

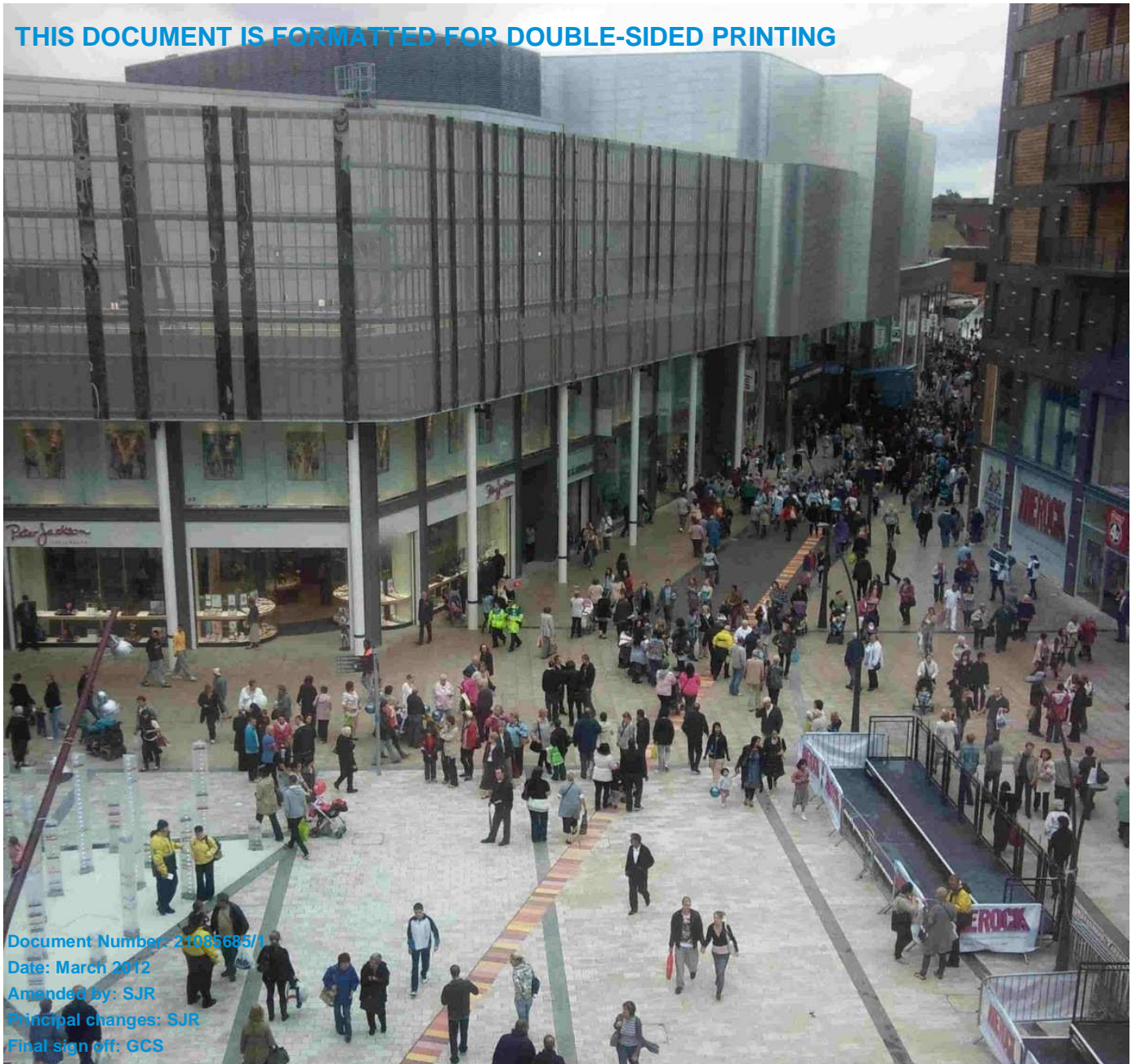
Drivers Jonas Deloitte.

Bury Council

Bury Retail Capacity Update

2012

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Executive Summary

1. This Study has been prepared to assess the need / capacity for additional retail floorspace within the Borough of Bury up to 2028. The Study forms part of the Core Strategy Evidence Base and divides the Borough into four zones, one for each of the Borough's main town centres of Bury, Ramsbottom, Prestwich and Radcliffe. A capacity for additional convenience and comparison goods floorspace is provided for each of the zones. These are set out respectively in Tables A and B below.

Table A: Convenience Goods Expenditure Capacity in Bury, Ramsbottom, Prestwich and Radcliffe (£m) – Current Market Share

Zone	Market Share	Capacity (£m) 2013	Capacity (£m) 2018	Capacity (£m) 2023	Capacity (£m) 2028
Zone 1 – Bury	69%	£30.80m	£33.32m	£39.63m	£45.44m
Zone 2 – Ramsbottom	54%	£0.27m	£0.71m	£2.09m	£3.33m
Zone 3 – Prestwich	72%	-£4.74m	-£3.51m	£0.57m	£4.26m
Zone 4 - Radcliffe	54%	£13.03m	£13.88m	£15.81m	£17.55m

Table B: Comparison Goods Expenditure Capacity in Bury, Ramsbottom, Prestwich and Radcliffe (£m) – Current Market Share

Zone	Market Share	Capacity (£m) 2013	Capacity (£m) 2018	Capacity (£m) 2023	Capacity (£m) 2028
Zone 1 – Bury	73%	£2.00m	£39.32m	£89.75m	£151.14m
Zone 2 – Ramsbottom	11%	-£4.01m	-£3.37m	-£2.30m	-£0.97m
Zone 3 – Prestwich	16%	-£14.01m	-£12.67m	-£10.21m	-£7.11m
Zone 4 - Radcliffe	21%	-£3.73m	-£1.60m	£1.60m	£5.50m

2. An analysis of how housing projections within the Borough's current SHLAA may alter these conclusions demonstrates that in overall terms there will be no material changes in the amount of available expenditure within each of the four zones as a result of these projections over the study period. This is because the SHLAA projections are broadly in line with the ONS projections for each zone and the main source of expenditure capacity over the study period is a growth in expenditure per person rather than population increases.

Bury

3. There is identified capacity for additional convenience and comparison goods floorspace within Bury. Identified qualitative needs support the quantitative provision identified in Tables A and B above although do not justify substantial amounts of floorspace in addition to these levels. For convenience goods, additional floorspace should be provided in a manner that supports the centre's sub-regional status and potentially acts as an anchor to complement the draw of The Rock taking account of the need to sustain and enhance the long term health of the town centre as a whole. Identified comparison goods capacity should ideally be directed to reduce vacancies over the short term although proposals that result in the modernisation or reconfiguration of floorspace and / or improvements to linkages between the various parts of the town centre should be supported. Bury Town Centre should be encouraged as the first choice comparison goods shopping destination for residents of the Borough to support its sub-regional status.

Ramsbottom

4. There is a limited amount of identified convenience goods capacity within Ramsbottom and no identified comparison goods capacity. There is a small degree of qualitative need for additional retail units within the centre in comparison goods terms given the low vacancy rate and low comparison goods market share, however, any additional provision should not detract from the character of the centre, including and its tourist role and function.

Prestwich

5. There is no overriding quantitative or qualitative need for additional retail floorspace within Prestwich over the short to medium term in addition to the Longfield Centre regeneration proposals. The Longfield redevelopment or one along similar lines would be important in improving the attractiveness of the centre and providing more modern retail units and community facilities. Bury Council should resist development that would prevent the delivery of this scheme although if it is demonstrated that these proposals are not viable, the Council should consider alternative proposals, within the centre as first preference, to meet the qualitative and quantitative needs identified within Prestwich.

Radcliffe

6. There is both quantitative and qualitative need to support new retail floorspace within Radcliffe. This would ideally take the form of a development with a 'Discounter' foodstore, new or improved markets and other modern retail units. This would improve consumer choice for residents of Radcliffe and improve the vitality and viability of the centre. This could be achieved through a development in line with the previous Sun Quarter proposals, or indeed a re-working of the opportunity that this site presents reflecting market considerations.

1 Introduction

- 1.1 Drivers Jonas Deloitte (DJ Deloitte) was instructed by Bury Council in July 2011 to provide updated retail 'need' / capacity assessments for areas of the Metropolitan Borough of Bury centred around its four town centres of Bury, Ramsbottom, Prestwich and Radcliffe.
- 1.2 These capacity assessments and this accompanying report build upon previous retail capacity work undertaken by DJ Deloitte including the 2007 Borough-wide Retail Study update, the 2009 Prestwich Town Centre Retail Capacity Assessment and the 2010 Bury, Ramsbottom and Radcliffe Town Centres Retail Capacity Study.
- 1.3 The capacity assessments are supported by Household Telephone Surveys undertaken by RMG Clarity during September and October 2011 the results of which are attached at Appendix 6 and also by 'in-centre' surveys conducted by DJ Deloitte and Bury Council during August and September 2011 the results of which are attached at Appendix 8.
- 1.4 The Study Area adopted for the capacity assessments vary from that utilised within previous studies, principally through the inclusion of 'buffer' zones outside the Borough boundaries to assess the levels of retail trade flowing from these areas to facilities within the Borough. A map of the Study Area is attached at Appendix 1 and this is described in more detail within the methodology section.
- 1.5 The methodology of the Study was the subject of consultation during August 2011 with comments received taken into account in formulating a revised methodology addressing some of the issues raised. The methodology utilised and how this differs from that originally proposed is described within Chapter 3 – the quantitative analysis methodology.

2 National Policy Guidance

- 2.1 This Study and the accompanying capacity assessments have been undertaken in accordance with current Government guidance, principally in the form of the National Planning Policy Framework which was adopted on 27 March 2012.

National Planning Policy Framework (2012)

- 2.2 With regard to retail policy, the National Planning Policy Framework (NPPF) requires that Local Planning Authorities include strategic priorities within their Development Plans to deliver retail, leisure and other commercial development and that in doing so, Development Plans are based upon a proportionate, adequate, up-to-date and relevant evidence base and that this evidence base is integrated. This Study forms part of this evidence base.
- 2.3 Paragraphs 23 to 27 of the draft NPPF provide guidance in respect of the promotion of the vitality and viability of town centres and paragraph 23 specifically covers how Local Planning Authorities should draw up the retail policies of their Local Plans. This guidance continues the ‘town centres first’ approach of retail planning policy at the national level which has been a longstanding feature of such policy through stating that Local Planning Authorities should prefer applications for retail and leisure uses to be located in town centres where practical. The draft NPPF also sets out a number of objectives and requirements of Local Planning Authorities’ retail policy. These are that Local Planning Authorities should:
- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
 - Define a network and hierarchy of centres that is resilient to anticipated future economic changes;
 - Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
 - Promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
 - Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
 - Allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and

are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;

- Allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- 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.

2.4 This Study and the accompanying capacity assessments form part of the evidence base that will allow Bury Council to develop planning policy to meet the above objectives.

3 Quantitative Analysis

Methodology

- 3.1 The retail capacity assessments contained within Appendix 2 and Appendix 3 set out the degree of quantitative need / expenditure capacity for convenience (food) and comparison (non-food) goods¹ respectively within the zones centred around each of Bury's four town centres. These zones are as follows:
- Zone 1 – Bury
 - Zone 2 – Ramsbottom (zone also includes Tottington District Centre)
 - Zone 3 – Prestwich (zone also includes Whitefield District Centre)
 - Zone 4 – Radcliffe
- 3.2 The findings of the retail capacity assessments are assessed in more detail within chapter 4 and results are presented for each year from 2011 up to 2028. An analysis of how the available expenditure within each zone may change over time as a result of Bury Council's housing projections is contained within Appendix 4 and the results are reviewed in more detail within chapter 5.
- 3.3 As with previous Studies, it must be noted that projections of expenditure over such an extensive period (more than 15 years) must be treated with caution, particularly in the light of changing economic circumstances – indeed the application of expenditure rates over such a long time period could not be said to be a precise science, particularly towards the later years of the study period. It is therefore recommended that the analysis contained within the Study is reviewed on a regular basis to ensure its findings remain a reliable and up to date basis upon which to plan for the future of Bury's Town Centres.

Study Area

- 3.4 A plan of the study area utilised for the capacity assessments is attached at Appendix 1. This differs from the study areas utilised within previous Studies principally through the inclusion of 'buffer' zones outside of the Borough of Bury. These have been utilised to assess the levels of trade flowing from these areas to facilities located within the Borough and also assess the principal locations where residents of Bury itself are shopping outside of the Borough.

¹ Some goods classed as convenience goods are not actually food, these are 10% of detergents and household cleaners, 40% of kitchenware, newspapers, magazines and books and all tobacco.

3.5 Zones 1 and 2 (Bury and Ramsbottom) remain the same as utilised in previous studies. Zone 3 (Prestwich) is the same as the previous Zone 4 from the 2010 Study and the overall catchment area used in the 2009 Prestwich Town Centre Retail Capacity Assessment. The current Zone 4 (Radcliffe) is similar to Zone 5 from the 2010 Bury, Ramsbottom and Radcliffe Town Centres Retail Capacity Study although with the omission of postal sector BL3 1 that lies outside of the Borough boundary and includes Little Lever Town Centre in the Metropolitan Borough of Bolton. This postal sector now falls within one of the 'buffer' zones. The postal sectors that constitute each of the study zones are set out in Table 3.1 below.

Table 3.1: Study Area Zones Constituent Postcod Sectors

Study Area Zone	Constituent Postal Sectors
Primary Study Area	
Zone 1 – Bury	BL8 1, BL8 2, BL8 3, BL9 0, BL9 5, BL9 6, BL9 7, BL9 8, BL9 9
Zone 2 – Ramsbottom	BL0 0, BL0 9, BL8 4
Zone 3 – Prestwich	M25 0, M25 1, M25 2, M25 3, M25 9, M45 6, M45 7, M45 8
Zone 4 – Radcliffe	M26 1, M26 2, M26 3, M26 4
Buffer Zones	
Buffer 1 – Rawtenstall and Haslingden	BB4 4, BB4 5, BB4 6, BB4 7, BB4 8, BB4 9
Buffer 2 – West Rochdale and Heywood	OL10 1, OL10 2, OL10 3, OL10 4, OL11 3, OL11 4, OL11 5, OL12 6, OL12 7
Buffer 3 – Middleton	M9 0, M24 1, M24 2, M24 4, M24 5, M24 6
Buffer 4 – Blackley, Crumpsall and Cheetham Hill	M7 4, M8 0, M8 4, M8 5, M8 8, M8 9, M9 4, M9 5, M9 6, M9 7, M9 8
Buffer 5 – Broughton, Irlam O' Th' Heights and Swinton	M6 6, M6 7, M7 1, M7 2, M7 3, M27 0, M27 4, M27 5, M27 6, M27 8, M27 9
Buffer 6 – Walkden and South-east Bolton	M28 3, BL3 1, BL3 2, BL4 7, BL4 8, BL4 9
Buffer 7 – North-east Bolton	BL2 1, BL2 2, BL2 3, BL2 3, BL2 4, BL2 5, BL2 6, BL7 0

3.6 The buffer zones have been formulated to include areas with broadly similar shopping habits and of generally consistent population sizes. The zones within the Primary Study Area (Zones 1, 2, 3 and 4) are based upon previous studies and the shopping patterns identified within the Household Telephone Surveys supporting these studies.

3.7 By separating the overall study area into separate zones, the actual levels of expenditure from each of the zones and buffers can be determined and a more detailed analysis of shopping patterns incorporated into the capacity assessments.

Household Telephone Survey

3.8 The Household Telephone Survey results attached at Appendix 8 set out the broad shopping patterns within the Borough of Bury and the surrounding area. This survey was undertaken during September and October 2011 by RMG Clarity and the questions contained within it were the subject of consultation. The survey included the following questions:

- 1) At which one store do you most do your main food shopping?
- 2) Apart from Q1, which other store do you use for your main food shopping?
- 3) At which one store do you go for most of your top-up food shopping i.e. food shopping done at other times, usually involving smaller purchases?
- 4) Apart from Q3, where else does your household normally do any other top-up shopping for food and grocery items?
- 5) Where do you go most often when shopping for clothes, footwear and other fashion goods?
- 6) Apart from Q5, where else does your household shop for clothing, footwear and other fashion goods?
- 7) Where do you go most often when shopping for goods such as books, CDs, toys and jewellery?
- 8) Where do you go most often when shopping for household goods such as tableware, crockery etc?
- 9) Where do you go most often when shopping for chemist goods, toiletries and cosmetics?
- 10) Where do you go most often when shopping for furniture, carpets and soft furnishings?
- 11) Where do you go most often when shopping for electrical goods, e.g. PCs, TVs, Videos, Hi-fi, washing machines, cookers etc?
- 12) Where do you go most often when shopping for DIY and hardware goods?
- 13) What is the occupation of the chief wage earner in your household?
- 14) Which of the following age bands do you fall into?
- 15) How many people are there in your household who are aged between:
- 16) How many cars does your household own or have the use of?
- 17) Gender of respondent
- 18) Would you be willing to be re-contacted for future quality control purposes?

3.9 The above questionnaire was developed in conjunction with RMG Clarity to ensure the responses provided would be as accurate as possible and provide the relevant data to gain an accurate picture of current shopping patterns in the study area.

In-centre Surveys

3.10 In addition to the Household Telephone Surveys, 'in-centre' surveys were conducted within the four town centres of the Borough of Bury. These were undertaken to establish the views of shoppers within those centres with regard to the existing retail provision and environment of the centre and also, where people who are using each of the centres live, through obtaining their home postcodes. A detailed methodology note outlining the approach undertaken in the surveys is attached at Appendix 7 and the results of the surveys are attached at Appendix 8.

3.11 The questions included within the in-centre surveys were the subject of consultation and additional questions were added as a result. The final methodology was discussed with RMG Clarity who are responsible for the conducting of in-centre / street surveys and agreed as robust following the integration of suggested changes from them. The in-centre surveys included the following questions:

- 1) What is your main purpose for visiting CENTRE [Bury / Ramsbottom / Prestwich / Radcliffe] today?
- 2) Have you or are you intending to make a purchase in CENTRE today?
- 3) Which shops have you visited or do you intend to visit in CENTRE today?
- 4) How did you travel to CENTRE today?
- 5) How often do you normally visit CENTRE?
- 6) Where else do you go to do your shopping most often?
- 7) What is your main reason for visiting CENTRE – what is your favourite thing about it?
- 8) If you could improve one thing about CENTRE, what would it be?
- 9) Could you please provide me your home postcode?

3.12 The survey locations within each centre were chosen to maximise respondents whilst ensuring as broad a range as possible of the shoppers who use each centre were surveyed. Both a busy and a quieter day within each of the centres was utilised to ensure that this range was increased further. The number of responses obtained within each is set out in Table 3.2 below.

Table 3.2: Number of In-centre Survey Responses Achieve In Each Centre

Centre	Number of Surveys Completed
Bury Town Centre	205
Ramsbottom Town Centre	213
Prestwich Town Centre	202
Radcliffe Town Centre	185
Overall Total	805

Methodology

- 3.13 A step by step approach to the assessment of expenditure need / capacity has been undertaken and the most up-to-date assumptions and data have been utilised. Each step of the approach is set out in turn below for the convenience goods capacity assessment contained within Appendix 2 and the comparison goods capacity assessment contained within Appendix 3. Further details in respect of the data and assumptions utilised in the assessment are provided at the foot of each table within Appendix 2 and Appendix 3.

Convenience Goods

Step 1 – Establish Study Area Population

- 3.14 Table 1 of Appendix 2 shows the population for each of the four main zones within the primary study areas and the overall total for each of the buffer zones for the period 2011 to 2028. The base population data was obtained from Experian Micromarketer in October 2010 and projected forwards to 2028 using ONS 2010 2008-based sub-national population projections for each of the Local Authorities within which the zones and buffers principally lie.

Step 2 – Establish the Amount of Money Residents Spend on Food

- 3.15 Tables 2 and 3 set out the expenditure per head of residents within the four mains zones and an average for the buffer zones. Table 2 sets out the total money residents spend on food goods each year and Table 3 sets out the money spent in physical stores. Table 3 discounts the amount of money spent through Non-Store Retail Trade (NSRT) means. This means the amount of money that is spent principally on the internet but also through markets, catalogues, vending machines and door to door sales. This percentage deduction for each year is taken from Experian's latest Retail Planning Briefing Note 9 published in September 2011².

² In line with guidance from Experian, the deduction does not include goods that are ordered online but collected or delivered from physical stores and is therefore transacted through the tills of these stores. It does however include means such as Ocado or 'dark' stores and warehouses where access to the public is not available.

- 3.16 The base figure in 2010 was obtained from Experian Micromarketer in October 2011 and projected forwards using Experian Forecast growth rates. Forecast growth rates have been adopted as these are the only growth rates that represent a prediction of how retail expenditure is estimated to grow in the future rather than basing this growth on past trends. It has been appropriate to utilise trend-base growth rates in previous Studies as these were either produced at a time when there was less certainty with regard to future growth, demonstrated by the number of changes to the Forecast growth rates during 2009, or at a time when Forecast growth rates were in any event similar to the medium, long and ultra-long term growth rates derived through extrapolating previous trends in the growth of retail expenditure.

Step 3 – Establish the Total Amount Available to Spend on Food Goods

- 3.17 Following steps one and two above, Table 4 of Appendix 2 sets out the total amount of expenditure available in each of the four primary zones and across the study area as a whole. This is achieved by multiplying the population of each of the zones (from Table 1) by the expenditure residents within each of the zones have available to spend in physical stores. This table shows that in 2011 there is £359.04m available within the Borough of Bury and £1,093.11m in the overall study area including the buffer zones.

Step 4 – Establish Where Residents Are Currently Buying Their Food

- 3.18 Tables 5, 6, 7, 8 and 9 set out where residents of the Borough and the buffer areas are currently buying their food goods. This information is based upon the Household Telephone Surveys conducted by RMG Clarity in September and October 2011.
- 3.19 Table 5 sets out where residents go most often for their main food shopping. Table 6 sets out residents' second choice main food shopping destination, Table 7 shows where residents go most often for their top-up shopping and Table 8 sets out residents' second choice top-up shopping location.
- 3.20 These tables show the market share of a particular facility from residents of each zone. For example, Table 5 shows that the most popular main food shopping destination for residents of zone 1 – Bury is the Tesco at Woodfields Retail Park with a market share of 28.1%. This is then converted to a flow of expenditure from residents of zone 1 to the store by multiplying the market share percentage by the total expenditure available within that zone. It is assumed that 49% of residents' convenience goods expenditure is spent at their first choice main foods shopping destination, 21% at their second choice main foods shopping destination, 21% at their first choice top-up shopping destination and 9% at their second choice top-up shopping destination³.

³ These are based upon the assumption that 70% of residents' convenience goods expenditure is spent on their main food shopping and 30% on top-up shopping and 70% of this is spent at their first choice shopping destination and 30% at their second choice shopping destination for both convenience and comparison goods.

- 3.21 Table 9 presents the sums of the flows of the individual flows of expenditure set out in Table 5, 6, 7 and 8 to give the turnover of retail facilities within the catchment area and buffers from residents of the overall study area. The table also shows the amount of money leaking to retail facilities outside of the study area. Table 9 shows that the total convenience goods turnover of facilities within the Borough of Bury is £391.50m from residents of the overall study area. When compared to the total available expenditure available from residents of the Borough in 2011 of £359.04m, this shows us that more convenience goods expenditure is flowing into the Borough from people who live outside than is flowing outside the Borough from residents who live within it.
- 3.22 Table 10 projects the survey-derived turnover of facilities within the primary study area (zones 1, 2, 3 and 4) forward from 2011. This takes the total flow of expenditure from residents of the study area from Table 9 and increases the turnover of each facility in line with Experian's Forecast sales density increases from Retail Planner Briefing Note 9 (September 2011).

Step 5 – Establish the Market Share of Zones Within the Catchment Area

- 3.23 Table 11 presents the market share of each of the zones within the primary study area and each of these zones' market share from the primary study area as a whole. This is calculated by dividing the total amount of money spent by residents of a particular zone within that zone from Table 9 by the total available convenience goods expenditure within that zone taken from Table 4. The individual market shares of each zone and their market share from the primary study area are set out in Table 3.3 below.

Table 3.3: Convenience Goods Market Shares of Primary Study Area Zones

Zone	Individual Market Share (%)	Market Share From Primary Study Area (%)
Zone 1 – Bury	69.01%	36.95%
Zone 2 – Ramsbottom	53.86%	9.54%
Zone 3 – Prestwich	72.26%	28.10%
Zone 4 - Radcliffe	53.77%	12.38%
Total Primary Study Area	-	86.97%

- 3.24 Table 3.3 shows that the Borough as a whole has a market share of around 87%. This is arguably high for a densely populated urban area such as Greater Manchester and this is particularly the case given the number of large foodstores that lie a short distance outside the Borough such as the Sainsburys at Heaton Park, the Morrisons store in Heywood, the Tesco in Middleton and the foodstores adjacent to Bolton Town Centre.

- 3.25 Zone 3 has the highest market share for residents within the zone although Zone 1 has the highest market share of facilities from the primary study area as a whole. Most notably, more than half of all of the money residents have to spend on food is being spent in the local area, demonstrated by the market shares of above 50% for all zones.
- 3.26 Table 12 of Appendix 2 sets out the proportion of trade that facilities within each zone obtain from residents of that zone and from residents of the primary study area as a whole. The tables shows that facilities within each zone obtain a broadly consistent percentage of trade from residents of the particular zone, with percentages between 59% and 65%. The table also shows that facilities within Zone 1 and Zone 3 draw a higher proportion of their trade from outside of the Borough – 23% for facilities within Zone 1 and 20% for facilities within Zone 3 compared to 14% for Zone 2 and 17% for Zone 4.

Step 6 – Establish the Trading Level of Existing Stores

- 3.27 Table 13 sets out the 'benchmark' turnovers of existing stores within the primary study area. The benchmark turnover is calculated by multiplying the net convenience goods sales area of the store by the average turnover per sq m for that retailer providing the turnover level that the store would 'normally' achieve based upon Country-wide performance. These benchmark turnovers are projected forwards using Experian's Forecast sales density increases from Retail Planner Briefing Note 9 (September 2011).
- 3.28 Table 14 of Appendix 2 compares the survey-derived turnovers of existing large foodstores within the primary study area (those in Zones 1, 2, 3 and 4 with a net sales area of over 700 sq m) against their 'benchmark' turnovers. This allows the level of indicative over or under trading to be assessed to give an indication of the popularity of these stores and therefore the potential for additional foodstore floorspace within the vicinity of these stores⁴. For example, if a group of nearby stores are found to be 'over-trading', this can suggest a need for additional convenience goods floorspace to ensure the shopping experience of residents is maintained and an adequate level of consumer choice is provided.

Step 7 – Establish the Trading Level of Future Stores

- 3.29 Table 15 of Appendix 2 sets out the estimated convenience goods turnover of Commitments within the primary study area. The details of these have been provided by Bury Council and there is one Commitment within zone 1, the redevelopment of the Hornby Buildings / Sol Viva site in between The Rock development and the Millgate Centre and one Commitment within zone 3, the Longfield Centre redevelopment. The turnover of these Commitments has been assessed using information from the Applicants' Planning Application submissions and where required, Drivers Jonas Deloitte assumptions.

⁴ This over or under-trading is only indicative for stores on an individual basis as further evidence is required to substantiate the results of the Household Telephone Survey for individual facilities. However, the results are considered robust on a cumulative basis across the primary study area taking into account the knowledge of the trade of these stores.

Step 8 – Establish the Capacity for Additional Floorspace

- 3.30 Tables 16, 17, 18 and 19 set out the expenditure to support new floorspace within Zones 1, 2, 3 and 4 respectively. This is calculated by assessing the amount of residents' expenditure currently retained within the zone by multiplying the total available expenditure from Table 4 by the current market share from Table 11. The inflow to facilities within the zone from the other zones and buffer areas taken from Table 9 is added to this as is an allowance for trade from outside the overall study area. This percentage is based upon the home postcodes of the in-centre survey respondents within each centre⁵. This then produces a figure of the total amount of expenditure available to support convenience goods retail floorspace.
- 3.31 Following this it is necessary to deduct the turnover of existing facilities taken from Table 13, the survey-derived turnover of Bury Market taken from Table 9 and the turnover of Commitments taken from Table 15. This then provides the amount of capacity available to support new floorspace within the zone.
- 3.32 The survey-derived turnover of Bury Market has been included in the overall flows of expenditure and discounted from the "total expenditure to support new floorspace" figure due to its popularity and size. Although markets are a form of Non-Store Retail Trade (NSRT), the proportion of expenditure spent through these means is likely to be higher than average within the Borough of Bury due to the easy access of a high quality market that sells a wide range of goods. The Country-wide NSRT allowance does not, therefore reflect these local circumstances.
- 3.33 Following the calculation of the level of expenditure capacity available to support new floorspace, this figure is translated into net and gross floorspace equivalents based upon the turnover per sq m of 'Top-four' retailers (an average of the turnover per sq m of Tesco, ASDA, Sainsburys and Morrisons) and the turnover per sq m of 'Discounter' retailers (an average of the turnover per sq m of Aldi, LIDL, Netto and Iceland). A gross to net ratio for top-four retailers of 65% is utilised and a gross to net ratio for discounters of 75%. The floorspace equivalent figures are for indicative purposes only and when considering individual retail proposals, Bury Council should consider each proposal separately based upon the specifics of the scheme such as the exact net sales area and the turnover per sq m of the intended operator against the identified convenience goods expenditure capacity figure.

⁵ With the example of Bury Town Centre, it was found that 18% of the in-centre survey respondents lived outside the overall study area. It was therefore assumed that these shoppers were responsible for 18% of the turnover of the centre as a whole in comparison goods terms. However, for convenience goods, a deduction of 50% was applied on the basis that despite the popularity of Bury Market for convenience goods in this example, shoppers would be less likely to shop for convenience goods compared to comparison goods after travelling a longer distance from outside the overall study area.

- 3.34 Tables 16, 17, 18 and 19 each set out three scenarios of expenditure capacity and floorspace capacity. Each table has a scenario A, B and C. Scenario A is the position based upon current market share, scenario B models the capacity position based upon an increase in market share to 80% for zones 1 and 3 (Bury and Prestwich) and to 65% for zones 2 and 4 (Ramsbottom and Radcliffe). Scenario C sets out the increase level of market share in addition to an increase in inflows for other zones, buffer areas and outside the overall study area of 10%. This is to reflect the situation that inflows would be likely to increase were it the case that market share of a zone increased as a result of the provision of additional retail facilities.
- 3.35 The results displayed within Table 16, 17, 18 and 19 of Appendix 2 are set out and analysed within Chapter 4.

Comparison Goods

- 3.36 The same broad methodology is employed within the comparison goods capacity assessment as is employed within the convenience goods capacity assessment set out above. Therefore to avoid unnecessary repetition, the description of the comparison goods methodology below only covers areas that differ slightly from the convenience goods methodology above.

Steps 1, 2 and 3 – Establish the Population and Amount of Money Spent on Non-food Goods

- 3.37 The population data contained within Appendix 3 is identical to that utilised within Appendix 2. Tables 2 and 3 of Appendix 3 also set out the amount of money each individual resident of each of the zones and an average across the buffers has to spend on non-food goods each year. Table 2 sets out the total figure and Table 3 the figure minus the deduction for the amount of money spent on non-food goods spent through Non-Store Retail Trade (NSRT) means. The expenditure per head in Table 2 has been projected forward utilising Experian Forecast comparison goods growth rates and the relevant NRST deduction percentage have also been taken from Experian Retail Planner Briefing Note 9 (September 2011). The exact figures utilised for each year are set out in Appendix 5.

Step 4 – Establish Where Residents Are Currently Buying Their Non-food Goods

- 3.38 Tables 5, 6, 7, 8, 9, 10, 11, 12 and 13 of Appendix 3 set out where residents within the primary study area and buffer zones currently buy various categories of non-food goods. The categories to which the tables relate are set out below.
- Table 5 – first choice clothing and footwear;
 - Table 6 – second choice clothing and footwear;
 - Table 7 – first choice books, CDs, toys and jewellery;
 - Table 8 – household goods;
 - Table 9 – chemist goods toiletries and cosmetics;
 - Table 10 – furniture, carpets and soft furnishings;

- Table 11 – electrical goods;
 - Table 12 – DIY and hardware goods; and,
 - Table 13 – total comparison / non-food goods flows of expenditure.
- 3.39 As with convenience goods, Tables 5, 6, 7, 8, 9, 10, 11 and 12 show the market share of a particular facility from residents of each zone. For example, Table 5 shows that the most popular first choice clothing and footwear shopping destination for residents of zone 1 – Bury is Bury Town Centre with a market share of 69.0%. This is then converted to a flow of expenditure from residents of zone 1 to Bury Town Centre by multiplying the market share percentage by the total expenditure available for the first choice clothing and footwear destination. It is assumed that 70% of the total available clothing and footwear expenditure is spent at the first choice shopping location and 30% at the second choice location.
- 3.40 The total available expenditure for each of the goods categories within each zone is displayed at the top of each table. These have been calculated by multiplying the population of each zone by the expenditure per head for each of these goods categories minus the deduction for the proportion of non-food goods expenditure spent through NSRT means. The expenditure per head figures for each of the Household Telephone Survey goods categories have been derived using the equivalent figures for Experian fine comparison goods expenditure per head categories with the data obtained from Experian Micromarketer in October 2011.
- 3.41 Table 13 presents the sums of the flows of the individual flows of expenditure set out in Table 5, 6, 7, 8, 9, 10, 11 and 12 to give the non-food turnover of retail facilities within the catchment area and buffers from residents of the overall study area. The table also shows the amount of money leaking to retail facilities outside of the study area. Table 13 shows that the total non-food goods turnover of facilities within the Borough of Bury is £483.03m from residents of the overall study area. When compared to the total available expenditure available from residents of the Borough in 2011 of £491.08m, this shows us that the amount of non-food goods expenditure flowing into the Borough from people who live outside the area is roughly equal to that leaving the Borough when taking into account the proportion of trade facilities obtain from outside the overall study area. This is particularly notable given the proximity of facilities such as Manchester City Centre, The Trafford Centre, Bolton Town Centre, Manchester Fort Shopping Park and Rochdale Town Centre to the Borough.
- 3.42 Table 14 projects the survey-derived non-food turnover of facilities within the primary study area (zones 1, 2, 3 and 4) forward from 2011. This takes the total flow of expenditure from residents of the study area from Table 13 and increases the turnover of each facility inline with Experian's Forecast comparison goods sales density increases from Retail Planner Briefing Note 9 (September 2011).

Step 5 – Establish the Market Share of Zones Within the Catchment Area

3.43 Table 15 presents the market share of each of the zones within the primary study area and each of these zones' market share from the primary study area as a whole. This is calculated by dividing the total amount of money spent by residents of a particular zone within that zone from Table 13 by the total available comparison goods expenditure within that zone taken from Table 4. The individual market shares of each zone and their market share from the primary study area are set out in Table 3.4 below.

Table 3.4: Comparison Goods Market Shares of Primary Study Area Zones

Zone	Individual Market Share (%)	Market Share From Primary Study Area (%)
Zone 1 – Bury	72.98%	54.17%
Zone 2 – Ramsbottom	11.07%	2.03%
Zone 3 – Prestwich	15.69%	5.28%
Zone 4 - Radcliffe	21.43%	5.56%
Total Primary Study Area	-	67.03%

3.44 Table 3.4 shows that the Borough as a whole has a market share of around 67%. This is very strong for an area in close proximity to other similar major comparison goods shopping destinations most notably Manchester City Centre. It is clear that facilities within Zone 1 and most notably Bury Town Centre have by far the largest draw. Indeed, Bury Town Centre (including the turnover of Bury Market but not the nearby retail parks) has a market share of around 42% from the primary study area (zones 1, 2, 3 and 4) as a whole and the turnover of Bury Town Centre accounts for approximately 80% of the non-food goods turnover of all facilities within the Borough as a whole⁶. Indeed, the flows of expenditure within Table 13 show us that more non-food goods expenditure within the overall study area is flowing to Bury Town Centre, than to any other destination.

3.45 As would be expected given the lower order role of the other town centres within the Borough and their position below Bury Town Centre in the retail hierarchy, their market shares from within their zones and from the primary study area as a whole is much lower. Indeed, Bury Town Centre is a more popular non-food shopping destination for residents of the Ramsbottom, Prestwich and Radcliffe zones than the town and district centres that lie within these zones.

⁶ Based on survey-derived flows of expenditure from the primary study area and buffer zones.

- 3.46 Table 16 of Appendix 4 sets out the proportion of trade that facilities within each zone obtain from residents of that zone and from residents of the primary study area as a whole. The tables shows that zone 1 – Bury obtains the highest proportion of the survey-derived turnover of its facilities from outside the zone, 65% from outside zone 1 and 35% from the buffer areas. Excluding the trade from outside the overall catchment area this means that Bury Town Centre gets roughly one third of its trade from Bury itself, one third from the other towns within the Borough and one third from the towns immediately surrounding the Borough with the buffer areas. This demonstrates the true sub-regional centre role that the town centre is currently fulfilling.
- 3.47 Facilities within zones 2, 3 and 4 obtain roughly equal percentages of their trade from outside the zone in which they are located, between 30% and 40% and between 12% and 17% from the buffer areas. As with the market share, this reflects the more localised non-food shopping role that the facilities within these centres currently perform.

Steps 6 and 7 – Establish the Trading Level of Existing and Future Stores

- 3.48 Tables 17, 18, 19 and 20 of Appendix 3 set out the turnover of existing and future non-food goods facilities within the primary study area. Table 17 displays the turnover of existing centres and 'other' unnamed stores within the primary study area⁷, Table 18 displays the benchmark non-food goods turnover of foodstores within the primary study area, Table 19 displays the benchmark non-food goods turnover of existing retail parks within the primary study area and Table 20 calculates the benchmark non-food goods turnover of Commitments within the primary study area. As with convenience goods there are two Commitments within the primary study area, the Hornby buildings / Sol Viva nightclub site redevelopment in zone 1 – Bury and the Longfield Centre redevelopment in zone 3 – Prestwich.

Step 8 – Establish the Capacity for Additional Floorspace

- 3.49 Tables 21, 22, 23 and 24 of Appendix 4 set out the expenditure to support new non-food goods floorspace within Zones 1, 2, 3 and 4 respectively. This is calculated in the same manner as with the food goods expenditure capacity described above including the deduction for the survey-derived turnover of Bury Market. However, with regard to inflow from outside of the overall study area (zones 1, 2, 3, 4 and the buffer areas), no deduction has been made to the proportion of trade obtained from residents who live outside the overall study area based upon the postcodes provided. This is because it is assumed that shoppers who have travelled a longer distance would be more likely to purchase comparison goods.

⁷ The floorspace of other unnamed stores within the primary study area is assumed to be 5% of the total town and district centre floorspace within each zone. A benchmark turnover per sq m of £2,000 has been applied to calculate the overall estimated non-food goods turnover of this floorspace.

- 3.50 Following the calculation of the level of expenditure capacity available to support new non-food goods floorspace, this figure is translated into net and gross floorspace equivalents based upon the turnover per sq m of each town centre displayed in Table 17 and a 'typical' retail warehouse turnover per sq m of £3,000 in 2011. A gross to net ratio for town centre floorspace of 70% is utilised and a gross to net ratio for retail warehouses of 85%. The floorspace equivalent figures are for indicative purposes only and when considering individual retail proposals, Bury Council should consider each proposal separately based upon the specifics of the scheme such as the exact net sales area and the turnover per sq m of the intended operator against the identified comparison goods expenditure capacity figure.
- 3.51 As with convenience goods, Tables 21, 22, 23 and 24 each set out three scenarios of expenditure capacity and floorspace capacity. Each table has a scenario A, B and C. Scenario A is the situation based upon current market share, scenario B models the capacity position based upon an increase in market share to 80% for zone 1 (Bury), 25% for zone 2 (Ramsbottom), 30% for zone 3 (Prestwich) and 35% for zone 4 (Radcliffe). Scenario C sets out the increase level of market share in addition to an increase in inflows for other zones, buffer areas and outside the overall study area of 10%. This is to reflect the situation that inflows would be likely to increase were it the case that market share of a zone increased as a result of the provision of additional retail facilities.
- 3.52 The results displayed within Table 21, 22, 23 and 24 of Appendix 4 are set out and analysed within Chapter 4.

4 Key Findings - Quantitative

Shopping Patterns

4.1 The detailed flows of expenditure for the overall study area are outlined in Table 9 of Appendix 2 for convenience goods and Table 13 of Appendix 3 for comparison goods. However a summary analysis of some of the key findings within these tables is outlined below.

Convenience Goods

4.2 Table 4.1 below sets out the most popular shopping destinations for residents of the Borough as a whole and the principal locations⁸ within the Buffer areas to which convenience goods expenditure is flowing.

Table 4.1: Convenience Goods Flows of Expenditure of Residents of Bury

Facility	Total Borough (£m)	Percentage of Total	Zone 1 – Bury (£m)	Zone 2 – Ramsbottom (£m)	Zone 3- Prestwich (£m)	Zone 4 - Radcliffe (£m)
Primary Study Area						
Tesco Woodfields Retail Park	£39.39m	11.0%	£28.63m	£5.90m	£0.00m	£4.86m
Morrisons, Whitefield	£37.53m	10.5%	£9.89m	£0.00m	£21.13m	£6.50m
ASDA Radcliffe	£37.20m	10.4%	£3.34m	£0.16m	£5.60m	£28.10m
Tesco, Prestwich	£29.61m	8.2%	£2.60m	£0.15m	£25.72m	£1.14m
ASDA Pilsworth	£24.35m	6.8%	£17.39m	£1.48m	£5.48m	£0.00m
ASDA Spring Street	£20.15m	5.6%	£17.73m	£2.20m	£0.00m	£0.22m
Morrisons, Ramsbottom	£12.43m	3.5%	£2.75m	£9.68m	£0.00m	£0.00m
Bury Market	£10.05m	2.8%	£6.28m	£0.43m	£1.77m	£1.56m

⁸ All convenience goods facilities within the primary study area with a survey-derived turnover of over £10m and facilities within the buffers with a survey-derived convenience goods turnover of over £5m from residents of Zones 1, 2, 3 and 4.

Facility	Total Borough (£m)	Percentage of Total	Zone 1 – Bury (£m)	Zone 2 – Ramsbottom (£m)	Zone 3- Prestwich (£m)	Zone 4 - Radcliffe (£m)
Buffers						
Sainsburys, Heaton Park	£7.99m	2.2%	£0.00m	£0.23m	£7.54m	£0.22m
Morrisons, Harwood	£7.14m	2.0%	£5.71m	£0.74m	£0.00m	£0.69m
Morrisons, Heywood	£5.55m	1.5%	£5.01m	£0.55m	£0.00m	£0.00m

- 4.3 The above table shows that there are no clearly dominant stores within the Borough in terms of convenience goods market share from the four zones. Indeed the top seven foodstores in the table above have a combined market share from the Borough of 56% with the remainder dispersed between smaller stores throughout the Borough. Furthermore, Table 9 of Appendix 2 shows that only 9.9% of convenience goods expenditure is leaking from the Borough to the Buffer zones with the majority of this (7.7%) taken up by the three stores listed in the table above. In addition to this, only 3.2% of convenience goods expenditure is flowing to a variety of destinations outside of the overall study area.
- 4.4 Table 4.1 also shows a number of shopping patterns that would be expected. For example, there is no notable amount of trade flowing from Zone 3 to the Tesco at Woodfields Retail Park or Morrisons in Ramsbottom as the Tesco at Prestwich and Morrisons in Whitefield are more convenient for residents within this zone respectively. Furthermore, there is no notable amount of expenditure flowing from residents of Zone 2 to the Morrisons in Whitefield given the more conveniently situated Morrisons in Ramsbottom.
- 4.5 Table 9 of Appendix 2 also shows that convenience goods facilities within zone 1 – Bury generally obtain a greater percentage of their trade from the buffers than equivalent facilities within the primary study area. Examples of this are Bury Market, Marks and Spencer in Bury Town Centre and Tesco at Woodfields Retail Park that obtain 39%, 42% and 17% of their trade from the buffer zones respectively. The equivalent figure for the Morrisons in Whitefield is 9% despite the store's less central position within the primary study area.
- 4.6 Table 11 of Appendix 2 shows that the market share of the primary study area is 87%. This represents a small increase from 85% at the time of the 2007 Borough-wide Retail Study Update.

Comparison Goods

4.7 Table 4.2 below sets out the most popular shopping destinations for residents of the Borough as a whole and the principal⁹ locations within the Buffer areas and outside the overall study area to which comparison goods expenditure is flowing.

Table 4.2: Comparison Goods Flows of Expenditure of Residents of Bury

Facility	Total Borough (£m)	Percentage of Total	Zone 1 – Bury (£m)	Zone 2 – Ramsbottom (£m)	Zone 3- Prestwich (£m)	Zone 4 - Radcliffe (£m)
Bury Town Centre	£198.36m	40.4%	£103.69m	£29.80m	£33.76m	£31.11m
Woodfields Retail Park (including Tesco)	£17.17m	3.5%	£10.34m	£3.13m	£1.02m	£2.68m
ASDA, Radcliffe	£13.10m	2.7%	£0.34m	£0.00m	£3.68m	£9.07m
Radcliffe Town Centre	£11.33m	2.3%	£0.48m	£0.18m	£1.99m	£8.68m
Prestwich Town Centre	£10.90m	2.2%	£0.90m	£0.00m	£9.80m	£0.21m
B&Q, Bury	£10.55m	2.1%	£4.69m	£2.04m	£2.37m	£1.45m
Croston Road Retail Park	£10.01m	2.0%	£4.92m	£1.36m	£2.38m	£1.36m
Ramsbottom Town Centre	£7.03m	1.4%	£1.36m	£5.67m	£0.00m	£0.00m
Buffers						
Cheetam Hill (including Manchester Fort)	£14.40m	2.9%	£0.97m	£0.09m	£12.81m	£0.52m
Outside Overall Study Area						
Manchester City Centre	£70.31m	14.3%	£17.80m	£7.81m	£35.32m	£9.38m
Bolton Town Centre	£21.76m	4.4%	£6.82m	£4.26m	£1.76m	£8.92m
The Trafford Centre	£17.63m	3.6%	£6.07m	£2.23m	£5.67m	£3.67m

⁹ All comparison goods facilities within the primary study area with a survey-derived turnover of over £10m, all town centres within the primary study area, facilities within the buffers with a survey-derived turnover of over £10m and facilities outside the overall study area with a survey-derived turnover of over £5m from residents of Zones 1, 2, 3 and 4.

- 4.8 Table 4.2 shows that Bury Town Centre is the most dominant comparison goods shopping destination within the Borough with almost three times as much expenditure flowing to the town centre as the next most popular destination Manchester City Centre (Bury Town Centre's turnover and market share increase to £205.42m and 41.83% when including Bury Market). Furthermore, over half of the expenditure flowing to Manchester City Centre is from Zone 3 and with much of this zone lying equidistant between Manchester City Centre and Bury Town Centre (both geographically and when considering accessibility by car and public transport), it is natural that a large amount of expenditure would flow from this zone to Manchester City Centre. Indeed, when including Bury Market, the expenditure flowing from zone 3 to Bury (£34.76m) is almost identical to that flowing to Manchester (£35.32m) which shows the substantial attractiveness of Bury Town Centre despite its proximity to Manchester City Centre, ranked third in the UK after London and Glasgow in terms of its shopping offer.
- 4.9 Table 15 of Appendix 3 shows that the comparison goods market share of the primary study area is 67%. This represents an increase from 64% at the time of the 2007 Borough-wide Retail Study Update. This market share level may increase further as The Rock development 'beds in' and vacancies within the Millgate Centre are potentially reduced.
- 4.10 Table 13 of Appendix 3 also shows that only 5.43% of comparison goods expenditure within the Borough is flowing to facilities within the buffer zones and over half of this to Cheetham Hill and Manchester Fort Shopping Park. The Table also shows that 27.5% of the Borough's comparison goods expenditure is flowing to locations outside of the overall study area and of this, 22.3% is to Manchester City Centre, Bolton Town Centre and the Trafford Centre. This again suggests that there is a broadly good provision of comparison goods facilities within the Borough with leakage principally to higher order comparison goods destinations which again may be reduced over time as The Rock development becomes more established.

Market Share Changes

- 4.11 The flows of expenditure contained within Table 9 of Appendix 2 for convenience goods and Table 13 of Appendix 3 for comparison goods and described above have been used to calculate market shares for each of the zones in 2011. Tables 4.3 and 4.4 below show how these market shares have changed for each of the zones since the previous relevant studies were conducted – the 2010 Bury, Ramsbottom and Radcliffe Town Centres Retail Capacity Report for zones 1, 2 and 4 and the 2009 Prestwich Town Centre Retail Capacity Assessment for zone 3.

Table 4.3: Change In Convenience Goods Market Share from Previous Study to 2011 Levels

Zone	Previous Study Market Share (%)	Current Market Share (%)	Difference (%)
Zone 1 – Bury	80%	69%	-11%
Zone 2 – Ramsbottom	35%	54%	+19%
Zone 3 – Prestwich	71%	72%	+1%
Zone 4 – Radcliffe	59%	54%	-5%

4.12 The above tables shows a decline in the market share within zone 1 – Bury from 2009 of 11%. This is fairly significant. Of the money flowing outside of zone 1 £9m is being spent within zone 2 (principally the Co-op Tottington and Morrisons Ramsbottom), £16m to zone 3 (principally the Morrisons in Whitefield) almost £4m to zone 4 (principally ASDA Radcliffe) and around £14m to the buffer areas (principally the Morrisons in Harwood and Morrisons in Heywood).

4.13 The zone with the largest change in convenience goods market share is zone 2 with a 19% increase. This is likely to be as a result of the addition of the Aldi store within Ramsbottom, the ‘bedding in’ of the Tesco and Morrisons stores and the increasing popularity of events within the centre such as the farmers market making it a more attractive overall location for people to undertake their convenience goods shopping.

4.14 The market share of the Prestwich zone 3 has increased slightly by 1% although remains generally stable and the market share of the Radcliffe zone has decreased by 5% with the ASDA in Radcliffe being the most popular convenience goods shopping destination in the zone, accounting for 84% of the convenience goods turnover of the facilities within the zone as a whole.

Table 4.4: Change In Comparison Goods Market Share from Previous Study to 2011 Levels

Zone	Previous Study Market Share (%)	Current Market Share (%)	Difference (%)
Zone 1 – Bury	69%	73%	+3%
Zone 2 – Ramsbottom	8%	11%	+3%
Zone 3 – Prestwich	18%	16%	-2%
Zone 4 - Radcliffe	18%	21%	+3%

- 4.15 The above table shows that all zones with the exception of zone 3 – Prestwich have increased their market share by 3%. The market share of the Prestwich zone has decreased by 2%. The increase in zone 1 is likely to be attributed to the increased attractiveness of the centre as a result of The Rock development and this could potentially increase further over time as the change in shopping patterns brought about by The Rock ‘beds in’ and the remainder of the centre responds to the loss of some retailers to The Rock.
- 4.16 The increase in the market share of Ramsbottom is likely to have improved as a result of the improvement in the convenience goods provision of the town centre and shoppers buying some comparison goods whilst shopping for their convenience goods. The increase in the market share of Radcliffe may be a result of the improved environment of the centre as a result of the provision of the new health centre and the refurbishment of some of the properties along Church Street West which has particularly improved the links between the town centre and the Metrolink stop.
- 4.17 The decline in the market share of Prestwich is possibly a result of the increased popularity of Cheetham Hill to the south of the zone as a shopping destination with almost £13m flowing from residents of zone 3 to Cheetham Hill and Manchester Fort Shopping Park, more than the £10m flowing to Prestwich Town Centre itself from residents of zone 3.

Quantitative Capacity Assessment Results Analysis

- 4.18 The results of the capacity analysis undertaken for both convenience and comparison goods is set out in the tables and accompanying analysis below. It must be noted that although Local Planning Authorities are required by The National Planning Policy Framework to assess as part of the Development Plan preparation process the need for additional town centre uses floorspace, including retail over the plan period, ‘need’ is no longer a specific policy test to be met by individual planning application proposals.

Bury

Convenience Goods

- 4.19 Table 4.5 below sets out the convenience goods capacity identified within zone 1 and how this changes between 2013 and 2028. This capacity figure is also converted into a net floorspace equivalent for top-four retailers and discounter retailers.

Table 4.5: Convenience Goods Capacity in Zone 1 – Bury: Existing Market Share of 69%

	2013	2018	2023	2028
Expenditure to support new floorspace (£m)	£30.80m	£33.32m	£39.63m	£45.44m
Net floorspace equivalent 'Top four' foodstore (sq m)	2,190 sq m	2,322 sq m	2,735 sq m	3,105 sq m
Net floorspace equivalent 'Discounter' foodstore (sq m)	5,149 sq m	5,460 sq m	6,429 sq m	7,298 sq m

4.20 The above table demonstrates that there is expenditure capacity for additional convenience goods floorspace within Bury over the plan period at current market share. This capacity in quantitative terms would justify further convenience goods provision which would also have the effect of either redressing the decline in the convenience goods market share of Bury Town Centre or preventing this decline from increasing. Given the important role Bury Town Centre plays as a sub-regional centre, the provision of this additional convenience goods floorspace should not detract from, and where possible, strengthen this role.

Comparison Goods

4.21 Table 4.6 below sets out the comparison goods capacity identified within zone 1 and how this changes between 2013 and 2028. This capacity figure is also converted into a net floorspace equivalent utilising the Bury Town Centre turnover per sq m and a benchmark retail warehouse turnover per sq m.

Table 4.6: Comparison Goods Capacity in Zone 1 – Bury: Existing Market Share of 73%

	2013	2018	2023	2028
Expenditure to support new floorspace (£m)	£2.00m	£39.32m	£89.75m	£151.14m
Net floorspace equivalent Bury Town Centre turnover per sq m (sq m)	388 sq m	7,023 sq m	14,735 sq m	22,808 sq m
Net floorspace equivalent retail warehoused turnover per sq m (sq m)	645 sq m	11,660 sq m	24,463 sq m	37,865 sq m

4.22 The above table shows that there is a degree of comparison goods capacity in Bury following the potential implementation of Commitments in 2013 and that this grows fairly substantially over the study period to 2028. However, given the recent changes within the centre as a result of The Rock development and the vacancies this has resulted in within the Millgate Centre, this capacity should ideally, where possible, be directed towards the reduction in vacancies rather than the provision of additional floorspace in the centre over the short to medium term.

Ramsbottom

Convenience Goods

4.23 Table 4.7 below sets out the convenience goods capacity identified within zone 2 and how this changes between 2013 and 2028. This capacity figure is also converted into a net floorspace equivalent for top-four retailers and discounter retailers.

Table 4.7: Convenience Goods Capacity in Zone 2 – Ramsbottom: Existing Market Share of 54%

	2013	2018	2023	2028
Expenditure to support new floorspace (£m)	£0.27m	£0.71m	£2.09m	£3.33m
Net floorspace equivalent 'Top four' foodstore (sq m)	19 sq m	50 sq m	144 sq m	228 sq m
Net floorspace equivalent 'Discounter' foodstore (sq m)	44 sq m	117 sq m	338 sq m	535 sq m

4.24 The above table shows that there is only a small degree of capacity for additional convenience goods capacity in Ramsbottom at current market share. Given the now relatively healthy market share of the Ramsbottom zone of 54% for a zone with a population of its size and location, it is considered that this level of market share should not be sought to be increased by specific allocations for new retail floorspace.

Comparison Goods

4.25 Table 4.8 below sets out the comparison goods capacity identified within zone 2 and how this changes between 2013 and 2028.

Table 4.8: Comparison Goods Capacity in Zone 2 – Ramsbottom: Existing Market Share of 11%

	2013	2018	2023	2028
Expenditure to support new floorspace (£m)	-£4.01m	-£3.37m	-£2.30m	-£0.97m
Net floorspace equivalent Ramsbottom Town Centre turnover per sq m (sq m)	0 sq m	0 sq m	0 sq m	0 sq m
Net floorspace equivalent retail warehouse turnover per sq m (sq m)	0 sq m	0 sq m	0 sq m	0 sq m

4.26 The above table shows that there is no capacity through the whole of the study period for additional comparison goods floorspace in Ramsbottom Town Centre at the current market share of 11%. Given the strong tourist shopping role the centre plays with a number of specialist shops, most residents travel outside the zone to conduct their non-food shopping with Bury Town Centre being the most popular single destination. As a result of this and the accessibility of Bury Town Centre to the majority of the residents of zone 2, Bury should continue to serve as the main non-food goods shopping destination for residents of zone 2. In addition to this, given the nature of the centre and its more historic layout compared to other centres in the Borough, there is less scope to provide additional floorspace in or near to the centre without compromising the character of the centre which is key to its current popularity.

Prestwich

Convenience Goods

4.27 Table 4.9 below sets out the convenience goods capacity identified within zone 3 and how this changes between 2013 and 2028. This capacity figure is also converted into a net floorspace equivalent for top-four retailers and discounter retailers.

Table 4.9: Convenience Goods Capacity in Zone 3 – Prestwich: Existing Market Share of 72%

	2013	2018	2023	2028
Expenditure to support new floorspace (£m)	-£4.74m	-£3.51m	£0.57m	£4.26m
Net floorspace equivalent 'Top four' foodstore (sq m)	0 sq m	0 sq m	39 sq m	291 sq m
Net floorspace equivalent 'Discounter' foodstore (sq m)	0 sq m	0 sq m	92 sq m	684 sq m

4.28 As can be seen, there is insufficient capacity to justify a notable amount of additional convenience goods floorspace within the Prestwich zone throughout the study period following the development of the Longfield Centre. Given the zone's currently high level of market share, it is not considered that there is scope to increase this significantly following the implementation of the Longfield Centre proposals.

Comparison Goods

4.29 Table 4.10 below sets out the comparison goods capacity identified within zone 3 and how this changes between 2013 and 2028.

Table 4.10: Comparison Goods Capacity in Zone 3 – Prestwich : Existing Market Share of 16%

	2013	2018	2023	2028
Expenditure to support new floorspace (£m)	-£14.01m	-£12.67m	-£10.21m	-£7.11m
Net floorspace equivalent Prestwich Town Centre turnover per sq m (sq m)	0 sq m	0 sq m	0 sq m	0 sq m
Net floorspace equivalent retail warehoused turnover per sq m (sq m)	0 sq m	0 sq m	0 sq m	0 sq m

4.30 The above table shows that following the implementation of the Longfield Centre redevelopment proposals, there is no capacity for additional comparison goods floorspace within the Prestwich zone at current market shares. Due to the proximity of centres within the zone to Bury the sub-regional centre, Bury should remain the principal non-food shopping destination for residents of zone 3 to support this role.

4.31 However, given the low market share of zone 3 and the decline in this market share since 2009, proposals that potentially increase this market share and produce more sustainable shopping patterns should be considered on a case by case basis. However, given the proximity of zone 3 to Bury Town Centre, Manchester City Centre and Cheetham Hill / Manchester Fort Shopping Park and the good accessibility to residents of zone 3 to these shopping destinations, it is not considered that a significant increase in the market share of zone 3 is likely to be achievable in reality.

Radcliffe

Convenience Goods

4.32 Table 4.11 below sets out the convenience goods capacity identified within zone 4 and how this changes between 2013 and 2028. This capacity figure is also converted into a net floorspace equivalent for top-four retailers and discounter retailers.

Table 4.11: Convenience Goods Capacity in Zone 4 – Radcliffe : Existing Market Share of 54%

	2013	2018	2023	2028
Expenditure to support new floorspace (£m)	£13.03m	£13.88m	£15.81m	£17.55m
Net floorspace equivalent 'Top four' foodstore (sq m)	927 sq m	967 sq m	1,091 sq m	1,199 sq m
Net floorspace equivalent 'Discounter' foodstore (sq m)	2,178 sq m	2,274 sq m	2,565 sq m	2,819 sq m

4.33 As can be seen, there is a degree of convenience goods capacity identified within zone 3 over the study period at current market share. This level of capacity over the short term would be sufficient to justify further foodstore provision which in Radcliffe would be most likely to be in the form of a Discounter foodstore to complement rather than compete directly with existing provision within the centre.

Comparison Goods

4.34 Table 4.12 below sets out the comparison goods capacity identified within zone 3 and how this changes between 2013 and 2028. This capacity figure is also converted into a net floorspace equivalent utilising the Radcliffe Town Centre turnover per sq m and a benchmark retail warehouse turnover per sq m.

Table 4.12: Comparison Goods Capacity in Zone 4 – Radcliffe: Existing Market Share of 21%

	2013	2018	2023	2028
Expenditure to support new floorspace (£m)	-£3.73m	-£1.60m	£1.60m	£5.50m
Net floorspace equivalent Radcliffe Town Centre turnover per sq m (sq m)	0 sq m	0 sq m	584 sq m	1,842 sq m
Net floorspace equivalent retail warehoused turnover per sq m (sq m)	0 sq m	0 sq m	437 sq m	1,379 sq m

4.35 The above table demonstrates that there is a limited amount of capacity for additional comparison goods floorspace within zone 4 over the study period at current market share. This is concentrated towards the end of the study period and in itself would not be sufficient to justify the allocation of sites for the delivery of a substantial amount of non-food retail floorspace notwithstanding any qualitative need for such developments.

Overall Conclusions

4.36 The level of identified capacity has generally decreased from that calculated in previous studies, particularly over the short term. This identified capacity also increases less quickly than previous forecast. This is principally a result of the reduced expenditure growth projections set out by Experian that have fallen as a result of the recession and prolonged period of economic uncertainty from 2008 to the present. This uncertainty has necessitated the use of Forecast growth rates to ensure that expenditure capacity is not overstated based upon projections derived from periods of expenditure growth that will not reoccur in the future, at least over the short to medium term.

4.37 The analysis above sets out the capacity for each zone based upon the current market share. As a result of the comprehensive manner in which flows of expenditure have been modelled, were a zone to increase its market share, this would correspondingly reduce outflow to other zones within the primary catchment area and thus reduce capacity within each zone. It is our advice that with the exception of the encouragement of modest increases in market share in the Bury and Prestwich zones for convenience and comparison goods respectively, the Council should not plan for notable increases in the market share of each of these zones over the short term. The level of market share increase for the Bury and Prestwich zones should be assessed on a case by case basis judged against the application proposals that would be likely to create these increases in market share.

5 Housing Allocations Analysis

Rationale

- 5.1 The Housing Allocations Analysis is attached at Appendix 4. This analysis assesses the implications of Bury Council's housing allocations for each ward upon the population of each of the four zones within the retail study's primary study area. The spatial changes in population up to the year 2028 could have an effect on the level of retail expenditure within an area as a rapidly growing population requires a greater demand for retail floorspace than a stagnant or declining population.
- 5.2 The retail capacity assessments for convenience and comparison goods attached at Appendix 2 and Appendix 3 respectively assume that the population of each of the four zones within the primary study area will grow in line with the ONS 2010 2008-based sub-national population projections for the Borough of Bury as a whole. However, at a finer grain of analysis, the changes will be more complex given a declining household size over the study period and a variation in where additional households will be formed and reside as a result of the Borough's housing allocations.

Methodology

- 5.3 Tables 1 and 2 of Appendix 4 convert the Council's Strategic Housing Land Availability Assessment (SHLAA) figures for each ward and each year of the study period to projection completions for each of the four retail study zones up to 2028. Table 2 makes the assumption that windfalls are distributed across the four zones in proportion to the actual allocations within that zone¹⁰.
- 5.4 Table 3 then utilises this number of completions to ascertain the difference between the increase in population using the ONS projections and the increase in population likely as a result of the housing allocations. This analysis assumes that new homes will accommodate the average household size for that particular zone based on the 2010 household and population estimates taken from Experian Micromarketer in October 2011. It is also assumed that the average household size in Bury will decline by 7% over this period in line with ONS national projections.

¹⁰ For example, zone 1 – Bury, has 45% of allocations of the period up to 2028, it is therefore assumed that 45% of windfalls will also fall within this zone.

5.5 The change in population as a result of the housing allocations and the difference between this increase and the ONS projections is set out in Table 5.1 below.

Table 5.1: Additional Population Created Within Zone as a Result of Housing Allocations up to 2028

Zone	Population Increase As A result of Housing Allocations	Population Increase As A result of ONS Projections	Difference
Zone 1 – Bury	7,793	5,526	2,267
Zone 2 – Ramsbottom	2,095	1,677	418
Zone 3 – Prestwich	1,512	3,791	-2,279
Zone 4 – Radcliffe	6,004	2,173	3,831
Total Primary Study Area	17,214	13,167	4,236

5.6 Table 5.1 shows that within all zones with the exception of Prestwich, the Borough’s housing allocations will produce an increase in population over and above the ONS Borough-wide projections. Tables 4, 5, 6 and 7 then convert these population increases and decreases into figures of available convenience and comparison goods expenditure based upon the forecast expenditure per head within each of the zones in 2028 and the current and modelled market shares. These results are displayed in Tables 5.2, 5.3, 5.4 and 5.5 below along with a comparison of the total available expenditure for the goods category within the particular zone in 2028.

Table 5.2: Additional Comparison and Convenience Goods Expenditure Created Through Housing Allocations by 2028 in Zone 1 – Bury

Goods Category / Scenario	Change in Population	Total Expenditure Retained From Additional Population (£m)	Total Available Expenditure in Zone in 2028 (£m)	Percentage Increase As A Result of Housing Allocations
Convenience Goods Scenario A – Current Market Share: 69%	2,267	£3.06m	£164.70m	1.9%
Convenience Goods Scenario B – Market Share: 80%	2,267	£3.55m	£164.70m	2.2%
Comparison Goods Scenario A – Current Market Share: 73%	2,267	£6.53m	£332.10m	2.0%
Comparison Goods Scenario B – Market Share: 80%	2,267	£7.16m	£332.10m	2.2%

Table 5.3: Additional Comparison and Convenience Goods Expenditure Created Through Housing Allocations by 2028 in Zone 2 – Ramsbottom

Goods Category / Scenario	Change in Population	Total Expenditure Retained From Additional Population (£m)	Total Available Expenditure in Zone in 2028 (£m)	Percentage Increase As A Result of Housing Allocations
Convenience Goods Scenario A – Current Market Share: 54%	418	£0.47m	£51.83m	0.9%
Convenience Goods Scenario B – Market Share: 65%	418	£0.56m	£51.83m	1.1%
Comparison Goods Scenario A – Current Market Share: 11%	418	£0.21m	£114.39m	0.2%
Comparison Goods Scenario B – Market Share: 25%	418	£0.48m	£114.39m	0.4%

Table 5.4: Additional Comparison and Convenience Goods Expenditure Created Through Housing Allocations by 2028 in Zone 3 – Prestwich

Goods Category / Scenario	Change in Population	Total Expenditure Retained From Additional Population (£m)	Total Available Expenditure in Zone in 2028 (£m)	Percentage Increase As A Result of Housing Allocations
Convenience Goods Scenario A – Current Market Share: 72%	-2,279	-£3.42m	£115.87m	-3.0%
Convenience Goods Scenario B – Market Share: 80%	-2,279	-£3.81m	£115.87m	-3.3%
Comparison Goods Scenario A – Current Market Share: 16%	-2,279	-£1.55m	£236.39m	-0.7%
Comparison Goods Scenario B – Market Share: 30%	-2,279	-£2.91m	£236.39m	-1.2%

Table 5.5: Additional Comparison and Convenience Goods Expenditure Created Through Housing Allocations by 2028 in Zone 4 – Radcliffe

Goods Category / Scenario	Change in Population	Total Expenditure Retained From Additional Population (£m)	Total Available Expenditure in Zone in 2028 (£m)	Percentage Increase As A Result of Housing Allocations
Convenience Goods Scenario A – Current Market Share: 54%	3,831	£3.81m	£72.69m	5.2%
Convenience Goods Scenario B – Market Share: 65%	3,831	£4.59m	£72.69m	6.3%
Comparison Goods Scenario A – Current Market Share: 21%	3,831	£2.95m	£144.93m	2.0%
Comparison Goods Scenario B – Market Share: 35%	3,831	£4.92m	£144.93m	3.3%

5.7 As can be seen from the above tables, although additional convenience and comparison goods expenditure is created within zones 1, 2 and 4, this is relatively minor in comparison to the levels of expenditure that exists within each of the zones in 2028.

Conclusions

5.8 The above analysis demonstrates that the additional expenditure created or reduced as a result of the Council's housing allocations is relatively minor in comparison to the overall levels of expenditure available within each of the four zones by 2028. As a result of this, and due to the fact that the above changes are based upon the completions in the SHLAA being borne out across all zones exactly as predicted (which is not guaranteed) the analysis does not alter the overall capacity findings contained within Appendix 2 and Appendix 3 and analysed in Chapter 4 above.

6 Key Findings – Qualitative

Introduction and Methodology

- 6.1 The 'need' for new floorspace has two principal indicators, the level of quantitative need identified and qualitative factors that may justify the provision of floorspace over and above the level of quantitative need. A number of these qualitative factors can however be quantified and compared to local or national averages to give an indication of the performance of centres in certain areas to identify strengths and potential deficiencies.
- 6.2 Qualitative indicators of retail need include retailer requirement / demand, type and size of accommodation, and facilitating new investment to enhance the centre. In accordance with national planning policy it is incumbent upon Local Planning Authorities to facilitate the continued investment within centres in order to ensure that long term health and vitality of the centre is sustained and enhanced.
- 6.3 A number of data sources have been utilised to provide the background evidence to assess the current health and future qualitative needs of each of the centres in conjunction with visits to the centres and the professional judgements of DJ Deloitte and Bury Council officers. The data sources utilised include:
- EGi – retailer requirements.
 - CoStar Group Focus database – retailer requirements.
 - Experian GOAD Centre Reports – floorspace mix.
 - Property Market Analysis Promis database – catchment population demographic data.
 - Experian Micromarketer – study area demographic data.
 - In-centre survey results.
- 6.4 We provide a commentary below taking account of these indicators and the retail facilities which the centres currently provide in the context of their position within the retail hierarchy. The qualitative analysis is not broken down by goods sector i.e. convenience and comparison goods as most of the qualitative considerations such as type and size of accommodation and floorspace mix cut across the detailed goods categories.

Bury

Retailer Requirements

- 6.5 According to the Focus database, there are 22 requirements for Bury Town Centre. This is a decrease from the 2009 figure of 60. This decrease however is attributable to the opening of The Rock development and the wider economic downturn.
- 6.6 EGi states the number of unsatisfied retailer requirements in Bury as 47. These include the retailers and leisure operators set out in the table below:

Table 6.1: Retail Requirements in Bury – from EGi

99p Stores	Aldi	Ann Summers	ASK
B&M Bargains	Booths	Farmfoods	Halfords
Harveys	Hawkins Bazaar	Little Waitrose	Maplin
Pizza Hut	Sainsburys Local	Starbucks	Subway
Topps Tiles	Zizzi	Waitrose	Vans

- 6.7 As can be seen, the table includes a variety of potential operators of both A1 (convenience and comparison), A3, A4 and A5 uses. The table also includes a number of stores and operators that are currently present in the centre – their inclusion in the Focus database may indicate a need or a desire for a relocation or new store.

Type and Size of Accommodation

- 6.8 Following the opening of The Rock development Bury Town Centre now has a wide range of floorspace formats, ages and sizes. The Rock provides large modern format units which have succeeded in attracting new retailers to Bury Town Centre, most notably Debenhams and in drawing retailers from other units in the town centre to new larger stores, most notably Marks and Spencer.
- 6.9 As a result of this there are a number of vacancies within the centre the most prominent of which is the former Marks and Spencer store within the Millgate Centre and other stores in the surrounding square. Due to this, Bury now has a number of vacant stores in prime locations meaning there is no overarching need for additional floorspace to meet this need. Indeed, with the market providing very small units (albeit with 100% occupancy), Bury has a good range of units. The only obvious exception to this is in the category of 'in-centre' medium to large sized foodstore.

Floorspace Mix

6.10 Table 6.2 below sets out mix of floorspace within Bury Town Centre based upon the GOAD Centres database from a survey undertaken on 25 March 2011. The table compares the percentage of units and floorspace within the centre for particular uses against the national averages.

Table 6.2: Floorspace Mix of Bury Town Centre

	Convenience	Comparison	Service	Vacant
Bury – Units	5.75%	46.46%	31.42%	16.15%
National Average – Units	9.02%	41.71%	34.89%	13.20%
Bury – Floorspace	14.43%	54.80%	17.82%	12.89%
National Average – Floorspace	17.23%	47.15%	23.08%	11.52%

6.11 The above table shows that Bury has a higher than average proportion of units and floorspace occupied by comparison goods retailers. This reflects the centre's sub-regional status and is positive in providing a good range for the town's shoppers. However, the centre has a vacancy rate above the national average and a proportion of convenience goods units and floorspace below the national average. Although the proportion and floorspace of convenience goods retailers is, to a degree, to be expected given the important role of the market in serving this role, this suggests that there is a qualitative need for further convenience goods uses in the centre to provide additional consumer choice and reduce vacancies.

In-Centre Survey Results

6.12 The in-centre surveys in Bury Town Centre were conducted on Wednesday 31 August and Thursday 1 September 2011. Wednesday 31 August was a market day. The results of these surveys are attached at Appendix 8.

6.13 The surveys highlight the popularity of the market and larger anchor stores in drawing shoppers to the centre. Notable features that shoppers wish to see improved about the centre are the number of vacant shops, particularly in and around the Millgate Centre and the distance from the Millgate Centre and areas adjoining this such as the markets and bus station to The Rock development. The number of vacancies in the Millgate Centre have increased following the opening of The Rock as some retailers, most notably Marks and Spencer, have relocated there. This has resulted in some prominent vacant units within the Millgate Centre and longer distances for people to walk between certain stores than was previously the case. However, some of the 'issues' associated with this longer walk could likely be resolved through improving the visual and functional linkages between The Rock and the Millgate Centre.

- 6.14 Over the short term therefore, the majority of identified comparison goods capacity should be directed towards reducing vacancies in Bury Town Centre and through improvements and refurbishments to the existing centre that may attract retailers to these vacant units and / or improve linkages between The Rock and the remainder of the town centre.

Ranking Compared to Other Centres

- 6.15 The Javelin VENUESCORE for 2011 ranks Bury Town Centre 108th nationally with a score of 174. This is compared to a rank of 118th in 2010 and 130th in 2009. The ranking of Bury Town Centre compared to other nearby centres is set out below.

- Manchester City Centre – 3rd
- The Trafford Centre – 44th
- Bolton – 66th
- Wigan – 104th
- **Bury – 108th**
- Stockport – 118th
- Oldham – 147th
- Blackburn – 150th
- Ashton – 183rd
- Rochdale – 203rd

- 6.16 The increase in Bury's ranking over the past three years is positive and puts the centre high in the above list of centres in Greater Manchester and the surrounding area. The majority of this increase is likely to be attributed to the effect of The Rock in attracting new retailers to the centre. This ranking may increase further should additional retailers be attracted to Bury once The Rock development fully 'beds in' and if vacancies are reduced across the centre as a whole.

Overall Qualitative Needs

- 6.17 The above analysis shows that there is a degree of qualitative need for additional retail floorspace within Bury although at a level broadly in line with the levels of identified capacity. The key objective that any retail development in Bury should achieve over the short term is to support Bury Town Centre's sub-regional centre role and function by building on the improvements brought about by The Rock development and ensuring that overall the centre remains healthy. A part of this strategy should be actions to seek to reduce vacancies, particularly those brought about by the relocation of retailers to The Rock, and the improvement of linkages between various parts of the town centre. On the basis that individual proposals comply with the requirements of the National Planning Policy Framework, there may be justification for the provision of floorspace over and above the levels identified within the quantitative assessment providing the proposals contribute to achieving the overall objective of enhancing the long term health and vitality of the town centre, and continuing to balance its provision of facilities to meet residents' and shoppers' needs.

Ramsbottom

Retailer Requirements

- 6.18 According to the Focus database, there are 5 requirements for Ramsbottom Town Centre which represents a slight increase from January 2009 when data was first available. EGi lists the number of unsatisfied retail requirements for Ramsbottom as 25 although it is likely a number of these are generic requirements for the broad area of Bury / northern Greater Manchester rather than for Ramsbottom Town Centre itself.

Type and Size of Accommodation

- 6.19 Ramsbottom has three small to medium sized food stores, the new Aldi store and the adjacent Tesco and Morrisons stores. The in-centre surveys found that a number of people link trips between the Tesco and Morrisons stores. Other than these food stores, most of the retail units in Ramsbottom are of a small size reflecting the historic nature of the built environment in the centre. Although there are few larger stores suitable of accommodating more national multiple retailers, this has arguably been to the benefit of Ramsbottom's independent sector which is healthy.
- 6.20 Although the lack of larger accommodation in the centre and the low vacancy rate identified in Table 6.3 further below suggests a qualitative need for additional floorspace, this qualitative need should be weighed against the further qualitative need to retain the centre's character and 'quaintness' which is important to the centre's tourist economy and healthy independent sector.

Floorspace Mix

- 6.21 Table 6.3 below sets out mix of floorspace within Ramsbottom Town Centre based upon the GOAD Centres database from a survey undertaken on 26 July 2007. The table compares the percentage of units and floorspace within the centre for particular uses against the national averages¹¹.

¹¹ These floorspace details are different from those utilised within Appendix 2 and Appendix 3 for the centres of Ramsbottom, Prestwich and Radcliffe. The GOAD reports have been utilised in the analysis above to allow ease of comparability between centres.

Table 6.3: Floorspace Mix of Ramsbottom Town Centre

	Convenience	Comparison	Service	Vacant
Ramsbottom – Units	13.76%	46.79%	35.78%	3.67%
National Average – Units	9.02%	41.71%	34.89%	13.20%
Ramsbottom – Floorspace	34.15%	38.11%	26.01%	1.73%
National Average – Floorspace	17.23%	47.15%	23.08%	11.52%

6.22 The above table shows the dominance of the food stores within the centre in floorspace terms accounting for over a third of the floorspace prior to the development of the Aldi store. This is mainly a result of the small size of the remainder of the shops within the centre. The centre has a higher than average percentage of comparison goods units compared to centres nationally and a lower than average percentage of floorspace. This would suggest a qualitative need for additional, larger comparison goods units. This is also supported by the very low vacancy rate in the centre (which anecdotally has increased to a degree since the survey was undertaken).

In-Centre Survey Results

6.23 The in-centre surveys in Ramsbottom Town Centre were conducted on Thursday 8 September and Sunday 11 September. Sunday 11 September was a day the farmers market was held in the centre and also saw the centre hosting the world black pudding throwing championships. Although this event only occurs once a year it is representative of the number of speciality weekend events that are held in Ramsbottom on many occasions each year. The results of these surveys are attached at Appendix 8.

6.24 Perhaps the most notable findings of the in-centre survey results in Ramsbottom is the number of people who would not seek to change the centre. Although this is expected to a degree by people who currently use the centre (people who do not like the centre choosing to shop elsewhere), it demonstrates the popularity of the centre as a tourist / leisure shopping destination and in serving a localised convenience goods shopping role.

6.25 However, a number of respondents queried the choice of shops and the price of goods within some of the shops which could be a potential downside for local users of the centre of its popular tourist role. Traffic through the centre (including heavy goods vehicles along Bridge Street) and parking during busy periods were seen as particular problems by a number of respondents.

Overall Qualitative Needs

- 6.26 The lack of larger units in the centre and the very low vacancy rate suggests a qualitative need for additional floorspace over and above the level of identified quantitative capacity within Ramsbottom. However, this qualitative need should be balanced against the importance of maintaining the overall character and environment of Ramsbottom which in conjunction with the East Lancashire Railway and numerous specialist events in the town¹² are significant factors in attracting people to Ramsbottom.

Prestwich

Retailer Requirements

- 6.27 According to the Focus database, there is only 1 requirement for Prestwich Town Centre which is a decline from a high of 11 in April 2007. EGi lists the number of unsatisfied retail requirements for Prestwich as 32 although it is likely a number of these are generic requirements for the broad area of Bury / northern Greater Manchester rather than for Prestwich Town Centre itself.

Type and Size of Accommodation

- 6.28 Prestwich contains a mix of ages of accommodation with older properties along Bury New Road, the units within the Longfield Centre and more modern units within the Radius scheme and the nearby Marks and Spencer store. The centre is fairly elongated although its core is around the Longfield Centre and Radius scheme adjacent to the centre's main car parking and the Metrolink stop. The size and variety of accommodation would be improved following the redevelopment of the Longfield Centre which would provide more modern retail units that are better suited to national multiple retailers.

Floorspace Mix

- 6.29 Table 6.4 below sets out mix of floorspace within Prestwich Town Centre based upon the GOAD Centres database from a survey undertaken on 27 October 2009. The table compares the percentage of units and floorspace within the centre for particular uses against the national averages.

¹² These include the regular farmers' markets and car boot sales, East Lancashire Railway events such as the rail ale tour and wartime weekends and music and food festivals.

Table 6.4: Floorspace Mix of Prestwich Town Centre

	Convenience	Comparison	Service	Vacant
Prestwich – Units	11.71%	34.23%	38.74%	14.41%
National Average – Units	9.02%	41.71%	34.89%	13.20%
Prestwich – Floorspace	45.52%	22.14%	20.09%	8.88%
National Average – Floorspace	17.23%	47.15%	23.08%	11.52%

6.30 The above table shows that a large proportion of the floorspace of Prestwich Town Centre is taken up by convenience goods units. This shows that comparison units are on average smaller than convenience goods units which is to be expected in a centre of Prestwich's size. The centre had an above average vacancy rate in terms of units but a below average vacancy rate in terms of floorspace which suggest a need for larger units although there is little evidence of unfulfilled demand in terms of the number of outstanding retail requirements in the town.

6.31 The centre's proportion of units and floorspace of service units is around the national average although the proportion of comparison goods units and floorspace is below the national average and indeed, the lowest of the four town centres within the Borough. This is also reflected in the low comparison goods market share of Prestwich of 16%. This suggests a qualitative need for additional comparison goods floorspace in contrast to the lack of identified quantitative comparison goods need within the centre.

In-Centre Survey Results

6.32 The in-centre surveys in Prestwich Town Centre were conducted on Friday 9 September and Monday 12 September. The results of these surveys are attached at Appendix 8.

6.33 The most common suggestions of improvements to Prestwich from the in-centre surveys were the provision of more shops and the improvement of the environment of the centre. The availability and cost of parking was also identified as an issue. A number of respondents also specified a need to 'knock it down and start again' which in conjunction with the factors above and Prestwich's currently low comparison goods market share demonstrate the importance of bringing forward the regeneration and redevelopment of the centre, currently proposed in the form of a foodstore-led redevelopment of the Longfield Centre, to rectify the issues identified by users of the centre.

Overall Qualitative Needs

- 6.34 There is a clear need in Prestwich for additional retail development. This is currently proposed in the form of the foodstore-led redevelopment of the Longfield Centre. As this has Planning Permission it is treated as a Commitment within the quantitative retail assessment and as a result takes up almost all identified capacity within the town centre at current market share over the study period (with the exception of a small amount of convenience goods expenditure capacity from 2023 onwards).
- 6.35 This development should it occur would also address the majority of the qualitative needs identified above through providing new shops and a more modern environment. The degree to which the proposals address the centre's current deficiencies will be dependent upon the eventual occupiers of the retail units and overall quality of design of the development. Bury Council should keep this under review to assess if there is a further qualitative need that would justify additional floorspace over and above that proposed within the Longfield Centre redevelopment.

Radcliffe

Retailer Requirements

- 6.36 According to the Focus database, there are 4 requirements for Radcliffe Town Centre. This figure has remained relatively static since 2007 although decreasing to 2 in 2009. EGi lists the number of unsatisfied retail requirements for Radcliffe as 32 although it is likely a number of these are generic requirements for the broad area of Bury / northern Greater Manchester rather than for Radcliffe Town Centre itself.

Type and Size of Accommodation

- 6.37 The majority of retail accommodation in Radcliffe is smaller in nature although with the Dunelm and ASDA stores providing the main exceptions to this away from the core of the centre. The market also provides small units within the potential for retailers to start on a small scale before progressing to other units within the centre. The smaller size of accommodation is reflected in Table 6.5 below that shows that Radcliffe has a vacancy rate in unit terms almost twice the national average yet in floorspace terms one marginally below the national average. Although this is likely to be skewed to a degree by the large ASDA and Dunelm stores, it does support the qualitative need for large units within the centre to improve the attractiveness of the centre to a wider range of retailers, particularly national multiples. This is further demonstrated by the higher proportion of service units in the centre compared to the national average compared to the lower percentage of floorspace suggesting service units in Radcliffe are smaller than average for centres nationally.

Floorspace Mix

6.38 Table 6.5 below sets out mix of floorspace within Radcliffe Town Centre based upon the GOAD Centres database from a survey undertaken on 14 April 2009. The table compares the percentage of units and floorspace within the centre for particular uses against the national averages.

Table 6.5: Floorspace Mix of Radcliffe Town Centre

	Convenience	Comparison	Service	Vacant
Radcliffe – Units	9.32%	26.27%	39.83%	22.28%
National Average – Units	9.02%	41.71%	34.89%	13.20%
Radcliffe – Floorspace	35.58%	32.60%	19.09%	11.50%
National Average – Floorspace	17.23%	47.15%	23.08%	11.52%

6.39 The above table shows that although Radcliffe has a proportion of convenience units slightly above the national average in unit terms, this is over twice the national average in floorspace terms and reflects the large size of the ASDA store and its dominance of the centre in convenience goods shopping terms whilst forming an important anchor role. The centre has a lower proportion of both comparison goods units and floorspace compared to the national average. The proportion of comparison goods units in Radcliffe is the lowest of the Borough's four town centres although it is higher than Prestwich in floorspace terms principally as a result of the Dunlem store. This suggests a qualitative need for additional comparison goods floorspace within the centre.

In-Centre Survey Results

6.40 The in-centre surveys in Radcliffe Town Centre were conducted on Tuesday 6 September and Wednesday 7 September. Tuesday 6 September was a market day. The results of these surveys are attached at Appendix 8.

6.41 One of the most frequently cited suggestions for improvement of Radcliffe Town Centre in the in-centre surveys was a need to provide a better market. This was also coupled with an overall suggestion for more and better shops within the centre although this response was reflected across all centres, it was perhaps more prevalent in Radcliffe than other centres. The quality of the environment in and around the centre was also identified as an area for improvement although principally around the existing bus station, the market and the crossing to the ASDA store.

Overall Qualitative Needs

- 6.42 The identified qualitative needs within Radcliffe Town Centre analysed above support the level of quantitative need within the centre at current market share. There is a particular need for additional comparison goods retailers and an improved market. There would be potential to provide these improvements through the Sun Quarter proposals. The proposed development could also potentially be anchored by a small or 'Discounter' foodstore for which identified capacity exists and this would provide additional consumer choice for residents of the area as Radcliffe is the only one of the Borough's four town centres with only one national foodstore operator in or within the vicinity of the centre. These proposals, were they to come forward would also assist in linking the edge-of-centre ASDA store more effectively with the remainder of the centre.
- 6.43 The appearance of the northern part of the centre has improved recently with the development of the health centre on Church Street West and the refurbishment of some of the retail properties along this street providing improved footfall in this area of the centre and improving links with the Metrolink stop.

7 Overall Conclusions

Bury

Convenience Goods

- 7.1 There is a degree of identified quantitative need for additional convenience goods floorspace in zone 1 – Bury over the short term. Any additional floorspace should be directed towards Bury Town Centre to maintain and where possible enhance the centre's sub-regional shopping role. This could be achieved by promoting the floorspace in a location to act as an anchor to complement the draw of The Rock taking account of the need to sustain and enhance the long term health of the town centre as a whole. Any additional convenience goods floorspace provided in Bury should not detract from the important role that the market serves in this regard and in particular in attracting people from a wide area to Bury Town Centre contributing substantially to its vitality and viability.
- 7.2 The promotion of a appropriate scale of additional floorspace would improve consumer choice and seek to halt or partially reverse the decline in convenience goods market share of the town since the previous study was undertaken. Consideration should be given to making specific allocation(s) to meet these needs.

Comparison Goods

- 7.3 Some quantitative need is identified for additional floorspace over the medium term, however this should ideally be directed towards reducing vacancies – the reconfiguration of existing older floorspace, including extensions within the centre should be supported to improve the vitality and viability of the centre
- 7.4 There is a modest amount of identified quantitative need for additional retail floorspace within Bury over the short term although this rises more substantially over the medium to long term. Given the recent development of The Rock and the delivery of additional comparison goods floorspace, there is no immediate qualitative need for additional comparison goods floorspace per se. Indeed vacancy rates in the centre have increased with some retailers relocating from the Millgate Centre to The Rock. As a result, identified comparison goods capacity in the town should ideally be directed towards reducing vacancies in the first instance.

- 7.5 In addition to this however, there is a need to improve linkages between the two main comparison goods anchors of Bury in the form of the Millgate Centre and The Rock as well as improving linkages between the other parts of the town centre. Any proposed developments that would improve these linkages should be supported by Bury Council on the assumption that they would contribute to the vitality and viability of the centre.

Ramsbottom

Convenience Goods

- 7.6 There is a small amount of identified convenience goods capacity in Ramsbottom throughout the study period. This is in the context of a notable improvement in the convenience goods market share of the town centre – through two main foodstores and the opening of the Aldi store. However, this would in itself, not be sufficient to warrant a specific allocation for additional convenience goods provision within the centre. Further to this, Ramsbottom is currently a very popular centre for tourist shopping, even for convenience goods with an important independent convenience goods sector and popular events such as the farmers' market. These events and retailers contribute notably to the vitality and viability of the centre and in conjunction with the three foodstores, provide a good level of consumer choice for residents of the town, given its smaller catchment than others within the Borough.

Comparison Goods

- 7.7 There is no identified quantitative capacity for additional comparison goods floorspace within Ramsbottom over the study period. Bury should remain as the first choice comparison goods shopping destination for residents of this zone although any small scale increases in comparison goods provision within existing centres would be favoured if this increases sustainable shopping patterns and reduces the need for residents to travel. This would reflect the currently low comparison goods market share of the centre. However, the provision of any additional floorspace within or near Ramsbottom Town Centre should not detract from the centre's strong tourist role. Indeed, Bury Council may wish to specifically consider the impact of any planning application for retail or town centre uses upon this sector including the consequences of a decline in the centre's independent sector on this tourist role and function. It may be difficult to achieve a significant increase in the centre's market share without harming the strong environment and character of the centre.
- 7.8 Specialist events within the centre such as farmers markets, car boot sales, festivals and events associated with the East Lancashire Railway are important in drawing shoppers and tourists to the town and enhancing the vitality and viability of the centre. The use of these events should be encouraged and extended wherever possible.

Prestwich

Convenience Goods

- 7.9 There is no quantitative capacity for additional convenience goods floorspace within Zone 3 over the short to medium term in addition to the Committed Longfield Centre redevelopment proposals. The redevelopment of the Longfield Centre, if built out, will contribute substantially to the vitality and viability of the town centre.
- 7.10 Other than the need to regenerate Prestwich Town Centre, there is little qualitative need for additional convenience goods floorspace within the zone as provision is currently strong with two discounters, two large foodstores and the Marks and Spencer Simply Food providing the principal shopping facilities in addition to a number of smaller stores. The market share of the zone at 72% is also strong, particularly given the proximity of other large foodstores within the area such as the ASDA at Pilsworth, ASDA at Radcliffe and Sainsburys at Heaton Park. It is not considered that the Longfield Centre proposals once implemented would have a substantial effect on the market share of zone 3, instead simply maintaining the current position in 'response' to the new, larger Sainsburys store at Heaton Park and potential additional convenience goods floorspace in zone 1.

Comparison Goods

- 7.11 There is no identified quantitative capacity for additional comparison goods floorspace within zone 3 throughout the study period at current levels of market share following development of the Longfield Centre Commitment. However, this market share has declined since the publication of the 2009 Prestwich Town Centre Retail Capacity Assessment.
- 7.12 As a result of this, the Council may wish to consider whether there is a qualitative need significant enough to justify an increase in market share above existing levels to address the centre's current deficiencies – however this needs to be weighed against the reduction in capacity this would have in other zones (by virtue of reducing inflow to these zones from zone 3) and the reality of achieving such a market share increase given the proximity of Prestwich to Bury, Manchester and Manchester Fort Shopping Park. Appendix 3 shows that an increase in market share to 30% would result in capacity in the Prestwich zone over and above the Longfield Centre proposals although it is arguably unlikely that such a level of market share could be achieved given the proximity of nearby facilities with a stronger attraction in comparison goods terms, most notably, Bury Town Centre, Manchester City Centre and Manchester Fort Shopping Park.

- 7.13 Give the implications for capacity in others zones an increase in the market share in zone 3 would have, Bury Council should consider applications that may result in an increase in market share on a case by case basis. Whilst an increase in the comparison goods market share of Prestwich could be positive in promoting sustainable shopping patterns, particularly given the recent decline in market share, this should not be at the expense of Bury's role as the main comparison goods shopping destination for residents of the Borough, including zone 3 or the role and function and regeneration prospects of nearby centres outside of zone 3, most notably Radcliffe Town Centre.

Radcliffe

Convenience Goods

- 7.14 There is a degree of additional convenience goods capacity identified in Radcliffe over the short to medium term at the current market share of 54%. This would be sufficient to justify a Discounter foodstore within the centre and would also provide additional consumer choice to the town's residents. This would also result in each of the Borough's main town centres having a choice of more than one foodstore for shoppers within the town. This Discounter foodstore would also complement the role of the current ASDA store which is a popular anchor to the centre. Such a foodstore could form part of the Sun Quarter proposals within the centre which could also potentially deliver improved markets, better links to the edge of centre ASDA store and improvements to the overall environment in the centre.
- 7.15 The markets in Radcliffe are fairly popular although are described by many of the in-centre survey respondents as needing improvement. The provision of improved markets within Radcliffe would also contribute substantially to the centre's attractiveness and should be promoted by Bury Council.

Comparison Goods

- 7.16 There is little identified capacity for new comparison goods floorspace over the short term although where the provision of additional comparison goods floorspace would support the wider regeneration of the centre this should be supported. Radcliffe has a currently fairly low market share and limited comparison goods offer which is to be expected given the centre's proximity to Bury and Bolton Town Centres. There is a modest qualitative need for additional modern units within the centre which also could be met through the development of the Sun Quarter proposals. Beyond this, there is no overriding need for additional comparison goods floorspace in Radcliffe although proposals that would promote sustainable shopping patterns and improve consumer choice should be viewed favourably providing they do not detract from the role of Bury Town Centre as the principal comparison goods shopping destination for residents of zone 4 or impinge on the regeneration prospects of Radcliffe or Prestwich Town Centres.

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