had a market value of approximately £3.9 billion in March 2012, an increase of 1.5% over the previous twelve month period. Mintel also notes that, whilst only 15% of adults currently use a private health and fitness club, the potential for a further expansion of the market remains strong.
- 2.26 The health and fitness sector is dominated by the David Lloyd Leisure and Virgin Active operators, with these two health clubs having approximately 455,000 and 435,000 members¹⁸. There has also been a rapid growth in the number of the no-contract budget club operators, with Pure Gym (260,000 members) and The Gym (255,000 members) ranked fourth and fifth in the list of leading chains behind DW Sports Fitness which has 275,000 members. Mintel identifies that there has been a growth in the popularity of innovative exercise classes and technological features to attract additional people to these clubs, with many of the higher end clubs also adding spa facilities to their offer.
- 2.27 In terms of other leisure activities, the cinema sector is performing steadily, with data indicating that there were 173 million UK cinema admissions in 2012, an increase of 0.5% since 2011. Mintel¹⁹ identifies that the eating out market has grown by around 8% between 2008 and 2013, and by an estimated 2.3% between 2012 and 2013, to an estimated £32.1 billion. It recognises however that this has largely been driven by inflation, with consumer demand muted by recent low consumer confidence levels.

¹⁶ 'Leisure Centres and Swimming Pools', Mintel, January 2013
¹⁷ 'State of the UK Fitness Industry', The Leisure Database Company, June 2013
¹⁸ 'Health and Fitness Clubs', Mintel, June 2013
¹⁹ 'Eating Out Review', Mintel, June 2013



Out of Centre Development

- 2.28 Despite the 'town centre first' planning policies which have been adopted by recent Governments, research undertaken by Verdict²⁰ indicates that between 2007 and 2012, the amount of out of centre floorspace increased by 23%. However, in very recent years, Colliers notes that the demand for out of centre representation has been limited, with those retailers seeking to acquire stores having a pick of vacant stock which has been made available through the administration of MFI (in November 2008), Land of Leather (in January 2009) and Focus DIY (in May 2011), amongst others. However, only five retailers with any significant out-of-town presence have failed since June 2011, these being Allied Carpets, Clintons, Comet, GAME and Peacocks.
- 2.29 The national average vacancy rate²¹ in out of centre retail warehouses in 2014 was 8.0%, an increase of around 4.1% since 2012. Some of the voids created by administrations remain un-let and the flooding of the market with so much unwanted space has acted to reduce rents. Retailers who have had their pick of the best stores include Dunelm, Pets at Home, Dreams, Matalan, Dixons Group, Go Outdoors, B&M, Mothercare, Next Home and TK Maxx.
- 2.30 Looking forward, Colliers²² indicates that future out of centre development will fall into two main categories. The first relates to the adaptation and refurbishment of existing stock. Colliers states that between 80% and 90% of the retail warehousing stock that the UK requires to service demand has already been built. Accordingly, most development activity will see landlords seeking to improve the suitability of their property for the latest retailers and also make improvements to improve dwell time on retail parks (for example, by seeking to introduce coffee shops and restaurants). Older schemes may be remodelled or redeveloped to meet current needs. According to Colliers, the other main strand of out of centre retail development relates to opportunities in areas where there has not been a great deal of retail warehousing in the past.

Shopping Centre Development

- 2.31 Shopping centre retail development has been at a virtual standstill in recent years, but there are a few signs that a corner may about to be turned. Cushman & Wakefield²³ reports that development activity was restrained in 2014, with an estimated 124,300 sq.m of shopping centre space added over the course of the year, which is less than half the total added in 2013. Cushman & Wakefield indicates

²⁰ 'UK Out of Town Retailing', Verdict Datamonitor, April 2012

²¹ 'Vacancy Report Summary H2 2014', Local Data Company, February 2015

²² 'Midsummer Retail Report 2014: Coming Up for Air', Colliers, July 2014

²³ 'Marketbeat Shopping Centre Development Report', Cushman & Wakefield, September 2014



that the shopping centre development pipeline for 2015 totals 154,618 sq.m and includes the 51,100 sq.m Westfield Bradford and the 27,870 sq.m Friars Walk in Newport, both of which are scheduled to open in Autumn 2015. It is anticipated that next year will see the delivery of several shopping extensions, including Birmingham's Grand Central centre, which when complete, will nearly double its size to 53,000 sq.m. Cushman & Wakefield forecasts that the shopping centre pipeline will pick up significantly from 2017 as the economic recovery and the greater availability of finance help to bring forward new schemes and extensions that already have planning permission.

2.32 Notwithstanding this, the viability of shopping centre retail development remains, for the moment, challenging no matter how well designed or well located a scheme is. There are three types of scheme which have a better chance of success in the current economic climate. The first of these will be where a town has a large, affluent catchment and an acknowledged undersupply of retail floorspace in both town centre and out-of-town locations. The second scenario relates to schemes which were very close to happening before the recession took hold, which may be revised to better meet the current needs of the market. Barnsley, Macclesfield, Bradford and Lichfield are examples of such schemes. The third opportunity relates to development where the key anchor is a foodstore and, as a result, demand has remained strong. However, due to changes in the food retail sector and the trading model of the 'main four' operators, opportunities in this latter category are more difficult to come by.

2.33 In addition to retail, food and drink is becoming an integral part of many shopping centres. In particular, consumers are increasingly travelling to larger centres to use the leisure facilities and experience more of a complete 'day out'. In the past, it was relatively typical for non-retail uses to occupy less than 10% of shopping centre floorspace, but this has increased in recent schemes, including Westfield in Stratford where catering and leisure units occupy over 20% of the space.

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

2.34 Many consumers who previously shopped in town centres and at retail parks are now increasingly using the internet to make purchases. Experian²⁴ identifies that internet sales' share of total retail sales stood at 10.6% in mid-2014 compared to just 4.7% at June 2008. The value of internet sales in 2014 is estimated at £37.2 billion.

²⁴ 'Experian Retail Planner Briefing Note 12.1', October 2014



- 2.35 The rise in recent years of e-commerce has had a major impact upon retailers, developers and investors alike, with the top 10 e-retailers in 2012 including Amazon UK (16%), Shop Direct (5%) and Next (4%)²⁵. As access to the internet/online shopping continues to grow through digital televisions, tablets and mobile phones, proportionally less money is anticipated to be spent on the high street or at retail parks.
- 2.36 The growth in internet as a sales medium has been enabled by the increase in access to the internet by households, which the Office for National Statistics²⁶ reports increased from 57% at 2006 to 83% in 2013. A total of 22 million households in Great Britain now have internet access. The proportion of households with access to the internet is expected to increase further over the coming years, alongside the growth in mobile phone and tablets with access via the new 4G spectrum. The ONS states that access to the internet using a mobile phone more than doubled between 2010 and 2014, from 24% to 58%. This has supported the strong growth recorded, together with improved consumer confidence in the security of online payment, deliveries and heavy demand for expensive electrical products available online. The option of using the internet to 'click and collect' in-store at a dedicated counter is also increasing in popularity (particularly within stores with large sales areas), with the service now accounting for around a fifth of John Lewis internet orders.
- 2.37 As a consequence of such changes, the Office for National Statistics²⁷ indicates that the number of people using the internet to purchase goods continues to rise, with 74% of the UK population purchasing products over the internet in 2013, compared to 53% in 2008. The most popular online purchases were clothes/sports goods, with 49% of all adults in the UK purchasing some items via the internet. In addition, 42% of the population bought household goods online and 23% bought food or groceries.
- 2.38 Online spending continues to be the key growth opportunity for national and independent retailers, accounting for increasing proportions of total sales. For example, online sales at Next in 2011 accounted for 44% of operating profit and 32% of group sales. With regard to foodstore operators, food accounts for 20.5% of all internet sales, which equates to 3.1% of all food retailing²⁸. Verdict's research identifies that, with the exception of Morrisons (though it is currently in the process of establishing an online presence via Ocado), major retailers have seen their business grow as online shopping has increased and, as a result, the likes of Asda and Sainsbury's have improved their

²⁵ Ibid

²⁶ 'Statistical Bulletin: Internet Access Households and Individuals', Office for National Statistics, August 2013

²⁷ Ibid

²⁸ 'Shop Expansion and the Internet', CBRE, May 2012



geographical coverage and capacity. In particular, online sales at Tesco currently exceed £2 billion, with Colliers noting that the operator has a reported 48% online grocery market share.

- 2.39 It is evident that internet shopping as a whole is having an impact upon traditional high streets, in light of increased competition and lower prices. Consequently, there is a possibility that online retailing will continue to put pressure on retail rental growth over the next five to ten years. In particular, it appears likely that smaller town centres (which may be less able to offer a complete 'shopping experience') are likely to be the subject of greater ongoing impacts from online retailing.
- 2.40 Despite some variance in the estimated future growth of online shopping, it is clear that e-tailing cannot entirely replace the 'shopping experience' as shopping is a social activity. In this regard, retailers are already adopting innovative approaches to encourage people to visit their store through 'try before you buy' concepts. For example, Ellis Bingham has installed Vertical Chill indoor ice climbing walls at five stores for customers to try equipment and to interact with products. For successful retailers, online selling provides an additional route to the market. Online retailers benefit from demand generated through physical channels whilst high street outlets can benefit from reaching a wider customer base through the internet. Those retailers who are likely to have a healthy future are those who are able to combine a strong high street presence with an interesting and closely related e-tail offer.

Summary

- 2.41 In summary, it is evident that the retail market has undergone significant changes in recent years. Wider economic conditions facing the UK have led to a marked decline in some previously healthy town centres, as well as other traditional retail formats. This has principally been caused by a decline in available expenditure, due to suppressed disposable incomes and an increase in the proportion of expenditure committed online.
- 2.42 However, 2014 has seen an increase in consumer confidence, mainly driven by an improved economic outlook as a result of falling unemployment and the availability of credit. As a consequence, it is anticipated that expenditure growth rates will increase moving forward. Whilst such forecasts remain below those achieved before the recession, they are significantly higher than those recorded over the last three or four years. The growth in online sales has also impinged on the need for new tangible floorspace. However, increased expenditure growth allied with the retail industry embracement of innovative multi-channelling retail strategies, provides an opportunity for town centres to widen their audience in the future and retain ground. To deliver on this, it will be critical that town centres are



flexible enough to both embrace and complement digital solutions, whilst also providing appropriate and well managed retail floorspace that can showcase products and services. The ability for centres to 'move with times' and utilise modern technology, whilst providing a materially different experience to online shopping (partly through the inclusion of leisure and food and drink offers), will help ensure their ongoing vitality and viability.



3.0 Planning Policy Context

Introduction

- 3.01 Given that this Study seeks to provide important evidence to assist in the production of future retail planning policy, it is important to review existing national planning policy of pertinence to retail and town centre matters to explore the context for the Study and how it may impact upon the production of the Local Plan. We also summarise Warrington’s planning policy, insofar as it is relevant to retail and leisure matters, in order to consider the Council’s strategy in respect of its centres.

National Planning Policy Framework

- 3.02 The National Planning Policy Framework was published in March 2012. The NPPF replaces all former Planning Policy Statements, Planning Policy Guidance Notes and some Circulars in a single consolidated document.
- 3.03 The main theme of the NPPF is that there should be ‘a presumption in favour of sustainable development’. In terms of plan-making, it is stated that local planning authorities should positively seek opportunities to meet the development needs of their area, with an emphasis on Local Plans having sufficient flexibility to adapt to rapid change.
- 3.04 In terms of economic development, it is set out within the NPPF’s core principles that planning should proactively drive and support economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made to objectively identify and then meet the business and other development needs of an area, with positive responses made to wider opportunities for growth.
- 3.05 The NPPF stresses the Government’s commitment to securing economic growth in order to create jobs and prosperity, with paragraph 17 stating that the planning system should do everything it can to support sustainable economic growth.
- 3.06 Paragraph 19 indicates that planning should operate to encourage and not to act as an impediment to sustainable growth, and that significant weight should be placed on the need to support economic growth through the planning system. The NPPF seeks to ensure that local planning authorities plan proactively to meet the development needs of business and support an economy fit for the 21st century.



3.07 The NPPF still recognises the need to promote the vitality and viability of towns and cities through the promotion of competition and growth management during the plan period. Paragraph 23 of the NPPF provides guidance for local planning authorities in drawing up Local Plans, it indicates that they should:

- recognise town centres as the heart of their communities and pursue policies to support their vitality and viability;
- 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 centre. 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;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

3.08 Paragraph 23 also indicates that needs for retail, leisure, office and other main town centre uses should be met in full and should not be compromised by limited site availability.

3.09 Paragraph 24 requires local planning authorities to adopt a sequential approach to the consideration of planning applications for main town centre uses that are not in an existing centre or in accordance



with an up-to-date Local Plan. The following paragraph 25 indicates that that the sequential approach should not apply to applications for small scale rural offices or other small scale development.

- 3.10 Paragraph 26 indicates 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.
- 3.11 Paragraph 27 indicates that where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on the vitality and viability of a town centre or on existing, planned, committed investment in a centre it should be refused.
- 3.12 The NPPF also recognises that retail activity should still, where possible, be focused in existing town centres. Retail and leisure proposals which cannot be accommodated in or adjacent to the town centre will have to satisfy a dual impact test and the sequential test.

Ensuring the Vitality of Town Centres Planning Practice Guidance

- 3.13 Ensuring the Vitality of Town Centres National Planning Practice Guidance was published in March 2014 and replaces the previous Planning for Town Centres Practice Guidance. It provides a more concise summation of how retail and main town centre planning policy is to be applied in practice. However, the objectives of the Practice Guidance remain comparable with those of its predecessor, with there being a stated requirement for local planning authorities to plan positively and support town centres to generate local employment, promote competition within and between town centres, and create attractive and diverse places for users.
- 3.14 The Practice Guidance requires local planning authorities to fully assess and plan to meet needs for main town centre uses through the adoption of a 'town centre first' approach. Paragraphs 002 and 003 confirm that this should be delivered through a positive vision or strategy which is communicated through the development plan. The strategy should be facilitated through active engagement with the private sector and other interested organisations (including Portas Pilot organisations, Town Teams and so on). Any strategy should be based on evidence which clarifies the current state of town centres and opportunities to meet development needs and support centres' vitality and viability.



- 3.15 Such strategies should seek to address the following matters:
- the appropriate and realistic role, function and hierarchy of town centres in the area of over the plan period, including an audit of the vitality and viability of existing town centres and their ability to accommodate new development;
 - consideration of the vision for the future of each town centre and the most appropriate mix of uses;
 - the assessment of the scale of development that a town centre can accommodate;
 - the timeframe for new retail floorspace to be delivered;
 - what other complementary strategies are necessary or appropriate to enhance the town centre to deliver the vision in the future; and
 - the consideration of the enhancement of car parking provision including charging and enforcement mechanisms.
- 3.16 Paragraph 005 of the Practice Guidance identifies a series of key indicators which are of relevance in assessing the health of a centre over time. Paragraph 005 goes on to state that not all successful town centre regeneration initiatives have been retail led or focused on substantial new development, but have instead involved improvements such as renewed public realm, parking, and accessibility and other partnership mechanisms. Paragraph 007 identifies the importance of planning for tourism as an important component of any overall vision and indicates that local planning authorities should consider specific tourism needs (including locational or operational requirements) and opportunities for tourism to support local services, vibrancy and the built environment.
- 3.17 Paragraph 009 reaffirms the town centre first policy in the form of the sequential test, which requires local planning authorities to undertake an assessment of candidate sites' availability, suitability and viability when preparing their local plan. Such an assessment should also consider the scale of future needs and the type of land needed to accommodate main town centre uses.

Housing and Economic Development Needs Assessment Planning Practice Guidance

- 3.18 The Government has issued further Practice Guidance to provide specific instruction in respect of the undertaking of needs assessments (including those for main town centre uses). Paragraph 032 of the Practice Guidance states that plan makers should consider forecasts of quantitative and qualitative need based on a range of data which is current and robust. Local planning authorities will need to



take account of business cycles and make use of forecasts and surveys to assess employment land requirements.

Relaxation of Permitted Development Rights

- 3.19 At a national level, recent changes to the Town and Country Planning (General Permitted Development) Order 1995 have sought to support the diversification and vitality of town centres. The changes follow the Portas Report recommendation to make it easier to change surplus space in order to provide for the effective re-use of buildings.
- 3.20 The Town and Country Planning (General Permitted Development) (Amendment) (England) Order 2013 came into force on 30 May 2013. It provides, for a period of three years, for the change of use of Use Class B1 offices to residential without the need for planning permission. The 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, subject to the use relating to no more than 150 sq.m of floorspace and subject to the temporary provision not previously being relied upon.
- 3.21 From 6 April 2014, permitted development rights have been further extended to provide for certain additional changes of use without the need for planning permission. The changes come into force under the Town and Country Planning (General Permitted Development) (Amendment and Consequential Provisions) (England) Order 2014 and result in the introduction of two new classifications that affect commercial premises.
- 3.22 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). The second provides for the change of use from Use Classes A1 and A2 to residential. There are certain restrictions as to where and when the rights can be exercised.
- 3.23 Subsequent to the above, the Town and Country Planning (General Permitted Development) (England) Order 2015 came into force on 15 April 2015. The Order acts, *inter alia*, to consolidate and replace the Town and Country Planning (General Permitted Development Order 1995) and to provide additional permitted development rights. It should be noted that conditions and restrictions apply, and that prior approval is generally required in order to implement development. The new rights include:



- a permitted change of use from amusement arcade/casino (sui generis use) to residential use (Class C3);
- a permitted change from retail (Class A1) to financial services (Class A2);
- a permitted change from retail/financial services (Class A1/A2) to food and drink (Class A3);
- a permitted change from retail/financial services (Class A1/A2), betting offices, pay day loan shops and casinos to assembly and leisure uses (Class D2);
- extension of the temporary permitted development rights introduced in May 2013 for extensions to shops, offices, industrial and warehouse buildings to support business expansion and the economy so they apply permanently;
- the erection of click and collect facilities within the cartilage of a retail shop; and
- modifications to the size of an existing retail shop loading bay.

3.24 The intended consequence of such measures is to secure the redevelopment and reuse of premises. However, it is considered that the relaxation in respect of changes of use to residential are more likely to encourage re-use of offices in larger metropolitan areas which may benefit from a greater supply of office buildings and where previously there may have been some reluctance to grant planning permission for residential uses. Notwithstanding this, the changes set out above are of relevance to Warrington and we return to them in the concluding section of this report.

Development Plan

3.25 The adopted development plan for Warrington Borough is the Warrington Local Plan Core Strategy (adopted July 2014). However, there has been a challenge to the adoption of the Warrington Local Plan Core Strategy under section 113 of the Planning and Compulsory Purchase Act 2004 which has resulted in the quashing of the plan's housing target.

3.26 Notwithstanding this, the following Local Plan policies relating to Warrington's retail and town centre strategy form part of the adopted plan.

3.27 Policy CS1 sets out the overall spatial strategy for delivering sustainable development in Warrington Borough. The policy states that development in the Borough must have regard to the importance of sustaining and enhancing the vitality and viability of the town centre and other designated centres that act as community hubs. Policy CS2 sets out a strategy for the distribution of development across the Borough. It is explained that defined centres, primarily Warrington town centre, will maintain



their role and status by being the focus for further retail and leisure development investment, and by strictly controlling inappropriate out of centre retail development.

3.28 Policy CS7 relates to Warrington town centre. The policy indicates that the Council will support development in the town centre where it supports its viability and vitality, and:

- generates job growth, particularly in indigenous sectors, including retail & high value jobs; or
- adds to the provision and attractiveness of the office market in the town centre; or
- supports existing, committed and planned public and private investment; or
- increases the diversity of uses and contributes to the day or night time economy; or
- supports the town in its role as a regional transport gateway/interchange and improves linkages to it from the rest of the borough and beyond especially by active travel modes; or
- includes housing development.

3.29 Policy PV4 of the Local Plan refers specifically to retail development and states that the focus for new retail development in the Borough is the Primary Shopping Area within Warrington town centre. The policy states that the Council will support proposals within the Primary Shopping Area that contribute positively to the character, diversity and vitality of the centre. Active ground floor uses other than shops, but with frontages fashioned as shops (such as banks and building societies), will be acceptable uses for all frontages within the Primary Shopping Area, provided their presence does not result in an unacceptable loss of A1 uses or an unacceptable concentration of non A1 uses (i.e. there would not normally be more than two adjacent non retail frontages). We give consideration to the appropriate extent of the Primary Shopping Area in the concluding Section 9 of this report.

3.30 Policy PV4 also indicates that where retail development is proposed outside Warrington’s Primary Shopping Area and is not in accordance with any allocation in the Local Plan, or is outside the Bridge Street and Time Square development area, the applicant will be required to demonstrate that there are no suitable sites available in more sequentially preferable locations. In addition, where there are no available, suitable or viable sites within the Primary Shopping Area, or where a proposal is over 500 sq.m gross, the applicant must demonstrate that the proposal would not result in any significant adverse impacts on the Primary Shopping Area and wider Town Centre. The policy indicates that, should the monitoring of vacancies and future retail capacity assessment indicate that it is necessary to extend the Primary Shopping Area, the Council will primarily consider doing so in the Bridge Street and Time Square development area.



- 3.31 Policy PV5 relates to enhancing Warrington town centre’s economy. The policy states that proposals for offices and other appropriate uses such as leisure, entertainment, sport and recreation, arts, culture and tourism developments will be encouraged where they reinforce the role of the town centre and enhance its attractiveness, diversity of uses and the overall vitality and viability. The policy states that all proposals for main town centre uses will need to satisfy the sequential test, and that retail, leisure and office development over 500 sq.m gross outside the town centre will be required to undertake an impact test to demonstrate that there will be no significant adverse impacts on the vitality and viability of the town centre. It is also explained that facilities which strengthen, protect or enhance existing community and cultural facilities will be supported.
- 3.32 Policy PV7 states that the Council and its partners will support proposals which sustain and enhance Warrington’s visitor and tourism economy.
- 3.33 The hierarchy of centres in Warrington Borough is set out at Policy SN4. The policy states that the provision for retailing within the Borough will be based on the need to safeguard and enhance the vitality and viability of the following hierarchy of centres:
- District Centres – Birchwood, Stockton Heath, Westbrook;
 - Neighbourhood Centres; and
 - Local Centres.
- 3.34 Policy SN5 goes on to state that retail and leisure uses will be directed towards district, neighbourhood and local centres where the development is of a scale and nature appropriate to the area served by the centre. Proposals will be expected to enhance the vitality and viability and overall attractiveness of the centre. The policy requires retail or leisure uses outside of a defined centre to satisfy the sequential and impact tests. Policy SN5 indicates that, outside of a defined centre, proposals for all main town centre uses will need to satisfy the sequential test and proposals for retail, leisure and office uses over 500 sq.m gross will need to satisfy the impact test.
- 3.35 Policy SW1 relates specifically to Stockton Heath district centre. It states that the Council will support proposals in and on the edge of Stockton Heath district centre that contribute positively to the character, diversity and vitality of the centre and do not lead to an unacceptable loss of A1 uses or an unacceptable concentration of non A1 uses. Where possible, such proposals should add to or support cultural provision in the area.



- 3.36 Policy SN6 seeks to sustain the local economy and services. It states that the Council will seek to assist the continued viability and growth of the local economy and support the sustainability of local communities by ensuring development proposals, *inter alia*, avoid the loss or change of use of viable convenience shops, cultural facilities, post offices and public houses where the loss would impact on the diversity of local services in communities.
- 3.37 A number of key development sites in Warrington town centre are identified at Policy TC1. The policy states that the Council and its partners will support and promote comprehensive redevelopment and regeneration opportunities in the following areas:
- the Bridge Street and Time Square area, for mixed use development including leisure, retail, cinema and office uses;
 - the Stadium/Winwick Street area, for mixed use development complementary to the Bridge Street and Times Square area;
 - Bank Park area, for mixed use small scale residential and office development on previously developed sites in the vicinity of Bank Park to help to support, protect and enhance the park; and
 - Palmyra Area and Wilson Patten Street for mixed use development including residential, offices and leisure.
- 3.38 Policy TC1 identifies that the Council is keen to promote the growth and improvement of retail provision in the town centre and will seek to direct new comparison goods floorspace that could be supported by emerging expenditure capacity to locations within the town centre. It indicates that, by 2021, the provision of at least 6,500 sq.m net additional comparison goods retail floorspace is proposed in locations within the Primary Shopping Area, and as part of a mixed use development in the Bridge Street and Time Square redevelopment area, and the mixed use development in the Stadium/Winwick Street area.
- 3.39 Policy TC1 also states that the Council will engage with partners to discuss and promote longer term opportunities for appropriate redevelopment in Bank Quay and Wilderspool Causeway, and Town Hill and Cockhedge.

[Bridge Street Supplementary Planning Document \(SPD\)](#)

- 3.40 The Bridge Street SPD (May 2009), seeks to guide development within the Bridge Street area of Warrington town centre. The SPD aims to highlight development opportunities and provide more detail on the range of land uses which would be suitable for the area and provide design advice.



- 3.41 The SPD sets out several aims for the development of the area, including:
- to contribute to the vital and viable town centre;
 - to promote development opportunities and outline a range of uses suitable for the town centre which attract large numbers of people;
 - to support and enhance locally important uses such as Warrington Market; and
 - to provide a mix of retail units, appropriate in size and nature to this area of the town centre and including a type and size which will attract independent retailing, leisure and recreational uses.
- 3.42 In relation to retail development, paragraph 6.25 of the SPD states that the Bridge Street area predominantly comprises retail uses and that any redevelopment should comprise a wider mix of uses. Paragraph 6.26 identifies the existing indoor market as a very important asset, but indicates that the current building which accommodates the market is dated and of little architectural merit. Accordingly, it is considered by the SPD that a new, modern indoor market would be of significant benefit to the area and the town centre as a whole. In addition, paragraph 6.27 identifies that the area would benefit from the provision of smaller retail units in proximity to the market to provide an independent retail focus and also indicates that a space used for outdoor markets and events could also be successful.
- 3.43 Paragraph 6.33 of the SPD identifies that Warrington town centre could be significantly improved through the provision of a wider variety of cafes, restaurants and bars in order to increase overall activity in the area and complement the retail uses on offer within Golden Square.

Additional Policy Considerations

Warrington Means Business

- 3.44 In November 2012, the Council launched the Warrington Means Business programme, which aims to provide a comprehensive framework that sets out the methodology and intent to drive, progress, encourage and facilitate future business growth in Warrington. The programme seeks to bring together all the regeneration and development masterplans for the town.
- 3.45 The Warrington Means Business Programme sets out a range of components in order to achieve the aims and objectives of the programme, as follows:



- Reinforcing the heart of the town;
- Places for business growth;
- Priority infrastructure to facilitate growth;
- Providing aspirational and affordable homes;
- Ensuring a skilled workforce for the future;
- Encouraging enterprise;
- Supporting local business; and
- Attracting and supporting business investment.

3.46 In terms of Warrington town centre, the programme seeks to provide for the regeneration and development of the town centre as the hub of the Borough's life. The programme refers to the town centre masterplan and advises that the plan will be delivered as a series of development areas. The aims and objectives for each development areas are considered in turn within the document.

3.47 The programme aims to support the evolution of the High Street in order that the main shopping streets are vibrant, relevant and economically sustainable going forward. The programme suggests that, in the future, the High Street will contain a wider mix of uses including residential, office, civic, hospitality, education and training, alongside retail uses.



4.0 Original Market Research

Introduction

- 4.01 The undertaking of original market research enables in-depth analysis at a local level and allows the evaluation of the trade draw of particular town centres. The use of specifically commissioned and tailored survey research is fundamental to identifying the likely capacity for future retail floorspace across the Study Area. Notwithstanding this, WYG acknowledges that there can be limitations to survey research, particularly with regard to the sample size which can be achieved, and the results should therefore be taken to be a broad indication of consumer preferences.
- 4.02 A key requirement of this Study is the detailed understanding of shopping patterns in terms of the use of retail centres and the identification of the centres' catchment areas. WYG commissioned specialist market researchers NEMS to undertake a comprehensive household telephone survey to identify consumers' habits and preferences in the Study Area. In addition, in order to gain a greater understanding of the role and function of Warrington town centre and Stockton Heath and Westbrook district centres (and identify from where the centres draw their custom) an in-street survey of shoppers and visitors has also been undertaken by NEMS. A total of 200 surveys were undertaken in Warrington town centre and 100 surveys each in Stockton Heath and Westbrook district centre. Birchwood district centre is in private ownership and we were unable to obtain permission to undertake an in-street survey in this centre. A third type of survey – namely, a business survey – has been undertaken in order to gauge the views of existing retail and service operators in Warrington town centre. We have also taken into account the Town Centre Night Time Use Survey which was undertaken by the Council in 2014.
- 4.03 We set out the general methodological approach to the surveys and the key results below.

Household Survey

- 4.04 In November 2014, a survey of 1,000 households was undertaken across the defined Study Area which comprises 10 separate zones and stretches beyond the Warrington administrative boundaries to incorporate outlying areas, including in Cheshire West and Chester, Halton and St Helens. These outlying areas also, to some extent, look to facilities within the authority area to meet some retail and leisure needs.



- 4.05 The Warrington administrative area broadly equates to Study Area Zones 2, 6, 7, 8, 9 and 10. Zone 6 incorporates Warrington town centre, Zone 7 incorporates Birchwood district centre, Zone 8 incorporates Westbrook district centre and Zone 9 incorporates Stockton Heath district centre.
- 4.06 Table 4.1 below sets out the postcode sectors which comprise each zone and a map of the catchment is provided at Appendix 1. The questions and full tabulation of results from the household survey are provided at Appendix 2.

Table 4.1: Postcodes by Survey Zone

Survey Zone	Postcode Sectors
Zone 1	L21 1, L24 4, L24 5, WA8 0, WA8 3, WA8 4, WA8 5, WA8 6, WA8 7, WA8 8, WA8 9, WA 88 1
Zone 2	WA5 2, WA5 3
Zone 3	WA7 1, WA7 2, WA7 3, WA7 4, WA7 5, WA7 6
Zone 4	WA6 0, WA6 6, WA6 7, WA6 9
Zone 5	WA4 4
Zone 6	WA1 1, WA1 2, WA1 3, WA1 4, WA2 7, WA4 1, WA5 1
Zone 7	WA3 4, WA3 5, WA3 6, WA3 7
Zone 8	WA5 0, WA5 4, WA5 6, WA5 7, WA5 8, WA5 9, WA2 0, WA2 8, WA2 9, WA55 1
Zone 9	WA4 2, WA4 3, WA4 5, WA4 6
Zone 10	WA13 0, WA13 9

- 4.07 The results of the household survey are utilised to calculate the expenditure claimed by each existing retail facility within the Study Area, a process which is considered in Section 7 of this report.
- 4.08 The household survey is also of assistance in identifying the market share claimed by specific retail destinations, the frequency of visit to purchase various types of goods, the incidence of linked trips, the most popular means of accessing town centre facilities, the use of other town centre facilities, and so on.
- 4.09 In considering the market share of trips secured by specific retail destinations, we note that the previous Warrington Retail and Leisure Study (MT Planning, October 2009) provided only a limited analysis of market shares, which was based upon the market share of *expenditure* which was attracted to particular destinations rather than the market share of *trips*. In our view, the consideration of trips is of particular interest as it accurately allows changes in customers' shopping habits to be monitored over time.



- 4.10 Accordingly, we consider below the market share of trips to particular retail venues to purchase both convenience goods and comparison goods. For convenience goods, respondents have been questioned in respect of where they last visited to undertake 'main' food shopping (which may take the form of a large 'trolley' shop and be undertaken on a weekly basis) and 'top up' food shopping (which will generally be undertaken on a more frequent basis and will involve the purchase of grocery staples, such as milk and bread, and occasional items). For comparison goods, respondents have been questioned in respect of where they last visited to purchase eight separate types of comparison goods.
- 4.11 Our market share analysis utilises the same NEMS household survey data that we rely on to assess quantitative need and our commentary relates to physical retail destinations only (in other words, expenditure which is committed through the internet and other special forms of trading does not form part of our market share analysis that follows).
- 4.12 However, it is possible to identify from 'unfiltered' household survey data²⁹ those respondents who indicated that their last convenience and comparison goods purchases were undertaken via the internet.
- 4.13 Table 4.2 below sets out the survey results, which suggest that there is considerable variation in terms of the types of goods which are purchases online. As we would expect, a greater proportion of main food shopping is undertaken online, when compared to top-up shopping. This is reflective of the fact that online food shopping is more practical and convenient when a larger number of items are purchases.
- 4.14 There are four types of comparison goods where, across the Study Area as a whole, at least one in ten purchases are made online. These categories are: books, CDs and DVDs (for which 53.8% of respondents indicates they made their last purchase online); toys, games, bicycles and recreation goods (28.0%); electrical goods (22.5%); and clothing and footwear (10.0%). However, it should be noted that there is a reasonably significant degree of variation between zones in terms of the proportion of purchases committed online. Accordingly, in assessing the future quantitative need for additional retail floorspace, we deduct an allowance for special forms of trading based on the national average figures for convenience and comparison goods identified by Experian in its Retail Planner Briefing Note 12.1, which was published in October 2014. Importantly, the Experian allowance also

²⁹ This being the household survey results which have not had special forms of trading responses 'stripped out' from the dataset



takes into consideration the proportion of online sales which are actually sourced from stores' shelves – expenditure which may be able to support additional floorspace in the future. We provide full details of our consideration of special forms of trading in assessing quantitative retail needs at Section 6 of this report.

Table 4.2: Proportion of Purchases Made Online by Zone (%)

Goods Type	1	2	3	4	5	6	7	8	9	10	Total
Convenience Goods											
Main Food Shopping	2.0%	3.0%	5.0%	3.0%	4.0%	4.0%	6.0%	5.0%	4.0%	8.0%	4.4%
Top-Up Food Shopping	0.0%	0.0%	1.3%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	1.3%	0.4%
Comparison Goods											
Clothing and footwear	7.3%	8.4%	9.5%	10.0%	6.3%	5.4%	11.6%	15.2%	11.3%	14.7%	10.0%
Books, CDs and DVDs	41.3%	43.7%	56.6%	58.7%	50.0%	55.7%	63.8%	50.8%	54.2%	63.6%	53.8%
Small household goods	3.1%	6.6%	9.9%	7.4%	12.3%	9.1%	7.3%	9.7%	10.3%	15.8%	9.1%
Toys, games, bicycles and recreation goods	29.6%	19.1%	29.8%	26.7%	32.7%	23.6%	26.9%	10.9%	35.4%	44.7%	28.0%
Chemist goods	1.1%	3.1%	4.3%	6.3%	2.1%	3.3%	6.5%	2.2%	2.2%	6.4%	3.7%
Electrical goods	21.4%	14.3%	35.7%	25.3%	20.3%	18.4%	15.1%	16.7%	29.5%	27.2%	22.5%
DIY	0.0%	1.3%	4.2%	8.1%	2.4%	1.3%	0.0%	2.7%	7.9%	5.2%	3.3%
Furniture	3.0%	4.2%	11.8%	7.4%	1.9%	9.4%	4.8%	2.0%	1.6%	10.6%	5.7%

Source: WYG Table 3, Appendix 2

4.15 As indicated at paragraph 4.09, the market share analysis which follows relates to shopping *trips* only. However, we give some consideration to the market share of *expenditure* (with reference to the findings of the previous MT Planning Warrington Retail and Leisure Study) at Section 7 of this report.

Food Shopping Patterns

4.16 Tables 4.3 and 4.4 summarise the proportion of main food and top up food shopping trips which are directed to key retail facilities located within the Study Area, based upon the results of the household survey.

4.17 Table 4.3 indicates that foodstores located within the Warrington administrative area currently claim a market share of 52.6% of all main food shopping trips which originate inside the Study Area. The most popular foodstores within Warrington include the Morrisons at Greenalls Avenue (which secures 8.6% of all trips originating within the Study Area to undertake main food shopping), the Asda at Westbrook district centre (7.5%), the Sainsbury's at Church Street (7.2%) and the Asda at Birchwood district centre (6.6%).



- 4.18 The Morrisons at Greenalls Avenue secures the greatest proportion of main food shopping trips which originate within any one zone, with the survey indicating that 65.0% of all main food shopping trips which originate within Zone 9 (within which the Morrisons is located) are undertaken at the store. The Morrisons also secures 48.1% of main food shopping trips which originate within the nearby Zone 5. The strong performance of the Morrisons store is reflective of the fact that main food shopping provision in the south of Warrington Borough is limited.
- 4.19 The Sainsbury's store at Church Street has the greatest penetration in terms of securing trade across a relatively large catchment. The Sainsbury's secures more than one in ten trips to undertake main food shopping in four separate zones (these being Zones 6, 8, 9 and 10), which is, at least in part, reflective of it being in a central and accessible location.
- 4.20 We also note that discount foodstores – most notably the Aldi at Crossfield Street and the Aldi at Birchwood – secure competitive main food shopping market shares, which accords with Aldi's strong performance nationally. The Aldi at Crossfield Street secures 3.1% of all main food shopping trips and the Aldi at Birchwood secures 2.1% of such journeys; they are both also able to attract trips which originate within multiple zones.
- 4.21 As would be expected, the main food shopping market share secured by facilities in Warrington Borough is significantly higher in the zones which broadly correlate to the Warrington administrative boundary (namely Zones 2, 6, 7, 8, 9 and 10). Each of these zones predominantly look to facilities in Warrington to meet their main food shopping needs and, in Zones 8 and 9, significantly more than nine out of ten of all main food shopping trips are directed to facilities in the Borough.



Table 4.3: Principal Food Shopping Destinations Trip Analysis by Zone – Main Food Shopping (%)

Zone	Address	1	2	3	4	5	6	7	8	9	10	Total
Warrington												
6.	Aldi, Crossfield Street	0.0%	7.4%	0.0%	0.6%	0.0%	12.0%	0.0%	3.2%	2.1%	1.6%	3.1%
	Asda, Cockhedge Way	0.0%	0.0%	0.0%	0.0%	0.0%	7.6%	0.0%	3.5%	1.9%	2.1%	2.0%
	Sainsbury's Church Street	0.0%	0.4%	0.0%	0.0%	6.3%	17.5%	4.0%	16.2%	11.6%	10.9%	7.2%
	Tesco Extra, Winwick Road	0.0%	0.9%	0.0%	0.0%	2.1%	3.3%	1.7%	7.4%	3.6%	14.0%	2.8%
	Warrington town centre	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%	0.0%	0.0%	0.6%	1.7%	0.4%
7.	Aldi, Dewhurst Rd, Birchwood	0.0%	0.0%	0.0%	0.0%	0.7%	2.0%	13.1%	4.5%	0.8%	0.0%	2.1%
	Asda, Dewhurst Rd, Birchwood	0.0%	0.0%	0.0%	0.0%	1.3%	8.2%	44.4%	12.2%	1.1%	3.1%	6.6%
8.	Asda, Westbrook Centre	0.0%	34.3%	0.0%	0.8%	0.7%	5.8%	0.0%	25.5%	0.8%	2.4%	7.5%
9.	Morrisons, Greenalls Avenue	0.0%	0.0%	1.5%	0.6%	48.1%	2.8%	1.7%	3.1%	65.0%	9.2%	8.6%
Warrington Authority Total		0.8%	87.9%	1.5%	2.1%	71.2%	84.2%	77.2%	92.0%	98.3%	73.5%	52.6%
Cheshire West and Chester												
4.	Tesco, Chester Rd, Helsby	0.0%	0.0%	0.0%	38.5%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	1.9%
Halton												
1.	Asda, Widnes Road, Widnes	28.3%	1.9%	1.0%	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	5.8%
	Morrisons, Green Oaks Way, Widnes	37.7%	3.8%	1.3%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	7.9%
	Tesco Extra, Ashley Retail Park, Widnes	6.3%	2.0%	2.8%	0.0%	0.0%	13.0%	0.0%	0.0%	0.0%	0.0%	3.8%
3.	Aldi, Trident Park, Runcorn	0.0%	0.0%	16.6%	3.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%
	Asda, West Lane, Runcorn	0.8%	0.0%	62.3%	19.3%	6.1%	0.0%	0.0%	0.0%	0.0%	0.0%	11.1%

Source: WYG Table 3, Appendix 2

4.22 Top up shopping is often undertaken close to home and, as expected, facilities in Warrington claim a very high proportion of such shopping trips which originate in the central zones. This pattern is replicated elsewhere in the Study Area, with a large proportion of top up food shopping trips being undertaken in the zone in which they originate. Warrington Borough claims 57.3% of all top up food shopping trips originating from within the Study Area. As we would expect, large food superstores are generally less able to attract top up food shopping trips from 'far and wide' (as some of them are able to do in respect of main food shopping), but still evidently help to meet this type of food shopping need. Whilst Warrington town centre secures a greater proportion of top up shopping trips than it does main food shopping trips (2.0% of top up food shopping trips, compared to 0.4% for main food trips), its market share is still very limited, reflecting the modest food shopping offer in the centre itself³⁰.

³⁰ We do not include the Asda at Cockhedge Way in this analysis as it located outside Warrington's Primary Shopping Area, as defined by the Local Plan Core Strategy, and therefore is 'edge of centre' in retail planning terms



4.23 Overall, both the main food shopping and top up shopping market shares secured in zones within and proximate to Warrington are considered to be generally healthy and where 'leakage' to other destinations is apparent, these facilities are often reasonably well placed to meet such needs in a sustainable manner (which is exemplified by the way in which the Asda at Runcorn helps meet needs that originate in Zone 5). We do note that Zone 10 retains just 1.4% of main shopping trips which originate in the Zone, which is a consequence of the limited food retail provision currently available in the zone.

Table 4.4: Principal Food Shopping Destinations Trip Analysis by Zone – Top-Up Food Shopping (%)

Zone	Address	1	2	3	4	5	6	7	8	9	10	Total
	Warrington											
6.	Aldi, Crossfield Street	0.0%	8.7%	0.0%	0.0%	0.0%	3.8%	0.0%	0.0%	1.1%	1.0%	1.2%
	Asda, Cockhedge Way	0.0%	0.0%	0.0%	0.0%	0.0%	9.8%	0.0%	3.2%	3.4%	0.0%	2.5%
	Sainsbury's Church Street	0.0%	0.0%	1.3%	0.0%	0.0%	8.5%	2.1%	4.3%	4.1%	0.0%	2.9%
	Tesco Extra, Winwick Road	1.1%	0.0%	1.0%	0.0%	0.0%	3.3%	2.7%	14.4%	1.4%	0.0%	3.2%
	Warrington town centre	0.0%	3.1%	0.0%	0.0%	2.5%	5.6%	0.0%	4.0%	2.5%	1.9%	2.0%
7.	Aldi, Dewhurst Rd, Birchwood	0.0%	0.0%	0.0%	0.0%	1.9%	1.2%	17.9%	4.6%	0.0%	0.0%	2.3%
	Asda, Dewhurst Rd, Birchwood	0.0%	0.0%	0.0%	0.0%	0.0%	6.1%	17.6%	2.5%	1.4%	1.8%	3.1%
8.	Asda, Westbrook Centre	0.0%	16.8%	0.0%	0.0%	2.2%	0.9%	0.0%	25.9%	0.0%	0.0%	4.2%
9.	Morrisons, Greenalls Avenue	0.0%	0.0%	1.0%	0.0%	7.1%	0.9%	0.0%	1.4%	13.6%	1.0%	2.0%
	Warrington Authority Total	5.8%	92.9%	3.4%	0.0%	77.9%	98.3%	89.9%	94.1%	97.5%	93.9%	57.3%
	Cheshire West and Chester											
4.	Tesco, Chester Rd, Helsby	0.0%	0.0%	0.0%	29.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.6%
	Halton											
1.	Asda, Widnes Road, Widnes	22.4%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.5%
	Morrisons, Green Oaks Way, Widnes	19.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.9%
	Tesco Extra, Ashley Retail Park, Widnes	2.5%	0.0%	0.8%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
3.	Aldi, Trident Park, Runcorn	0.0%	0.0%	9.4%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%
	Asda, West Lane, Runcorn	0.0%	0.0%	37.5%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	6.1%

Source: WYG Table 3, Appendix 2

4.24 From scrutiny of the household survey results, we also note the following convenience goods shopping trends.

- The four most dominant stores within Warrington Borough cumulatively attract a 30.0% market share of main food shopping trips originating within the Study Area. These stores are: Morrisons at Greenalls Avenue, Asda at Westbrook district centre, Sainsbury's at Church Street and Asda at Birchwood district centre.



- More than four out of every ten surveyed (43.0%) indicated that the principal reason for choosing their main food shopping destination was the store's proximity to their home, followed by the fact that the store offers low prices or represents good value (15.2%) and then due to the quality of goods available or because of habit (these responses each accounting for 4.2% of responses).
- More than four out of every five shoppers (83.9%) do their main food shop once a week or more frequently, with 10.7% undertaking main food shopping at least once a fortnight and 4.0% doing such shopping on a monthly basis or less frequently.
- A total of 6.2% of respondents suggested that their last main food shop was undertaken via the internet.
- A large majority of respondents use a car in travelling to do their main food shop (86.0%), with the next most popular means of transport being by foot (7.2%) and then by bus (2.9%).
- More than half of respondents (69.7%) do not link their main food shopping trip with any other activity, with the most popular activities of those that do being the undertaking of other food shopping (5.3%), the undertaking of non-food shopping (5.2%) and travelling to and from work (4.5%).
- In terms of top up food shopping, a very large number of stores have been identified as attracting top up food shopping expenditure. There are 17 stores within Warrington Borough which each claim more than a 1.0% market share of top up food shopping trips which originate from within the Study Area. These stores are: Co-operative Food at Warrington Road, Penketh (4.4%); Asda at Westbrook district centre (4.2%); Tesco Extra at Winwick Road (3.2%); Asda at Dewhurst Road, Birchwood (3.1%); Sainsbury's at Church Street (2.9%); Sainsbury's at Common Lane, Culcheth (2.9%); Asda at Cockhedge Way (2.5%); Tesco Express at Knutsford Road, Grappenhall (2.4%); Aldi at Dewhurst Road, Birchwood (2.3%); Morrisons at Greenalls Avenue (2.0%); Co-operative Food at Dudlow Green Road, Appleton (1.5%); Aldi at Walton Road, Stockton Heath (1.4%); Co-operative Food at Knutsford Road, Grappenhall (1.3%); Co-operative Food at Cherry Lane, Lymm (1.3%); Sainsbury's at Santa Rosa Boulevard, Great Sankey (1.3%); Aldi at Crossfield Street (1.2%); and, Co-operative Food at Orford Lane (1.1%).
- As would be expected, the household survey indicates that top up shopping trips tend to be undertaken on a more frequent basis than main food shopping trips, with 7.5% of respondents undertaking such shopping trips on a daily basis, 41.7% at least twice weekly and 33.7% at least weekly.

Conclusions in Respect of Convenience Goods Shopping Patterns

4.25 In considering convenience goods shopping patterns in the Study Area, it is of some relevance to compare the percentage of overall journeys attracted to each authority area with the percentage of



the Study Area population that resides in that authority area. In this regard, Experian MMG3 data indicates that the population of the Warrington administrative area at 2015 is 208,211. The population of Warrington equates to 58.3% of the overall 2015 Study Area population of 357,007. Accordingly, it might be expected – given that shoppers typically seek to use food shopping facilities close to home – that Warrington’s food retail facilities would gain a broadly similar market share of overall trips.

- 4.26 In this regard, the household survey indicates that the Warrington administrative area secures a market share of 52.6% of all main food shopping trips that originate within the Study Area. Accordingly, Warrington secures fewer main food shopping trips than we might expect. However, this is a consequence of there being a number of large food superstores located outside the Warrington administrative boundary but in close enough proximity to cater for the needs of its residents. Such stores include the Asda, Morrisons and Tesco Extra stores in Widnes (within the Halton administrative boundary).
- 4.27 Clearly, the drawing of local authority boundaries is largely immaterial to customers making decisions about where to shop. Accordingly, given the proximity of large food superstores to the Warrington boundary (which are accessible to the Borough’s residents), the market share secured by Warrington Borough as a whole is not considered to be problematic. However, we do consider that – subject to the availability of appropriate locations to accommodate additional development – there may be potential to for facilities in Warrington Borough to secure a slightly greater proportion of convenience goods expenditure which originates within Zones 7 and 10. Zone 10 currently has a particularly limited food retail offer, which will to some extent be addressed through the proposal to provide a small supermarket in Lymm³¹, and additional provision will reduce the need for residents to travel further afield to source convenience goods.
- 4.28 In respect of top up food shopping, Warrington Borough secures a market share of 57.3% of all main food shopping trips that originate within the Study Area. Accordingly, the market share for this type of shopping trip more closely aligns with the proportion of the Study Area population which is accommodated within the Borough.

³¹ At Rushgreen Road (planning permission reference 2014/23897)



Comparison Goods Shopping Patterns: Clothing

- 4.29 As Table 4.5 demonstrates, Warrington town centre is the single most popular destination for clothes shopping in the Study Area, attracting close to half of all such trips (44.7%) which originate in the Study Area. Whilst the popularity of Warrington town centre is directly proportionate to how centrally located a zone is, the town centre secures more than six in every 10 trips to purchase clothing and footwear which originate within Zones 2, 6 and 9. Moreover, Warrington town centre is the single most popular destination to undertake such shopping in seven of the 10 zones. This affirms the important sub-regional role of the town centre and is reflective of the range and choice of goods offered in the town centre. In Zones 2 and 6 (which represent the western and central part of the Warrington administrative area), the town centre secures 68.0% and 68.5% respectively of all trips to purchase clothing and footwear. However, in Zones 7 and 10 (which represent the eastern part of the Warrington administrative area) the town centre secures a lesser proportion of trips to purchase clothing and footwear (32.1% and 32.9% respectively). This is as a result of the attraction of other destinations which lie outside Warrington town centre, including destinations outside Warrington’s administrative area such as The Trafford Centre, which are situated in reasonably close proximity to these zones and can therefore cater for the needs of these residents.

- 4.30 The second most popular destination for clothing and footwear shopping located within the Warrington administrative area is Gemini Retail Park. Gemini Retail Park secures more than one out of 10 clothing and footwear trips which originate in Zones 2, 6, 7 and 9. It is clear that Gemini Retail Park is a popular destination for clothing and footwear trips across the Study Area as a whole (attracting 8.2% of trips).

- 4.31 The only other destination within Warrington Borough which secures more than 1.0% of overall trips to undertake clothing and footwear shopping across the Study Area is Birchwood district centre, which claims 1.8% of trips to purchase such goods.



Table 4.5: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Clothing and Footwear (%)

Zone	Address	1	2	3	4	5	6	7	8	9	10	Total
	Warrington											
6.	Warrington town centre	19.5%	68.0%	35.4%	3.6%	39.0%	68.5%	32.1%	55.9%	64.2%	32.9%	44.7%
7.	Birchwood district centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	10.3%	5.7%	0.0%	1.5%	1.8%
8.	Alban Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	B&Q Warehouse, Newton Rd	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Gemini Retail Park	3.0%	12.4%	2.4%	0.8%	9.9%	11.8%	16.6%	9.3%	15.1%	4.4%	8.2%
	Westbrook district centre	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	1.7%	3.9%	0.0%	0.9%	0.9%
9.	Stockton heath district centre	0.0%	0.0%	1.0%	0.0%	5.6%	0.0%	0.0%	0.7%	1.6%	0.7%	0.5%
	Warrington Authority Total	22.6%	83.0%	38.8%	4.5%	55.8%	84.2%	70.7%	85.6%	81.6%	40.4%	59.1%
	Cheshire West and Chester											
OSA	Chester city centre	0.9%	0.5%	1.9%	34.3%	0.0%	0.6%	0.0%	0.0%	1.9%	1.7%	2.3%
	Halton											
1.	Widnes town centre	41.1%	5.3%	8.3%	3.2%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	9.5%
3.	Runcorn town centre	0.9%	0.0%	7.9%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%
	Liverpool											
OSA	Liverpool city centre	14.7%	2.1%	17.7%	0.0%	1.0%	5.1%	0.0%	2.1%	0.0%	0.0%	6.9%
	Trafford											
OSA	Trafford Centre	0.0%	3.7%	1.9%	0.0%	9.1%	3.1%	13.3%	6.5%	4.3%	35.1%	4.9%

Source: WYG Table 9, Appendix 2

4.32 Although Gemini Retail Park is the second most popular destination for clothing and footwear purchases within the Warrington administrative area, it is Widnes town centre which attracts the second greatest proportion of clothing and footwear trips (9.5%) which originate within the Study Area and attract four out of 10 trips for such goods which originate in Zone 1. However, this is to be expected given the western part of the Study Area covers the Halton administrative area.

4.33 Considering the performance of the Warrington administrative area, facilities within Warrington claim 59.1% of all shopping trips to purchase clothing and footwear which originate within the Study Area. Accordingly, the market share for such shopping trips is comparable to the proportion of the Study Area population which is accommodated within the Borough (58.3%).

Comparison Goods Shopping Patterns: Books, CDs and DVDs

4.34 Table 4.6 identifies the shopping patterns relating to the purchase of books, CDs and DVDs. Warrington town centre is again the single most popular destination for such purchases within the Study Area, attracting over a third (39.9%) of all such trips which originate within the Study Area. The town centre secures more than half of all trips to tangible retail destinations to purchase books,



CDs and DVDs which originate within Zones 2, 6, 8 and 9 (which represent the central and western part of the Warrington administrative area).

- 4.35 The second and third most popular destinations within the Warrington administrative area to purchase books, CDs and DVDs are Birchwood district centre and Westbrook district centre. The district centres secure 2.9% and 2.6% of all shopping trips to purchase books, CDs and DVDs which originate within the Study Area. Stockton Heath district centre secures a lesser proportion of trips to purchase such goods (0.5%).
- 4.36 Outside the Warrington administrative area, Widnes town centre secures the highest proportion of all shopping trips to purchase books, CDs and DVDs which originate within the Study Area. The town centre, which is located within the Halton administrative area secures 8.1% of such trips.
- 4.37 In respect of the performance of the Warrington administrative area, Table 4.6 identifies that facilities within Warrington claim 54.9% of all shopping trips to purchase book, CDs and DVDs which originate within the Study Area.

Table 4.6: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Books, CDs, DVDs and so on (%)

Zone	Address	1	2	3	4	5	6	7	8	9	10	Total
	Warrington											
6.	Warrington town centre	13.6%	66.2%	17.1%	0.0%	36.7%	53.9%	26.8%	68.4%	72.2%	28.6%	39.9%
7.	Birchwood district centre	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%	22.2%	9.2%	0.0%	0.0%	2.9%
8.	Alban Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	B&Q Warehouse, Newton Rd	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Gemini Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Westbrook district centre	0.0%	7.2%	0.0%	0.0%	0.0%	0.0%	0.0%	14.2%	0.0%	0.0%	2.6%
9.	Stockton heath district centre	0.0%	1.3%	0.0%	0.0%	9.4%	0.0%	0.0%	0.0%	3.0%	0.0%	0.5%
	Warrington Authority Total	13.6%	86.1%	17.1%	0.0%	50.9%	97.0%	66.2%	91.9%	77.1%	32.7%	54.9%
	Cheshire West and Chester											
OSA	Chester city centre	0.0%	0.0%	0.0%	17.3%	4.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%
	Halton											
1.	Widnes town centre	28.9%	1.3%	11.9%	0.0%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	8.1%
3.	Runcorn town centre	1.5%	0.0%	27.4%	0.0%	3.1%	0.0%	0.0%	0.0%	0.0%	0.0%	4.4%
	Liverpool											
OSA	Liverpool city centre	18.0%	0.0%	12.6%	0.0%	3.1%	1.5%	0.0%	1.7%	0.0%	0.0%	6.3%
	Trafford											
OSA	Trafford Centre	0.0%	3.5%	5.4%	3.2%	2.4%	0.0%	8.3%	0.0%	8.8%	5.2%	2.8%

Source: WYG Table 11, Appendix 2



Comparison Goods Shopping Patterns: Small Household Goods

- 4.38 Table 4.7 below identifies that Warrington town centre attracts 28.0% of shopping trips to purchase small household goods (including such items as tableware, household utensils, jewellery, watches and appliances for personal care) which originate from within the Study Area. The town centre secures more than three in every 10 trips to purchase small household goods which originate within half of the 10 zones and is the most popular destination to undertake such shopping in seven of the 10 zones.
- 4.39 The second most popular destination to purchase small household goods is Gemini Retail Park, which secures 15.8% of all such shopping trips which originate within the Study Area. Gemini Retail Park secures more than two out of 10 small household goods trips in four of the 10 zones, which is reflective of its relatively strong household goods offer. Gemini Retail Park attracts a greater proportion of small household goods shopping trips which originate from Zone 7 and 8 (the zone in which the retail park is located) than are attracted by Warrington town centre.
- 4.40 Each of the district centres within the Warrington administrative area secure greater than 1.0% of all small household goods shopping trips which originate from the Study Area. Birchwood district centre secures 2.4%, Stockton Heath district centre secures 1.3% and Westbrook district centre secures 1.0% of all such trips. Given the number of retailers which now sell a wide range of household goods, the market share claimed by Warrington town centre is considered to be reasonable. Albeit, it is clear that the town centre faces competition from Gemini Retail Park in relation to this sector.
- 4.41 In terms of the performance of the Warrington authority area, Table 4.7 identifies that facilities within Warrington claim 63.5% of all shopping trips to purchase small household goods which originate within the Study Area.



Table 4.7: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Small Household Goods (%)

Zone	Address	1	2	3	4	5	6	7	8	9	10	Total
	Warrington											
6.	Warrington town centre	15.8%	35.7%	37.9%	26.3%	24.8%	36.7%	13.0%	24.1%	36.7%	32.2%	28.0%
7.	Birchwood district centre	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%	10.4%	6.6%	1.0%	1.3%	2.4%
8.	Alban Retail Park	0.0%	1.8%	1.2%	0.0%	0.0%	0.0%	2.8%	0.0%	0.0%	0.0%	0.5%
	B&Q Warehouse, Newton Rd	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Gemini Retail Park	10.5%	28.5%	0.9%	2.5%	15.3%	2.7%	25.6%	34.0%	30.6%	12.8%	15.8%
	Westbrook district centre	0.0%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	4.8%	0.0%	0.0%	1.0%
9.	Stockton heath district centre	0.0%	0.8%	0.0%	0.0%	0.0%	4.8%	0.0%	0.0%	5.2%	0.0%	1.3%
	Warrington Authority Total	26.3%	80.1%	43.3%	29.8%	54.8%	89.7%	68.3%	95.2%	78.9%	59.6%	63.5%
	Cheshire West and Chester											
OSA	Chester city centre	0.0%	0.0%	3.3%	22.0%	4.3%	0.0%	0.0%	0.0%	2.1%	0.0%	1.8%
	Halton											
1.	Widnes town centre	33.9%	7.8%	7.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	8.5%
3.	Runcorn town centre	0.0%	0.0%	22.4%	10.9%	7.8%	0.0%	0.0%	0.0%	0.0%	0.0%	4.1%
	Liverpool											
OSA	Liverpool city centre	6.6%	3.2%	3.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.0%
	Trafford											
OSA	Trafford Centre	0.0%	2.4%	0.0%	0.0%	5.9%	4.4%	13.5%	0.8%	1.8%	20.8%	2.7%

Source: WYG Table 13, Appendix 2

Comparison Goods Shopping Patterns: Toys, Games, Bicycles and Recreation Goods

- 4.42 Table 4.8 identifies that Warrington town centre secures 31.9% of all shopping trips to purchase toys, games, bicycles and similar items which originate within the Study Area. The town centre secures more than three in every 10 trips to purchase toys, games, bicycles and similar items which originate within four of the 10 zones. This is a lower number proportion of respondents than for other non-bulky comparison goods categories and is reflective of the fact that recreation goods are often bought at retail parks and other out of centre superstores.
- 4.43 Again, Gemini Retail Park is the second most popular destination to undertake such shopping. It secures 15.5% of all shopping trips to purchase toys, games, bicycles and similar items which originate within the Study Area. In addition, Gemini Retail Park attracts more than one out of 10 trips for recreational goods in eight of the 10 zones. The relatively strong market share achieved by Gemini Retail Park is reflective of the fact that recreation goods area often bought at retail parks and other out of centre superstores.



4.44 In respect of the performance of the Warrington authority area, Table 4.8 identifies that facilities within Warrington claim 65.8% of all shopping trips to purchase toys, games, bicycles and similar items which originate within the Study Area.

Table 4.8: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Toys, Games, Bicycles and Recreation Goods (%)

Zone	Address	1	2	3	4	5	6	7	8	9	10	Total
	Warrington											
6.	Warrington town centre	10.5%	19.0%	19.4%	3.5%	18.4%	54.4%	29.9%	37.6%	54.0%	35.8%	31.9%
7.	Birchwood district centre	0.0%	0.0%	0.0%	0.0%	0.0%	4.1%	27.2%	0.0%	0.0%	3.6%	3.0%
8.	Alban Retail Park	0.0%	1.7%	0.0%	0.0%	4.4%	1.1%	0.0%	1.1%	3.4%	6.3%	1.0%
	B&Q Warehouse, Newton Rd	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Gemini Retail Park	4.0%	49.0%	11.1%	9.7%	16.1%	15.8%	10.8%	23.7%	13.2%	6.3%	15.5%
	Westbrook district centre	0.0%	3.8%	0.0%	0.0%	0.0%	5.9%	0.0%	1.1%	0.0%	0.0%	1.6%
9.	Stockton heath district centre	0.0%	0.0%	0.0%	0.0%	3.8%	0.0%	0.0%	0.0%	7.3%	0.0%	0.6%
	Warrington Authority Total	14.5%	87.9%	33.0%	13.2%	54.5%	93.5%	77.9%	94.2%	87.2%	62.3%	65.8%
	Cheshire West and Chester											
OSA	Chester city centre	0.0%	0.0%	0.0%	17.1%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
	Halton											
1.	Widnes town centre	47.3%	3.4%	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	9.1%
3.	Runcorn town centre	1.5%	0.0%	26.7%	13.9%	0.0%	0.0%	0.0%	3.4%	0.0%	0.0%	4.6%
	Liverpool											
OSA	Liverpool city centre	2.7%	0.0%	0.0%	2.6%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.8%
	Trafford											
OSA	Trafford Centre	0.0%	1.7%	0.0%	0.0%	1.9%	0.0%	4.4%	0.0%	0.0%	12.4%	0.7%

Source: WYG Table 15, Appendix 2

Comparison Goods Shopping Patterns: Chemist Goods

4.45 Chemist goods are typically purchased in a similar manner to convenience items, with a large proportion of such trips taking place close to home (due principally to the similar nature of many such goods which reduces the propensity to 'shop around'). Accordingly, a wide range of facilities attract such shopping journeys, including defined centres, but also food superstores and standalone pharmacists. In this context, whilst Warrington town centre has a more limited market share of chemist goods when compared to most other non-bulky comparison goods categories, its performance is considered to be reflective of how such purchases are generally made and does not give cause for concern.

4.46 Table 4.9 identifies that Warrington town centre secures 29.7% of all shopping trips to purchase chemist goods. The town centre secures more than three in every 10 trips to purchase chemist goods which originate within four of the 10 zones.



4.47 Again, Gemini Retail Park is the second most popular destination to undertake such shopping. However, the retail park secures a lesser proportion (5.3%) of all shopping trips to purchase chemist goods which originate within the Study Area, than it secures in relation to recreational goods and small household goods. The three district centres are also popular destinations for the purchase of chemist goods, with Birchwood, Stockton Heath and Westbrook district centre each attracting between 4.0% and 4.9% of all such trips.

4.48 In respect of the performance of the Warrington authority area, Table 4.9 identifies that facilities within Warrington claim 60.3% of all shopping trips to purchase chemist goods which originate within the Study Area.

Table 4.9: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Chemist Goods (%)

Zone	Address	1	2	3	4	5	6	7	8	9	10	Total
	Warrington											
6.	Warrington town centre	5.0%	45.3%	6.4%	1.0%	10.3%	67.1%	14.8%	45.6%	39.5%	27.0%	29.7%
7.	Birchwood district centre	0.0%	0.0%	0.0%	0.0%	0.0%	2.4%	37.1%	6.9%	0.0%	0.0%	4.2%
8.	Alban Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	B&Q Warehouse, Newton Rd	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Gemini Retail Park	0.6%	21.6%	1.2%	0.0%	5.4%	6.8%	6.1%	9.0%	3.6%	1.3%	5.3%
	Westbrook district centre	0.0%	9.2%	0.0%	0.0%	0.0%	2.0%	0.8%	17.2%	0.0%	0.0%	4.0%
9.	Stockton heath district centre	0.0%	0.0%	0.0%	0.0%	46.7%	2.0%	0.0%	0.0%	40.1%	1.3%	4.9%
	Warrington Authority Total	5.6%	93.4%	7.6%	1.0%	73.6%	98.2%	84.7%	98.2%	96.2%	74.6%	60.3%
	Cheshire West and Chester											
OSA	Chester city centre	0.0%	0.0%	0.0%	5.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
	Halton											
1.	Widnes town centre	67.5%	5.8%	5.1%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	14.6%
3.	Runcorn town centre	0.0%	0.0%	61.0%	1.4%	4.5%	0.0%	0.0%	0.0%	1.1%	0.0%	8.8%
	Liverpool											
OSA	Liverpool city centre	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
	Trafford											
OSA	Trafford Centre	0.0%	0.0%	0.0%	0.0%	0.7%	0.8%	5.2%	0.0%	2.0%	6.3%	0.9%

Source: WYG Table 17, Appendix 2

Comparison Goods Shopping Patterns: Electrical

4.49 As one would expect, Warrington town centre is significantly less of a draw for those purchasing bulky goods than non-bulky goods. Notwithstanding this, Table 4.10 identifies that Warrington town centre secures 22.5% of all shopping trips for electrical goods, making the town centre the most popular destination within the Study Area for such purchases. Warrington town centre is the most popular



destination for such purchases in four zones (these being Zones 2, 6, 9 and 10). The town centre secures more than three in every 10 trips to purchase electrical goods in Zones 2, 6, 9 and 10, which comprise the central and southern zones within the Warrington administrative area.

4.50 Alban Retail Park is the second most popular destination in the Study Area in terms of electrical shopping trips. The retail park attracts 15.3% of such trips which originate within the Study Area, and secures more than two out of every 10 trips to purchase electrical goods which originate within three of the 10 zones. Westbrook district centre is the third most popular destination in terms of electrical goods shopping trips within the Warrington administrative area, attracting 3.9% of such trips.

4.51 In respect of the performance of the Warrington authority area, Table 4.10 identifies that facilities within Warrington claim 59.5% of all shopping trips to purchase electrical goods which originate within the Study Area.

Table 4.10: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Electrical Goods (%)

Zone	Address	1	2	3	4	5	6	7	8	9	10	Total
	Warrington											
6.	Warrington town centre	5.0%	41.0%	23.0%	0.0%	14.5%	30.7%	15.7%	17.0%	52.6%	31.0%	22.5%
7.	Birchwood district centre	0.0%	0.0%	0.0%	0.0%	3.9%	2.0%	4.9%	0.0%	0.0%	0.0%	0.8%
8.	Alban Retail Park	1.6%	22.3%	7.7%	0.0%	12.1%	20.5%	19.6%	32.5%	12.0%	9.2%	15.3%
	B&Q Warehouse, Newton Rd	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.9%	0.0%	0.0%	0.3%
	Gemini Retail Park	0.9%	1.4%	1.2%	2.1%	3.1%	0.0%	1.0%	0.0%	3.2%	0.0%	0.9%
	Westbrook district centre	0.0%	1.2%	0.0%	0.0%	0.0%	20.0%	0.0%	3.1%	0.0%	0.0%	3.9%
9.	Stockton heath district centre	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	1.1%	0.0%	0.3%
	Warrington Authority Total	7.6%	78.7%	33.4%	3.4%	42.2%	90.5%	66.9%	96.0%	86.8%	49.3%	59.2%
	Cheshire West and Chester											
OSA	Chester city centre	0.0%	0.0%	5.2%	19.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%
	Halton											
1.	Widnes town centre	36.5%	1.6%	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.6%
3.	Runcorn town centre	0.9%	0.0%	29.4%	11.4%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	4.5%
	Liverpool											
OSA	Liverpool city centre	13.4%	0.0%	5.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%
	Trafford											
OSA	Trafford Centre	0.0%	2.2%	0.0%	0.0%	9.5%	2.9%	12.7%	1.1%	1.8%	6.5%	2.4%

Source: WYG Table 19, Appendix 2

Comparison Goods Shopping Patterns: DIY

4.52 The most popular destination for DIY shopping in the Study Area is the B&Q at Newton Road which attracts nearly a third of DIY goods shopping trips which originate within the Study Area. The B&Q at



Newton Road is located in Zone 8 to the north of Warrington town centre and secures a very high market share of DIY shopping trips from proximate zones (it attracts 70.1% of such trips from Zone 8 and 52.6% of such trips from Zone 7).

4.53 Other popular destinations principally comprise standalone specialist DIY stores and include the B&Q at Milner Street in Warrington (attracting 11.3% of DIY shopping journeys which originate in the Study Area) and the Homebase at Riverside Retail Park (5.3%).

4.54 With regard to the performance of the Warrington authority area, Table 4.11 identifies that facilities within Warrington area claim 54.4% of all shopping trips to purchase DIY goods which originate within the Study Area.

Table 4.11: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – DIY Goods (%)

Zone	Address	1	2	3	4	5	6	7	8	9	10	Total
	Warrington											
6.	Warrington town centre	0.8%	1.5%	4.1%	0.0%	0.0%	12.8%	11.9%	5.3%	5.2%	3.2%	5.2%
7.	Birchwood district centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.2%	0.7%	0.0%	0.0%	0.2%
8.	Alban Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.1%
	B&Q Warehouse, Newton Rd	0.8%	25.5%	3.5%	2.6%	23.6%	33.3%	52.6%	70.1%	26.7%	49.7%	27.1%
	Gemini Retail Park	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.2%
	Westbrook district centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
9.	Stockton heath district centre	0.0%	0.0%	0.0%	0.0%	4.8%	0.0%	0.0%	0.0%	3.8%	0.0%	0.4%
	Warrington Authority Total	2.3%	45.1%	7.6%	3.6%	61.4%	100.0%	96.2%	96.7%	94.2%	71.1%	54.4%
	Cheshire West and Chester											
OSA	Chester city centre	0.0%	0.0%	0.0%	4.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
	Halton											
1.	Widnes town centre	15.8%	2.1%	4.8%	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.1%
3.	Runcorn town centre	2.5%	0.0%	8.1%	4.3%	1.5%	0.0%	0.0%	0.0%	0.0%	1.2%	2.2%
	Liverpool											
OSA	Liverpool city centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Trafford											
OSA	Trafford Centre	0.0%	0.0%	0.0%	0.0%	5.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%

Source: WYG Table 21, Appendix 2

Comparison Goods Shopping Patterns: Furniture

4.55 Warrington town centre secures the highest market share for furniture shopping trips which originate from within the Study Area of any destination within the Study Area. The town centre secures 21.9% of all such trips. The town centre secures more than three in every 10 trips to purchase furniture goods in two zones (Zones 6 and 9).



- 4.56 The second most popular destination within the Study Area for furniture shopping trips is Gemini Retail Park, which secures 11.8% of such trips. The retail park secures more than three in every 10 trips to purchase furniture goods in only one zone, namely Zone 8 in which the retail park is located.
- 4.57 The next most popular destination for furniture purchases in the Warrington administrative area is Stockton Heath district centre, which attracts 3.9% of all such shopping trips which originate within the Study Area, thus emphasising the relative dominance of the two most popular locations in Warrington.
- 4.58 With regard to the performance of the Warrington authority area, Table 4.12 identifies that facilities within Warrington claim 57.7% of all shopping trips to purchase DIY goods which originate within the Study Area.

Table 4.12: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Furniture (%)

Zone	Address	1	2	3	4	5	6	7	8	9	10	Total
	Warrington											
6.	Warrington town centre	10.7%	18.2%	14.8%	1.8%	22.5%	48.4%	25.0%	23.8%	32.3%	13.7%	21.9%
7.	Birchwood district centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.6%	2.4%	0.0%	0.0%	1.0%
8.	Alban Retail Park	0.0%	6.9%	3.4%	0.0%	1.3%	4.3%	0.0%	1.8%	2.9%	2.8%	2.3%
	B&Q Warehouse, Newton Rd	0.0%	1.1%	0.0%	0.0%	0.0%	8.7%	8.3%	0.0%	0.0%	0.0%	1.8%
	Gemini Retail Park	6.5%	28.5%	1.7%	6.9%	9.6%	2.3%	8.7%	38.1%	6.6%	22.1%	11.8%
	Westbrook district centre	0.0%	13.2%	0.0%	0.0%	0.0%	2.3%	0.0%	4.6%	2.9%	0.0%	2.1%
9.	Stockton heath district centre	0.0%	1.9%	1.0%	0.0%	23.3%	5.8%	2.3%	0.0%	20.7%	6.6%	3.9%
	Warrington Authority Total	17.1%	80.1%	24.4%	10.1%	66.4%	97.7%	71.4%	91.2%	92.0%	67.5%	57.7%
	Cheshire West and Chester											
OSA	Chester city centre	0.0%	0.0%	1.0%	25.0%	0.0%	0.0%	0.0%	1.4%	0.0%	0.0%	1.4%
	Halton											
1.	Widnes town centre	30.4%	1.7%	8.8%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.8%
3.	Runcorn town centre	0.0%	0.0%	8.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%
	Liverpool											
OSA	Liverpool city centre	7.2%	2.8%	2.7%	5.2%	0.0%	0.0%	0.0%	1.8%	0.9%	0.0%	2.7%
	Trafford											
OSA	Trafford Centre	0.0%	5.6%	0.0%	0.0%	11.2%	2.3%	4.6%	0.0%	1.6%	6.9%	1.4%

Source: WYG Table 23, Appendix 2



Conclusions in Respect of Comparison Goods Shopping Patterns

- 4.59 Once again, in considering shopping patterns in the Study Area, it is of some relevance to compare the percentage of overall journeys attracted to each authority area with the percentage of the Study Area population that resides in that authority area. In this regard, the populations of Warrington equates to 58.3% of the overall Study Area population. For comparison goods, we would generally expect Warrington to benefit from the sub-regional influence of the town centre, however, at the same time we appreciate that Warrington is located in relatively close proximity to the regional centres of Manchester, Liverpool and Chester, as well as the Trafford Centre. As such, we would expect Warrington to secure a comparative market share to 58.3%.
- 4.60 As set out below in Table 4.12, Warrington’s market share of shopping trips originating from within the Study Area for the various comparison goods sub-sectors ranges from 54.4% (for DIY goods) to 65.8% (recreation goods).
- 4.61 The Warrington administrative area secures a market share greater than 58.3% (the proportion of the Study Area population within the Warrington administrative area) for all shopping trips which originate within the Study Area in terms of clothing and footwear (59.1%), small household goods (63.5%), recreation goods (65.8%), chemist goods (60.3%) and electrical goods (59.2%). It is therefore concluded that the Warrington administrative area is performing reasonably well in relation to these sub-sectors. The comparison goods sub-sector for which the lowest market share is achieved by Warrington Borough is DIY goods (54.4%), however this is still considered to be a reasonable market share. This lower market share for DIY goods can be attributed to the presence of stores which attract such trips located outside the Warrington administrative boundary but in close enough proximity to cater for the needs of its residents, such as the B&Q store at Widnes Trade Park, which attracts 21.9% of DIY shopping trips from the Study Area.

Table 4.13: Comparison Goods Market Share for Warrington Borough

Clothing and footwear	Books, CDs and DVDs	Small household	Recreation goods	Chemist goods	Electrical	DIY	Furniture
59.1%	54.9%	63.5%	65.8%	60.3%	59.2%	54.4%	57.7%

Business Surveys

- 4.62 In addition to the Household Surveys, Business Surveys have been undertaken in Warrington town centre. The Business Surveys aim to obtain the views of local businesses in order to inform the wider ‘health check’ of the town centre, and in turn to inform the Council’s future strategy for the centre. The Council distributed a total of 605 surveys to businesses in Warrington town centre.



4.63 A total of 45 responses were received, which constitutes a response rate of 7.4%. In terms of the types businesses for which responses were received to the survey, 27.9% of respondents described their business as a leisure service, 20.9% as a non-food retailer, 11.6% as a retail service and 11.6% as a professional service. The remainder of respondents described their business as a food retailer, charity shop, pound shop or other. The majority of responses (79.5%) were received from independently owned business, while 18.2% were received from businesses which form part of a national/regional group or chain.

Business Performance

4.64 Of the responses received, the majority of businesses were leased (77.8%) rather than owner occupied (20.0%). Of those businesses which leased their premises, most (30.3%) had a break clause in their lease or their lease was due to expire in 3-5 years. A total of 12.1% of respondents had a lease running for 20 years plus, while the same proportion had just 0-6 months on their lease until a break clause or expiry.

4.65 A third of the businesses who responded to the survey had been trading in Warrington town centre for over 20 years. Only 4.4% of respondents had been trading in the town centre for less than one year. When respondents were asked why they chose Warrington town centre as a business location, the most popular answer was due to proximity to their home. Others noted the locational benefits of the town centre, for example the good transport links, practicalities of the location and the great location between Manchester and Liverpool. Other respondents explained that Warrington presented an appropriate market for their business. The majority of respondents to the survey (88.6%) had always operated from Warrington town centre.

Table 4.14: How Long has the Business Traded in Warrington Town Centre?

Duration	Proportion of Responses
0 to 6 months	4.4%
7 to 12 months	0.0%
1 to 3 years	11.1%
3 to 5 years	22.2%
6 to 10 years	17.8%
11 to 20 years	11.1%
20+ years	33.3%

Source: Business Survey, Question 7



4.66 When asked about the trading performance of their business during the last five years, the highest proportion of respondents (32.6%) considered that their business had grown moderately (up to 10% growth). Notwithstanding this, a similar proportion of respondents (27.9%) considered that their business had declined significantly (more than 10% decline). A total of 18.6% of respondents considered that their business had remained largely static in the last five years. In terms of current performance, most respondents (45.5%) would say their business is performing moderately. A further 31.9% considered their business to be performing well or very well. While 22.7% would say their business was performing poorly or very poorly.

Table 4.15: Business Performance During the Last Five Years of Trading in Warrington Town Centre

Duration	Proportion of Responses
Grown significantly (more than 10% growth)	9.3%
Grown moderately (up to 10% growth)	32.6%
Remained largely static	18.6%
Declined moderately (less than 10% decline)	11.6%
Declined significantly (more than 10% decline)	27.9%

Source: Business Survey, Question 11

Customer Base

4.67 In relation to the customer base of the businesses which responded to the survey, most stated that their business primarily relies on residents from elsewhere in Warrington Borough (35.0%) or residents from in or around the town centre (32.5%). A fifth of respondents stated that their business relies on specialist buyers. Others stated that they rely on passers-by (7.5%) and workers from the town centre (5.0%). No respondents stated that they primarily rely on residents from outside Warrington Borough, students from nearby schools/colleges, internet shoppers or tourists.

Table 4.16: Type of Customer the Business Primarily Relies on

Duration	Proportion of Responses
Residents from elsewhere in Warrington Borough	35.0%
Residents from in and around the town centre	32.5%
Specialist buyers	20.0%
Passers-by	7.5%
Workers from the town centre	5.0%

Source: Business Survey, Question 12



Town Centre Offer

- 4.68 Respondents to the business survey were asked to rate a range of aspects of the town centre. In terms of transport, most respondents considered accessibility to the town centre by train, accessibility for cyclists and accessibility for pedestrians to be good. Conversely, most respondents considered accessibility by vehicles, the approach to parking enforcement and the price of car parking to be poor.
- 4.69 When respondents were asked about the business offer of the town centre, most respondents considered the number of independent traders, number of market stalls, the quality of the market and the range of shops in general to be poor. They were no aspects of the town centre's business offer which most respondents considered to be good, with the majority of aspects, such a number of multiple national traders, number of services and number of shops, considered to be average.
- 4.70 In relation to the public realm in Warrington town centre, most respondents considered the attractiveness of the public realm to be poor. There were no aspects of the public realm for which most respondents rated the town centre as good. Most respondents rated the town centre as average in relation to the amount of signage for pedestrians, cleanliness of the public realm and number of events.
- 4.71 When asked about the safety and security of the centre, most respondents rated Warrington town centre as average in terms of incidents of anti-social activities, incidents of violent crime and policing presence.
- 4.72 In terms of other issues, the majority of respondents rated the range of marketing and promotion of the town centre to be poor. Most respondents considered the amount of marketing and promotion, the image of the centre and town centre management to be average.

Improvement Measures

- 4.73 Respondents to the business survey were asked what three improvement measures they would like to see in the town centre. In response, the highest proportion of respondents stated lower parking charges (14.0%), a new cinema (12.2%), measures to reduce traffic congestion (8.4%) and further consultation with retailers and business on town centre issues (7.5%).



Table 4.17: Top Three Improvement Measures that Respondents Would Like to See in the Town Centre

Improvement	Proportion of Responses
Lower parking charges	14.0%
A new cinema	12.2%
Measures to reduce traffic congestion	8.4%

Source: Business Survey, Question 14

4.74 The majority of respondents (56.8%) felt that there is a good balance of shops and other non-retail uses in the town centre. However, 34.1% considered there to be too many non-retail uses e.g. leisure, business, residential and so on.

Barriers to Performance

4.75 Respondents were asked what they considered to be the three main barriers to the trading performance of their business. The highest proportion (15.4%) of respondents stated business rates, followed by lack of passing trade (12.0%) and inappropriate on-street parking regulations (10.3%).

Table 4.18: Top Three Barriers to the Improved Trading Performance of Your Business

Barrier to Improvement	Proportion of Responses
Business rates	15.4%
Lack of passing trade	12.0%
Inappropriate on-street parking regulations	10.3%

Source: Business Survey, Question 16

Future Plans

4.76 When respondents were asked if they had any plans to alter their business in the next five years, 74.5% stated that they did. The most popular way in which respondents planned to alter their businesses were to relocate elsewhere in the town centre (11.8%), refurbish existing floorspace (11.8%) and set up a website (9.8%). A further 9.8% planned to close their business in the next five years.



Table 4.19: Plans to Alter Business in Next Five Years

Plans	Proportion of Responses
No	25.5%
Yes, relocate elsewhere in the town centre	11.8%
Yes, refurbish existing floorspace	11.8%
Yes, set up a website	9.8%
Yes, close the business	9.8%
Yes, other	7.8%
Yes, relocate to another city/town centre	5.9%
Yes, relocate out-of-centre	5.9%
Yes, expand range of products	5.9%
Yes, open up a new store	3.9%
Yes, reduce floorspace	2.0%

Source: Business Survey, Question 17

Costs

4.77 Respondents were asked to rank the most significant three costs to the operation of their business. Most respondents ranked staff as the most significant cost (37.5%). Other costs mentioned were business rates (27.5%) and rent/mortgage (15.0%).

Table 4.20: Most Significant Costs to the Operation of Your Business

Barrier to Improvement	Proportion of Responses
Staffing	37.5%
Business Rates	27.5%
Rent of Mortgage	15.0%

Source: Business Survey, Question 18

Competition

4.78 When asked which centres or out of town retail parks respondents considered to be Warrington’s biggest competitor, most respondents stated The Trafford Centre (19.3%). Other locations frequently referenced were Manchester city centre (15.1%), Liverpool city centre (14.3%) and Cheshire Oaks Designer Outlet Village (12.6%). The out of town retail parks in Warrington Brough were mentioned less frequently; Gemini Retail Park (6.7%), Alban Retail Park (5.0%) and Riverside Retail Park (3.4%). The internet was stated as the biggest competitor to Warrington town centre by 10.1% of respondents.



Table 4.21: Which Centre or Centres do you Consider to be Warrington’s Biggest Competitor?

Centre	Proportion of Responses
The Trafford Centre	19.3%
Manchester City Centre	15.1%
Liverpool City Centre	14.3%
Cheshire Oaks Designer Outlet Village	12.6%
The Internet	10.1%
Widnes Town Centre	7.6%
Gemini Retail Park	6.7%
Alban Retail Park	5.0%
Riverside Retail Park	3.4%
St Helens Town Centre	1.7%
Chester City Centre	1.7%

Source: Business Survey, Question 20

4.79 The majority of respondents to the business survey (74.4%) do not operate any other businesses in any other centre in the North West region. Of those that do (25.6%), the majority (50.0%) stated that the other business that they operate elsewhere in the North West trades about the same as their business in Warrington town centre.

4.80 When the respondents to the business survey were asked whether they felt the redevelopment of the Golden Square shopping centre had been of benefit to their business, the majority (61.4%) stated that it had not, while just 22.7% felt Golden Square has benefitted their business.

Internet Shopping

4.81 Respondents to the business survey were also asked a series of questions relating to trading over the internet. The majority of respondents to the survey (68.2%) had a business with its own website. Those businesses with a website were asked which services it provided to customers. Such services included: contact information (31.9%), ability to browse goods available at the business premises (24.6%) and contact via email (20.3%). A smaller proportion of the websites provided customers with the ability to order goods which could be delivered to a designated address (8.7%), the ability to order goods directly from the website (7.2%) or order goods that can be picked up in store (7.2%). The majority of businesses who had a website considered it to be essential or very important to their business (55.5%), that the website attracted customers from a wider catchment i.e. beyond Warrington Borough (75.0%) and that customers visited their store as a result of browsing the website (70.8%). Of those respondents who do not have a website, most (35.7%) did not consider a website to be relevant or necessary, while 28.6% were in the process of designing a website.



Table 4.22: Importance of a Website to Your Business

Importance	Proportion of Responses
Essential	25.9%
Very Important	29.6%
Important	18.5%
Fairly Important	14.8%
Of Little Importance	11.1%

Source: Business Survey, Question 28

Conclusions

- 4.82 The distribution of the business surveys has enabled the views of businesses located within Warrington town centre to be obtained. Most of the business survey respondents consider that they are serving a relatively localised catchment, with businesses primarily relying on customers from around the town centre or elsewhere in Warrington Borough. Notwithstanding this, those businesses with a website consider this provides the opportunity to attract customers from elsewhere. Businesses in Warrington town centre view higher order centres, including Manchester, Liverpool and the Trafford Centre as the main competition to Warrington town centre, rather than other out-of-town locations within the Borough.
- 4.83 Most respondents to the business survey advised that they considered Warrington town centre to perform well in terms of accessibility by train, cyclists and pedestrians. However, respondents considered Warrington performs poorly in terms of accessibility by vehicles, the approach to parking enforcements, the price of car parking, the number of independent traders, number of market stalls, the quality of the market, the range of shops in general, the attractiveness of the public realm and the range of marketing and promotion of the town centre.
- 4.84 Respondents considered that Warrington town centre could be improved through the introduction of lower parking charges, a new cinema and measures to reduce traffic congestion. Business rates are seen as the main barrier to trading performance by business, while staff costs are the most significant cost to most businesses. The majority of businesses have plans to alter their business in the next five years.

In-Street Surveys

- 4.85 In-street surveys were also undertaken in November and December 2014 in order to provide an insight into the views and behaviours of customers, residents and visitors in relation to Warrington town centre, and Stockton Heath and Westbrook district centre. Unfortunately, we were not able to



obtain consent to undertake the in-street surveys at Birchwood district centre, which is a privately managed centre, and therefore in-street surveys have not been undertaken for this centre.

4.86 In total, 205 responses were obtained to the Warrington town centre in-street survey, 102 responses were received to the Stockton Heath district centre in-street survey and 101 responses were received to the Westbrook district centre in-street survey.

Reason for Visiting the Centre

4.87 Respondents were asked why they choose to shop or visit Warrington, Stockton Heath or Westbrook. The most common response in Warrington and Stockton Heath was due to the town or district centre being close to the respondent’s home. However, in Westbrook, the most common reason for respondents choosing to shop/visit the centre was the accessibility to the centre. Other reasons for respondents choosing to visit Warrington town centre included that the centre provides a choice of High Street retailers (14.1%), a good shopping environment (11.7%) and due to the accessibility to the centre (10.7%). In Stockton Heath district centre, other popular reasons for visiting the centre included accessibility to the centre (11.8%), the provision of services e.g. banks (9.8%) and the range of independent/specialist shops (9.8%). In Westbrook district centre, other popular reasons included the centre being close to the respondent’s home (29.7%), car parking provision (8.9%) and the range of shops selling food goods (6.9%).

Table 4.23: Main Reason for Choosing to Shop/Visit the City Centre

Centre	1st		2nd		3rd		4th	
Warrington	Close to home	47.3%	Choice of High Street retailers	14.1%	Shopping environment	11.7%	Accessibility to centre	10.7%
Stockton Heath	Close to home	37.3%	Accessibility to centre	11.8%	Provision of services (joint 3 rd)	9.8%	Independent/specialist shops (joint 3 rd)	9.8%
Westbrook	Accessibility to centre	30.7%	Close to home	29.7%	Car Parking Provision	8.9%	Range of shops selling food goods	6.9%

Source: NEMS In Street Survey, Question 9

4.88 In addition to respondents being asked why they chose to shop/visit each centre, they were also asked their main reason for being in the centre on the day of the survey. The most common reason for respondents being in Warrington town centre was for clothes/shoe shopping (24.9%). This reflects the centre’s role in catering for non food shopping needs and the higher order status of the centre. Whereas the most common reason for respondents being in Stockton Heath town centre was to visit the bank, building society or post office (11.8%), with other reasons relating to food purchases, reflecting the district centre’s role in serving the day to day needs of the local community. In



Westbrook, the most common reason for respondents being in the centre was to visit the Asda store (34.7%). This is to be expected given that the centre is anchored by the Asda store and provides the majority of floorspace in the centre.

Table 4.24: Main Reason for Visiting the Centre on the Survey Day

Centre	1st		2nd		3rd		4th	
Warrington	Clothes/shoes shopping	24.9%	Bank/Building Society/Post Office	13.7%	Christmas shopping	7.3%	Browsing	5.4%
Stockton Heath	Bank/Building Society/Post Office	11.8%	Aldi, Walton Road	7.8%	Food and grocery shopping (joint 3 rd)	6.9%	Social/leisure activities and work/school/college (both joint 3 rd)	6.9%
Westbrook	Asda, Cromwell Road	34.7%	Visiting specialist shops	3.0%	General non-food goods (joint 3 rd)	2.0%	Work/school/college (joint 3 rd)	2.0%

Source: NEMS In Street Survey, Question 10

Mode of Travel to Centre

4.89 Respondents were asked how they had travelled to the town or district centre on the day of the survey. In each centre, by car was the most popular means to access the centre. However, the proportion of car use was substantially greater in relation to Westbrook (84.1%) than for Warrington (46.8%) or Stockton Heath (51.9%). It is clear that Westbrook is very appealing for car borne trips given the substantial level of free car parking provided at the centre. The proportion of respondents accessing the centre by bus was much higher for Warrington (30.7%) than for the district centres. This is likely to be due to the bus interchange located immediately adjacent to Golden Square Shopping Centre providing ease of access for those travelling to the centre by bus. The higher proportion of bus usage to Warrington is also to be expected given the greater number of services to the town centre. The proportion of respondents walking to the centre was higher for Stockton Heath (37.3%) than the other two centres. This is reflective of the walk-in residential catchment located in close proximity to the centre.

Table 4.25: Mode of Travel to Centre

Centre	Car	Bus	Walk	Train	Bicycle
Warrington	46.8%	30.7%	15.1%	2.4%	0.0%
Stockton Heath	51.9%	9.8%	37.3%	0.0%	0.0%
Westbrook	84.1%	3.0%	9.9%	0.0%	0.0%

Source: NEMS In Street Survey, Question 3



Food Shopping

4.90 Respondents to the in-street survey were asked how frequently they visited the town or district centre to undertake their main food and grocery shop. The majority of respondents in Stockton Heath and Westbrook visited the district centre once a week or more frequently for this reason. This is to be expected given that the district centres perform a role in catering for the day to day needs of the local community. The proportion of respondents undertaking main food shopping in Warrington town centre on a frequent basis was much less. Indeed, the majority of respondents stated that they never undertook their main food shopping in the town centre. This is to be expected given the limited main food shopping provision within the town centre, albeit such provision is offered by the Asda store and Lidl on the edge of the town centre.

4.91 When asked at which centre or store they last visited to undertaken their main food or grocery shopping, the most common destinations cited by respondents in Warrington were Asda at Cockhedge Way (19.5%), Tesco Extra at Winwick Road (11.7%), Aldi at Crosfield Street (7.3%) and Asda at Westbrook district centre (7.3%). In Stockton Heath, the most popular answers were Aldi on Walton Road (23.5%) and Morrisons on Greenall Avenue (20.6%). In Westbrook, 83.2% of respondents stated that they last visited the Asda in the district centre to undertake their main food shopping, which is to be expected given that the centre is anchored by this store and provides the only main food shopping destination in the centre.

Table 4.26: Frequency of Visit to Undertake Main Food Shopping

Centre	Every-day	2 to 3 times a week	Once a week	Once a fortnight	Once a month	Less than once a month	Never	First time today
Warrington	2.0%	7.3%	20.0%	6.3%	1.5%	2.4%	58.0%	0.5%
Stockton Heath	11.8%	23.5%	27.5%	3.9%	3.9%	5.9%	20.6%	2.9%
Westbrook	5.0%	32.7%	42.6%	8.9%	0.0%	4.0%	3.0%	0.0%

Source: NEMS In Street Survey, Question 14

Non Food Shopping

4.92 Respondents were also asked a series of questions in relation to their non-food shopping habitats. As would be expected the frequency of visits to each of the centres for non-food goods was less than for food goods. Warrington is the centre which is most frequently visited for non-food goods, with 21.9% of respondents visiting the centre more than once a week. This is reflective of the wide range of non-food goods present in the town centre, including a range of both national multiple and independent retailers. Stockton Heath received the next most frequent visits with 16.6% of respondents visiting the centre for non-food goods more than once a week. Only 6.0% of respondents visited Westbrook



more than once a week for non-food goods; this is reflective of the limited comparison goods offer in the centre.

4.93 Respondents were also asked in which centre/facility they last shopped for non-food goods. The majority of respondents to the Warrington survey (62.0%) last visited Warrington town centre for non-food shopping. The most common reasons provided by those not visiting Warrington for such purchases were the alternative destination being closer to home (29.5%) and the choice of shops nearby selling non-food goods (20.5%). Warrington town centre was also the most common destination in which respondents had last undertaken non-food shopping for those answering the survey in Stockton Heath (25.5%) and Westbrook (30.7%). Again this is to be expected given that Warrington is the highest order centre in the Borough and provides a substantially greater amount of non-food shopping provision than the district centres in the Borough. The most common reason given from respondents in Stockton Heath and Westbrook as to why they last chose to do their non-food shopping elsewhere was due to the choice of shops nearby selling non-food goods.

Table 4.27: Frequency of visit to Undertake Non Food Shopping

Centre	Every-day	2 to 3 times a week	Once a week	Once a fortnight	Once a month	Less than once a month	One time only
Warrington	3.9%	18.0%	25.4%	15.6%	13.2%	16.1%	1.0%
Stockton Heath	3.9%	12.7%	23.5%	12.7%	22.5%	20.6%	2.0%
Westbrook	2.0%	4.0%	30.7%	29.7%	21.8%	10.9%	1.0%

Source: NEMS In Street Survey, Question 20

Comparison to Other Centres

4.94 As part of the in-street survey respondents were asked to compare each centre with other similar sized centres. In terms of the Warrington in-street survey, the majority of respondents considered Warrington town centre to have a better or much better choice of shops (55.6%), choice of High Street names (52.2%), quality of shops (53.7%) and town centre environment (50.7%) when compared to other similar size centres. There were no areas where the majority of respondents felt Warrington was worse or much worse than other comparable centres, although there were a number of matters where the majority of respondents considered Warrington performed about the same as other centres, or respondents did not know how the centres compared.

4.95 In Stockton Heath district centre, the majority of respondents considered that Stockton Heath was better or much better than comparable centres in terms of choice of shops (52.0%), choice of independent shops (63.7%), quality of shops (63.8%), range and choice of pubs/restaurants (59.8%),



town centre environment (54.9%) and cleanliness (50.0%). However, a high proportion (47.1%) considered Stockton Heath to be worse or much worse than other comparable centres in terms of the choice of high street names.

4.96 Respondents did not provide as many positive or negative responses when comparing Westbrook to other comparable centres, which suggests that it is seen as an adequate but unexceptional centre.

Types of Shops/Services Desired

4.97 Respondents were asked what type of shops or services they would like to see more of. The most common response in both Warrington and Stockton Heath was clothing stores. In Westbrook, the cafe and restaurant sector was most frequently identified as being the type of facility that would benefit the centre. Although Westbrook already provides a reasonable proportion of leisure service floorspace, the majority of this is accounted for by the cinema. The desire for more restaurants and cafes in Westbrook perhaps indicates that respondents consider that more choice in this sector would be complementary to the centre’s existing leisure offer.

4.98 Respondents were also keen to see more independent/specialist shops in each of the centres. Whilst Stockton Heath already accommodates a strong independent/specialist function, nearly one in ten respondents (8.8%) indicated that they wished to see even more such retailers, which suggests that people wish to see this element of the centre being further developed.

Table 4.28: Types of Shops or Services Desired by Respondents

Centre	1st		2nd		3rd		4th	
Warrington	Clothing stores	9.8%	Independent/specialist shops (joint 2 nd)	8.3%	Specialist food shops (joint 2 nd)	8.3%	Department stores/retailers	6.8%
Stockton Heath	Clothing stores	14.7%	Independent/specialist shops	8.8%	Book shop	7.8%	Specialist food stores	6.9%
Westbrook	Restaurant/cafes	10.9%	Banks (joint 2 nd)	5.0%	Clothing stores (joint 2 nd)	5.0%	Independent/specialist shops	2.0%

Source: NEMS In Street Survey, Question 30

Types of Leisure Facilities Desired

4.99 In terms of leisure facilities, 26.3% of respondents stated that they would like to see a cinema in Warrington town centre, which is reflective of the fact that there is no cinema present in the town centre. The committed development at Bridge Street is proposed to include a cinema and therefore provides the opportunity for this desire to be met. Respondents in Stockton Heath also identified a



cinema as the leisure facility which is most desired in the district centre. Again, this is indicative of the lack of such provision in the centre. The most cited leisure facility which respondents would like to see in Westbrook district centre is a restaurant/cafe. Again, this is likely to be in order to widen the choice available in the centre. There is a hub of leisure uses present in the centre, namely the cinema, restaurant and cafe. However, a further restaurant or cafe would add to the choice available. In each centre, respondents stated that they would like to see more children’s activity centres and activities for young people, thus reflecting a desire across the Borough for more activities for young people.

Table 4.29: Types of Leisure Facilities Desired by Respondents

Centre	1st		2nd		3rd		4th	
Warrington	Cinema	26.3%	Swimming Pool	7.8%	Children’s activity centre (joint 3 rd)	6.8%	Entertainment /activities for young people (joint 3 rd)	6.8%
Stockton Heath	Cinema	7.8%	Children’s activity centre (joint 2 nd)	4.9%	Swimming pool (joint 2 nd)	4.9%	Entertainment /activities for young people	2.9%
Westbrook	Restaurant/cafes	4.0%	Children’s activity centre (joint 2 nd)	1.0%	Entertainment /activities for young people (joint 2 nd)	1.0%	-	-

Source: NEMS In Street Survey, Question 31

Measures to Improve the Centre

4.100 In identifying measures which would help to improve the town and district centres, the most common suggestion to improve Warrington was to fill the empty shops (18.0%). This is reflective of the high vacancy rate in Warrington town centre which is higher than the national average figure. Other suggestions included cheaper parking (9.8%), general face lift (8.3%) and fewer low quality shops (7.3%). In Stockton Heath, the most commonly referenced suggestions for improvements related to parking, with 14.7% of respondents suggesting more parking and 13.7% suggesting cheaper parking. Fewer suggestions for improvements were provided by the respondents to the surveys in Westbrook, with the majority of respondents providing no suggestions for improvements. Of those who did suggest improvements, the most common were more quality restaurants/ cafes and the expansion of the centre. This again reflects the desire for a more diverse range and choice of food and drink uses in Westbrook.



Table 4.30: Most Popular Suggested Measures to Improve the Centre

Centre	1st		2nd		3 rd		4th	
Warrington	Fill empty shops	18.0%	Cheaper Parking	9.8%	General face lift	8.3%	Fewer low quality shops	7.3%
Stockton Heath	More parking	14.7%	Cheaper Parking	13.7%	Public toilets	11.8%	Fill empty shops and reduce traffic congestion (both joint 4 th)	9.8%
Westbrook	Expansion of centre (joint 1 st)	4.0%	More quality restaurants/pavement cafes (joint 1 st)	4.0%	-	-	-	-

Source: NEMS In Street Survey, Question 32

Biggest Weaknesses

4.101 When asked about the biggest weaknesses in each centre, empty shops was cited as the biggest weakness in Warrington (24.4%), which is reflective of the high vacancy rate in the centre. In Stockton Heath, as per the responses received in relation to measures to improve the centre, the availability of car parking and the price of car parking were seen as the centre’s biggest weaknesses. There is clearly a desire for more car parking at a reasonable price in Stockton Heath. Again, in Westbrook respondents struggled to identify the centre’s biggest weaknesses, with the majority of respondents providing no answer or stating that they did not know. Notwithstanding this, those who cited the centre’s biggest weakness referred to the town centre environment and the range and choice of pubs/restaurants.

Table 4.31: Biggest Weaknesses of the Centre

Centre	1st		2nd		3 rd		4th	
Warrington	Empty shops	24.4%	Anti-social behaviour	6.8%	Availability of car parking	6.3%	Poor appearance	5.9%
Stockton Heath	Availability of car parking	17.6%	Price of car parking	14.7%	Too much traffic	7.8%	Empty shops	4.9%
Westbrook	Town centre environment	4.0%	Range and choice of pubs/restaurants	3.0%	-	-	-	-

Source: NEMS In Street Survey, Question 33

Night Time Economy

4.102 Respondents to the in-street survey were also asked about the night time economy in each of the centres. Warrington is visited less in the evening than Stockton Heath and Westbrook, with the majority of respondents (60.5%) stating that they never visit Warrington town centre in the evening. This compares to 44.6% of respondents never visiting Westbrook in the evening and 36.3% never



visiting Stockton Heath in the evening. The results are reflective of the fact that the proportion of leisure service units and floorspace in Stockton Heath and Westbrook is above the national average, whereas the proportion of such uses is below the national average in Warrington. It is evident that Stockton Heath, in particular, provides an offer which facilitates evening visits, as 24.4% visit the centre in the evening less than once a week or more frequently. This can be attributed to the good range of restaurants and other leisure uses present in the centre.

Table 4.32: Frequency of Evening Visits

Centre	Daily	Once a week or more	Less than once a week	Less than once a fortnight	Less than once a month	Never
Warrington	1.0%	7.8%	4.4%	4.9%	19.5%	60.5%
Stockton Heath	2.9%	12.7%	8.8%	15.7%	22.5%	36.3%
Westbrook	1.0%	5.0%	13.9%	8.9%	21.8%	44.6%

Source: NEMS In Street Survey, Question 41

4.103 Respondents were asked their main reason for visiting each of the centres in the evening. The most common response provided in both Warrington and Stockton Heath is to eat in a restaurant or cafe. A substantially greater proportion of respondents provided this response in Stockton Heath (84.4%) than Warrington (36.4%) which is reflective of the greater number of restaurants present in Stockton Heath when compared to Warrington. The most common reason for respondents visiting Westbrook district centre in the evening is to go to the cinema, which is to be expected given that the cinema forms the principal leisure use in the centre.

Table 4.33: Main Reason for Visiting in the Evening

Centre	1st		2nd		3 rd		4th	
Warrington	Eat in a restaurant	28.6%	Visit a bar	18.2%	Visit a pub	11.7%	Clothes/shoe shopping	9.1%
Stockton Heath	Eat in a cafe or restaurant	84.4	Visit a pub	9.4%	Visit a bar	3.1%	-	-
Westbrook	Go to the cinema	27.5%	Visit Asda	7.8%	Clothes/shoe shopping and Eat in a cafe or restaurant (joint 3 rd)	2.0%	-	-

Source: NEMS In Street Survey, Question 42

Golden Square Shopping Centre

4.104 Respondents to the Warrington survey were asked to describe whether they visit Warrington town centre more frequently now than they did before the Golden Square shopping centre expansion opened in 2007. The majority (64.9%) considered that they visit the centre about as frequently as



they did before the expansion. Notwithstanding this, a higher proportion (16.6%) stated that they visit Warrington more/much more frequently since the expansion of Golden Square, than stated that they visited Warrington less/much less frequently (7.9%).

Warrington Market

4.105 Approximately a third (32.2%) of respondents to the Warrington in-street survey intended to visit Warrington market during their trip to Warrington town centre. Most respondents (31.7%) stated that they visit the market less than once a month and 26.3% stated that they never visit the market. When respondents were asked what one thing they particularly liked about Warrington market, 11.7% stated the freshness of the food and 5.4% stated the friendly atmosphere. When asked what one thing they particularly disliked about Warrington market, 21.0% stated the empty stalls or stalls closing down. When asked what else they particularly disliked about the market, 6.8% stated that there are not enough stalls.

4.106 It is evident that Warrington market provides an important resource in the town centre, with the majority of respondents (67.4%) visiting the market on occasion. Notwithstanding this, respondents consider that the market is suffering due to the presence of empty stalls. It is considered that the new market which will be provided as part of the Bridge Street redevelopment scheme will deliver positive benefits through the provision of a new environment for the market. The investment in a new market is likely to build on the aspects of the market which respondents already consider to be beneficial.

In-Street Surveys

4.107 Between July and September 2014, a survey of Warrington town centre residents was undertaken by the Council. Letters were sent to 254 residents and there was a 14.5% response rate. Further to the survey, the Council reported the following key headlines in relation to the town centre night-time economy:

- Respondents considered noise (65%), fear of public nuisance (over 50%), fear of environmental or criminal damage (over 60%) and litter (over 80%) to be problems associated with the night-time economy;
- The majority of respondents thought there were too few family orientated venues;
- 39% thought there were too few food orientated bars;
- 45% thought there were too many late night drink/music orientated bars;
- 64% did not support the opening of new late night drink/music orientated bars in Bridge Street, and 68% did not support the opening of such bars in the Cultural Quarter;



- There was general support for wine bars and more family and food orientated venues in the Cultural Quarter; and
- The main reason for certain residents now using the town centre was because the bars were too noisy.

4.108 A survey was also undertaken by the Council between December 2014 and January 2015 of residents within half a kilometre of Stockton Heath. Of the 1,793 residents provided with a survey, there was a 27.3% response rate. The Council reported the following key headlines in terms of the night-time economy in Stockton Heath:

- The majority of respondents did not consider noise and fear of crime or criminal damage to be problems associated with Stockton Heath's night-time economy;
- The majority felt there were the right number of public houses (over 80%) and wine bars/food orientated venues (over 60%) in Stockton Heath. Although 34% felt there were too few family orientated venues;
- Support for the opening of new premises was mixed with approximately 50% of respondents supporting new public houses, wine bars and food orientated bars. Approximately 70% of respondents supported new family orientated venues. However, only 27% supported new late night drink/music orientated bars.



5.0 Health Check Assessments

- 5.01 The NPPF identifies a number of factors which will be of relevance in delivering sustainable development, with one such factor being the need to ensure the vitality of town centres. Paragraph 23 of the NPPF states that local authorities should promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. Paragraph 23 also requires local planning authorities to recognise that town centres are at the heart of their communities and to pursue policies that support their viability and vitality. It is also noted that competitive town centre environments should be promoted in order to enhance customer choice, provide a diverse retail offer and in order to reflect the individuality of town centres.
- 5.02 Whilst the NPPF does not provide a list of indicators to be used to assess the health of a centre, such criteria has been published in the Government's Planning Practice Guidance: Ensuring the Vitality of Town Centres. Indicators which should be monitored on a regular basis in order to judge the health of a centre and its performance over time include the following:
- **Diversity of uses** – Data on the diversity of uses in the town centre and the district centres was collated during our surveys in November 2014.
 - **Proportion of vacant street level property** – Vacant properties were identified during the undertaking of the surveys.
 - **Customers' views and behaviour** – Information on customers' views is based on the NEMS in-street survey results, as set out in Section 4.
 - **Retailer representation and intentions to change representation** – Information on the current strength of centres, retailer representation and retailer requirements has been derived from Venuescore's UK Shopping Venue Rankings and from other published sources.
 - **Commercial rents** – Zone A rental data has been sourced from Estates Gazette Interactive (EGi), which is a widely recognised source of such data.
 - **Pedestrian flows** – General footfall and pedestrian flows were observed during the undertaking of the centre surveys.
 - **Accessibility** – Consideration of access to and around each centre is informed by WYG's surveys.
 - **State of town centre environmental quality** – Consideration of the quality of the buildings and public realm in each of the centres has also been informed by WYG's 'on the ground' observations.



- 5.03 We have also had particular regard to the proliferation of vacant land and premises and the opportunities which may exist for future growth in Warrington. The commentary below provides an analysis of Warrington town centre in respect of each of the above indicators. We have also visited each defined district centre in Warrington and, whilst not all of the above indicators are applicable to smaller centres, we also provide our assessment of the health of these district centres in this section of our report.
- 5.04 We commence our assessment by considering the role of the centres in the Borough in the sub-regional shopping hierarchy.

Sub-Regional Retail Hierachy

- 5.05 Table 5.1 illustrates the position of the sub-region’s principal centres based on the Venuescore’s UK Shopping Venue Rankings 2014-15. Venuescore’s index ranks over 3,000 retail venues within the UK (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 rated using a scoring system which takes account of the presence in each location of multiple retailers – including anchor stores, fashion operators and non-fashion multiples.
- 5.06 Venuescore allocates each centre within a tier, reflecting its level of retail provision. The eight tiers comprise (highest to lowest): ‘Major City’, ‘Major Regional’, ‘Regional’, ‘Sub-Regional’, ‘Major District’, ‘District’, ‘Minor District’ and ‘Local’. The rankings in the table represent the position of the centres at the time of the most recent 2014 Rankings, as well as competing surrounding destinations. The market position index and classification, as set out in the below table, provides an indication as to whether a retail venue’s focus is upmarket (luxury goods) or more downmarket (discount stores).
- 5.07 Warrington is classed as a regional centre by Venuescore and is ranked 76th of all the centres surveyed. Warrington’s ranking has fallen by seven places from 69th position in 2013. However, it should be noted that additional venues have been included in the Venuescore rankings since 2013, and therefore this may have impacted upon Warrington’s position. As would be expected, Warrington is the highest ranked centre in the Warrington Borough, with its role as the principal centre in the Borough ensuring that it occupies a significantly more elevated position in the Rankings than nearby smaller centres such as Birchwood, Stockton Heath and Westbrook. Within the North West region, Warrington is the sixth highest ranked centre which places it ahead of Wigan, St Helens, Northwich, Widnes and Runcorn, but below the higher order centres of Manchester, Liverpool, Chester, Trafford



Centre and Preston. As Warrington is geographically located between these higher ranking centres, it is clear that shopping patterns are influenced by these higher-order venues.

- 5.08 The three district centres in the Borough are also included in the hierarchy. Birchwood achieves the highest ranking of 768th, followed by Stockton Heath (824th) and Westbrook (2,557th). Gemini Retail Park achieves a higher ranking than the three district centres, which is likely to be as a result of the high proportion of national operators accommodated at the retail park.

Table 5.1: Venuescore’s Sub-Regional Shopping Hierarchy

Centre	Score	Classification	Rank 2014	Market Position Classification	Market Position Index (Average 100)
Manchester	756	Major City	2	Upper Middle	118
Liverpool	569	Major City	5	Upper Middle	110
Trafford Centre	312	Major Regional	29	Upper Middle	122
Chester	295	Major Regional	37	Upper Middle	121
Warrington	210	Regional	76	Middle	92
Wigan	184	Regional	108	Middle	91
St Helens	146	Regional	163	Lower Middle	85
Northwich	73	Major District	388	Middle	92
Runcorn	49	District	616	Lower	73
Widnes	43	District	693	Lower	79
Warrington Gemini Retail	41	District	727	Upper Middle	115
Birchwood Shopping Centre	39	District	768	Lower Middle	82
Stockton Heath	37	District	824	Middle	101
Riverside Retail Park	23	Minor District	1,313	Middle	91
Alban Retail Park	19	Local	1,531	Middle	100
Westbrook	11	Local	2,557	Lower Middle	84

Source: Venuescore UK Shopping Venue Rankings 2014-15

Warrington Town Centre

- 5.09 The full health check assessment of Warrington town centre is contained at Appendix 3. A summary of the findings of the health check assessment is provided below.
- 5.10 Warrington town centre is the principal centre in Warrington Borough and provides the main hub of retail and service uses within the Borough. The Warrington Local Plan Core Strategy (adopted July 2014) describes Warrington as a sub-regional centre which serves the Borough and surrounding area. Notwithstanding Warrington’s important role in serving the needs of the Borough and further afield,



the catchment of the town centre is limited due to the town's close proximity to the regional centres of Manchester, Liverpool and Chester, as well as the Trafford Centre.

5.11 The main focus for retailing in Warrington is concentrated on Golden Square Shopping Centre which is located in the north western part of the town centre. Golden Square provides a modern, purpose-built, mainly indoor shopping centre, which was redeveloped in 2007 to provide an improved shopping environment. More traditional pedestrianised shopping streets are located to the south and east of Golden Square, along Bridge Street, Sankey Street, Buttermarket Street and Horsemarket Street which converge at Market Gate. Warrington's Market Hall is located to the east of Bridge Street, the market hall building appears somewhat tired and would benefit from improved connectivity to the remainder of the town centre. The Cockhedge Shopping Centre, which comprises an indoor shopping parade and external retail warehousing units, is located in the north east part of the town centre. The Golden Square Shopping Centre, the northern part of Bridge Street, Horsemarket Street, the western end of Buttermarket Street, Sankey Street and the Market Hall are located within the Primary Shopping Area (Policy PV4) as defined by the Warrington Local Plan Core Strategy. Smaller scale units are located in the south west part of the town centre, such as along Cairo Street, Suez Street and Rylands Street. This part of the town centre is markedly quieter than the areas further to the north. The south western part of the town centre, as defined by the Warrington Local Plan Core Strategy (Policy CS7), includes the Palmyra Square area, which provides an important contribution to the town centre's cultural offer, with the Pyramid and Parr Hall providing arts and entertainment venues.

5.12 As set out at Section 3, the Council has aspirations to redevelop the Bridge Street area of the town centre, which currently suffers from high vacancy levels, with the units present in this location appearing somewhat tired and in need of improvements. The Council produced the Bridge Street SPD in 2009 in order to guide development in this area. Further to the publication of the SPD, outline planning consent (Reference: 2014/24473) was granted on the 12th December 2014 to Warrington Council and their development partner, Muse Developments, for the demolition of existing on-site buildings and structures and the construction of a mixed use development, comprising of a new market hall and other Class A1 retail uses; Class A2 financial and professional service uses; Class A3 restaurants and cafes; Class B1 office uses including a new Council Office building, Class D1 non-residential units including a library, Class D2 leisure uses including a cinema; refurbishment of Academy Way car park; new landscaping and public realm; new vehicular access roads and servicing areas; accommodation and reinstatement works to retained buildings; site remediation and other associated works. The planning consent covers an area of approximately four hectares of previously developed land within the town centre. On the 13 April 2015, the Council's Executive Board resolved approve a revised Masterplan for the Bridge Street on the basis of revised project costs. The revised



Masterplan is to include an enlarged cinema, larger car park and enlarged Council offices. The aim of the masterplan for this area is to deliver a major new development which will reverse the decline in this part of Warrington town centre and provide £107m of new investment to transform the Bridge Street Quarter.

- 5.13 WYG surveyed Warrington town centre in November 2014, at which time 515 units were recorded in the town centre, providing 134,320 sq.m gross floorspace. The Experian Goad town centre boundary was utilised to survey the centre and units were classified in relation to the Experian Goad Category Report classifications. The updated diversity of use and vacancies plan for Warrington town centre, at November 2014, is contained at Appendix 4.
- 5.14 An analysis of the diversity of retail and leisure uses accommodated in the town centre was undertaken. The assessment found the proportion of convenience goods, retail service, leisure service and financial and business service floorspace in Warrington town centre to be slightly below the comparable national average figures. However, the proportion of comparison goods floorspace in the centre is above the national average. Although the proportion of convenience goods floorspace in the town centre is below the national average, there is a reasonable mix of convenience goods uses in the town centre. However, the two supermarkets present within the Goad town centre boundary, namely Asda and Lidl are located in edge of centre positions in accordance with the NPPF definition with a lack of supermarket provision in the Primary Shopping Area, aside from the food offer within the M&S store.
- 5.15 In terms of the comparison goods units, the majority of units (54.0%) are occupied by national multiple operators. The majority of national multiples are located within Golden Square which is anchored by a Debenhams store. Retail services in Warrington are distributed throughout the town centre, there is a particular concentration of health and beauty uses within Warrington. In terms of leisure service units, although there is a substantial number of take-aways, public houses and bars present in the town centre, in accordance with the GOAD town centre boundary, the town centre is under-represented in terms of leisure uses when compared to the national average figure. However, the GOAD boundary does not include the units at Palmyra Square, including the Pyramid and Parr Hall cultural venues, which are located within the Local Plan town centre boundary. Therefore, it is consider that the town centre is better represented in terms of leisure services than the GOAD assessment shows. Notwithstanding this it is considered that the leisure service offer will be improved further through the delivery of the Bridge Street scheme, which is proposed to include a cinema. Although the proportion of financial and business service floorspace in Warrington town centre falls



below the national average figure, there is good representation from retail banks in the town centre, with 18 such units present.

- 5.16 Warrington town centre currently suffers from high vacancy rates. The proportion of vacant floorspace in the town centre (17.1%) is substantially greater than the national average figure (9.3%). The vacancy rate is comparable to the vacancy rate recorded by the Council in their Town Centre Health Check of 17.5% in 2009 and 17.4% in 2010. However, in 2011, the Council recorded a vacancy rate of 10.4% which indicates that vacancies in the town centre have increased since this date³². Although there are vacant units present in all parts of the town centre, there is a particular concentration at the northern end of Bridge Street, along Ryland Street, Cairo Street, and Suez Street. It is considered that the high vacancy rate in the southern part of the town centre has resulted from the focus of the town centre being on Golden Square and the northern part of the town centre.
- 5.17 It is understood that a proportion of the vacant units present within the Bridge Street Masterplan area have resulted from the purchase of properties to facilitate the Bridge Street development and therefore the vacancy rate is considered to be artificially inflated to some extent. If the vacant units within the Bridge Street Masterplan area are removed from the diversity of use analysis, the proportion of vacant units reduces from 23.1% to 21.3% and the proportion of vacant floorspace reduces from 17.0% to 15.1%. In total, there are currently 20 vacant units within the Bridge Street Masterplan area.
- 5.18 Between 2008 and 2012, Prime Zone A Rents in Warrington fell from £145 per sq ft to £85 per sq ft. This is reflective of the pattern of falling Zone A rents nationally as a result of the economic recession. Since 2012, it appears that Prime Zone A Rents have stabilised in Warrington, as they retained a value of £85 per sq ft at 2013. Warrington town centre performs well in terms of Prime Zone A rents when compared to other smaller scale town centres in the surrounding area, such as St Helens, Runcorn, Widnes and Northwich. However, the Zone A Rents achieved by Warrington are substantially less than those achieved by Liverpool and Manchester, which were £165 to £180 per sq ft (approximately 100%) higher than Warrington's Zone A rents at 2013.
- 5.19 During WYG's survey of Warrington town centre³³, pedestrian flows were noted. The greatest levels of pedestrian activity were witnessed in the Golden Square Shopping Centre, with reasonable pedestrian

³² Note, the methodology and town centre used to determine diversity of main town centre uses (including vacancies) by the Council in producing the Town Centre Health Check 2012 varies somewhat to the methodology used by WYG.

³³ Which was undertaken over the morning and afternoon of Monday 10 November 2014



flows occurring along the other streets within the Primary Shopping Area. The lowest levels of pedestrian flows were observed in the south west area of the town centre, including the western end of Sankey Street, Bold Street, Egypt Street, Cairo Street, Suez Street and Rylands Street. The areas surrounding the Market Hall were also quiet.

- 5.20 Warrington town centre is considered to be located in an accessible location. The town centre is in close proximity to the M6, M56 and M62 motorways meaning that the centre is easily accessible by road. Notwithstanding this, the arterial routes leading to the centre can become congested at peak times. The largest car park in the town centre is provided at the Golden Square Shopping Centre which provides approximately 1,700 spaces. Further parking is provided at Warrington Market, Winwick Street, the Cockhedge Shopping Centre, New Town House (weekends only) and the Town Hall. Warrington is also well served by public transport. A bus interchange adjoins the Golden Square Shopping Centre and regular services are available to areas throughout the Borough. Warrington Central Station is located off Winwick Street in the northern part of the town centre and provides regular rail services to local areas such as Padgate and Birchwood, as well as to Liverpool and Manchester. In addition, Warrington Bank Quay Station is located 500m to the south west of the town centre and is located on the national network.

- 5.21 The perception of safety in Golden Square Shopping Centre is good, due to the presence of patrolling staff, CCTV and customer information desks. However, in areas of the town centre where footfall is more limited or vacancies are high, the lack of activity and active frontages do not help to foster a feeling of safety. Similarly, the state of the town centre environmental quality is good in Golden Square, as the shopping centre is well maintained, includes street furniture and advertisements are placed on vacant units to add interest. Elsewhere in the town centre the environmental quality is varied. Although the presence of historic buildings, street art and furniture in parts of the town centre adds interest to the environmental quality, the high proportion of vacant units, several of which have not been well maintained and are in need of improvements, detracts from the environmental quality elsewhere.

Summary

- 5.22 In summary, we consider the health of Warrington town centre to be mixed. Overall, there is a good mix of retail and service uses present in the town centre. There is good representation from national multiple retailers, as well as a range of independent retailers in the centre. Golden Square Shopping Centre provides a favourable shopping environment; the centre is well managed, clean and benefits from the convenience of the integrated car parking and bus station. However, the Bridge Street area of the town centre and more peripheral areas are suffering from high vacancy rates, with these parts



of the centre having suffered as a result of the migration of the focus of the town centre towards Golden Square. Notwithstanding the varied vitality and viability of the town centre, it is evident that Warrington performs an important role in catering for the retail and service needs of Warrington Borough and the surrounding area, albeit on a relatively localised basis given the proximity of higher order centres such as Manchester and Liverpool.

5.23 In summary, Warrington town centre presents the following strengths and opportunities:

- Diverse range of national and independent retail stores and a market which acts to provide a competitive shopping destination when compared to other town centres in the Study Area;
- The high quality and well maintained environment of Golden Square Shopping Centre;
- The consented Bridge Street scheme which will deliver additional retail, leisure and community uses, including a new market hall and cinema, and which aims to transform the Bridge Street area of the town centre; and
- The town centre's accessible location; in close proximity to the national motorway network and with favourable public transport links due to the presence of the town centre bus terminal and two train stations.

5.24 In contrast, the centre presents the following weaknesses and threats:

- Threat from nearby regional centres such as Manchester and Liverpool, as well as the easily accessible Trafford Centre, meaning that Warrington's catchment is relatively localised;
- High vacancy rate (although some of the vacancies are managed as a result of the Bridge Street scheme);
- Poorly maintained units and lack of activity in peripheral areas of the town centre, along Bridge Street and in the vicinity of the Market Hall; and
- Success of Golden Square Shopping Centre has resulted in other areas of the town centre becoming less well used and less desirable to retail operators.

District Centres

5.25 As part of our instruction, we have been asked to consider the current performance of the district centres in Warrington which serve the day to day shopping needs of the Borough's population. There are three district centres in the Borough, as defined by the Warrington Local Plan, namely Birchwood, Stockton Heath and Westbrook. We provide below an overview of the role and function of each centre. A full health check for each district centre is contained at Appendix 3.



Birchwood District Centre

- 5.26 Birchwood district centre is located approximately 9km to the north east of Warrington town centre and is in close proximity to both the M6 and M62 motorways. The district centre is focussed on Birchwood Shopping Centre, a purpose built, mainly indoor, single level shopping centre. The shopping centre is surrounded by surface level car parks and is located in close proximity to Birchwood railway station and bus interchange. The eastern part of the shopping centre was reconfigured in 2012/2013.
- 5.27 The centre is well provided for in terms of convenience goods and comparison goods uses. Birchwood is anchored by an Asda supermarket (10,070 sq.m gross), with additional provision offered by an Aldi store. The majority of comparison goods units in the centre are operated by national multiple retailers, which are complemented by a good range of independent stores. A number of the larger stores in the district centre are focused on the 'value' end of the market, such as Home Bargains, Poundworld and the 99p Store. The proportion of service floorspace present in the district centre is lower than the national average. In addition, the range of services is limited and is largely focussed on health and beauty services, cafes and fastfood take aways. The centre is lacking in terms of financial and business services, with only one such use present in the centre. However, there is a Barclays Bank present within the Asda store. The centre also provides a doctors, dentist and advice centre to cater for the needs of the local community. Although the proportion of convenience and comparison goods uses in the centre is above the national average and the proportion of service uses is below the national average, the mix of uses present in the centre appears to work well together.
- 5.28 Birchwood district centre has a low vacancy rate. The proportion of vacant floorspace (3.5%) is substantially less than the national average (9.3%) which is a key indicator of a healthy centre. The units which are currently vacant are not the same as those that were vacant in 2012 when the Retail Centre Report was produced by Warrington Council highlighting that there has been recycling of floorspace within the centre. New retailers have took up floorspace in the centre recently, including The Edge ladieswear and Roman ladieswear, showing that there is confidence in the centre.
- 5.29 Reasonable levels of footfall were witnessed in the centre during WYG's site visit, with particularly high footfall witnessed in the vicinity of the Asda supermarket. Although there are high levels of footfall within the centre, it is evident that most journeys to the centre take place by car; the extensive car parks were busy at the time of our site visit. The largely indoor, pedestrianised shopping centre, provides a convenient environment for shoppers.



- 5.30 The shopping centre is well maintained; the centre is clean, street furniture and landscaping areas add interest to the centre. There is a perception of safety within the centre, with the presence of shopping centre staff and CCTV helping to foster the feeling of safety. Notwithstanding this, the parade of units located to the east of the shopping centre appears somewhat outdated and contrasts with the design of the main shopping centre building.
- 5.31 Birchwood district centre is highly accessible due to its location close to the M6 and M62 motorway. Approximately 1,500 surface level car parking spaces are provided in the centre, which is a substantial level for a district centre. Free parking, (for a limited time), makes the centre attractive for car borne journeys. However, in addition, the centre is well served by public transport. Birchwood railway station is located to the south east of Birchwood shopping centre and provides regular services to the surrounding residential areas, as well as to Liverpool and Manchester.
- 5.32 From our assessment and the results of the household survey, it is evident that Birchwood district centre is well used and performs an important role in serving the needs of residents in the north east of the Borough and the surrounding employment uses.

Stockton Heath District Centre

- 5.33 Stockton Heath district centre is located in the south of Warrington Borough. The district centre is located approximately 4km to the south of Warrington town centre. The A49 which runs through the centre of the Stockton Heath connects to Warrington town centre to the north and the M56 to the south. WYG undertook a survey of the district centre in November 2014 at which time 138 units were recorded in the centre, providing 23,890 sq.m gross floorspace.
- 5.34 The majority of the retail and service units present in the centre are located along the main routes leading through the centre. The centre takes the form of a traditional high street, with units located along the two principal routes of London Road and Walton Road. Additional units are present on West Avenue and Grappenhall Road. The Forge Shopping Centre is situated to the west of London Road and comprises a small internal arcade of shops. A Morrisons supermarket is located in an edge of centre position (in accordance with the NPPF definition), to the north of the Manchester Ship Canal, off Greenall's Avenue.
- 5.35 Stockton Heath district centre provides a diverse retail and service offer. The range of both national multiple and independent operators present in the centre contribute to an appealing retail offer. The presence of several restaurants and bars in the centre means that Stockton Heath benefits from a vibrant night-time economy alongside the daytime offer.



- 5.36 The centre is well represented in terms of convenience goods, retail service, leisure service and financial and business service floorspace. The proportion of convenience goods floorspace is particularly high when compared to the national average, which can be attributed to the presence of the Morrisons store to the north of the centre, which provides a substantially larger scale unit than the majority of smaller scale traditional units present in the centre. The proportion of comparison goods floorspace in the centre is below the national average. Notwithstanding this, the independent comparison goods retailers, which comprise 80.0% of the comparison goods units in the centre, help to create a diverse and unique retail offer. There are also several national multiple comparison goods retailers in the centre including Boots, Clarks, Lloyds and WHSmith. The largest comparison goods unit is occupied by an independent household goods store.

- 5.37 There is a strong leisure service offer in the district centre, both the proportion of leisure service units (27.5%) and floorspace (24.6%) are above the respective national average figures (22.3% and 23.2%). Of the 38 leisure service units present in the district centre, there are 15 restaurants, eight fast food take aways, five cafes, three bars and two public houses. It is evident that Stockton Heath performs a role as a leisure destination for those residing in Warrington Borough and the surrounding area, particular in terms of food and drink uses.

- 5.38 The vacancy rate in Stockton Heath is low. The proportion of vacant floorspace in the centre (3.0%) is considerably less than the national average figure (9.3%). The eight vacant units present in the centre are distributed throughout the centre, indicating that there are no particular areas of the district centre which are seen as undesirable to operators. The units which are currently vacant in Stockton Heath differ from those that were vacant in 2012 when the Warrington Retail Centre Report 2012 was published, thus showing that there is a healthy recycling of space within the centre.

- 5.39 Although independent retailers occupy the majority of units within the district centre, several national multiple retailers have located in Stockton Heath since 2012, showing that there is confidence in the centre and that it is seen as a viable location for operators to locate. Since 2012, Mr Simms Olde Sweet Shop, Mind, Slug and Lettuce, Subway and WHSmith have located in the district centre.

- 5.40 The environmental quality of Stockton Heath district centre is good. The centre has been awarded 'Purple Flag' recognition for the welcoming environment that the centre provides. The majority of Stockton Heath is designated as a conservation area which is reflective of the special historic and architectural interest of the centre. Street furniture and planting beds are provided within the centre which contribute to the attractive environment. The low vacancy rate in the district centre and the



good levels of pedestrian flows within the core of the district centre helps to provide a vibrant and active environment.

- 5.41 As the centre takes the form of a traditional shopping street, with units located along the main routes through the centre, this means that traffic through the centre can be busy at times. Notwithstanding this, pedestrian crossings are present in the centre to aid pedestrian movements.
- 5.42 Stockton Heath is vital and viable centre which is performing well. The high proportion of independent operators present in the centre helps to create a diverse and niche offer. The favourable proportion of leisure service units ensures that activity is present in the centre into the evenings as well as during the day. The district centre is of good environmental quality; the centre is well maintained and clean and the good levels of activity and active frontages assist in creating a welcoming environment. The district centre performs an important role in catering for the needs of the population residing in the south of Warrington Borough.

Westbrook District Centre

- 5.43 Westbrook district centre is located in the north west of Warrington Borough. The centre is located 4km to the north west of Warrington town centre, and Gemini Retail Park is situated less than a kilometre to the north of Westbrook. The district centre is anchored by an Asda supermarket, which is adjoined by a parade of shops which are accessed via a covered walkway. An Odeon cinema with adjoining food and drink uses is located in the south west part of the centre. These leisure uses are separated from the main hub of the centre by access roads and car parking. The retail and service units present at Westbrook district centre are surrounded by surface level car parking which is free to customers. It is clear that there are a high proportion of car borne trips to the district centre.
- 5.44 In terms of the diversity of uses present in the district centre, the majority of floorspace in the centre is occupied by convenience goods uses (55.1%), which can be attributed to the presence of the Asda supermarket. Notwithstanding this, the Asda store is the sole convenience goods unit in the centre and therefore the proportion of convenience goods units is less than the national average figure. The proportion of leisure service floorspace in the centre is higher than the national average due to the presence of the cinema, as well as a betting office, coffee shop and restaurant. The proportion of comparison goods, retail service and financial/business service floorspace in the centre is less than the national average, albeit the proportion of retail service units is greater than the national average figure. The majority of units in the district centre are occupied by independent retailers. However, national multiple retailers present in the centre comprise Asda, British Heart Foundation, Cohen's



Chemist, Costa Coffee and Frankie and Bennies. In addition to the retail and service units present in the district centre, there are additional uses which have an important role in catering for the needs of the local community, namely a dentist, medical centre, library and childcare centre.

- 5.45 There are only two vacant units present in the centre and the proportion of vacant floorspace (3.4%) is substantially less than the national average figure (9.3%). Notwithstanding this, the proportion of vacant units (13.3%) is slightly greater than the national average figure (11.4%). Since the Warrington Retail Centres Report was published in 2012, the number of vacant retail units in Westbrook district centre has increased by two units, as at 2012 there were no vacant units in the centre. The two vacant units currently present in the centre have resulted from the closure of the Blockbuster video unit and the relocation of David Pluck betting office.
- 5.46 During WYG's visit to the district centre, the Asda store appeared to be trading well, with the greatest levels of pedestrian activity witnessed in the centre being in the vicinity of the Asda store. The remainder of the centre was much quieter, with only a limited number of pedestrians witnessed walking along the parade of shops which forms the remainder of the shopping centre.
- 5.47 The units within the district centre are well maintained, the centre is clean and benefits from landscaped elements which contribute to a favourable environmental quality. However, the 1980s purpose built centre does appear a little outdated in design terms. The Asda store forms the most prominent building in the centre, with the other smaller shop frontages appearing slightly concealed due to the presence of the covered walkway.
- 5.48 There is public transport provision available to Westbrook district centre, with bus stops providing regular services to surrounding residential areas and to Warrington town centre located on Westbrook Crescent and Cromwell Avenue. However, it is evident that a high proportion of journeys that are made to the centre are undertaken by private transport modes given the plentiful, well used car parking within the district centre.
- 5.49 Overall, Westbrook is considered to be a healthy centre, which provides an important role in catering for the needs of the local community. The centre also provides an important leisure function.

Summary

- 5.50 Birchwood district centre provides a good range of convenience and comparison goods provision. There is strong representation from national multiples in the centre, however independent retailers also complement this offer. One of the key benefits of the centre is the low vacancy level. The limited



number of vacant units in the centre provides for an active and attractive shopping environment. Where vacant units do exist these are well maintained. It is clear that there is also confidence in the centre as floorspace has recently been taken up by new retailers. The centre is well used, with good levels of footfall present in the centre, indicating that the centre provides a valuable resource for the local community in terms of meeting their retail and service needs.

- 5.51 When considering the centre’s weaknesses and threats, the centre is slightly limited in terms of service provision. The centre is dominated by convenience and comparison floorspace, with only a limited number of service units in the centre. In particular, the amount of financial and business and leisure service floorspace is restricted.
- 5.52 Overall, Birchwood is a vital and viable centre. The centre appears to be performing well and is key in providing for the needs of the local residential and business community.
- 5.53 Stockton Heath provides a diverse retail and service offer. There are a number of specialist shops and independent retailer located in the centre which helps to create this interesting offer. There is also representation from national multiple retailers in the centre, which combined with the independent retailers provides a strong offer. There is good representation from the leisure service sector in Stockton Heath which helps to create a vibrant night time offer in the centre in addition to the day time offer. The vacancy rate in Stockton Heath is low and the environmental quality of the centre is very good, which helps to create an attractive and appealing centre.
- 5.54 The proportion of comparison goods floorspace in the centre is below the national average, which is likely to be as a result of the majority of units being small in scale and the majority of comparison goods units being occupied by independents retailers rather than national multiple retailers who would be likely to require larger premises. Notwithstanding this, there is a good range of comparison goods units present in the centre. Given that the centre is located along the A49 (London Road), the centre does become busy at times in terms of traffic moving through the centre. There are however pedestrian crossings present in the centre to aid pedestrian movements.
- 5.55 Stockton Heath is clearly a healthy centre. The centre provides a diverse offer, including a number of specialist shops. The strong representation from leisure service units means that the centre is well used by the local community both during the day time and into the evening. The centre benefits from a strong walk-in catchment from the residential areas surrounding Stockton Heath.



5.56 Westbrook district centre is dominated by the Asda supermarket which forms the anchor retail unit in the centre. However, in addition the centre also provides an important leisure function by providing the only cinema within Warrington Borough. As a result, floorspace in the centre is biased toward convenience and leisure sector, while the proportion of comparison, retail service and business/financial service floorspace in the centre is below the national average. Although the proportion of vacant units in the centre is below the national average, the vacancy rate in the centre has increased since 2012.

5.57 It is evident that the majority of the trips to the centre are by private transport modes, as there is ease of access for such modes of transport with a substantial car park provided in the centre. Although the centre is well maintained, it would perhaps benefit from a level of modernisation, particularly in terms of the smaller parade of units which are somewhat overshadowed by the Asda store.

Overall, it is considered that Westbrook is a vital and viable centre. The centre performs an important role in catering for day to day needs of the local community, particularly in relation to food shopping. The centre also provides a wider leisure function as the centre houses the only cinema in the Borough. Notwithstanding this, the centre is dominated by the Asda and is reliant on this use. The vacancy rate in the centre has increased over the last two years and therefore this should be monitored to ensure that vacancies do not increase further.



6.0 Population and Expenditure

6.01 This section of the report assesses the current population and available expenditure (for both convenience and comparison goods) within the Study Area.

Study Area Population

6.02 The population within each postal code sector and each zone at 2015 has been calculated using Experian Micromarketer G3 data (2013 estimate, which was issued in October 2014).

6.03 We are aware that there has been a challenge to the adoption of the Warrington Local Plan Core Strategy under section 113 of the Planning and Compulsory Purchase Act 2004 which has resulted in the quashing of the Plan’s housing provision policies and its main housing allocation. Accordingly, at the time of our reporting, there is some uncertainty as to the number and distribution of future housing growth in the Borough.

6.04 In the absence of such information, we have assumed that Experian’s future population projections represent the most appropriate data source for the purposes of modelling future retail needs. The Experian data is reflective of growth rates which take into account Office for National Statistics population projections and current age and gender estimates.

6.05 Tables 6.1 sets out our estimate of future population growth across the Study Area using Experian Micromarketer G3 data.

Table 6.1: Study Area Population by Survey Zone (2015 to 2030)

Zone	2015	2020	2025	2030
1	65,998	66,692	67,211	67,439
2	21,519	22,328	23,046	23,612
3	62,854	63,532	64,063	64,329
4	17,012	17,181	17,336	17,458
5	3,381	3,466	3,542	3,605
6	54,502	56,569	58,477	60,031
7	24,895	25,811	26,638	27,317
8	58,969	61,187	63,195	64,828
9	34,713	36,008	37,174	38,157
10	13,164	13,642	14,072	14,428
Total	357,007	366,416	374,754	381,204

Source: Experian Micromarketer G3 2014 data release



6.06 The above table indicates that Experian forecast that the Study Area population will increase from 357,007 at 2015 to 381,204 at 2030, equating to an increase in population of 24,197 persons. Within zones 2, 6, 7, 8, 9 and 10 – which broadly accord to the Warrington administrative boundary – the forecast population increases from 207,762 at 2015 to 228,373 at 2030. This equates to an estimated population increase of 20,611 persons over the 15 year period or 1,374 person per annum.

Retail Expenditure

6.07 In order to calculate per capita convenience and comparison goods expenditure, we have again utilised Experian Micromarketer G3 data which provides detailed information on local consumer expenditure which takes into consideration the socio-economic characteristics of the local population. Experian is a widely accepted source of expenditure and population data and is regularly used by WYG in calculating retail capacity.

6.08 The base year for the Experian expenditure data is 2013. Per capita growth forecasts have been derived from Experian Retail Planner Briefing Note 12.1. Appendix 3 of the Retail Planner Briefing Note identifies the following annual growth forecasts for convenience and comparison goods which inform our assessment.

Table 6.2: Expenditure Growth Forecasts

Year	Convenience (%)	Comparison (%)
2015	0.5	4.4
2016	0.4	3.1
2017	0.5	3.0
2018	0.4	3.0
2019	0.7	3.2
2020	0.7	3.2
2021	0.5	3.0
2022	0.8	3.3
2023	0.8	3.3
2024	0.8	3.3
2025	0.7	3.3
2026	0.7	3.2
2027	0.6	3.2
2028	0.8	3.3
2029	0.6	3.3
2030	0.6	3.3

Source: Appendix 3, Retail Planner Briefing Note 12.1 (October 2014)



- 6.09 The latest growth forecasts suggest that the recovery from the downturn in the economy is well underway, albeit growth in convenience goods expenditure will improve over the medium and long term when compared to the current position. For convenience goods, Experian forecasts +0.5% annual growth at 2015, which is then forecast to increase to +0.8% at 2022. Whilst there is some deviation in the rate forecast thereafter, the rate of annual convenience goods growth forecast to 2030 does not fall below +0.6%.
- 6.10 By contrast, Experian identifies an immediate and relatively strong annual comparison growth rate of +4.4% at 2015. A drop in the rate of growth to +3.1% is anticipated at 2016, with growth rates thereafter to 2030 forecast to be extremely stable, within the range +3.0% to +3.3%.
- 6.11 Growth in expenditure forecast in the longer term (beyond the next ten years) should be treated with caution given the inherent uncertainties in predicting the economy's performance over time. Assessments of this nature should therefore be reviewed on a regular basis in order to ensure that forecasts over the medium and long term are reflective of any changes to relevant available data.
- 6.12 Experian Retail Planner Briefing Note 12.1 also provides a forecast as to the proportion of expenditure which will be committed through special forms of trading (comprising 'non-store retailing', such as internet sales, TV shopping and so on) over the reporting period. We have 'stripped out' any expenditure which survey respondents indicated was committed via special forms of trading and instead have made an allowance derived from Experian's recommendation.
- 6.13 In considering special forms of trading, it should be noted that many products which are ordered online are actually sourced from a physical store's shelves or stockroom (particularly in the case of convenience goods). Accordingly, expenditure committed in this manner acts to support stores and should be considered 'available' to tangible retail destinations.
- 6.14 Accordingly, in order not to overstate the influence of expenditure committed via special forms of trading, our approach is based on Experian's 'adjusted' figure (provided at Appendix 3 of its Retail Planner Briefing Note) which makes an allowance for internet sales which are sourced from stores. The proportion of expenditure committed through special forms of trading cited below at Table 6.3 is 'stripped out' of the identified expenditure as it is not available to stores within the Study Area.



Table 6.3: Special Forms of Trading Forecasts

Year	Convenience	Comparison
2015	2.8%	12.5%
2020	4.0%	15.7%
2025	4.9%	15.9%
2030	5.4%	15.6%

Source: Appendix 3, Experian Retail Planner Briefing Note 12.1 (October 2014)

6.15 Based on the above growth rates and special forms of trading allowances, it is possible to produce expenditure estimates for each survey zone at 2015, 2020, 2025 and 2030. In doing so, our assessment takes into account both per capita retail expenditure growth and population change.

Convenience Goods Expenditure

6.16 Taking into consideration the above increases in population and per capita expenditure, it is estimated that, at 2015, the resident population of the Study Area generates some £712.05m of convenience goods expenditure³⁴. Available convenience goods expenditure is then forecast to increase to £814.02m at 2030, which represents an increase of £101.97m (or 14.3%) between 2014 and 2030.

Table 6.4: Total Available Study Area Expenditure – Convenience Goods (£m)

2015 (£m)	2020 (£m)	2025 (£m)	2030 (£m)	Growth 2015-2020 (£m)	Growth 2015-2025 (£m)	Growth 2015-2030 (£m)
712.05	741.21	778.87	814.02	29.16	66.82	101.97

Source: Table 2a, Appendix 5
In 2013 prices

Main Food and 'Top-Up' Shopping

6.17 The proportion of convenience goods expenditure which is committed through main food shopping trips and through 'top-up' shopping trips has been estimated with reference to respondents' answers to Question 5 and Question 17 of the household survey, which ask respondents to estimate their weekly main food shopping expenditure and weekly top-up shopping expenditure respectively. We have analysed responses to these questions to derive an estimate of the split between main and top-up expenditure on a zonal basis. Across the whole of the Study Area, we calculate (by adding together our estimates of the monetary split between main and top up shopping expenditure within each zone) that the proportion of convenience goods expenditure directed to respondents' main food shopping destination equates to 79.1% of their overall convenience shopping expenditure. The

³⁴ Expressed in 2013 prices, as is every subsequent monetary value



remaining 20.9% of expenditure (which will typically be spent on regular purchases such as milk, bread and so on) is therefore attributed to the respondents' top-up convenience shopping destination. Our estimate of the split between these two types of expenditure on a zonal basis is provided below at Table 6.5.

Table 6.5: Assumed Split of Convenience Goods Expenditure Between Main and Top-Up Shopping

Zone	Main Food	Top Up
1	80.0%	20.0%
2	71.8%	28.2%
3	78.1%	21.9%
4	81.3%	18.7%
5	76.3%	23.7%
6	81.5%	18.5%
7	80.7%	19.3%
8	73.6%	26.4%
9	81.3%	18.7%
10	81.6%	18.4%

Source: Derived from Table 2B, Appendix 5

- 6.18 By applying these estimates to the identified resident population of the Study Area, convenience goods expenditure at 2015 committed through 'main food' shopping trips is estimated to be £534.04m and through 'top up' shopping trips is estimated to be £178.01m.

Comparison Goods Expenditure

- 6.19 For comparison goods, Table 6.6 sets out our estimation that the resident population of the Study Area will generate some £1,048.48m of comparison goods expenditure at 2015. Available comparison goods expenditure is then forecast to increase to £1,736.85 at 2030, which represents an increase of £688.38m (or 65.7%) between 2015 and 2030.
- 6.20 Whilst the identified expenditure increase is clearly significant, the rate of forecast growth is more modest than that which has been previously achieved, principally because of the expectation that an ever increasing proportion of comparison goods expenditure will be committed through special forms of trading (most particularly, internet shopping).



Table 6.6: Total Available Study Area Expenditure Under Two Population Scenarios – Comparison Goods (£m)

2015 (£m)	2020 (£m)	2025 (£m)	2030 (£m)	Growth 2015-2020 (£m)	Growth 2015-2025 (£m)	Growth 2015-2030 (£m)
1,048.48	1,206.43	1,446.57	1,736.85	157.95	240.14	688.38

Source: Table 8, Appendix 5
In 2013 prices

- 6.21 For the purposes of this Study, comparison goods expenditure has been divided into nine sub-categories: 'DIY' 'Electrical' and 'Furniture' (these three categories collectively being referred to as bulky goods)' and, 'Clothing & Footwear', 'CDs, DVDs and Books', 'Health and Beauty/Chemist Goods', 'Small Household Goods' and 'Toys, Games, Bicycles and Recreational Goods' (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zonal basis.
- 6.22 In considering the above, it should be noted that if an excess of expenditure manifests itself within the Study Area, this does not necessarily translate directly into a requirement for additional floorspace. In assessing quantitative need, it is also necessary to take account of:
- Existing development proposals;
 - Expected changes in shopping patterns; and
 - The future efficiency of retail floorspace.



7.0 Retail Capacity in Warrington Borough

- 7.01 We have examined the need for new convenience and comparison goods floorspace over the five year reporting periods to 2030 (i.e. at 2015, 2020, 2025 and 2030). At the outset, it is important to note that an assessment in the long term should be viewed with caution, due to the obvious difficulties inherent in predicting the performance of the economy and shopping habits over time. In any event, any identified capacity should not necessarily be viewed as justification of new retail floorspace outside of centres as this could prejudice the implementation of any emerging town centre redevelopment strategies and the development of more central sites which may be currently available or which could become available over time.
- 7.02 A complete series of quantitative capacity tables are provided at Appendix 5 to provide further detail in terms of the step-by-step application of our quantitative assessment methodology.

Capacity Formula

- 7.03 For all types of capacity assessment, the conceptual approach is identical, although the data sources and assumptions may differ. The key relationship is Expenditure (£m) (allowing for population change and retail growth) *less* Turnover (£m) (allowing for improved 'productivity') *equals* Surplus or Deficit (£m).
- 7.04 **Expenditure (£m)** – The expenditure element of the above equation is calculated by taking the population within the defined catchment and then multiplying this figure by the average annual expenditure levels for various forms of retail spending per annum. The expenditure is estimated with reference to a number of factors, namely:
- Growth in population;
 - Growth in expenditure per person per annum; and
 - Special Forms of Trading (e.g. the internet, catalogue shopping and so on).
- 7.05 **Turnover (£m)** – The turnover figure relates to the annual turnover generated by existing retail facilities within the Study Area. The turnover of existing facilities is calculated using Mintel Retail Rankings and Verdict UK Grocery Retailers reports – independent analysis which lists the sales densities for all major multiple retailers.



- 7.06 **Surplus / Deficit (£m)** – This represents the difference between the expenditure and turnover figures outlined above. A surplus figure represents an effective under provision of retail facilities within the Study Area (which, all things being equal, would suggest that additional floorspace could be supported), whereas a deficit would suggest a quantitative overprovision of retail facilities.
- 7.07 Although a surplus figure is presented in monetary terms, it is possible to convert this figure to provide an indication of the quantum of floorspace which may be required. The level of floorspace will vary dependent on the type of retailer proposed and the type of goods traded. For example, in the case of comparison goods, non-bulky goods retailers tend to achieve higher sales densities than bulky goods retailers. However, within the bulky goods sector itself there is significant variation, with electrical retailers tending to have a much higher sales density than those selling DIY or furniture goods.

Capacity for Future Convenience Goods Floorspace

- 7.08 In order to ascertain the likely need for additional convenience goods floorspace in Warrington, it is first necessary to consider the performance of the current provision. Given the geography of the Borough and its reasonable retention of convenience goods expenditure, it is assumed that the future convenience goods expenditure available to Warrington will be commensurate with its current market share.
- 7.09 Table 7.1 sets out the current convenience goods trading position compared against the 'benchmark' (or anticipated) turnover of existing convenience goods floorspace and projects this forward to 2030. The 'benchmark' turnover differs for each operator based on its average turnover per square metre throughout the country. Although robust up-to-date information is available in terms of the convenience goods floorspace provided by large foodstores, it can be more difficult to quantify the extent of local convenience provision as there is no single comprehensive database to rely upon. Where we have been unable to verify the exact quantum of floorspace provided by existing smaller-scale convenience stores, we have assumed that stores are trading 'at equilibrium' (i.e. the survey-derived turnover equates to the expected level of turnover).
- 7.10 For each convenience goods retail destination, consideration has been given as to whether any of its turnover is likely to be derived as 'inflow' from outside the Study Area. However, the Study Area is relatively extensive in its scope and we consider it unlikely that residents of areas further afield (such as Liverpool, St Helens and Wigan) will travel to Warrington in very significant numbers to undertake food shopping. Notwithstanding this, we consider that some convenience goods retailers in the town



centre and food superstores within the wider Warrington administrative area will benefit from some trade which results from visitors and commuters from outside the area. Accordingly, we have estimated that these convenience goods shopping destinations will benefit from an additional 5% of their turnover being derived from outside of the Study Area. In addition, we note that there are some facilities at the periphery of the Study Area, which could benefit from a greater level of inflow, but such facilities are generally of a small scale (local convenience grocery stores or farm shops) and have limited bearing on the results of the assessment as a whole. We set out all our assumptions in this regard within Table 5 of Appendix 5.

- 7.11 Our assessment is based upon a 'goods based' approach, which disaggregates expenditure by category type, and it is important to recognise that major foodstore operators generally sell an element of non-food goods such as books, compact discs, clothing and household goods. To account for this, the typical ratio between convenience/comparison goods provision for each operator³⁵ has been applied to the estimated net floorspace of each foodstore³⁶. This provides an indication of the likely sales area dedicated to the sale of convenience goods at each store.
- 7.12 Whilst survey results are commonly accepted as a means by which to identify existing shopping patterns, their findings should be treated with a 'note of caution' as they can have a bias towards national multiple retailers and, as a consequence, may understate the role of smaller stores and independent retailers.
- 7.13 Our assessment identifies that taking all convenience goods retail facilities in Warrington Borough together, the expected turnover of provision is £439.54m per annum at 2015, which is greater than the identified survey-derived turnover of £402.63m. This suggests that, taken cumulatively, existing convenience goods turnover is marginally 'undertrading' when compared to its expected turnover. Accordingly, it would appear that the existing food retail provision is broadly appropriate to meet the existing quantitative need.
- 7.14 However, there are instances where specific facilities trade very strongly or relatively poorly. For example, the Aldi store at Crosfield Street in Zone 6 has an estimated convenience goods benchmark turnover of £7.16m, but turns over an estimated £18.13m of convenience goods expenditure.

³⁵ Derived from Verdict UK Food & Grocery 2014 Company Briefing Reports. Where Verdict data is not available or is considered not to appropriately reflect how a store trades in practice, we have applied professional judgement in the manner set out in the notes to Table 5 of Appendices 5

³⁶ Net sales areas have been sourced from the Warrington Retail and Leisure Study 2009 or from Storepoint database of food retailers. Where such data is not available, we have applied professional judgement in the manner set out in the notes to Table 5 of Appendix 5



Another Aldi store, at Dewhurst Road in Birchwood in Zone 7, has an estimated convenience goods benchmark turnover of £6.68m, but turns over an estimated £15.33m of convenience goods expenditure. The Asda store in Westbrook district centre in Zone 8 has an estimated convenience goods benchmark turnover of £42.52m, but turns over an estimated £49.88m of convenience goods turnover.

- 7.15 By way of contrast, the convenience goods turnover of the Asda store at Cockhedge Way and the Tesco Extra store at Winwick Road (both within Zone 6) turn over £20.08m and £30.30 less than their respective benchmark turnovers of £35.11m and £52.60m.
- 7.16 Whilst we have no doubt that the Aldi stores are performing very strongly indeed and that the abovementioned Asda and Tesco stores are performing significantly below benchmark level, it should be noted that the estimation of stores' turnover is subject to a number of assumptions. For example, in apportioning main and top up convenience goods expenditure using the household survey, it is assumed that each person within a zone spends the zonal per capita average amount on such items. However, in actuality, it is likely that the typical discount foodstore customer spends a lesser amount than the typical 'main four' foodstore shopper. Accordingly, there is the possibility that the turnover of certain discount foodstores may have been overestimated and that the turnover of certain 'main four' foodstores may have been underestimated. However, across the Study Area as a whole, the methodology acts to balance out any such discrepancies.
- 7.17 The individual performance of each of the main convenience goods facilities is identified at Table 5 of Appendix 5.
- 7.18 In order to appraise the need for additional convenience goods retail floorspace, it is necessary to consider how the performance of stores will be affected by future growth in expenditure. Accordingly, Table 7.1 also sets out the anticipated increases in expenditure which will be available to the Borough's convenience goods retail facilities, assuming that the current market share of 54.2% is maintained. It is also assumed that the turnover of existing floorspace will improve through improvements in floorspace efficiency as set out in Experian Retail Planner Briefing Note 12.1. Following this exercise, we then consider the effect extant planning commitments will have in addressing any identified convenience goods shopping needs under each of the growth scenarios.
- 7.19 Table 7.1 indicates that, after taking into consideration future increases in both population and expenditure, an effective convenience goods expenditure deficit of -£36.90m is identified at 2015. By 2020, after increases in population and expenditure are considered against changes in floorspace



productivity³⁷, we estimate that there will still be an expenditure deficit of -£15.16m. By 2025, we estimate that there will be a modest expenditure surplus of £5.26m, increasing thereafter to £22.96m at 2030.

Table 7.1: Quantitative Need for Convenience Goods Floorspace in Warrington Borough

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2015	439.54	385.68	-36.90
2020	434.29	401.48	-15.16
2025	435.15	421.87	5.26
2030	437.33	440.91	22.96

Source: Table 6A of Appendix 5

¹ Benchmark turnover to increase in line with improvements in turnover efficiency set out in Table 4a of Addendum to Experian Retail Planner 12.1 (October 2014)

² Assumes constant market share of Study Area expenditure (54.2%) claimed by facilities across whole of Study Area 2013 Prices

7.20 We estimate that extant retail planning permissions³⁸ would, if implemented, provide an estimated 1,876 sq.m of convenience goods sales floorspace across the Borough. As set out at Table 7.2, we estimate that these commitments will have a combined benchmark turnover of £10.06m if they were operational at base year 2015. Notable food retail development is proposed through the extant permissions to extend the Aldi at Liverpool Road (planning permission reference 2013/22557), to provide a small foodstore at Rushgreen Road in Lymm (planning permission reference 2014/23897) and to provide a new Lidl store at Thewlis Street to the west of Warrington town centre (planning permission reference 2014/24841). Press reports³⁹ suggest that the Lymm store is to be operated by Netto and we have estimated its likely future turnover on this basis. Other convenience goods commitments are of a very small scale (providing substantially less than 200 sq.m gross floorspace) and are not considered to be of material consequence to a Borough-wide study of this nature.

³⁷ Account has been made for the turnover efficiency of existing convenience goods floorspace to change (on the basis that operators have historically been able to make their existing floorspace more productive over time) in accordance with the projections set out in Table 4a of Experian Retail Planner Briefing Note 12.1 (these being -0.3% at 2015, -0.4% at 2016, -0.2% per annum between 2017 and 2021, and +0.1% between 2022 and 2030)

³⁸ As reported by the Council in its email to WYG of January 2015

³⁹ As reported in The Guardian article headlined 'Netto announces two store openings', dated 17 March 2015



Table 7.2: Extant Convenience Commitments in Warrington Borough

Zone	Location	Planning Application Reference	Proposal	Net Conv Sales (sq.m)	Conv Sales Density (£ per sq.m)	Estimate Turnover at 2015 (£m)	Status
6.	Crosfield Street	2013/22557	Extension to existing discount foodstore	232	8,602	2.00	Extant planning permission
6.	Thewlis Street	2014/24841	New Lidl foodstore with adjacent restaurant unit	1,100	3,522	3.87	Extant planning permission
10.	Rushgreen Service Station	2014/23897	Outline planning permission for foodstore (to be occupied by Netto)	544	6,363	3.46	Extant planning permission
Total				1,876		10.06	

Source: Table 6d of Appendix 5
2013 Prices

7.21 Full details of the assumptions made in estimating the turnover of commitments are provided in the notes which accompany Table 6d of Appendix 5. The turnover which would be claimed by convenience goods commitments acts to extinguish any expenditure surplus which exists to support additional convenience goods retail floorspace across the period to 2025. Accordingly, after taking account of commitments, a residual of £12.96m is identified at 2030. The surplus equates to a convenience goods floorspace requirement of between 1,000 sq.m and 1,900 sq.m at 2030 (depending on format and operator), which is set out below at Table 7.3. Accordingly, the quantitative need for additional convenience goods floorspace is modest, even over the longer term, given the current performance of facilities and the fact that existing commitments extinguish much of the capacity identified.

Table 7.3: Quantitative Need for Convenience Goods Floorspace in Warrington Borough

Year	Convenience Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus (£m)	Commitments (£m)	Residual (£m)	Min ^{1*}	Max ^{2*}
2015	-36.90	10.06	-46.96	-3,600	-6,700
2020	-15.16	9.99	-25.15	-2,000	-3,600
2025	5.26	9.99	-4.73	-400	-700
2030	22.96	10.00	12.96	1,000	1,900

Source: Table 6c of Appendix 5

¹ Average sales density assumed to be £12,524 per sq.m at 2015 (based on the average sales density of the leading four supermarket operators as identified by Verdict 2013)

² Average sales density assumed to be £7,000 per sq.m at 2015 (based on the average sales density of discount food retailers) 2013 Prices



Capacity for Future Comparison Goods Floorspace

- 7.22 Turning to comparison goods capacity, it is first important to note that our methodology deviates from that which has been deployed in respect of convenience goods for two principal reasons. Firstly, it can be extremely difficult to attribute an appropriate benchmark turnover to existing comparison goods provision. Secondly, there tends to be greater disparity between the trading performance of apparently similar comparison goods provision depending on its location, the character of the area and the nature of the catchment. As a consequence, we adopt the approach with comparison goods floorspace that it is trading 'at equilibrium' (i.e. our survey derived turnover estimate effectively acts as benchmark) at 2015.
- 7.23 We assume that there is therefore a nil quantitative need for any additional floorspace across the Borough at 2015. Once again, it has generally been assumed that the future performance of Warrington's facilities will be commensurate with its current market share. However, we do consider that Warrington town centre, its retail parks and standalone large format retail units will attract some custom from outside the Study Area.
- 7.24 Through consideration of the in-street shopper surveys, which noted the home postcode of respondents, we have identified that:
- 17.2% of visitors to Warrington town centre reside outside the Study Area;
 - 8.0% of visitors to Stockton Heath district centre reside outside the Study Area; and
 - 13.0% of visitors to Westbrook district centre reside outside the Study Area.
- 7.25 Accordingly, we have allowed for inflow to these centres on this basis. We have typically allowed for out of centre destinations in proximity to Warrington town centre to secure 5.0% of their turnover as inflow. For Birchwood, given its proximity to the business park, we estimate that around 15.0% of its turnover could be derived through inflow.
- 7.26 However, for Gemini Retail Park, whilst we acknowledge that a very significant proportion of its trade will originate from outside the Study Area (particularly for Ikea), we make only limited allowance (equating to 5% of the turnover of retailers at Gemini) for this expenditure. This is because much of the inflow to Gemini Retail Park will come from across a large part of the North West of England and it does not necessarily accord with the 'town centre first' aspiration of planning policy to assume that future expenditure growth arising from visitors to Gemini is legitimately available to Warrington



Borough as a whole. Indeed, in order to secure such growth, it would be necessary to assume that Gemini would expand further in the future. The figure of 5% inflow has been used to account for the fact that a limited level of inflow will come from the immediate surrounding area and from visitors who are already in the Warrington area.

- 7.27 Accordingly, whilst our approach is somewhat cautious, it is considered to be wholly appropriate in the context of the Study, which principally seeks to consider the needs of those that reside within the Study Area. However, as a consequence of our approach, should planning proposals come forward in the future to provide additional floorspace at Gemini, such floorspace would not, in its entirety, act to reduce Warrington Borough's capacity to support additional comparison goods floorspace.
- 7.28 We set out all our detailed assumptions in respect of inflow within Table 5 of Appendix 5.
- 7.29 The inflow allowance has the net effect of increasing Warrington's identified comparison goods survey derived turnover from £626.01m to £713.17m at 2015 (inflow therefore representing 12.2% of total turnover).
- 7.30 The £626.01m of comparison goods expenditure claimed by facilities in Warrington from inside the Study Area at 2015 equates to a market share of 59.7% of all comparison goods expenditure generated by residents of the Study Area. Our assessment 'rolls forward' this market share to examine the likely level of comparison goods floorspace required to maintain the role and function of Warrington's comparison goods retail facilities going forward⁴⁰.
- 7.31 By 'rolling forward' this market share and making provision for inflow deriving from visitors to the Study Area, we estimate that facilities in Warrington Borough will attract £713.17m of comparison goods expenditure at 2015, increasing to £820.61m at 2020, to £983.95m at 2025 and to £1,037.02m at 2030.
- 7.32 Given the forecast increases in comparison goods expenditure and population and allowing for year on year increases in the productivity of existing floorspace, we estimate that by 2020 there will be an expenditure surplus of £30.89m to support additional comparison goods floorspace within Warrington Borough. As set out in Table 7.4, this surplus is forecast to increase sharply to £105.18m at 2025 and then to £201.62m at 2030. Account has been made for the turnover efficiency of existing comparison

⁴⁰ Accepting the qualification we have provided at paragraph 7.26 in respect of Gemini Retail Park



goods floorspace to increase (on the basis that operators are generally able to make their existing floorspace more productive over time)⁴¹.

Table 7.4: Quantitative Need for Comparison Goods Floorspace in Warrington Borough

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2015	713.17	713.17	0.00
2020	789.72	720.32	30.89
2025	878.77	983.95	105.18
2030	979.78	1,181.40	201.62

Source: Table 26A of Appendix 5

¹ Turnover of existing stores to increase in line with improvements in turnover efficiency set out in Table 4b of Experian Retail Planner 12.1 (October 12.1)

² Assumes constant market share (59.7%) claimed by facilities within the Study Area
2013 Prices

7.33 Once again, this initial analysis does not take into account existing commitments, which we set out in Table 7.5 and which we estimate will have a combined estimated turnover of £27.90m at 2013 prices, if it were to be assumed that each was operational at 2015. We have again taken account of known commitments that provide a gross floorspace greater than 200 sq.m. Such commitments comprise two extant planning permissions to provide additional comparison goods retail floorspace at Alban Retail Park (planning permissions reference 2011/18583 and 2014/23937) and an extant planning permission for a new unit at Riverside Retail Park (planning permission reference 2014/23846).

7.34 We are aware that there are further significant planning permissions provide for a mixed-use development (including cinema, retail and leisure units, hotel, residential units and primary care trust building) at the Wireworks site at Winwick Street and for the redevelopment of a site centred around the existing Warrington Market at Bridge Street for retail and leisure purposes (the Bridge Street scheme also includes a cinema). We do not account for these developments within the commitments as planning permission for the first scheme is about to lapse (with no indication whatsoever that it is to be implemented) and the second scheme provides a replacement market hall and no substantial uplift in comparison goods floorspace when compared to the current level of provision.

⁴¹ Such increases have been derived from the projections set out in Table 4b of the Addendum to Experian Retail Planner Briefing Note 12.1 (these being +2.3% at 2016, +2.0% per annum between 2017 and 2021, and +2.2% between 2022 and 2031)



Table 7.5: Extant Comparison Commitments within the Study Area

Zone	Location	Planning Application Reference	Proposal	Net Comp Sales (sq.m)	Comp Sales Density (£ per sq.m)	Estimate Turnover at 20135 (£ m)	Status
6.	Riverside Retail Park	2011/18583	Construction of new A1 retail unit	944	5,000	4.72	Extant planning permission
8.	Alban Retail Park	2014/23937	Erection of two retail units	390	5,000	1.95	Extant planning permission
8.	Alban Retail Park	2011/18583	New retail and leisure units and refurbishment of existing	4,246	5,000	21.23	Extant planning permission
Total				5,580		27.90	

Source: Table 26d of Appendix 5
2013 Prices

7.35 The estimated £27.90m turnover of comparison goods commitments is relatively substantial and extinguishes much of the need for additional comparison goods floorspace in Warrington Borough in the period to 2020. A very limited positive residual of £1.56m is identified at 2020 increasing to £73.42m at 2025 and to £167.86m at 2030. The surplus could support between 300 sq.m and 500 sq.m at 2020, increasing to between 12,000 sq.m and 20,100 sq.m at 2025, and to between 24,700 sq.m and 41,100 sq.m at 2030. The minimum figure is based on the identified need being met through the delivery of high street floorspace and the maximum figure relates to need being met by bulky goods retailers or in smaller town centres (which both generally accommodate operators which achieve lesser sales densities). The requirement in respect of additional comparison goods floorspace is set out below at Table 7.6.

Table 7.6: Quantitative Need for Comparison Goods Floorspace in Warrington Borough

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2015	0.00	27.90	-27.90	-5,600	-9,300
2020	30.89	29.11	1.78	300	500
2025	105.18	30.98	74.20	12,000	20,100
2030	201.62	32.27	169.36	24,700	41,100

Source: Table 26c of Appendix 5

¹ Average sales density assumed to be £5,000 per sq.m at 2015

² Average sales density assumed to be £3,000 per sq.m at 2015
2013 Prices



- 7.36 In considering the level floorspace which could be supported by the identified expenditure surplus, we again note that Warrington town centre currently accommodates a high level of vacant floorspace. In this regard, we consider that it would be prudent to plan for the reuse, refurbishment or redevelopment of these existing premises wherever possible rather than grant planning permission for additional comparison goods floorspace outside of a centre.
- 7.37 Our survey of November 2014 identified a total of 23,020 sq.m of vacant floorspace in Warrington town centre, equating to 17.1% of the total stock of commercial premises in the centre. We note that the national average vacancy rate equates to 9.3% of all vacant commercial floorspace. If the national average figure were to be applied to Warrington centre (we are unaware of any reasons why such a vacancy level could not be achieved), this would require 10,528 sq.m of floorspace to be brought back into active use. This would reduce the identified minimum floorspace requirement identified above to circa 14,000 sq.m.
- 7.38 Accordingly, in considering future floorspace requirements, the Council should give appropriate consideration to the ability of existing vacant floorspace to meet the need identified in Table 7.6 (accepting that there may be a need for this floorspace to be refurbished, reconfigured or redeveloped in order for it to be attractive to future tenants).

Changes in Market Share of Expenditure and the Scope for Warrington Borough to Increase its Market Share

- 7.39 We provided our analysis in respect of the market share of *trips* secured by retail venues within or proximate to the Study Area at Section 4 of our report. However, in this regard, we note that the previous 2009 Warrington Retail and Leisure Study provided some analysis of the market share of *expenditure* attracted to particular destinations. Accordingly, we have used the quantitative capacity tables provided at Appendix 5 to ascertain the market share of expenditure claimed by the principal retail destinations and provide our assessment below in respect of how the position has changed since 2009.
- 7.40 In this regard, it should be noted that the two household surveys (undertaken in 2009 and 2014 respectively) are not identically worded and that we increased the size of Zone 4 in order that it includes Helsby and the area which immediately surrounds it. Accordingly, given that the survey incorporates a slightly extended area, it might be expected that its market share may reduce slightly as a result. The below analysis should be viewed in this context.



- 7.41 Table 7.7 sets out the market share of convenience goods expenditure claimed by retail venues in Warrington at 2009 and 2014. The principal trend evident from the comparison of market share over this five year period is that discount foodstores have performed very strongly over this period, gaining significant market share at the expense of large superstores. By way of example, the market share of expenditure claimed by the Aldi at Crosfield Street has increased from 0.4% of Study Area total convenience goods expenditure at 2009 to 2.5% of total expenditure at 2014. Similarly, the market share of expenditure claimed by the Aldi at Dewhurst Road has increased from 0.4% of Study Area total convenience goods expenditure at 2009 to 2.2% of total expenditure at 2014. Whilst the increases in market share are very substantial indeed, they are a consequence of the wider trend of more shoppers being attracted to discount foodstore and then buying a larger 'basket' of goods from such stores. Accordingly, households are increasingly turning to discount foodstores as the principal destination for their main food shop and the improvements in Aldi's market share in Warrington are a consequence of this.
- 7.42 In contrast, the market share of expenditure claimed by the Asda at Cockhedge Way has decreased from 6.2% of Study Area total convenience goods expenditure at 2009 to 2.0% of total expenditure at 2014. The Tesco Extra at Winwick Road has been the subject of a similarly marked reduction in market share and other large foodstores have similarly lost market share (though not to the same degree).
- 7.43 However, viewing the convenience goods provision in Warrington as a whole (and noting once again that the Study Area boundary has been slightly enlarged), it is evident that Warrington Borough market share of Study Area convenience goods of 58.6% at 2009 has reduced to 54.2% at 2014. In our view, this reduction can be attributed to the slightly larger Study Area and also to the implementation of major convenience goods retail facilities outside Warrington Borough but inside the Study Area boundary (including the Tesco Extra at Widnes).
- 7.44 In considering this market share, we again note that the population of Warrington equates to 58.3% of the overall 2015 Study Area population. Whilst the secured market share of convenience goods expenditure is below this level, the retention rate is not considered to be problematic as any 'leaked' expenditure generally travels to locations that are proximate to where the expenditure is drawn from (i.e. such shopping trips are broadly sustainable). Accordingly, we do not consider there to be a need for policy intervention specifically to 'claw back' convenience goods expenditure which is currently directed to destinations outside Warrington or the Study Area as a whole.



Table 7.7: Market Share of Convenience Goods Expenditure Claimed by Retail Facilities in Warrington Borough at 2009 and 2014

Zone	Address	Study Area 2009	Study Area 2014
6.	Aldi, Crosfield Street	0.4%	2.5%
	Asda, Cockhedge Way	6.2%	2.0%
	Sainsbury's Church Street	6.5%	6.0%
	Tesco Extra, Winwick Road	6.1%	3.0%
	Warrington town centre	2.2%	0.8%
7.	Aldi, Dewhurst Rd, Birchwood	0.4%	2.2%
	Asda, Dewhurst Rd, Birchwood	6.7%	5.8%
8.	Asda, Westbrook Centre	11.1%	6.7%
9.	Morrisons, Greenalls Avenue	8.5%	7.5%
	Warrington Authority Total	58.6%	54.2%
	Study Area Total	95.9%	93.3%
	Leakage Outside Study Area	4.1%	6.7%

Source: MT Planning Warrington Retail Study 2009 and WYG Table 3, Appendix 5

7.45 Turning to comparison goods, Table 7.8 below identifies that there has been a significant reduction in Warrington town centre’s market share of comparison goods Study Area expenditure between 2009 and 2014. We attribute a limited part of this reduction to the extension of the Study Area, but also note that Gemini Retail Park has significantly improved its offer over this period (most notably through the opening of the Next Home and Garden store) and that this will have had some detrimental impact on Warrington town centre. It should also be noted that, at the time of the household survey, the Council was working towards the implementation of the Bridge Street retail and leisure proposal and, as a consequence, the Bridge Street area was the subject of a number of vacancies and was perhaps not contributing to the overall vitality and viability of Warrington town centre as successfully as it could. Accordingly, we anticipate that the successful implementation of the Bridge Street scheme could be of benefit to Warrington town centre’s overall market share in the future.

7.46 In this context, we note that the principal beneficiary of the reduction in market share of comparison goods expenditure has been Gemini Retail Park, which increased its market share from 4.9% to 9.6%. This improvement in performance accounts for the majority of the 7.7 percentage point reduction in Warrington town centre’s market share of Study Area comparison goods expenditure (from 38.8% at 2009 to 31.1% at 2014). We also note that the market share of expenditure claimed collectively by comparison goods facilities in Warrington Borough has actually increased from 59.0% at 2009 to 59.7% at 2014. Accordingly, we do not consider it necessary for Warrington to plan for a further significant town centre development (beyond that proposed at Bridge Street) as other retail facilities –



albeit some in out of centre locations – within the Borough are helping to meet the needs of its residents.

Table 7.8: Market Share of Comparison Goods Expenditure Claimed by Retail Facilities in Warrington Borough at 2009 and 2014

Zone	Address	Study Area 2009	Study Area 2014
6.	Warrington town centre	38.8%	31.1%
7.	Birchwood district centre	1.9%	1.9%
8.	Alban Retail Park	2.7%	2.3%
	B&Q Warehouse, Newton Rd	1.6%	1.7%
	Gemini Retail Park	4.9%	9.6%
	Westbrook district centre	2.0%	1.5%
9.	Stockton Heath district centre	0.8%	1.4%
	Warrington Authority Total	59.0%	59.7%
	Study Area Total	81.0%	76.5%
	Leakage Outside Study Area	19.0%	23.5%

Source: WYG Table 11, Appendix 5

Qualitative Need

- 7.47 As we set out at paragraph 7.13 of this section, convenience goods retail facilities in Warrington Borough turn over £402.63m at 2015, which is less than their expected benchmark turnover of £432.79m. However, in examining the performance of specific stores, it is evident that smaller, discount supermarkets (operated by the likes of Aldi and Lidl) are generally performing better in Warrington than food superstores⁴² operated by the 'main four' (relative to their expected 'benchmark' performance).
- 7.48 In this regard, Table 7.13 below provides an overview of the current performance of existing foodstores (which provide an estimated net sales area of 632 sq.m or more⁴³) with reference to their expected trading performance. The six food superstores in Warrington Borough collectively turn over £232.15m, which is less than their anticipated benchmark turnover of £251.95m.
- 7.49 The food superstore with the strongest performance is the Morrisons at Greenalls Avenue, which has an estimated convenience goods benchmark turnover of £39.61m and an estimated survey derived

⁴² Defined as having a net sales area of more than 2,500 sq.m

⁴³ Which equates to the net sales area of the smallest discount supermarket operated by either Aldi or Lidl, this being the Aldi at Dewhurst Road in Zone 7



turnover of £56.44m (it is therefore effectively overtrading by £16.83m). By way of contrast, the Tesco Extra at Winwick Road has a convenience goods benchmark turnover of £52.60m and an estimated survey derived turnover of just £22.30m (it is undertrading by £30.30), and the Asda at Cockhedge Way has a convenience goods benchmark turnover of £35.11m and an estimated survey derived turnover of just £15.03m (it is undertrading by £20.08m).

7.50 Whilst the trading performance of the Tesco Extra and Asda stores are unusually poor, the difference between the benchmark turnovers and the identified trading performance of other superstores operated by the 'main four' are not considered to be particularly unusual. Benchmark performances are clearly representative of a company's average performance and numerous stores will undertrade or overtrade in relation to benchmark without significant issues arising.

7.51 Notwithstanding this, when taken as a whole, the performance of the big food superstores in Warrington is such that there does not appear to be any pressing requirement for another store of this format in the Warrington administrative area. This is consistent with the current strategy of the 'main four' operators who are currently very circumspect in terms of their appetite to bring forward additional large superstores.

7.52 We do, however, note that discount foodstores in the Borough are performing strongly. This is particularly the case with the four Aldi stores in the Borough, which cumulatively overtrade by £26.37m. The Borough's two Lidl stores cumulatively overtrade by £5.82m. As set out at Section 2 of this report, both discount operators have substantially improved their share of the national grocery market in recent years. Notwithstanding this, the very strong performance of the discount sector in Warrington suggests that it may currently be underprovided for and that the Council could expect further planning applications for such uses in the short to medium term (potentially including proposals to extend existing stores). These should be considered having regard to the qualitative benefits which may result from the delivery of additional convenience goods retail facilities but also with regard to the impacts which may arise at any existing centre.

7.53 In terms of the spatial distribution of convenience goods facilities, there are, in our view, two areas of relative deficiency in the Borough, these being the area around Lymm and Warrington town centre itself. In respect of the former, we note the extant planning permission to provide a foodstore at Rushgreen Road in Lymm (planning permission reference 2014/23897). We understand that this store will be operated by Netto and its implementation will allow a far greater proportion of convenience goods expenditure that originates in the Lymm area to be spent locally. Accordingly, we



do not envisage that, subsequent to the implementation of this planning permission, that there will be such a pressing requirement to provide additional convenience goods facilities in Lymm.

Table 7.9: Performance of Convenience Goods Floorspace of Principal Foodstores in Warrington at 2015

Zone	Store	Gross Floor-space (sq.m)	Estimated Net Con. Floor-space (sq.m)	Sales Density (£ per sq.m)	Benchmark Turnover (£m)	Survey Derived Turnover (£m)	Over-trading (£m)
2.	Sainsbury's, Santa Rosa Boulevard	3,436	1,288	12,684	16.34	13.59	-2.74
6.	Aldi, Crosfield Street	1,143	609	11,748	7.16	18.13	10.97
	Asda, Cockhedge Way	6,540	2,526	13,901	35.11	15.03	-20.08
	Lidl, Fennel Street, Warrington	1,319	882	3,522	3.11	7.11	4.00
	Lidl, Thelwall Lane, Latchford	1,234	825	3,522	2.91	4.73	1.82
	M&S Food Hall, Sankey Street	2,245	1,285	11,578	14.88	2.69	-12.19
	Sainsbury's Church Street	8,147	2,714	12,684	34.42	45.18	10.76
	Tesco Extra, Winwick Road	12,698	4,348	12,099	52.60	22.30	-30.30
7.	Aldi, Dewhurst Rd, Birchwood	1,141	569	11,748	6.68	15.33	8.64
	Asda, Dewhurst Rd, Birchwood	10,055	3,431	13,901	47.69	43.33	-4.36
	Sainsbury, Culcheth	1,754	692	12,684	8.78	9.30	0.52
8.	Asda, Westbrook Centre	9,459	3,059	13,901	42.52	49.88	7.36
	Aldi, Chiltern Road	1,418	698	11,748	8.20	8.96	0.75
	Co-op, Fearnhead Cross	1,095	581	8,146	4.74	1.02	-3.72
9.	Aldi, Walton Rd, Stockton Heath	1,115	594	11,748	6.98	12.99	6.01
	Co-op, Forge Shopping Centre	1,581	793	8,146	6.46	0.48	-5.97
	Morrisons, Greenalls Avenue	7,506	2,958	13,388	39.61	56.44	16.83

Source: Table 5 of Appendix 5 (Extract providing details of foodstores with a net sales area of 690 sq.m or above, which correlates to the estimated net sales area of the smallest discount supermarket in both authority areas, this being the Aldi at Meridian Way in Blaby)
2013 Prices

7.54 With regard to Warrington town centre, its market share of Study Area convenience goods expenditure (as identified by the household survey) is considered to be low at just 0.8% of overall expenditure. The edge of centre Asda at Cockhedge Way secures a further 2.0% of Study Area convenience goods expenditure. Whilst the principal role of Warrington is to provide for comparison goods and service needs, its convenience goods shopping role is currently modest. Indeed, comparison between the current and 2009 household surveys suggests that its convenience goods shopping role has diminished in the intervening period. Accordingly, we consider that there would be a qualitative benefit in providing additional convenience goods provision in Warrington town centre in order to serve the requirements of those that work and shop in the centre. We envisage that any such provision would likely take the form of the smaller formats operated by food retailers.



- 7.55 We plot the distribution of the supermarket and food superstores set out at Table 7.9 at Appendix 6.
- 7.56 Turning to comparison goods, the importance and relative dominance of Warrington town centre as a comparison goods shopping venue means that other centres in Warrington’s hierarchy have a significantly more localised role and function. Given the location and relative accessibility of Warrington (and of additional comparison goods venues such as Liverpool city centre and the Trafford Centre), this is not in itself problematic. Moreover, as we identified as Section 4 of this report, the market share of shopping trips claimed by facilities in the Warrington administrative area is considered broadly appropriate and indicates that most of the comparison goods shopping needs of Warrington’s residents are met within the authority area.
- 7.57 Accordingly, we do not consider there to be significant qualitative deficiencies in respect of comparison goods shopping in Warrington Borough which need to be addressed. However, we again note that Warrington town centre’s market share of Study Area comparison goods expenditure has decreased by a relatively substantial amount between 2009 and 2014. Whilst the emerging development at Bridge Street should act to considerably improve Warrington’s offer (and therefore improve its market share), careful consideration should be given to the location of any additional comparison goods floorspace and how this may impact on the performance of the town centre. In accordance, with ‘town centre first’ principles, we anticipate that Warrington town centre will be the preferred venue for any further substantial comparison goods floorspace in order to enhance its vitality and viability and ensure that it remains the dominant location for comparison goods retail in the Study Area.



8.0 Commercial Leisure

- 8.01 Our approach to the assessment of quantitative need in the leisure market necessarily departs from our retail methodology for a number of reasons, including the fragmentation of the market and the limited availability of accurate data. However, the household survey undertaken to inform the Study asked respondents questions about their use of commercial leisure facilities and, through reference to market share, we are therefore able to form a view as to how Warrington currently meets the need of its population in relation to the bingo, cinema and ten-pin bowling sectors. We also use national statistics in respect of the typical level of provision of specific types of facilities to assist our judgement in respect of the likely future need for additional facilities in the administrative area. By reference to estimated increases in the Study Area population, this 'benchmarking' exercise informs our judgement in respect of the likely future need for additional commercial leisure facilities in the Study Area.
- 8.02 In considering future leisure provision, it should be noted that certain types of facility are often provided in locations proximate to large centres. Accordingly, we anticipate that some of Warrington's commercial leisure needs could possibly be met within or in the vicinity of centres in the adjoining authority areas which are located in close proximity to parts of Warrington Borough. The analysis that follows seeks to apportion future growth in commercial leisure provision on the basis of Warrington's current market share, but this should be viewed with some flexibility in respect of how opportunities that come forward 'on the ground' can appropriately contribute to meeting identified needs.
- 8.03 For each leisure sector, we consider the current broad patterns of existing use, before then assessing the quantitative need for additional facilities.

Bingo

- 8.04 The Warrington administrative area currently accommodates one permanent bingo hall, namely the Gala Bingo hall at The Cockhedge Centre (in Zone 6). The bingo hall is a large, purpose built facility. The Gala Bingo hall attracts 57.7% of bingo trips which originate within the Study Area. As Table 8.1 indicates, other facilities within the Warrington administrative area operate on a more occasional basis in social clubs and schools. Outside the Warrington administrative area, relatively popular bingo facilities comprise Club 2000 Bingo at Trident Retail Park in Runcorn and Gala Bingo on Lugsdale Road in Widnes, which respectively account for 16.2% and 13.6% of all trips to play bingo that originate from within the Study Area.



Table 8.1: Study Area Market Share for Bingo Hall Visits (%)

Zone	Address	1	2	3	4	5	6	7	8	9	10	Total
	Warrington											
6.	Gala, Cockhedge Centre	0.0%	56.7%	0.0%	0.0%	0.0%	83.4%	71.1%	42.9%	100.0%	100.0%	57.7%
	Nora Street Community House, Nora Street	0.0%	0.0%	0.0%	0.0%	0.0%	16.6%	0.0%	0.0%	0.0%	0.0%	2.0%
	St Benedicts Social Centre, Rhodes Street	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	18.6%	0.0%	0.0%	2.7%
	Warrington town centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	14.2%	0.0%	0.0%	2.1%
7.	Gorse Covert Primary School, Gorse Covert Road	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	28.9%	0.0%	0.0%	0.0%	1.5%
8.	Tetley Walker Recreation Club, Long Lane	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	24.3%	0.0%	0.0%	3.5%
	Halton											
1.	Gala, Windmill Centre, Lugsdale Road	62.2%	43.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.6%
3.	Club 2000 Bingo, Trident Retail Park	37.8%	43.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.6%

Source: Question 52 of Household Survey, Appendix 2. Includes all responses located within Study Area and those receiving more than 1.0% of total market share of trips outside Study Area

8.05 The Study Area has a total estimated population of 357,007 at 2015, increasing to 381,204 at 2030. Reports⁴⁴ indicate that there were around 400 bingo halls in the UK at 2012, which given the estimated 63.7 million population of the UK at the same year⁴⁵, suggests that each is supported by a catchment of 159,250 persons or thereabouts. Accordingly, we estimate that the Study Area could be expected to support 2.2 bingo halls at 2015, increasing to 2.4 bingo halls at 2030. We note that the population of Warrington Borough equates to 58.3% of the overall Study Area population. Therefore based on 58.3% of the Study Area’s needs being accommodated in Warrington Borough, we would expect around 1.3 of these bingo halls to be located in the Warrington administrative area at 2015, increasing to 1.4 halls at 2030.

8.06 In terms of the existing provision in Warrington, it should be noted that the Gala bingo hall located at the Cockhedge Centre is a large, purpose built facility and that, throughout the country, bingo halls often operate below capacity. Accordingly, it is likely that this bingo hall will be able to accommodate most people’s needs in the Borough.

8.07 Furthermore, it should be noted that the bingo market has been significantly affected by the 2007 ban on smoking in enclosed public places, and increase in the proliferation of fixed odd gaming machines

⁴⁴ Including the HM Treasury announcement titled ‘Budget bingo tax to create and save hundreds of jobs and revitalise industry’ of March 2014

⁴⁵ As identified by the Office for National Statistics’ Population Estimates for UK, England and Wales, Scotland and Northern Ireland, Mid-2011 and Mid-2012, August 2013



and an increase in online gambling. As a consequence of this, new bingo hall openings are few and far between and we therefore do not consider it likely that there will be any change to current provision in the Study Area in the foreseeable future. Accordingly, we do not consider it necessary for the local authority to plan for additional provision in the period to 2030, but instead recommend that, should any proposals for such development be forthcoming, they are judged on their own merit in accordance with relevant town centre planning policy at the time of an application’s submission.

Table 8.2: Bingo Hall Requirement in Study Area

Year	Study Area Population	Typical Population Required to Support Hall	Potential Number of Clubs Supported by Study Area	Proportion of Study Area population in Warrington Borough	Potential Number of Clubs Supported in Warrington
2015	357,007	159,250	2.2	58.3%	1.3
2020	366,416	159,250	2.3	58.3%	1.3
2025	374,754	159,250	2.4	58.3%	1.4
2030	381,204	159,250	2.4	58.3%	1.4

Note: Typical population to support a bingo hall derived from the Government’s estimation (set out the HM Treasury announcement titled ‘Budget bingo tax to create and save hundreds of jobs and revitalise industry’ of March 2014) and the Office of National Statistics UK population projection of 64.9 million persons at 2015

Cinema

- 8.08 There is a single cinema present within the Warrington administrative area, namely the Odeon cinema at Westbrook district centre. Other cinemas located within the Study Area, but outside Warrington’s administrative area, include the Cineworld at Trident Park in Runcorn and the Reel Cinema at Venture Fields Leisure Park in Widnes. It is also noted that an extant planning consent is in place for the development of a 10-screen cinema as part of the Bridge Street development in Warrington, which is expected to be completed in 2019.
- 8.09 The single cinema located within the Warrington administrative area accommodates a total of 10 screens.
- 8.10 As set out below at Table 8.3, the results of the household survey show that 35.6% of trips to the cinema which originate within the Study Area are secured by the Odeon Cinema in Westbrook district centre, the sole cinema in the authority area. The second most popular facility visited in the Study Area is the Cineworld at Trident Park in Runcorn (in the Halton authority area), which secures 27.9% of trips to the cinema which originate within the Study Area.



Table 8.3: Study Area Market Share for Cinema Visits (%)

Zone	Address	1	2	3	4	5	6	7	8	9	10	Total
	Warrington											
8.	Odeon Cinema, Westbrook Centre	1.3%	84.2%	1.6%	2.6%	27.9%	82.7%	25.1%	97.9%	47.5%	25.9%	35.6%
	Halton											
1.	Reel Cinema, Venture Fields Leisure Park	68.4%	15.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	15.9%
3.	Cineworld, Trident Park, Runcorn	16.1%	0.0%	93.4%	53.2%	35.2%	4.0%	0.0%	2.1%	15.7%	0.0%	27.9%
	Other Authority Areas – Outside Study Area											
OSA	Vue Cinema, Cheshire Oaks Outlet Village	0.0%	0.0%	2.9%	35.7%	20.0%	0.0%	0.0%	0.0%	1.6%	0.0%	3.0%
	Woolton Picture House, Mason Street, Liverpool	3.3%	0.0%	0.0%	1.5%	0.0%	4.0%	0.0%	0.0%	0.0%	0.0%	1.4%
	Cineworld Cinemas, St Helens	5.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%
	Apollo Cinemas, Altrincham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	19.0%	1.1%
	Odeon Cinema, Trafford Centre	0.0%	0.0%	0.0%	3.6%	11.5%	7.2%	29.0%	0.0%	30.3%	36.5%	7.9%
	Cineworld Cinemas, Leigh	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	37.2%	0.0%	0.0%	0.0%

Source: Question 48 of Household Survey, Appendix 2. Includes all responses located within Study Area and those receiving more than 1.0% of total market share of trips outside Study Area

- 8.11 Once again, we estimate that the Study Area has a total estimated population of 357,007 at 2015, increasing to 381,204 at 2030. The Mintel Cinema Market report of May 2011 estimates that the UK population on average visits a cinema 2.7 times per annum and that each cinema screen attracts around 45,228 separate admissions.
- 8.12 Applying these benchmark averages to the Study Area, we estimate that there will be 963,919 cinema admissions arising from the Study Area population at 2015, increasing to 1,029,251 admissions at 2030. Based on the assumed number of visits per screen, we calculate that around 21.3 screens are supported at 2015, increasing to 22.8 screens at 2030. Our calculations are set out below at Table 8.4.
- 8.13 Based on the population of Warrington Borough as a proportion of the Study Area population (58.3%), we would expect around 12.4 cinema screens to be located in the Warrington administrative area at 2015, increasing to around 13.3 screens at 2030.



8.14 As only 10-screens are present at the existing Odeon cinema in Westbrook district centre, a need has been identified for additional screens in the Borough up to 2030. We are aware that a 10-screen cinema is planned to be delivered as part of the Bridge Street development which will respond to this need. It is considered that the additional cinema provision planned as part of the Bridge Street redevelopment is likely to assist in increasing Warrington’s market share with regards to cinema trips through the provision of an additional facility in a central location. We do not consider it necessary for the local authority to plan for additional provision (aside from the Bridge Street scheme) in the period to 2030, but instead recommend that, should any further proposals for such development be forthcoming, they are judged on their own merit in accordance with relevant town centre planning policy at the time of an application’s submission.

Table 8.4: Cinema Screen Requirement in Study Area

Year	Study Area Population	Number of Cinema Visits Per Person	Attendance	Number of Admissions Required to Support Screen	Potential Number of Screens Supported by Study Area	Proportion of Study Area population in Warrington Borough	Potential Number of Screens Supported by Warrington
2015	357,007	2.7	963,919	45,228	21.3	58.3%	12.4
2020	366,416	2.7	989,323	45,228	21.9	58.3%	12.8
2025	374,754	2.7	1,011,836	45,228	22.4	58.3%	13.1
2030	381,204	2.7	1,029,251	45,228	22.8	58.3%	13.3

Note: Number of cinema trips per person and number of admission per screen derived from Mintel Cinema Market report of May 2011

Ten Pin Bowling

- 8.15 There is a single ten pin bowling alley within Warrington Borough, this being the LA Bowl at Chetham Court in Zone 8, which attracts 47.6% of all bowling trips that originate within the Study Area. Furthermore, the household survey indicates that the LA Bowl attracts all trips to undertake ten pin bowling in three zones (these being Zones 6, 8 and 9). Outside the Warrington administrative area, but within the Study Area, a further bowling alley is located at The Hive in Widnes which attracts 41.8% of all bowling trips that originate within the Study Area.
- 8.16 Other ten pin bowling alleys in the wider area include Tenpin at Coliseum Leisure Park in Ellesmere Port and Namco Funscape at The Trafford Centre, which attract 6.5% and 3.7% respectively of ten pin bowling trips which originate from the Study Area.



Table 8.5: Study Area Market Share for Ten Pin Bowling Visits (%)

Zone	Address	1	2	3	4	5	6	7	8	9	10	Total
	Warrington											
8.	LA Bowl, Chetham Court, Warrington	11.4%	83.3%	13.0%	0.0%	58.6%	100.0%	82.9%	100.0%	100.0%	44.8%	47.6%
	Halton											
1.	Widnes Superbowl, The Hive, Widnes	88.6%	16.7%	66.4%	0.0%	5.8%	0.0%	0.0%	0.0%	0.0%	0.0%	41.8%
	Other Authority Areas – Outside Study Area											
OSA	Tenpin, Coliseum Leisure Park, Ellesmere Port	0.0%	0.0%	13.0%	88.4%	35.7%	0.0%	0.0%	0.0%	0.0%	0.0%	6.5%
	Namco Funscape, The Trafford Centre	0.0%	0.0%	7.6%	0.0%	0.0%	0.0%	17.1%	0.0%	0.0%	48.0%	3.7%

Source: Question 51 of Household Survey, Appendix 2. Includes all responses located within Study Area and those receiving more than 1.0% of total market share of trips outside Study Area

8.17 In terms of the expected benchmark level of provision, we note that the Mintel Tenpin Bowling report of July 2010 identified that there were 5,822 bowling lanes across the UK in 2010. Given that the UK population at 2010 was approximately 62.7 million⁴⁶, this equates to one lane for every 10,769 persons.

8.18 We again estimate that the Study Area has a population of 357,007 at 2015, increasing to 381,204 at 2030. Based on the assumed benchmark identified above, we calculate that around 33.2 ten pin bowling lanes are supported by the Study Area population at 2015, increasing to 35.4 lanes at 2030. The below table also apportions these according to proportion of the Study Area population residing in Warrington Borough, i.e. 58.3%, which shows that Warrington Borough could support 19.4 ten pin lanes at 2014, increasing to 20.6 lanes at 2030.

8.19 We note that the LA Bowl at Chetham Court has 28 lanes and, as a consequence, it appears that there is an adequate supply of ten pin bowling lanes in Warrington to support the need. Accordingly, we do not consider it necessary for the local authority to plan for additional provision in the period to 2030, particularly as there has been a general downturn in the ten pin bowling sector over the past decade.

8.20 Notwithstanding this, in larger towns and cities a different type of ten pin bowling experience has begun to emerge. Such 'boutique' ten pin bowling alleys are typically of a smaller scale and incorporate bars and restaurants in order to integrate into a centre's evening economy and attract a relatively affluent clientele. Accordingly, if any proposals to provide a further ten pin bowling facility

⁴⁶ As identified by the Office for National Statistics' Revised Annual Mid-Year Population Estimates 2001 to 2010, December 2013



do come forward, it may well be that they conform to this operating model. We envisage that Warrington town centre would be the most likely location to accommodate any such facility. We would recommend that should any proposals for ten pin bowling development be forthcoming, that they are judged on their own merit in accordance with relevant town centre planning policy at the time of the application's submission.

Table 8.6: Ten Pin Bowling Requirement in Study Area

Year	Study Area Population	Typical Population Required to Support One Ten Pin Lane	Potential Number of Ten Pin Lanes Supported by Study Area	Proportion of Study Area population in Warrington Borough	Potential Number of Ten Pin Lanes Supported in Warrington
2015	357,007	10,769	33.2	58.3%	19.4
2020	366,416	10,769	34.0	58.3%	19.8
2025	374,754	10,769	34.8	58.3%	20.3
2030	381,204	10,769	35.4	58.3%	20.6

Note: Typical number of persons required to support a bowling lane derived from Mintel Tenpin Bowling report of July 2010



9.0 Future Retail Strategy and Recommendations

Key Findings: Retail Need

- 9.01 The floorspace requirements identified in this Study – which are summarised below – are of some relevance to the determination of future planning applications for new retail floorspace in the Borough. However, whilst the identified level of quantitative need has some relationship to the test of impact, it is necessary to be mindful that ‘need’ is no longer a direct planning test. Accordingly, the identified floorspace requirements should not be considered a ‘cap’ on appropriately located development. Instead, proposals that come forward should be assessed against the relevant policies of the NPPF and the development plan.
- 9.02 As identified at Section 7, we identify a requirement for between 1,000 sq.m and 1,900 sq.m of additional new convenience goods sales floorspace at 2030 (depending on format and operator), after account has been taken of existing commitments. Accordingly, the quantitative need for additional convenience goods floorspace equates to that which might be delivered through a single additional supermarket over the 15 year reporting period.

Table 7.3: Quantitative Need for Convenience Goods Floorspace in Warrington Borough

	2015 (sq.m)	2020 (sq.m)	2025 (sq.m)	2030 (sq.m)
Minimum Convenience Goods Requirement	-3,600	-2,000	-400	1,000
Maximum Convenience Goods Requirement	-6,700	-3,600	-700	1,900

- 9.03 We consider that a key qualitative deficiency in food retailing in the Borough – this being the lack of any substantial food shopping facilities in Lymm and the surrounding area – will be at least partly addressed through the implementation of extant planning permission reference 2014/23897, which provides for a small supermarket at Rushgreen Road (to be operated by Netto). However, the household survey also identifies that Warrington town centre secures a relatively low market share of convenience goods expenditure and, therefore, it would be beneficial if at least some of the identified floorspace requirement was delivered within or in close proximity to Warrington’s Primary Shopping Area.
- 9.04 It is recognised that the planned housing growth in the Borough will result in opportunities to provide additional local retail and service provision to cater for the day to day needs of communities. Indeed, we understand that plans are being developed for the delivery of major residential developments at Omega and Warrington Waterfront. It is envisaged that any retail provision to provide for localised



needs would likely be small in scale in order to support and complement the existing centre hierarchy. Such small scale retail provision can provide benefits in serving the needs of a localised catchment and contribute to sustainable shopping patterns by providing a local destination for day to day purchases. The appropriate scale and location for any additional retail facilities to serve local needs arising from planned housing growth will need to be determined with reference to the exact location of future development, the dwelling densities which will be realised, and the scale and location of existing retail and service provision.

9.05 In terms of comparison goods, we identify a requirement for between 24,700 sq.m to 41,100 sq.m of additional new comparison goods sales floorspace at 2030 (again, depending on format and operator), after account has been taken of existing commitments. In considering the level floorspace which could be supported by the identified expenditure surplus, it is relevant to note that Warrington town centre currently accommodates a high level of vacant floorspace. In this regard, we consider that the Council should seek to plan for the reuse, refurbishment or redevelopment of these existing premises wherever possible.

Table 7.3: Quantitative Need for Comparison Goods Floorspace in Warrington Borough

	2015 (sq.m)	2020 (sq.m)	2025 (sq.m)	2030 (sq.m)
Minimum Comparison Goods Requirement	-5,600	300	12,000	24,700
Maximum Comparison Goods Requirement	-9,300	500	20,100	41,100

9.06 Our survey of November 2014 identified a total of 23,020 sq.m of vacant floorspace in Warrington town centre, equating to 17.1% of the total stock of commercial premises in the centre. We note that the national average vacancy rate equates to 9.3% of all vacant commercial floorspace. If the national average figure were to be applied to Warrington centre (we are unaware of any reasons why such a vacancy level could not be achieved), this would require 10,528 sq.m of floorspace to be brought back into active use. This in turn would reduce the identified minimum floorspace requirement identified above to circa 14,000 sq.m.

Key Findings: Leisure Need

9.07 In terms of the leisure sector, we identify a requirement for 13 cinema screens in Warrington Borough at 2030. Given there are currently 10 screens present at the Odeon cinema in Westbrook, we identify a need for an additional three screens in the Borough. We consider that this need will be met by the extant permission for a 10-screen cinema in Warrington town centre as part of the Bridge Street redevelopment proposals. As the principal town in the Borough, we consider that Warrington town



centre is the most suitable location for this provision, and that the delivery of a cinema in the town centre will likely assist in improving the overall offer of the town centre. Indeed, our health check assessment, found Warrington town centre to be under-represented in terms of leisure provision when compared to the national average figure and the in-street survey identified that a high proportion of respondents never visit Warrington town centre in the evening (60.5%). Therefore, the provision of a cinema in the town centre represents an opportunity to boost the town centre's leisure provision and the evening economy.

- 9.08 In terms of bingo and ten pin bowling, we have identified that the existing facilities in Warrington Borough, i.e. the LA Bowl at Chetham Court and the Gala Bingo at the Cockhedge Centre, are sufficient to meet the needs of the Borough's population. Accordingly, we do not consider it is necessary for the Council to plan for the delivery of additional provision.
- 9.09 Notwithstanding this, as we have set out in relation to retail floorspace, 'need' is no longer a direct planning test in relation to proposals for additional leisure floorspace. Therefore, even where no need for additional leisure floorspace has been identified, this should not preclude additional floorspace coming forward and any such proposals should be assessed against the relevant policies of the NPPF and the development plan.

Key Findings: Warrington Town Centre

- 9.10 Our assessment has found the health of Warrington town centre to be mixed. The centre has several strengths, including a diverse range of national and independent retail stores, and a market, which acts to provide a competitive shopping destination. Golden Square Shopping Centre is a considerable strength of the centre due to its high quality and well maintained shopping environment. Notwithstanding this, while the focus of comparison goods retailing in the town centre is Golden Square, which appears to be performing well, more peripheral areas of the town are under-performing due to the focus of activity being elsewhere.
- 9.11 Indeed, Warrington town centre is suffering from a high vacancy rate (17.1%) when compared to the national average (9.3%), with the majority of these vacant units located in the southern part of the town centre, particularly along Bridge Street, Rylands Street, Cairo Street and Sankey Street. We note that some of the vacancies in the town centre are managed vacancies, as a result of the forthcoming Bridge Street development. However, even if these vacancies are discounted, the vacancy rate apparent in the remainder of the town centre is still 15.1%. The presence of vacant units, mainly in the southern part of the town centre, coupled with the presence of several poorly maintained units



and lower levels of footfall in these areas, means that a clear distinction in the performance of the southern part of the town centre, when compared to the north west, (i.e. Golden Square) is evident. It is clear from the results of the in-street survey, that empty shops are seen as a considerable weakness to the town centre.

- 9.12 Due to the geographical position of Warrington town centre, the centre faces strong competition from higher order centres in the north west region, including Manchester and Liverpool, as well as the Trafford Centre. As a result, the catchment of Warrington town centre is relatively localised. Notwithstanding this, due to Warrington town centre's good public transport links due to the presence of the bus terminal and railway stations, it is clear that Warrington town centre provides an important resource for residents in the Borough. The identified localised catchment of Warrington town centre accords with the findings of the business surveys, as most respondents (67.5%) considered their business primarily relies on residents from Warrington Borough.
- 9.13 The main food (0.4%) and top up shopping (2.0%) market share of trips secured by facilities within the Primary Shopping Area of Warrington town centre is low. However, this is to be expected given the lack of supermarket provision in the PSA. As we have set out above, it would be beneficial if at least some of the identified convenience floorspace requirement up to 2030 was delivered within or in close proximity to Warrington's PSA.
- 9.14 In terms of the comparison goods market share of trips attracted by the town centre, Warrington performs reasonably well. The town centre is the most popular shopping destination for residents of the Study Area for clothing and footwear, securing a market share of 44.7%. The town centre is also the most popular destination in the Study Area for books/CDs/DVDs (39.9%), small household goods (28.0%), recreational goods (31.9%), chemist goods (29.7%), electrical goods (22.5%) and furniture (21.9%). The town centre achieves a much lower market share in terms of DIY goods (5.2%), with the most popular destination for such goods in the Borough being the B&Q at Newton Road (27.1%). However, this is to be expected given the bulky nature of such goods.
- 9.15 Notwithstanding the fact that Warrington town centre is the most popular destination in the Borough for most comparison goods categories, the market share of Warrington town centre has decreased since 2009. This has coincided with a decrease in Warrington town centre's retail ranking since 2013, from 69th to 76th in 2014. It is evident that the town centre is facing competition from out-of-centre retail destinations, in particular Gemini Retail Park, which has significantly improved its retail offer since 2009, with a resultant increase in the retail park's market share over the same period.



- 9.16 It is consider that the implementation of the Bridge Street redevelopment could be of benefit to Warrington town centre’s comparison goods market share. Currently, the Bridge Street area suffers from high vacancy levels, which are partly managed vacancies in preparation for the implementation of the redevelopment proposals. It is likely that the successful delivery of Bridge Street will help to revitalise this part of the town centre, leading to a better balance in performance across the town centre.
- 9.17 As we have set out above, given the high vacancy rate in the town centre and the decrease in comparison goods market share of the town centre since 2009, we consider that the Council should seek to plan for the reuse, refurbishment or redevelopment of the existing vacant premises in the town centre wherever possible. Any proposals for additional comparison goods floorspace should be considered in accordance with the requirements of national and local planning policy.
- 9.18 We have reviewed the PSA boundary for Warrington town centre as defined by Policy PV4 of the Warrington Local Plan Core Strategy and consider the existing PSA to be appropriate. We note that Policy PV4 of the Local Plan advises that where monitoring of vacancies and capacity for additional retail floorspace indicates it is necessary to extend the PSA, the Council will primarily consider doing so in the Bridge Street and Time Square development area. Although we have identified capacity for additional comparison goods floorspace up to 2030, we do not consider it to be necessary to extend the PSA to accommodate such floorspace at the time of reporting. There are a high level of vacant units within the PSA which should be a priority for additional comparison goods floorspace where suitable and available in advance of any expansion to the PSA. We would advise that proposals for additional comparison goods floorspace outside the PSA should be assessed in relation to national and local retail planning policy. We consider that there may be potential for the PSA to be expanded once the Bridge Street redevelopment has been delivered to include the additional areas of retail floorspace which will be delivered as part of the development. However, as the existing consent remains in outline, we would advise that the extent of any expanded PSA should be determined once there is greater certainty in terms of the layout and composition of the development.
- 9.19 Overall, we conclude that the health of Warrington town centre is mixed. Although Golden Square and the surrounding area in the north west of the town centre are performing well, there are some weaknesses in the southern and peripheral areas of the town centre, which is apparent due to the high proportion of vacant units and poorer environmental quality. When the town centre is considered as a whole, it clearly performs an important role in Warrington Borough and is the most popular destination in the Borough for comparison goods shopping. Notwithstanding this, the town centres market share has reduced in recent years, at the same time as the market share of Gemini Retail



Park's market share has increased. As such, we consider there should be a focus on ensuring the successful delivery of the Bridge Street redevelopment to improve the offer of the town centre, as well as the encouraging the redevelopment or reoccupation of vacant units in the town centre to improve the vacancy rate and revitalise those areas of the town centre which are currently underperforming.

Key Findings: District Centres

- 9.20 We have identified Birchwood district centre as a vital and viable centre. The centre provides a good range of both convenience and comparison goods retail provision, with strong representation from national multiples for a centre of its size. The shopping centre provides a convenient, all weather shopping environment, with plentiful car parking and the low vacancy levels provides for a vibrant centre. It is clear that the centre is well used and provides an important resource for the surrounding residential and business community. Notwithstanding this, we consider the centre would benefit from additional representation from the service sector, particularly in relation to financial and leisure outlets and, as the centre does not open in the evening, it provides little contribution in terms of the night time economy.

- 9.21 The Asda store in Birchwood district centre attracts a strong proportion of convenience goods expenditure (5.8%) from the Study Area and therefore has a clear role in anchoring the centre. Although the district centre attracts a comparison goods expenditure market share of only 1.9%, this is not surprising given the role and function of the centre in serving the day to day needs of the local community.

- 9.22 We also consider Stockton Heath to be a healthy centre. The presence of a range of specialist and independent shops in the centre helps to provide an interesting and diverse offer. There is a good representation of leisure service units in the centre which creates a vibrant night time economy, with a higher proportion of respondents to the Stockton Heath in-street survey visiting Stockton Heath in the evening than respondents to the Warrington in-street survey visiting Warrington in the evening. The environmental quality of the district centre is good, with a low level of vacant units. The centre can become busy at times in terms of traffic due to the centre's location on the A49, however, crossings are present to aid pedestrian movement. Although the centre benefits from a strong walk-in catchment, respondents to the in-street survey consider the centre would benefit from additional car parking.

- 9.23 The Morrisons foodstore, which is located on the edge of Stockton Heath district centre, secures the greatest proportion of convenience goods expenditure of any foodstore in the Borough (7.5%). The



presence of the popular foodstore helps to underpin the performance of the centre as a whole by bringing footfall to the centre. Again, Stockton Heath's limited comparison goods expenditure market share of 1.4% is not unexpected given the centre's role in serving the day to day needs of local residents. Notwithstanding this, the centre's market share has increased since 2009 from 0.8%.

9.24 Westbrook is considered to be a vital and viable centre, with a low vacancy level and reasonable environmental quality. Notwithstanding this, the centre is dominated by the Asda store, which although acting as an anchor to the centre, somewhat overshadows the other units present in the centre. The centre also provides an important leisure function due to the presence of the cinema and food and drink uses. The centre provides convenience for car borne trips due to the high level of surface car parking and it is evident that the majority of trips to the centre are by private car, with 84.1% of respondents to the in-street survey travelling to the centre by car. Although Westbrook is considered to be a healthy centre, it is considered that the centre may benefit from a level of modernisation to improve the attraction of the smaller units in the centre. Respondents to the in-street survey considered the centre would benefit from expansion and more food and drink uses.

9.25 The Asda store in Westbrook district centre attracts a high proportion of convenience goods expenditure (6.7%) from the Study Area and as stated above clearly anchors the centre. Again, Westbrook's comparison goods market share of 1.5% is to be expected given the function of the centre in providing for the day to day retail and service needs of a localised catchment.

Operator Aspirations

9.26 We have made contact with a number of food retailers and planning agents acting on their behalf in order to gauge the current level of interest in providing additional convenience goods floorspace in the Warrington area. In this regard, such discussions suggest that the greatest level of interest is at the discount end of the market, with existing retailers appearing to have appetite to extend existing operations as well as bringing forward further stores in particular locations.

9.27 We are also aware that the owner of Alban Retail Park has been in discussions with the Council with respect to proposals to effectively extend the park to accommodate additional floorspace. We understand that such proposals may incorporate a main food shopping destination in addition to further comparison goods floorspace. Whilst we do not wish to prejudge any such proposals – which will need to be considered on their own merits in accordance with relevant development plan and national planning policy – we do highlight a number of concerns in respect of the town centre's performance in this report. Accordingly, in order that any such development does not have a



significant adverse impact on the vitality and viability of the centre as a whole, there may well be a need to attach appropriate conditions should any future planning permission be granted on the site to ensure that the form of development which comes forward is broadly complementary to the town centre's offer and does not materially impact on its role and performance going forward.

- 9.28 Notwithstanding the above, main food operators have generally been reluctant to divulge their future aspirations in terms of their representation in Warrington Borough, which is perhaps understandable given the highly competitive nature of the food retail market. However, apart from the Alban Retail Park scheme, which we understand is still being progressed and which may accommodate a 'main four' foodstore operator, such retailers are currently generally cautious in bringing forward any further larger stores given the clear fragility in the market place.

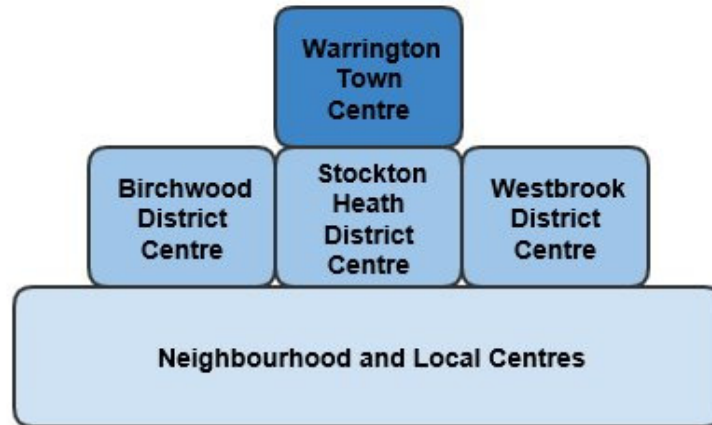
- 9.29 We are aware that an outline planning application was submitted by Birchwood Warrington Ltd on 2 June 2015 for the demolition of existing buildings at Birchwood Shopping Centre and a proposed mixed use extension (Use Classes A1/A3/D1) with associated access, servicing, car parking, signage and associated works. The application proposes an uplift in floorspace of 2,342 sq.m, with 2,565 sq.m floorspace to be demolished and 4,907 sq.m new floorspace proposed. The application submission advises that the scheme has been designed to accommodate a B&M and Iceland, as well as food and drink (Use Class A3) and leisure (Use Class D1) uses. We are not aware of any other planning applications which provide for significant levels of additional retail or leisure floorspace which are awaiting determination.

Future Retail Hierarchy

- 9.30 Warrington town centre is the principal retail and service destination in the Borough. The town centre serves the whole of the Borough and surrounding area, provides the main hub of retail and service uses in the Borough and is clearly the highest order centre in the administrative area. Warrington town centre is supported by the three district centres of Birchwood, Stockton Heath and Westbrook. Although each of the district centres has its own characteristics, each centre performs an important role in serving the day to day needs of their location catchment. It is considered that the district centres are well distributed in order to serve the needs of the Borough's population.

- 9.31 We recommend that the hierarchy of centres as identified at Policy SN4 of the Warrington Local Plan Core Strategy be maintained as detailed at Figure 9.1.

Figure 9.1: Recommended Retail Hierarchy



9.32 The town and district centres are supported by a network of neighbourhood and local centres. We have not undertaken a full review of the neighbourhood and local centres as part of this commission. The Council may wish to consider undertaking such a review of the role each of the neighbourhood and local centres defined at Policy SN4 of the Local Plan.

Priorities for Future Development

9.33 As we have set out above, one of the main challenges currently facing Warrington town centre is the high vacancy rate, which is particularly concentrated on the southern part of the town centre, including the Bridge Street area. We consider that the Council should seek to ensure that the Bridge Street redevelopment is successfully delivered in order to improve the retail and leisure offer and vibrancy of this part of the town centre and to provide an improve balance between Golden Square and the remainder of the town centre. In addition, we consider that it would be prudent for the Council to plan for the reuse, refurbishment or redevelopment of existing vacant premises in the town centre wherever possible.

9.34 The town centre currently has a low market share in terms of convenience goods expenditure which is to be expected given the lack of supermarket offer within the PSA. Notwithstanding this, the Asda at the Cockhedge Centre is an edge of centre site in retail planning terms and, although the household survey has found the Asda store to be undertrading, we consider that the store performs an important role in allowing linked trips between the store and other attractions in Warrington town centre. It can therefore be concluded that the presence of a supermarket at this location does have a beneficial impact on the centre as a whole.



- 9.35 Although the town centre is the most popular destination in the Borough for most comparison goods shopping trips, the market share of comparison goods expenditure attracted by the centre has decreased since 2009, whilst the market share of Gemini Retail Park has increased. Again, we consider it important for the Council to support the successful delivery of the Bridge Street redevelopment proposals which may act to improve the market share of the town centre and improve the attraction of the town centre as a whole when compared to out-of-centre locations. In addition, by directing some of the requirement for additional comparison goods floorspace up to 2030 to the Warrington town centre through the reuse and redevelopment of vacant units, there may be some scope for the market share of the town centre to improve, (possibly diverting some trade from out of centre retail parks in the process).
- 9.36 Each of the district centres in the Borough is considered to be healthy, with each centre performing an important role in catering for the day to day retail and service needs of their local catchment. Given each of the district centres is performing well, we do not consider there is a need for the Council to actively plan for new development in any of the centres, however, the centres should be monitored to ensure they continue to be vital and viable. In particular, in Westbrook, although the vacancy rate is below the national average, it has increased in recent years. Therefore, we consider regular reviews of the centre, along with the other centres in the Borough, should be undertaken to ensure their performance does not decline. Any proposals for retail, leisure and office development outside the district centres should be consider in accordance with national and local policy requirements.



Glossary of Terms

Capacity	Retail capacity in terms of this report refers to surplus/deficit of expenditure (£m) which represents the difference between the expenditure and turnover of the identified facilities.
Comparison Goods	Comparison goods relate to items not obtained on a frequent basis, these include clothing, footwear, household and recreational goods. A more detailed breakdown of comparison goods categories is provided below.
<i>Furniture Goods</i>	<i>Includes all consumer expenditure on furniture, floor coverings and household textiles such as beds, sofas, tables, cupboards, bed linen, curtains, towels, lamps, mirrors, and so on.</i>
<i>DIY Goods</i>	<i>Includes all consumer expenditure on hardware, DIY, decorators' supplies and garden centre type goods. This category includes products such as hammers, saw, screwdrivers, wallpaper, plumbing items, floorboards, ceramic tiles, plants, pots, turf for lawns, and so on.</i>
<i>Electrical Goods</i>	<i>All consumer retail expenditure on domestic electrical and gas appliances, such as washing machines, dryers, dishwashers, ironing and press machines, cookers, freezers and fridge-freezers, coffee makers, radios, televisions, DVD players, and so on.</i>
<i>Clothing & Footwear</i>	<i>All consumer retail expenditure on shoes and other footwear, garments for men, women, children and infants either ready-to-wear or made-to-measure, underwear, ties, handkerchiefs, scarves, and so on.</i>



Household Goods Includes household textiles and soft furnishings, china, glassware, jewellery and other miscellaneous goods such as greeting cards, notebooks, pens, pencils, and so on.

Recreational Goods All consumer retail expenditure on bicycles and tricycles (excluding toy bicycles), musical instruments, sports equipment, camping equipment, toys of all kinds including dolls, soft toys, and so on.

Chemist Goods All consumer retail expenditure on prescription and non-prescription drugs, adhesive and non-adhesive bandages, first-aid kits, hot-water bottles, toilet shops, sponges, and so on.

Convenience Goods Convenience goods relate to everyday essential items including confectionary, food, drinks, newspapers and magazines.

District Centre District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.

Expenditure Per Capita The average spend of each person within the defined Study Area on a variety of retail goods.

Expenditure Expenditure is calculated by taking the population within a defined area and then multiplying this figure by average annual expenditure levels for various forms of goods.

Expenditure Forecasts This assessment has been undertaken using the 'goods based' approach as prescribed in the Planning for Town Centres Practice Guidance. Retail expenditure forecasts have been derived from Experian Retail Planner Briefing Note 11 (October 2013).

Experian (MMG3) The database used to identify population, expenditure and socio-economic breakdown of the Study Area population.



Gross Floorspace	Represents the level of total floorspace or footprint of a specific development (i.e. sales area, storage, checkouts, café, display, and so on).
GOAD Plans	Provide accurate information on the composition of town centres, shopping areas, out-of-town retail parks and outlet villages in the UK. Identifies the fascia name, retail category, floorspace, and exact location of all retail outlets and vacant premises.
GOAD Reports	Provide a snap-shot of the retail status or demographic make-up of Goad surveyed town centres. Provides a comprehensive breakdown of floorspace and outlet count for all individual trade types in the Convenience, Comparison, Retail Service, Leisure, Financial/Business Services and Vacancy sectors.
Local Centre	Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.
Net Floorspace	Represents the level of internal area devoted to the sale of goods.
Market Share	Market shares derived from the household survey results, which are based on either the proportion of shopping trips or the proportion of expenditure attracted to a particular centre/facility.
National Multiple	This is a retail or service operator which is or part of a network of nine or more outlets.



Price Base	The price base for the Study is 210; all prices are or have been adjusted to 2010 in order to be consistent.
Rates of Productivity	This takes into account the potential for existing retail floorspace to improve their turnover productivity (e.g. smaller goods could be sold from a smaller area for more money, increased opening hours, etc.).
Sales Density	Retail capacity figures are expressed in term of floorspace, relying on the application of assumed sales density figures to the surplus expenditure identified. This is based on the typical turnover of a store by square metre/foot.
Special Forms of Trading	Defined by Experian as expenditure not directed to traditional floorspace such as the internet, mail order, party plan and vending machines and other non-store activity such as market and road-side stalls.
Study Area	This represents the household survey area, which is based on postal sectors.
Trade Draw	This refers to the level of trade attracted to a particular facility/centre.
Turnover	The turnover figure relates to the annual turnover generated by existing retail facilities.
Town Centre	A town centre will usually be the second level of centres after city centres and, in many cases, they will be the principal centre of centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the



function of different parts of the centre and how these contribute to its overall vitality and viability.