

# Trafford Council

## Retail and Leisure Study

### Final Report

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## 1.0 Introduction

### Instruction and Scope

- 1.1 Nexus Planning has been instructed by Trafford Council (hereafter referred to as 'the Council') to undertake a new Borough-wide Retail and Leisure Study. The focus of the Study is to establish the current position in respect of the need for additional retail and leisure facilities in Trafford Borough, and consider the vitality and viability of the Council's principal centres<sup>1</sup>.
- 1.2 This Retail and Leisure Study replaces the previous Trafford Borough Retail and Leisure Study which was undertaken by GVA Grimley and which reported in November 2007. This new Study will not only form part of the evidence base to inform the future Local Plan, it will also assist with the Council's consideration of planning applications for retail and leisure uses.
- 1.3 Nexus Planning's Response to the Council's Request for Quotation confirmed the principal outputs for the Study. In brief summary, these comprise:
- a comprehensive assessment of relevant retail and town centre planning policy, and an appraisal of relevant retail and leisure trends, in order to clearly set out the context for the Study;
  - healthcheck assessments of the four town centres of Altrincham, Sale, Stretford and Urmston, the three district centres of Hale, Sale Moor and Timperley, and Partington local centre;
  - the undertaking of 1,000 household shopper surveys across the Borough's principal catchment area in order to identify shopping trips to purchase convenience and comparison goods, and trips to access leisure facilities;
  - the undertaking of 150 in-street surveys in Altrincham town centre and 100 in-street surveys in each of the other three town centres in order to record visitors' views, behaviour, needs and future intentions;
  - a quantitative and qualitative assessment of the capacity to support additional retail and leisure provision in the period to 2037, with reference to the findings of the household survey and planned future population growth;
  - the consideration of the opportunities that exist in order to accommodate identified future requirements; and

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<sup>1</sup> These being: the four main town centres of Altrincham, Sale, Stretford and Urmston; three district centres of Hale, Sale Moor and Timperley; and, Partington local centre

- advice in respect of the implications of the Study in respect of plan-making with particular reference to town centre and primary shopping area boundaries, the setting of a locally-appropriate thresholds for the purpose of the impact test, and the retail hierarchy.

1.4 The household survey that underpins the Study was undertaken by NEMS Market Research in October 2018 across nine zones, which are considered reflective of the principal catchment area for retail and leisure facilities within Trafford Borough. The zones are consistent with those utilised in the previous 2007 Retail and Leisure Study in order to allow comparison of shopping patterns over time.

1.5 A plan of the Study Area is provided at Appendix 1, and the tabulated household survey results are provided at Appendix 2. The Study Area includes parts of neighbouring authority areas of Cheshire East, Manchester, Salford and Warrington, where residents sometimes look to facilities in Trafford to meet at least some of their retail and leisure needs.

### Structure of Report

1.6 Our report firstly provides an overview of prevailing retail and leisure trends, before then going on to consider the planning policy context for the Study. We then summarise the key findings of the in-street and household surveys, before considering the vitality and viability of defined centres within Trafford Borough. The remainder of the report is focussed around the assessment of retail and leisure needs.

1.7 Accordingly, our report is structured as follows:

- Section 2 identifies current retail and leisure trends of relevance;
- Section 3 provides an overview of the planning policy context;
- Section 4 summarises the findings of the in-street surveys in the four town centres;
- Section 5 summarises the findings of the healthcheck assessments, which consider the vitality and viability of the Borough's eight principal centres;
- Section 6 provides an overview of estimated Study Area population and expenditure growth in the period to 2037;
- Section 7 summarises the results of the household shopper survey and the changes in the Borough's market share over time;
- Section 8 sets out our assessment of future retail needs;
- Section 9 sets out our assessment of future leisure needs;

- Section 10 considers the role and function of out of centre retail destinations across the Borough (including Altrincham, Trafford and White City Retail Parks, and the Trafford Centre); and
- Section 11 summarises our key findings and provides our recommendations including town centre boundaries and local impact thresholds.

## 2.0 Current Retail and Leisure Trends

2.1 In order to provide a context for this Study and help identify the sectors that are more likely to be the subject of additional development proposals, we provide an overview of current retail and leisure trends below. In reading the below review, it should be noted that the retail and leisure sectors are dynamic and, whilst online shopping has impacted on the retail sector, new retailers and new formats continue to evolve to meet shoppers' needs. The below commentary should therefore be taken as a 'snapshot' in respect of current market conditions; it will be necessary to judge future development proposals for main town centre uses with reference to the prevailing conditions at the time of a proposal's determination.

### **The Impact of Brexit and the Current State of the UK Economy**

2.2 Subsequent to the referendum result in June 2016, which secured a majority vote for the UK to leave the European Union, it is generally accepted that the immediate future is likely to be one of economic uncertainty with a consequential impact on consumer confidence and spending. In the aftermath of Brexit, Verdict published its Economic & Retail Update<sup>2</sup> in September 2016. Verdict forecast the following economic trends.

- Retail growth across Britain in 2016 is likely to be relatively flat. However, a weaker pound effectively brings down the cost of goods for international travellers, who may spend more as a consequence.
- A weaker pound also leads to higher import and manufacturing costs, which retailers may pass onto consumers. Verdict anticipates that the clothing and footwear sector is likely to be the subject of the greatest inflationary price increases.
- Brexit may have a negative impact on the housing market and a consequential adverse impact on those retailers who rely on householders investing in their property. As such, there may be less money spent on goods such as DIY, furniture, floor coverings, gardening goods and so on.
- In volume terms, little will change in respect of the food retail sector, but inflationary pressures may mean that shoppers spend more on their groceries and less on other goods.

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<sup>2</sup> 'Economic & Retail Update: H2 2016', Verdict, September 2016

- 2.3 Two years on, Verdict's initial forecast in respect of how the market would react appears accurate.
- 2.4 As we go on to consider in greater detail below, page 2 of Experian's Retail Planner Briefing Note 16 ('ERPBN16') finds that the UK economy's recovery '**...will remain on a sluggish growth trajectory for the next couple of years amid ongoing uncertainty over the final outcome of Brexit negotiations**'.
- 2.5 In terms of inflation, Office for National Statistics data<sup>3</sup> indicates that the rate of inflation (as measured by the consumer price index) increased from 0.5% at June 2016 to a high of 3.1% at November 2017, before reducing to 2.4% at June 2018. The increasing cost of living is particularly problematic for the retail sector, as inflation has been principally driven by increasing fuel prices (affecting the cost of electricity, gas and petrol), meaning that consumers have a lesser amount to spend on the high street. Indeed, The Guardian<sup>4</sup> reports that the price of men's clothing in particular has fallen and that the monthly drop in clothing costs in June 2018 was the biggest recorded since 2012 as shops staged their summer sales in a challenging trading environment.
- 2.6 In respect of the predicted downturn for the DIY sector, both B&Q and Homebase have reported difficult trading conditions in recent times. Kingfisher, owner of B&Q, saw its share price reduce significantly in March 2018 after reporting a 2.8 fall in full year like-for-like sales<sup>5</sup>. Homebase is in greater difficulty after its previous owner, Wesfarmers, sold the chain to Hilco for £1 in May 2018. It has been widely reported<sup>6</sup> that 300 jobs are to be lost at Homebase's head office and that up to 80 stores could close as efforts are made to stabilise the business.
- 2.7 In terms of the grocery market, Kantar<sup>7</sup> reports that grocery inflation stands at 1.9% for the 12-week period ending 17 June 2018. Prices (judged on a like-for-like basis, with reference to identical products) have increased over every quarterly reporting period since January 2017. However, this cannot be attributed just to the economic impacts of Brexit, but is also a consequence of weather conditions and factors such as the recent 'sugar tax' on soft drinks (which came into force in April 2018). The increase in prices is not necessarily good news for the industry as it is reflective of costs increasing, and shoppers have often 'traded down' to buy cheaper substitutes or undertaken more shopping at discount stores

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<sup>3</sup> ONS 'Consumer price inflation tables' dataset, July 2018

<sup>4</sup> Article headlined 'UK interest rate rise in doubt as inflation stays at 2.4%', The Guardian, 18 July 2018

<sup>5</sup> Article headlined 'DIY sector sums up need for economic improvement', Sky News online, 27 April 2018

<sup>6</sup> Including the article headlined 'Homebase cuts more than 300 jobs as more store closures loom', The Guardian, 28 June 2018

<sup>7</sup> Article headlined 'UK grocery market reaches two-year growth milestone', Kantar, 26 June 2018

in order to avoid price increases.

**Available Expenditure and the Impact of the Internet**

2.8 Experian forecasts limited increases in per capita convenience and comparison goods expenditure over the short term. The below Table 2.1 provides an extract from Figure 1a and Figure 1b of ERPBN16. The convenience goods sector has been the subject of a reduction in per capita consumer expenditure across much of the past decade (in real terms, after allowing for inflation), with some limited growth only returning from 2015. The market conditions can be attributed to the continued rise of the discount operator subsequent to the recession of 2008 and 2009, and the reaction of the ‘big four’ supermarket operators<sup>8</sup> to increased competition. Experian forecasts that per capita expenditure growth in the convenience goods sector will slow to 0.5% at 2019 (from 1.0% at 2018), with very limited forecast growth thereafter.

2.9 As Table 2.1 indicates, forecast increases in comparison goods spending are more optimistic, but it is evident that per capita comparison goods expenditure increases will be below the level apparent at the turn of the millennium. Experian identifies that per capita comparison goods expenditure growth dropped from 5.5% at 2017 to 2.8% at 2018, and forecasts that it will remain between 2.6% and 3.3% per annum across the next decade and beyond. By way of comparison, Figure 1a of ERPBN16 indicates that per capita expenditure growth was, on average, 8.2% per annum between 1997 and 2007.

**Table 2.1: Experian’s Identified and Forecast Convenience and Comparison Goods Per Capita Expenditure Growth**

Volume Growth Per Head (%)	2013	2014	2015	2016	2017	2018	2019	2020	2021-2025	2026-2037
Convenience goods	-0.9	-0.1	0.5	1.3	1.3	1.0	0.5	0.1	0.1	0.1
Comparison goods	3.6	4.3	4.9	4.7	5.5	2.8	2.6	2.8	3.3	3.2

Source: Figure 1a and Figure 1b of Experian Retail Planner Briefing Note 16

2.10 Whilst the above figures relate to a level of growth which is significantly below that which has historically been available to retailers, the situation is exacerbated through the increasing amount of expenditure which is committed through special forms of trading<sup>9</sup> and, in particular, online.

2.11 In this regard, Appendix 3 of ERPBN16 indicates that a strong increase in online shopping over the past

<sup>8</sup> Asda, Morrisons, Sainsbury’s and Tesco

<sup>9</sup> Including internet sales, mail order, stalls and markets, door-to-door and telephone sales

decade has lifted the share of special forms of trading to a level where it now accounts for around 20% of total retail sales (with the internet alone accounting from 17% of total retail sales). Experian forecasts that non-store retailing will continue to grow rapidly, increasing at a faster pace than total retail sales well into the long term. Experian believes that special forms of trading will account for almost 23% of retail sales by 2022, increasing to around 27% by the mid-2030s.

- 2.12 The below Table 2.2 sets out Experian's identified and forecast level of special forms of trading as a proportion of overall convenience and comparison goods expenditure. Experian estimates that special forms of trading will account for more than a quarter of comparison goods expenditure and around a fifth of convenience goods expenditure at 2037.

**Table 2.2: Experian's Identified and Forecast Market Share of Non-Retail Sales for Convenience and Comparison Goods Sectors**

Volume Growth Per Head (%)	2015	2016	2017	2018	2022	2027	2029	2032	2037
Convenience goods	8.2	9.4	11.2	12.4	15.3	17.5	18.0	18.7	19.7
Comparison goods	16.4	18.1	20.7	22.6	26.3	28.1	28.5	28.7	29.0

Source: Figure 1a and Figure 1b of Experian Retail Planner Briefing Note 16

- 2.13 The ongoing popularity of internet shopping continues to have clear implications in respect of the viability of some 'bricks and mortar' retailers. However, it is important to note that changes in how people shop also bring about opportunities for retailers trading from the high street. In particular, many stores sell online but fulfil orders from regular stores rather than warehouses<sup>10</sup>, with purchases therefore helping to sustain tangible retail floorspace. As a consequence, Experian also provides an 'adjusted' estimate of special forms of trading, which relates to expenditure which is not available to actual stores. We return to this matter when considering the level of expenditure generated within the Study Area at Section 6 of this report.
- 2.14 One way in which online expenditure can help to sustain bricks and mortar retailers is through the use of the internet to 'click and collect', with purchases being picked up at a dedicated counter within a store. Such sales now account for over half of John Lewis internet orders<sup>11</sup>. In addition, it is evident that some retailers (particularly those offering big ticket items) are benefitting from having a bricks and mortar presence which can be used a 'showroom' in order to view and try goods, with some purchases

<sup>10</sup> This is particularly the case with food shopping and speciality comparison goods purchases, where retailers often try to tap into a wider market through an online presence

<sup>11</sup> 'Click and Collect', Mintel, September 2014

then being made later online. Retailers are also more frequently providing in-store wi-fi and 'technology points', which can allow shoppers to browse a wider product range than is carried in-store. Accordingly, whilst new technology provides significant challenges to bricks and mortar operators, it also provides opportunities for more progressive operators that are able to invest in new technology.

### Convenience Goods

- 2.15 Recent socio-economic conditions have led to significant shifts in convenience goods retailing, which have resulted in the 'big four' supermarket operators' market share being cut. Mintel<sup>12</sup> finds that the decline of the food superstore is well established and that this can be attributed to two issues.
- 2.16 Firstly, people are undertaking food shopping in different ways. More people are living in town and city centres and more people are having difficulties financing the purchase of their own home. Mintel indicates that such people are more likely to undertake food shopping on a 'as needs' basis and are more likely to eat out or use takeaways. As such, they are less likely to have need to undertake a 'main food shop'.
- 2.17 Secondly, the current uncertainty in the economy has made hard discounters (namely Aldi and Lidl) a more attractive proposition. Discounters have also made efforts to try to compete more directly with the 'big four' supermarket operators, with larger stores, greater ranges, fresh foods and premium products becoming increasingly prevalent. When analysing the performance of Aldi, Retail Economics<sup>13</sup> notes that it has **'attacked the heartland of UK grocery'** by undercutting the 'big four' with highly competitive prices and investing in more high quality premium produce. In a similar way, Lidl has also adopted an aggressive growth programme relating to its pricing, produce offer and store openings since 2013.
- 2.18 The move towards the middle ground has allowed discounters to secure market share from both superstores and smaller convenience stores. In addition, we note that discount retailers are often happy to trade alongside more upmarket convenience goods retailers (such as Marks & Spencer Foodhall) as, collectively, the two stores can meet many food shopping needs.
- 2.19 The shifts in the sector are illustrated with reference to changes in retailers' market share in recent years. As Table 3.3 sets out, the market share of each of the 'big four' has been consistently eroded in

<sup>12</sup> 'UK Retail Rankings', Mintel, April 2016

<sup>13</sup> 'UK Food and Grocery', Retail Economics, September 2015

recent years, with Tesco and Morrisons being the subject of the largest percentage point losses. Tesco's market share of the UK grocery market has reduced from 23.7% at 2011 to 21.6% at 2016, and Morrisons market share reduced from 9.5% to 7.7% over the same time frame. The greatest beneficiaries have been Aldi and Lidl, with the former's market share more than doubling from 1.9% at 2011 to 5.3% at 2016. Lidl's market share increased from 1.9% to 2.7% over the same period.

**Table 2.3: Market Share of Principal UK Grocers**

	2011	2012	2013	2014	2015	2016
Tesco	23.7%	23.9%	23.0%	22.5%	22.0%	21.6%
Sainsbury's	12.8%	13.1%	12.9%	12.8%	12.2%	11.9%
Asda	12.5%	13.3%	13.0%	13.0%	12.0%	11.5%
Morrisons	9.5%	9.3%	8.9%	8.2%	7.9%	7.7%
Aldi	1.9%	2.6%	3.3%	4.2%	4.8%	5.3%
Co-operative Food	5.5%	5.4%	5.1%	4.9%	4.8%	4.7%
Waitrose	3.5%	3.6%	3.7%	3.9%	3.9%	3.9%
Marks & Spencer	3.6%	3.7%	3.7%	3.8%	3.9%	3.9%
Lidl	1.9%	2.0%	2.0%	2.2%	2.4%	2.7%
Iceland	1.8%	1.9%	1.9%	1.9%	1.8%	1.8%

Source: UK Food & Grocery Retailer Update, October 2016

- 2.20 As a consequence of the above, the 'big four' grocers have closed some of their loss-making stores and larger stores have accommodated further concessions in order to take floorspace which is no longer required for the operators' main product range. By way of example, Sainsbury's is progressing with plans<sup>14</sup> to open around 250 Argos concessions within Sainsbury's foodstores. Other food superstores have welcomed additional concessions (including day to day services, such as dry cleaning and key cutting).
- 2.21 In April 2018, a proposed merger between Asda and Sainsbury's was announced, which had the potential to be one of the most significant structural changes affecting large format food retailing in recent times. However, the merger was considered by the Competition and Markets Authority ('CMA'), and a report published in April 2019 confirmed that the CMA found that UK shoppers and motorists would be worse off if the merger took place, due to expected price rises, reductions in the quality and range of products available, or a poorer overall shopping experience. This final decision to block the deal follows the publication of the CMA's provisional findings and a subsequent consultation period, during which the CMA reviewed responses from a variety of interested parties, including Sainsbury's

<sup>14</sup> Article headlined 'Sainsbury's pushes ahead with Argos rollout in supermarkets', BBC News online, 13 April 2017

and Asda themselves.

2.22 Discount operators continue to be generally optimistic in respect of their future growth. Aldi announced ambitious expansion plans in 2017, with an aspiration to trade from around 1,300 stores by 2022<sup>15</sup>; a significant increase given it currently trades from around 700 stores. Similarly, Lidl announced last year that its intention is to open at least one shop a week in forthcoming years<sup>16</sup>.

2.23 Tesco has tried to take on the discounter market with its own operation, called Jack's, which launched in September 2018. It appears that the initial stores trading under the Jack's fascia will occupy former and proposed Tesco stores, which may allow the new operation to grow relatively quickly. Reports suggest that the initial plan is for around 60 Jack's stores to open across the UK.

### Comparison Goods

2.24 The comparison goods sector is currently being squeezed by a number of factors, including reduced expenditure growth, the ability of internet shopping to plug gaps in retailer representation, increases in the minimum wage, and business rates changes. This 'perfect storm' has resulted in changes in the structure of retailing on the UK high street and a generally lesser reliance on comparison goods retail.

2.25 Whilst the sector is continually evolving and there are a number of ongoing success stories (including Primark, Zara, Jack Wills, Joules and Hotel Chocolat), recent headlines have focussed on failing retailers and store closures. High profile retailers that have struggled include:

- BHS, which entered into administration in April 2016, resulting in the closure of 164 stores;
- Marks & Spencer, which has had problems with its core clothing and homeware business, resulting in a May 2018 announcement that it is to close around 100 stores;
- New Look, which entered into a company voluntary arrangement ('CVA') in March 2018, and intends to close 60 of its 593 stores;
- Maplin, which entered into administration in February 2018, resulting in the closure of 219 stores;
- Toys 'R' Us, which entered into administration in February 2018, resulting in the closure of 100 stores;
- Poundworld, which entered into administration in June 2018, resulting in the closure of 335 stores;
- House of Fraser, which stated in August 2018 that it is to close 31 of its 59 stores; and

<sup>15</sup> Article headlined 'Aldi plans to open up to eight stores in some UK towns', The Guardian, 12 May 2017

<sup>16</sup> Article headlined 'Lidl to add 60 new shops a year in ambitious £1.5bn UK expansion plan', The Telegraph, 8 July 2017

- Debenhams, which announced in April 2019 that a total of 50 stores would close, with 22 of the 50 already being named<sup>17</sup>. One of the 22 stores named is the Debenhams in Altrincham town centre, the potential implications of which we consider in more detail later in the Study.

2.26 Whilst the loss of some of the above names will have significant repercussions for certain towns (particularly those that lose Marks & Spencer and House of Fraser from their high street in very quick succession), it is evident that a number of struggling retailers have failed to 'move with the times' and update both their offer and accommodation.

2.27 This is partly a consequence of retailers struggling to reinvest in their business when margins are tight (or non-existent). In this regard, there has been particular issue in respect of the 'polarisation' of shopping habits, whereby shoppers have increasingly been prepared to travel to access a greater choice of shops and services, effectively visiting centres for the day as a leisure activity. Consequently, larger retail venues (with a sub-regional or regional role) have tended to perform relatively well, but smaller centres (particularly those located in satellite towns around major centres) have struggled. The performance of smaller towns has been particularly affected by the last recession and by internet shopping, which has resulted in some retailers believing that they can cover the UK with a lesser number of stores.

2.28 Colliers has reported<sup>18</sup> that some new entrants to the market aspire to trade from around 50 stores in key locations across the UK and that this trend has an impact in terms of the take-up of available stock on the high street. It is also evident that certain retailers – including Marks & Spencer, Next and retailers within the Arcadia Group – are prepared to close town centre stores and instead trade out of centre.

2.29 Whilst such structural changes have had a material impact on the vitality and viability of many UK high streets, there are some beneficiaries. In particular, household discount operators, such as B&M Bargains, Poundland and Wilko, have reoccupied a number of medium to large retail units. However, as evidenced by the recent failure of Poundworld, there is some evidence that this market may be approaching capacity.

2.30 More encouragingly, the availability of high street units appears to have helped stoke an entrepreneurial spirit, with a number of centres beginning to benefit from a greater focus on

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<sup>17</sup> Article headlined 'Debenhams names 22 stores to close', BBC News, April 2019

<sup>18</sup> 'Midsummer Retail Report 2014', Colliers, July 2014

independent retailers and also modern markets, which are frequently focussed around food and drink operators.

### Leisure and Food & Drink

- 2.31 One of the recent high street success stories has been the resurgence of the town centre leisure sector, which has sometimes been focussed around new cinemas<sup>19</sup> close to the shopping core and, increasingly, a revived markets provision.
- 2.32 Colliers<sup>20</sup> has reported that cinema openings are on the up and niche cinema operators – including Curzon, Everyman and The Light – are able to operate from smaller sites in town centre (partly as a consequence of digital technology). Town centre cinema development has successfully underpinned wider mixed-use developments, as food and drink operators are typically keen to locate in close proximity to benefit from spin-off custom.
- 2.33 The importance of independent food and drink operators and modern markets has been exemplified by the success of the Market House in Altrincham, which accommodates six different kitchens, a coffee shop, chocolatier, a wine shop and a bar. As we go on to consider in greater detail in the healthcheck assessment provided as part of this Study, the success of Altrincham market has resulted in a resurgence of the town centre as a destination to eat and drink. There have been many new restaurant openings subsequent to the market changing perceptions of the centre. The confidence in Altrincham as a dining destination has had a beneficial impact on the town's vacancy rate, and also now appears to be helping to attract new retailers to the town. The 'Altrincham model' is beginning to be replicated by other centres, with new or refreshed markets opening in Manchester and Preston, and a new food hall (solely accommodating independent traders) planned for Urmston.
- 2.34 The food and drink sector has also been buoyed in recent years by the success of mid-market national multiples, which expanded quickly across the UK. However, there are signs that the 'bubble has burst' and a number of high profile operators have been in financial difficulty. These operators include Byron<sup>21</sup>, Carluccio's<sup>22</sup> and Jamie's Italian<sup>23</sup>, which closed a number of restaurants in 2018. Given the problems suffered by such operators, the market has become more cautious and mid-market operators

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<sup>19</sup> Which have been delivered in towns such as Bury, Oldham, Preston and Stockport

<sup>20</sup> 'Midsummer Retail Report 2015', Colliers, July 2015

<sup>21</sup> In January 2018, Byron announced that it was closing 20 of its 67 restaurants

<sup>22</sup> In May 2018, Carluccio's announced that it was closing 34 of its 103 restaurants

<sup>23</sup> In May 2019, Jamie's Italian announced that the restaurants had gone into administration

are picking new sites carefully as a result.

- 2.35 More generally, the gym market continues to perform well, with the Leisure Database Company<sup>24</sup> identifying that there are now more than 7,000 gyms across the UK, with the fitness market having an estimated value of more than £5bn. The Leisure Database Company suggests that this is a 'golden age of fitness', with around one in every seven Britons having a gym membership.
- 2.36 Budget gyms are currently particularly popular, with operators such as Pure Gym, the Gym Group and easyGym utilising a format that is based on low costs and high volume. Whilst Pure Gym has become the first operator to reach 200 clubs and to pass the one million members mark<sup>25</sup>, the Gym Group is currently growing at the greatest rate, opening 21 new gyms in 2017 and planning for a further 15 to 20 openings in 2018<sup>26</sup>.
- 2.37 There are also a number of emerging urban leisure concepts, which are generally supported by larger town centres, including modern 'in centre' bowling alleys (which have tend to have a strong food and drink offer and are pitched at providing an evening out, as much as the family market), indoor climbing centres<sup>27</sup>, and crazy golf.

### Implications for Trafford Borough

- 2.38 The above trends have consequences for the future provision of retail and leisure floorspace in the authority area. The prevailing conditions in respect of the comparison goods market are evident through the changing nature of Trafford's town centres. In this regard, whilst Altrincham and Urmston are characterised by a growing leisure service sector, Stretford is faring less well and has a vacancy rate well above national average level.
- 2.39 The offer in Altrincham is more substantial than that in Sale and the two other town centres. In addition, the Trafford Centre has a significant comparison goods offer that, for the most part, meets the needs of the authority area (and a wider regional catchment) that are not met in the established centres.
- 2.40 As we go on to consider in greater detail later in this report, the consequence of this is that smaller

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<sup>24</sup> 'State of the UK Fitness Industry Report', Leisure Database Company, May 2018

<sup>25</sup> Article headlined 'State of industry report: UK fitness industry worth £5bn, Well to Do: Global Wellness News, 16 May 2018

<sup>26</sup> Article headlined 'Gym Group reports fastest growth in budget sector', Health Club Management, 16 January 2018

<sup>27</sup> The operator Rock Up is currently rolling out an expansion programme and is seeking additional sites in retail and leisure parks, and shopping centres

town centres can struggle to establish a clear role, particularly if they are not able to sustain a critical mass of comparison goods retailers. Upscale retailers generally trade from a limited number of centres, which often means that smaller town centres will be focussed around meeting convenience goods and day to day comparison goods needs (most notably, household goods). The future vitality and viability of smaller town centres is therefore not just reliant on the comparison goods sector, but is also dependent on their convenience goods and service offer.

2.41 In respect of the convenience goods sector, three of the 'big four' operators currently trade from stores in Trafford (Morrisons being the exception). Whilst most of these stores appear to trade in a satisfactory manner, given the current popularity of Aldi and Lidl, we believe that additional pressure for further convenience goods floorspace is most likely to derive from this type of discount operator. In this regard, we note that Aldi and Lidl have a number of outstanding store requirements at March 2019 across the Borough<sup>28</sup>, and that discount variety operators, such as Home Bargains (which increasingly provide a good range of convenience goods) are also generally still taking more space.

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<sup>28</sup> Aldi in Altrincham and East Sale, and Lidl in Altrincham, Sale, Timperley and Urmston/Flixton

## 3.0 Planning Policy and Legislative Context

3.1 In order to shape the direction of this Study, it is helpful to understand relevant retail and town centre planning policy at a national and local level. As such, we first summarise national planning policy of relevance before briefly considering relevant development plan policy as set out in the Trafford Local Plan: Core Strategy. We also provide a summary of other relevant material policy consideration and a summary of emerging planning policy within Trafford.

### **The Revised National Planning Policy Framework**

3.2 The revised National Planning Policy Framework ('NPPF'), which was published on 24 July 2018 and subsequently updated on 19 February 2019, recognises that a flexible approach will be necessary to provide for the future vitality and viability of town centres. The revised NPPF reflects the fact that the traditional role of town centres has been undermined by structural changes in the sector, and that there may be a need to plan for a more diverse range of uses going forward. The policies of the NPPF are considered on a thematic basis below.

#### Plan-Making

3.3 Paragraph 20 of the NPPF indicates that development plans should set out an overall strategy for the pattern, scale and quality of development, including policies to deliver retail, leisure and other commercial development. Paragraph 31 states that the preparation and review of all policies should be underpinned by relevant and up-to-date evidence. This should be proportionate and take into account relevant market signals.

#### Building a Strong, Competitive Economy

3.4 Paragraph 80 of the NPPF indicates that planning policies and decisions should help create the conditions in which businesses can invest, expand and adapt. Significant weight should be placed on the need to support economic growth and productivity, taking into account both local business needs and wider opportunities for development.

#### Ensuring the Vitality of Town Centres

3.5 Paragraph 85 specifically relates to planning for town centres. It states that:

**'Planning policies should:**

- a) define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;**
- b) define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;**
- c) retain and enhance existing markets and, where appropriate, re-introduce or create new ones;**
- d) allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;**
- e) where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and**
- f) recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.'**

3.6 The requirement to plan to meet needs across a minimum ten year period represents a change from the previous NPPF which required town centre needs to be met in full across the entire plan period.

3.7 In addition, it is notable that the NPPF Annex 2 Glossary drops the reference to primary and secondary frontages. Page 32 of the Government Response to the Draft Revised National Planning Policy Framework Consultation indicates that, whilst the revised NPPF has removed the expectation in national planning policy that such frontages must be defined, this does not preclude authorities from doing so where their use can be justified. However, it is evident that the general intention is to provide for more flexibility through a less prescriptive approach to land use.

3.8 Paragraph 89 of the NPPF states that it is appropriate to identify thresholds for the scale of edge of centre and out of centre retail and leisure development that should be the subject of an impact assessment. Any such threshold policy applies only to the impact test (all planning applications for

main town centre uses that are not in an existing centre and not in accordance with an up-to-date development plan will generally be the subject of the sequential test<sup>29</sup>).

### **Ensuring the Vitality of Town Centres Planning Practice Guidance**

3.9 The Ensuring the Vitality of Town Centres Planning Practice Guidance ('the Town Centres PPG') was published in July 2019 and is in place to provide additional direction in respect of how retail and town centre planning policy should be applied in respect of plan-making and decision taking. The Town Centres PPG affirms the Government's aspiration to support town centres in order to generate employment, promote beneficial competition and create attractive, diverse places where people want to live, work and visit.

3.10 Paragraph 004 of the Town Centres PPG indicates that a local planning authority's strategy for their town centres should include:

- the realistic role, function and hierarchy of town centres over the plan period. Given the uncertainty in forecasting long-term retail trends and consumer behaviour, this assessment may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed.
- the vision for the future of each town centre, including the most appropriate mix of uses to enhance overall vitality and viability.
- the ability of the town centre to accommodate the scale of assessed need for main town centre uses, and associated need for expansion, consolidation, restructuring or to enable new development or the redevelopment of under-utilised space. It can involve evaluating different policy options (for example expanding the market share of a particular centre) or the implications of wider policy such as infrastructure delivery and demographic or economic change.
- how existing land can be used more effectively – for example the scope to group particular uses such as retail, restaurant and leisure activities into hubs or for converting airspace above shops.

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<sup>29</sup> With the exception (in accordance with paragraph 88 of the NPPF) of small scale rural office proposals and other small scale rural development.

- opportunities for improvements to the accessibility and wider quality of town centre locations, including improvements to transport links in and around town centres and enhancement of the public realm (including spaces such as public squares, parks and gardens).
- what complementary strategies are necessary or appropriate to enhance the town centre and help deliver the vision for its future, and how these can be planned and delivered. For example, this may include consideration of how parking charges and enforcement can be made proportionate.
- the role that different stakeholders can play in delivering the vision. If appropriate, it can help establish the level of cross-boundary/strategic working or information sharing required between both public and private sector groups.
- appropriate policies to address environmental issues facing town centres, including opportunities to conserve and enhance the historic environment.

3.11 Paragraph 006 of the Town Centres PPG identifies a series of key indicators of relevance in assessing the health of a centre over time<sup>30</sup>. The indicators include diversity of uses, commercial yields, customers' experience and behaviour, retailer representation, balance between independent and multiple stores and opening hours/extent to which there is an evening and day time economy offer.

3.12 Paragraph 007 refers to circumstances where planning permission is not required for changes involving town centre uses. The guidance states that a change of use of land or buildings requires planning permission if it constitutes a material change of use. The guidance refers to the range of permitted development rights as set out in the Town and Country Planning (General Permitted Development) (England) Order 2015, as amended, which we set out in more detail below.

3.13 Paragraph 008 relates to permitted development rights which support flexibility in town centres. The paragraph states that in order to support new ventures and pop-ups and avoid long terms vacancies, there is a separate temporary right which allows a range of uses (offices, shops, services etc) to convert temporarily to another use (office, shop, restaurant etc) for a single continuous period of up to three years. The guidance has been drafted to allow start-ups to test a new business model and then subsequently seek permanent permission on the same, or another site.

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<sup>30</sup> These indicators inform the healthcheck assessments that are set out at Section 5 of this report

- 3.14 The same right now allows for the temporary change of use to specified community uses (health centre, art gallery, museum, public library, public hall or exhibition hall) to provide a greater mix of uses on the high street and increase footfall, and bring community uses closer to communities.
- 3.15 Other permitted development rights provide for physical works to support the operation of shops or financial and professional services, including:
- extensions to existing buildings;
  - the provision of click and collect facilities for shops;
  - modification of shop loading bays; and
  - hard surfacing for shops, financial and professional services and restaurants.
- 3.16 Paragraph 009 indicates that the sequential test is of direct relevance to plan-making. It requires local planning authorities to consider the suitability, viability and availability of sites when considering sequentially preferable opportunities to accommodate additional development for main town centre uses.

### **Changes to Permitted Development Rights**

- 3.17 On 15 April 2015, the Town and Country Planning (General Permitted Development) (England) Order came into force. The Order consolidates and replaces the Town and Country Planning (General Permitted Development) Order 2015 (and its subsequent amendments), and provides additional permitted development rights.
- 3.18 The new rights of relevance to town centres include:
- a permitted change from amusement arcade/casino (sui generis use) to residential use (Class C3);
  - a permitted change from retail (Class A1) to financial services (Class A2);
  - a permitted change from retail/financial services (Class A1/A2) to food and drink (Class A3);
  - a permitted change from retail/financial services (Class A1/A2), betting offices, pay day loan shops and casinos to assembly and leisure (Class D2);
  - extension of the temporary permitted development rights introduced in May 2013 for extensions to shops, offices, industrial and warehouse buildings to support business expansion and the economy so they apply permanently;
  - the erection of click and collect facilities within the curtilage of an extension retail shop; and
  - modifications to the size of an existing retail shop loading bay.

3.19 In addition to the above, the Town and Country Planning (General Permitted Development) (England) (Amendment) Order 2016 subsequently came into force on 6 April 2016. The Amendment Order provides for:

- a permitted change from launderettes (sui generis use) to residential use (Class C3); and
- the previously temporary permitted development right to change offices (Class B1) to residential use (Class C3) to be made permanent, with a condition allowing the local planning authority to consider certain noise impacts.

3.20 The above provisions seek to make it more straightforward to secure the reuse of buildings (and thereby reduce the amount of vacant property). The relaxation in respect of residential dwellings has been of greatest consequence in large metropolitan areas, which are more likely to benefit from both a substantial stock of office floorspace and strong demand for apartment development.

#### **The Trafford Local Plan: Core Strategy**

3.21 The Trafford Local Plan: Core Strategy was adopted in January 2012 and sets out the Council's spatial policy framework for development in the Borough up to 2026. The Local Plan sets out the Council's approach in respect to economic, social and environmental issues.

3.22 Policy W2 relates to town centre and retail matters, and outlines the future strategy for town centres within the Borough. Policy W2 identifies Altrincham as the Principal Town Centre which will be:

**'...the principal focus for high quality comparison retail supported by a range of retail, service, leisure, tourism, office and other town centre-type uses, including residential.'**

3.23 The policy goes on to identify the Council's view that Altrincham town centre is capable of delivering: 20,000 sq.m of retail floorspace; 10,000 sq.m of office floorspace; significant new leisure and hotel facilities; a new and/or improved hospital facility; an improved public transport interchange; enhancements to the public realm; and, improvements to pedestrian routes.

3.24 Many of the above objectives have now been delivered, with notable successes including the delivery of Altrincham hospital on Railway Street, which opened in April 2015, and public realm improvements, which have been undertaken on a phased basis since 2015.

3.25 The principal opportunity identified for Altrincham town centre by Policy W2.3 of the Core Strategy is the Altair mixed-use development, which is planned for a 3 hectare site immediately to the east of the transport interchange. The policy indicates that the site is expected to deliver a range of uses, including residential apartments, retail and leisure.

3.26 Within the other town centres of Sale, Stretford and Urmston, Policy W2.4 identifies that there will be a focus on the:

**'...consolidation and improvement of the convenience and comparison retail offer, with the potential to strengthen and enhance the retail offer where suitable, as well as diversification to other uses such as offices, services, leisure, cultural and residential, as appropriate.'**

3.27 Whilst the retail market has 'moved on' somewhat since the adoption of the Core Strategy, we note that Policy W2.5 identifies an aspiration to deliver the following in Sale:

- improvements to the mix and quality of the existing retail offer;
- new retail floorspace (4,000 sq.m);
- new commercial office accommodation (3,000 sq.m);
- additional leisure, hotel and community facility development; and
- additional residential accommodation (100 units).

3.28 In Stretford, the Council's focus is to encourage the regeneration of the town centre and the area's immediately surrounding it. Policy W2.6 indicates that this can be delivered through:

- new/improved retail floorspace to enhance the offer of the town centre, in particular within Stretford Mall and its immediate vicinity;
- new/updated commercial office accommodation and family-oriented leisure facilities;
- new residential (apartment and family) accommodation (250 units);
- public realm enhancements and accessibility improvements around the A56 Chester Road – A5145 Edge Lane/Kingsway junction and between the town centre and the Metrolink station; and
- securing the active reuse and preservation of the Essoldo building.

3.29 Paragraph 19.11 confirms the following hierarchy for the Borough's centres:

- Main Town Centre – Altrincham;
- Other Town Centres – Sale, Stretford and Urmston;

- District Centres – Hale, Sale Moor and Timperley; and
- Local Centres, including Partington.

3.30 The Core Strategy is clear that Altrincham will act as the primary focus to accommodate major retail development and other main town centre uses.

#### **Trafford Local Plan: Land Allocations Consultation Draft (January 2014)**

3.31 The Land Allocations Plan was to be the principal means by which the objective defined in the Core Strategy would be translated onto the ground. The Council consulted on a full draft of the Land Allocations Plan between February and March 2014. On 25 March 2015, the Council's Executive agreed to delay the production of the Land Allocations Plan until the GMSF was progressed.

3.32 Sections 14 to 20 of the draft Land Allocations Plan relate to town centres and out-of-centre retailing within the Borough. We summarise the key draft guidance below.

- Section 14 provides guidance in respect of the proposed primary shopping areas and primary and secondary shopping frontages within the three town centres of Sale, Stretford, and Urmston. In respect of Altrincham town centre, the draft plan refers to the Business Neighbourhood Plan and how this document will provide policy guidance for the future for Altrincham.
- Sections 15 to 17 then set out site specific guidance for potential development sites within the three town centres of Sale, Stretford and Urmston. The site specific guidance sets out the range of uses appropriate for the identified sites, along with wider policy guidance in respect of aesthetic improvements for the centres.
- Section 18 provides the draft guidance in respect of the three district centres of Hale, Sale Moor and Timperley. Paragraph 18.4 seeks to restrict the change of use of ground floor premises within the district centres from Class A1 Use, along with wider policy guidance to seek to help protect the future vitality and viability of the centres.
- Section 19 then relates to local centres (including hubs, parades, radial destinations and radial parades). The guidance seeks to protect the vitality of the local centres.
- Section 20 seeks to provide specific policy guidance relating to retail warehouse parks. Paragraph 20.4 states that the Council will grant planning permission for main town centre uses where the

proposal cannot be located on a sequentially preferable site, will not have a significant adverse impact on defined centres and is in accordance with other policies in the Local Plan.

3.33 The Land Allocations Consultation Draft Policies Map (January 2014) includes inset maps for the three town centres of Sale, Stretford and Urmston town centre. The maps include proposed town centre boundaries, primary shopping areas, primary and secondary frontages along with the town centre action areas as referred to in Sections 15 to 17 of the draft plan.

### **Sale Town Centre: Public Realm and Movement Strategy**

3.34 The Sale Town Centre Public Realm and Movement Strategy was undertaken by Planit-IE and Civic Engineers and was approved by the Council's Executive on 17 September 2018.

3.35 The Strategy identified that Sale 'on paper' seems like a thriving town, characterised by independent retail and leisure operators, abundant street planting and the Bridgewater Canal, a public square and arts centre at Sale Waterside, strong housing stock, and access to green areas. However, the Strategy found that the town centre underperforms in some respects and does not provide a sufficiently attractive environment for residents or visitors.

3.36 Page 5 of the Strategy sets an aspiration to create:

**'...a town centre that is functional, inclusive, sustainable, fun, beautiful and unique. These themes have been chosen to respond to both the existing retail and leisure uses in the town, but also the thriving residential neighbourhoods that share the town centre locality – particularly the families, teenagers and children.'**

3.37 In order to provide for this, two key types of intervention are identified. These relate to:

- improved traffic solutions and easier connectivity (at the junction by the Town Hall, Washway Road/Cross Street, Sibson Road, and Ashfield Road); and,
- public realm improvements (at School Road, Town Hall, Sale Waterside and Bridge, the Family Square at The Square shopping centre, and Northenden Road).

### **The Refreshed Stretford Masterplan**

3.38 The Refreshed Stretford Masterplan was approved by the Council's Executive on 29 January 2018.

3.39 Section 1 of the Refreshed Masterplan indicates that the document seeks to build on recent successes (including the opening of the new Aldi foodstore at Stretford Mall, the disposal of Stretford Public Hall to the Friends of Stretford Hall trust and the delivery of public realm improvements) in order to further reposition Stretford as an attractive destination capable of securing further investment.

3.40 Page 1 of the Masterplan indicates that:

**‘The Refreshed Masterplan provides an ambitious and comprehensive plan to transform Stretford. The plans will encourage significant private investment, maximise the impact of the University Academy 92 (UA92) concept to deliver an innovative higher education facility in Stretford, deliver new leisure facilities for the whole community, facilitate improvements in public spaces, and support the delivery of new housing and town centre facilities.’**

3.41 Section 4 of the Refreshed Masterplan identifies a number of development opportunities, which include:

- Stretford Mall, which is identified as having potential to accommodate a landmark development (potentially including residential), subsequent to the completion of ongoing works to demolish the former indoor market hall and O’Brien’s public house;
- Stretford Public Hall, which would be brought back into full use as a multi-purpose community hub;
- the Essoldo Cinema, which the Council intends to acquire using through a Compulsory Purchase Order (if required) in order to provide for community and commercial uses; and
- Lacy Street car park and commercial units, which is considered suitable to accommodate affordable/key worker and student accommodation, with food and drink uses at ground floor level.

#### **The Greater Manchester Spatial Framework – Revised Draft**

3.42 The Greater Manchester Spatial Framework (‘GMSF’) Revised Draft was published in January 2019 for public consultation. The GMSF was rewritten to focus more heavily on the environment and to reduce the overall reduction in the proposed Green Belt release.

3.43 The GMSF sets out how Greater Manchester should develop up until 2037 and identifies the amount of new development that will come forward across the ten districts in terms of housing, offices and industry, including within Trafford.

3.44 There are two Strategic Allocations identified in the GMSF in Trafford. We provide a summary in respect of both of the allocations below.

- Policy GM Allocation 45 – ‘New Carrington’. New Carrington is identified in the GMSF as being suitable to deliver around 6,100 new residential units within the plan period, along with a new local centre and community infrastructure.
- Policy GM Allocation 46 – ‘Timperley Wedge’. Timperley Wedge is identified as being suitable to deliver around 2,400 new residential units, along with a new local centre with convenience shopping facilities close to the Metrolink Western Leg extension and Davenport Green stop.

## 4.0 Market Research: In-Street Surveys

### Introduction

- 4.1 In-street surveys were undertaken in the centres of Altrincham, Sale, Stretford and Urmston by NEMS in October 2018, in order to understand how each centre is used and identify those aspects of the centre that may benefit from improvement and change. Our survey is similar to that undertaken by NEMS to inform the 2007 Retail and Leisure Study. We refer to previous results in order to consider changes over time where it is appropriate to do so.
- 4.2 In total, 150 surveys were undertaken in Altrincham and 100 surveys were undertaken in each of Sale, Stretford and Urmston. In all cases, the surveys were undertaken at different times and on different days to try to ensure interactions with a variety of users. Within the centres, the surveys were undertaken at various locations to ensure that the results picked up a range of responses and that they were reflective of a broad array of visitors to the centre.
- 4.3 The full tabulated in-street survey results are provided at Appendix 2. We set out an overview of the key findings of the survey below, focusing on customer satisfaction ratings, customer behaviour and suggestions for improvement.

### Purpose of Visit

- 4.4 Respondents were asked to identify the principal purpose of their visit to the respective centre. Table 4.1 below demonstrates that the principal reason for visiting each of the four centres is to go shopping, which remains unchanged as the most popular response since the previous survey was undertaken in 2007. However, in three of the centres, there was a notable decrease in the proportion of respondents who identified shopping as the principal purpose of their trip (equating to a 26.2 percentage point reduction in Sale, a 15.0 percentage point reduction in Urmston, and an 8.9 percentage point reduction in Altrincham).
- 4.5 Interestingly, the only centre that saw minimal change was Stretford (which 70.7% of respondents identifying shopping as the principal reason for their visit in 2007, compared to 70.0% in 2018), which suggests that the centre has largely maintained its status as a retail destination, and perhaps has not evolved and diversified to the extent of Altrincham and Sale.

4.6 Reference to the previous 2007 in-street survey shows that the most significant growth in respect of the reason to visit Altrincham and Sale has been for social and leisure reasons (increasing from 6.4% to 11.3% in Altrincham, and from 4.0% to 8.8% in Sale). This demonstrates that the expanded food and drink offer in both centres has resulted in a change in the principal reasons to visit each centre. However, despite this change in the profile of the centres, it is positive to note that, for each centre, the primary reason to visit remains shopping. As such, the centres' overall function in respect of providing retail facilities to serve their catchments has been retained over the past 11 years.

**Table 4.1: Purpose of Visit to Centre**

Centre	Year	1st	2nd	3rd	4th
Altrincham	2007	Shopping (61.6%)	Using financial services <i>and</i> Work in/near to town centre (both 7.4%)	-	Social/leisure reasons (6.4%)
	2018	Shopping (52.7%)	Social/leisure reasons (11.3%)	To use services (e.g. bank, post office and so on) (9.0%)	Work in or near town centre (6.7%)
Sale	2007	Shopping (88.0%)	Social/leisure reasons (4.0%)	Other (2.7%)	Using financial services <i>and</i> Visiting Council offices <i>and</i> Going for a walk (all 1.3%)
	2018	Shopping (61.8%)	Social/leisure reasons (8.8%)	Work in/near to town centre (7.8%)	Using financial services (6.9%)
Stretford	2007	Shopping (70.7%)	Social/leisure reasons (9.3%)	Work in/near to town centre (5.3%)	Using financial services <i>and</i> hairdressers & opticians <i>and</i> Other (all 2.7%)
	2018	Shopping (70.0%)	Work in/near to town centre <i>and</i> social/leisure reasons (both 6.0%)	-	Using financial services <i>and</i> library (both 3.0%)
Urmston	2007	Shopping (70.7%)	Using financial services (9.8%)	Work in/ near to town centre (7.3%)	Social/leisure reasons <i>and</i> Other <i>and</i> Don't know (all 2.4%)
	2018	Shopping (55.7%)	Work in/near to town centre (9.3%)	Visiting Council offices/job centre (7.2%)	Hairdressers/ beauty salons (5.2%)

Source: Question 1 of the 2007 and 2018 In-Street Surveys

### Shopping Intentions

4.7 Of those users who intend to make purchases during their visit to the centres, the most popular goods to buy in all four of the town centres are food and other grocery items. As Table 4.2 identifies, 55.3% of shoppers in Altrincham intended to purchase food and other grocery goods, with the second most

popular goods to purchase being clothing and footwear (cited by 44.7% of shoppers). In Sale, a greater proportion of shoppers (77.3%) intended to purchase food and other groceries, and a smaller proportion (24.0%) intended to purchase clothing and footwear.

**Table 4.2: Goods Respondent Has or Intends to Purchase**

Centre	Year	1st	2nd	3rd	4th
Altrincham	2007	Food and groceries (39.0%)	Clothes and shoes (37.8%)	Toiletries and cosmetics (18.3%)	Books and stationery (17.1%)
	2018	Food and groceries (55.3%)	Clothes and shoes (44.7%)	Toiletries and cosmetics (13.2%)	Household goods and furnishings (7.9%)
Sale	2007	Food and groceries (73.2%)	Clothes and shoes (23.9%)	Household goods and furnishings (22.5%)	Toiletries and cosmetics (18.3%)
	2018	Food and groceries (77.3%)	Clothes and shoes (24.0%)	Household goods and furnishings (10.7%)	Toiletries and cosmetics <i>and</i> DIY and hardware goods (both 8.0%)
Stretford	2007	Food and groceries (66.1%)	Clothes and shoes (32.3%)	Toiletries and cosmetics (11.3%)	Household goods and furnishings <i>and</i> Games, toys and hobbies, sport and camping equipment (both 6.5%)
	2018	Food and groceries (81.1%)	Toiletries and cosmetics (17.8%)	Confectionary/ tobacco/newspapers (15.6%)	Clothes and shoes (12.2%)
Urmston	2007	Food and groceries (85.5%)	Toiletries and cosmetics (13.0%)	Household goods and furnishings (8.7%)	DIY and hardware goods <i>and</i> confectionary/ tobacco/newspapers and magazines <i>and</i> medical goods and other pharmaceuticals (all 4.3%)
	2018	Food and groceries (76.1%)	Toiletries and cosmetics (9.9%)	Confectionary/ tobacco/ newspapers <i>and</i> medical goods and other pharmaceuticals (both 8.5%)	Household goods and furnishings (5.6%)

Source: Question 3 of the 2007 and 2018 In-Street Surveys

- 4.8 The results suggest that Stretford's offer may have narrowed over the past eleven years. In particular, we note that a significantly lower proportion of shoppers in 2018 indicated that they intended to purchase clothes and footwear during their trip (reduced from 32.3% of shoppers at 2007 to 12.2% of shoppers at 2018). A similar decline in household goods and furnishings purchases, and toiletries and cosmetics purchases, is noted in Sale with these purchases decreasing by 11.8 and 10.3 percentage points respectively since 2007. This shows the challenges that the smaller town centres have faced in

maintaining a diverse range of operators against a backdrop of increasing competition from a range of alternative retail destinations.

### Frequency of Visit

- 4.9 The survey results indicate that a higher proportion of respondents, at least occasionally, undertake food shopping in Sale, Stretford and Urmston town centres compared to Altrincham town centre.
- 4.10 In Altrincham, 20.0% of respondents never undertake food shopping in the town centre, which compares to just 10.8% in Sale. Similarly, 78.4% of respondents in Sale undertake some food shopping either daily or at least once a fortnight, which compares to 79.4% in Urmston, 70.0% in Stretford and 66.7% in Altrincham. The use of Sale, and to an extent Urmston, as a food shopping destination is reflective of both the market and the presence of larger national multiple retailers, with Tesco and Sainsbury's in Sale and Sainsbury's and Aldi in Urmston. By way of comparison, Altrincham and Stretford have a greater comparison goods shopping role and it is therefore unsurprising that they have a proportionally lesser convenience goods focus.
- 4.11 As the below Table 4.3 demonstrates, the only centre that has seen a reduction in the frequency of visits to undertake food shopping is Sale town centre. This is most likely a result of growth of alternative provision since the previous survey was undertaken, including Sainsbury's in Urmston and Tesco Extra on Chester Road in Stretford, along with the emergence of other out of centre main food destinations elsewhere in the Borough.

**Table 4.3: Frequency of Respondent's Visit to the Subject Centre for Food Shopping**

Centre	Year	Daily	2-3 times per week	Less than once a week	Less than once a fortnight	Less than once a month	Less often	Don't do this activity	Don't know
Altrincham	2007	9.9%	18.7%	23.6%	6.4%	3.0%	11.3%	26.1%	1.0%
	2018	8.0%	25.3%	27.3%	6.0%	4.7%	7.3%	20.0%	1.3%
Sale	2007	8.0%	32.0%	45.3%	2.7%	4.0%	6.7%	1.3%	0.0%
	2018	11.8%	21.6%	31.4%	13.7%	4.9%	5.9%	10.8%	0.0%
Stretford	2007	12.0%	29.3%	20.0%	4.0%	4.0%	16.0%	14.7%	0.0%
	2018	4.0%	31.0%	20.0%	15.0%	9.0%	7.0%	14.0%	0.0%
Urmston	2007	8.5%	18.3%	28.0%	8.5%	4.9%	12.2%	19.5%	0.0%
	2018	8.2%	43.3%	24.7%	3.1%	5.2%	3.1%	12.4%	0.0%

Source: Question 7 of the 2007 In-Street Survey and Question 8B of the 2018 In-Street Survey

- 4.12 Table 4.4 indicates that of the four centres, respondents in Sale typically visit the centre more frequently to undertake non-food shopping. This may be a consequence of Sale having a particularly strong selection of discount variety operators, which typically meet day to day needs. In the case of Stretford, its diminished frequency for non-food shopping is likely to be a result of the centre’s relative decline in comparison floorspace since 2007.
- 4.13 Across the four centres, in Altrincham 65.3% of respondents visit the centre to undertake non-food shopping at least once a fortnight, whereas the respective figures are 70.6% in Sale, 69.1% in Urmston, and 58.0% in Stretford.
- 4.14 Comparison with the 2007 survey demonstrates that there has been a significant change in the proportion of users of all centres that rarely or never undertake non-food shopping in the centre. In Urmston, 21.6% of respondents never undertake non-food shopping in the centre or visit hardly ever for this purpose; this represents a significant decrease in the figure of 37.8% recorded in 2007. In Sale, the comparable figure has increased from 8.0% at 2007 to 15.7% at 2018.

**Table 4.4: Frequency of Respondent’s Visit to the Subject Centre for Non-Food Shopping**

Centre	Year	Daily	2-3 times per week	Less than once a week	Less than once a fortnight	Less than once a month	Less often	Don’t do this activity	Don’t know
Altrincham	2007	4.4%	16.3%	27.6%	14.3%	14.8%	14.8%	7.4%	0.5%
	2018	3.3%	19.3%	29.3%	13.3%	14.7%	5.3%	12.7%	2.0%
Sale	2007	5.3%	28.0%	36.0%	8.0%	18.7%	18.7%	2.7%	1.3%
	2018	2.9%	14.7%	32.4%	20.6%	13.7%	5.9%	9.8%	0.0%
Stretford	2007	9.3%	20.0%	21.3%	8.0%	18.7%	18.7%	2.7%	1.3%
	2018	4.0%	10.0%	25.0%	19.0%	14.0%	15.0%	13.0%	0.0%
Urmston	2007	6.1%	12.2%	25.6%	8.5%	8.5%	13.4%	24.4%	1.2%
	2018	6.2%	23.7%	33.0%	6.2%	8.2%	9.3%	12.4%	1.0%

Source: Question 7 of the 2007 In-Street Survey and Q8c of the 2018 In-Street Survey

- 4.15 As the below Table 4.5 identifies, respondents in Altrincham and Sale typically visit the centres more frequently than respondents in Stretford and Urmston to undertake day-time leisure activities. In Altrincham, 40.7% of respondents visit the centre for leisure purposes at least once a fortnight; the respective figure in Sale is 48.0%. Both centres have a substantial food and drink offer, with Altrincham Market being both a popular day-time and night-time destination. Although Stretford and Urmston have a lesser frequency of day-time leisure visits, Urmston has the greatest proportion of respondents

who undertake night-time leisure activities in centre at 18.6%. This is the highest across the four town centres.

4.16 Since 2007, there has been a notable increase in the frequency of respondents that use the town centres for day-time leisure purposes at least once a fortnight, with the number of respondents visiting Altrincham for that purpose increasing from 25.1% at 2007 to 40.7% in 2018, and in Sale from 36.0% at 2007 to 48.0% in 2018. This is reflective of the changing role of town centres over the intervening period, but also the change that has occurred in the composition of Trafford's town centres.

**Table 4.5a: Frequency of Respondent's Visit to the Subject Centre for Day-time Leisure Purposes**

Centre	Year	Daily	2-3 times per week	Less than once a week	Less than once a fortnight	Less than once a month	Less often	Don't do this activity	Don't know
Altrincham	2007	1.5%	6.9%	13.3%	3.4%	4.4%	9.9%	59.1%	1.5%
	2018	3.3%	9.3%	22.0%	6.0%	6.7%	3.3%	47.3%	2.0%
Sale	2007	2.7%	21.3%	8.0%	4.0%	4.0%	5.3%	53.3%	1.3%
	2018	0.0%	14.7%	23.5%	9.8%	7.8%	3.9%	39.2%	1.0%
Stretford	2007	0.0%	2.7%	6.7%	0.0%	5.3%	1.3%	84.0%	0.0%
	2018	0.0%	2.0%	15.0%	2.0%	3.0%	4.0%	73.0%	1.0%
Urmston	2007	0.0%	7.3%	7.3%	3.7%	0.0%	4.9%	73.2%	3.7%
	2018	1.0%	9.3%	15.5%	2.1%	8.2%	5.2%	56.7%	2.1%

**Table 4.5b: Frequency of Respondent's Visit to the Subject Centre for Evening Leisure Purposes**

Centre	Year	Daily	2-3 times per week	Less than once a week	Less than once a fortnight	Less than once a month	Less often	Don't do this activity	Don't know
Altrincham	2007	1.5%	3.9%	8.4%	4.4%	7.4%	7.9%	65.5%	1.0%
	2018	0.7%	4.0%	4.7%	3.3%	14.0%	5.3%	61.3%	6.7%
Sale	2007	1.3%	5.3%	4.0%	10.7%	2.7%	18.7%	57.3%	0.0%
	2018	0.0%	1.0%	0.0%	6.9%	2.0%	3.9%	68.6%	17.6%
Stretford	2007	1.3%	1.3%	2.7%	0.0%	0.0%	0.0%	94.7%	0.0%
	2018	0.0%	2.0%	4.0%	2.0%	2.0%	4.0%	81.0%	5.0%
Urmston	2007	0.0%	2.4%	7.3%	2.4%	3.7%	3.7%	78.0%	2.4%
	2018	0.0%	4.1%	6.2%	8.2%	5.2%	4.1%	69.1%	3.1%

Source: Question 7 of the 2007 In-Street Survey and Question 8 of the 2018 In-Street Survey

4.17 In addition, there has generally been a decline across the centres (the exception being Stretford) in respect of the proportion of respondents who undertake night-time leisure activities at least once a

fortnight. It is likely that this is indicative of the diversification of the leisure offer in the centres, with greater choice available to visitors.

### Type of Leisure Facility Visited

- 4.18 By far the most popular day-time activity undertaken in each of the centres is to visit restaurants and cafés. Table 4.6 identifies that, of those undertaking a leisure activity, 80.3% of respondents in Altrincham, 88.6% of respondents in Sale, 61.5% of respondents in Stretford and 82.5% of respondents in Urmston intended to visit a restaurant or café. In the case of Altrincham, Sale and Urmston, these figures represent a significant increase on those recorded at the 2007 survey.
- 4.19 Visits to pubs and bars and restaurants and cafés have increased in frequency across all four town centres as a proportion of night-time activity, with the exception being a relative decline in the proportion of respondents visiting Altrincham to visit pubs and bars (from 39.7% at 2007 to 35.4% at 2018).

**Table 4.6a: Type of Facility Visited in Daytime**

Centre	Year	1st	2nd	3rd	4th
Altrincham	2007	Restaurants/cafés (60.0%)	Entertainment facilities (e.g. cinema) (21.3%)	Pubs/bars (15.0%)	Shopping services (12.5%)
	2018	Restaurants/cafés (80.3%)	Pubs/bars (7.9%)	Gym (6.6%)	Work <i>and</i> Shopping services (both 5.3%)
Sale	2007	Restaurants/cafés (52.9%)	Gym (26.5%)	Other (8.8%)	Nothing <i>and</i> Library (5.9%)
	2018	Restaurants/cafés (88.6%)	Work <i>and</i> Entertainment facilities (e.g. cinema) (both 4.9%)	-	Pubs/bars (3.3%)
Stretford	2007	Restaurants/cafés (75.0%)	Snooker hall (25.0%)	-	-
	2018	Restaurants/cafés (61.5%)	Pubs/bars (15.4%)	Shopping services <i>and</i> Entertainment facilities (e.g. cinema) (both 11.5%)	-
Urmston	2007	Entertainment facilities (e.g. cinema) (26.3%)	Nothing (21.1%)	Other <i>and</i> pubs/bars (15.8%)	-
	2018	Restaurants/cafés (82.5%)	Entertainment facilities (e.g. cinema) (20.0%)	Shopping services (10.0%)	Pubs/bars <i>and</i> Work (5.0%)

Source: Question 8A of the 2007 In-Street Survey and Question 9A of the 2018 In-Street Survey

**Table 4.6b: Type of Facility Visited in the Evening**

Centre	Year	1st	2nd	3rd	4th
Altrincham	2007	Restaurants/cafés (51.5%)	Pubs/bars (39.7%)	Entertainment facilities (e.g. cinema) (30.9%)	Nightclubs <i>and</i> Nothing (both 7.4%)
	2018	Restaurants/cafés (81.3%)	Pubs/bars (35.4%)	Entertainment facilities (e.g. cinema) (14.6%)	Gym <i>and</i> Theatre (both 2.1%)
Sale	2007	Restaurants/cafés (53.1%)	Pubs/bars (40.6%)	Nothing (9.4%)	Other (6.3%)
	2018	Restaurants/cafés and pubs/bars (both 64.3%)	Entertainment facilities (e.g. cinema) (7.1%)	-	-
Stretford	2007	Nothing (50.0%)	Pubs/bars (25.0%)	Other (25.0%)	-
	2018	Pubs/bars (50.0%)	Restaurants/cafés (35.7%)	Entertainment facilities (e.g. cinema) <i>and</i> Shopping services (21.4%)	-
Urmston	2007	Pubs/bars (37.5%)	Nothing and Restaurants/cafés (both 25.0%)	Entertainment facilities (e.g. cinema) <i>and</i> Nightclubs (both 6.3%)	-
	2018	Restaurants/cafés (77.8%)	Pubs/bars (74.1%)	Entertainment facilities (e.g. cinema) (11.1%)	Nightclubs (3.7%)

Source: Question 8B of the 2007 In-Street Survey and Question 9B of the 2018 In-Street Survey

### Amount Spent on Different Activities

- 4.20 The average spend by respondents within each centre on various types of activity (food and grocery shopping, non-food shopping, eating/drinking out in the daytime and eating/drinking out at night time) is set out in Table 4.7 below. This question was added to the 2018 survey and, as such, we are unable to provide a comparison with the position at 2007.
- 4.21 Table 4.7 indicates that the average spend on food and grocery goods is the highest in Stretford town centre at £24.11, and the highest spend on non-food goods is within Altrincham town centre at £24.73. The lowest average spend on food and grocery goods was recorded in Altrincham town centre at £17.94, and the lowest average spend on non-food goods is in Urmston town centre at £14.50.
- 4.22 In respect of eating and drinking out, the daytime average spend is considerably lower than the evening spend. Within the daytime, the average spend ranges from £8.17 per visit in Sale town centre to £13.48 in Urmston town centre. Within the evening, the average spend ranges from £27.77 in Stretford town centre to £45.42 in Urmston town centre. The ranges of average spend can be accounted for by the

range and variety of eateries in the four town centres, with a lower proportion of higher-end restaurants present in Stretford town centre compared to Altrincham and Urmston in particular.

**Table 4.7: Mean Average Spend By Respondent on Each Type of Activity**

Centre	Food and grocery	Non-food goods	Eating/drinking out (daytime)	Eating/drinking out (night-time)
Altrincham	£17.94	£24.73	£13.47	£39.72
Sale	£20.05	£15.07	£8.17	£36.14
Stretford	£24.11	£15.53	£10.90	£27.77
Urmston	£21.66	£14.50	£13.48	£45.42

Source: Questions 4, 5, 10 and 11 of the 2018 In-Street Survey

### Travel and Car Parking

- 4.23 Respondents were asked how they travelled to each respective centre in 2007 and 2018. As we would anticipate, the most popular mode of travel to all of the centres except Stretford is by car.
- 4.24 In all centres, around three out of every ten visitors (or more) arrive by private vehicle (36.0% in Altrincham, 30.4% in Sale, 29.0% in Stretford and 46.4% in Urmston).
- 4.25 Table 4.8 identifies that the second most popular mode of transport for each centre is generally walking, with the exception again being Stretford (where this mode of travel is the most popular means of accessing the centre).
- 4.26 A substantially greater proportion of respondents walked into Stretford and Urmston town centres than either Altrincham or Sale on the day of the survey, which again reflects the more localised catchments of these centres.
- 4.27 A total of 14.0% of respondents in Altrincham, 22.5% in Sale, 21.0% in Stretford and 7.2% in Urmston travel to the respective centre by bus. The proportion of respondents travelling by bus has generally reduced between 2007 and 2018 (except in Stretford), as has the proportion of respondents travelling as the driver of a car (except in Urmston).

**Table 4.8: Most Popular Mode of Travel to Centres**

Centre	Year	1st	2nd	3rd	4th
Altrincham	2007	Car/van (as driver) (37.9%)	Bus (21.7%)	On foot (20.2%)	Car/van (as passenger) <i>and</i> Tram (both 7.9%)
	2018	Car/van (as driver) (36.0%)	On foot (19.3%)	Bus <i>and</i> Tram (both 14.0%)	-
Sale	2007	Car/van (as driver) (33.3%)	Bus (30.7%)	On foot (20.0%)	Car/van (as passenger) (9.3%)
	2018	Car/van (as driver) (30.4%)	On foot (23.5%)	Bus (22.5%)	Car/van (as passenger) (11.8%)
Stretford	2007	Car/van (as driver) (33.3%)	On foot (29.3%)	Bus (17.3%)	Car/van (as passenger) (14.7%)
	2018	On foot (37.0%)	Car/van (as driver) (29.0%)	Bus (21.0%)	Car/van (as passenger) (5.0%)
Urmston	2007	Car/van (as driver) (45.1%)	On foot (32.9%)	Bus (11.0%)	Car/van (as passenger) (7.3%)
	2018	Car/van (as driver) (46.4%)	On foot (36.1%)	Car/van (as passenger) (8.2%)	Bus (7.2%)

Source: Question 12 of the 2007 In-Street Survey and Question 15 of the 2018 In-Street Survey

- 4.28 Respondents in 2007 and 2018 were asked where they parked when travelling by car, van or motorcycle to the centre. Within Altrincham town centre, the most popular response was the Tesco car park, which was the response provided by 29.6% of those surveyed in 2007 and 23.1% in 2018.
- 4.29 In Sale town centre, the Tesco and Sainsbury's car parks were the principal locations where respondents parked in both 2007 and 2018, attracting a total of 56.3% of responses in 2007 and 53.5% of responses in 2018. In Stretford town centre, the most popular car park has also remained the Stretford Mall car park, achieving a total of 36.2% of responses in 2007 and 58.8% in 2018.
- 4.30 Finally, in terms of Urmston town centre, the Eden Square car park (listed as both Eden Square and Sainsbury's in the responses) is the most popular car park, cited by a total of 71.7% of respondents in 2018. In 2007, the precinct car park was the most popular response, referring to the car park present at Eden Square prior to the redevelopment of the town centre, which was completed in 2012.
- 4.31 Free on-street car parking also featured within the top four answers for all four of the town centres in 2018, indicating that there is some provision of free and accessible on-street parking (at certain times) in proximity to the centres.

**Table 4.9: Most Popular Place to Park**

Centre	Year	1st	2nd	3rd	4th
Altrincham	2007	Tesco (29.6%)	Other (13.3%)	On-Street (meter/pay & display) <i>and</i> Rackhams (both 9.2%)	Roof car park (8.2%)
	2018	Tesco (23.1%)	Multi-storey (13.9%)	On-street (free) (12.3%)	Dropped off (9.2%)
Sale	2007	Tesco (34.4%)	Sainsbury's (21.9%)	Other (18.8%)	On street (meter) <i>and</i> On street (free) <i>and</i> Disabled parking (all 3.1%)
	2018	Sainsbury's (27.9%)	Tesco (25.6%)	On-street (free) (11.6%)	Aldi <i>and</i> Q Park (4.7%)
Stretford	2007	Mall Car Park (36.1%)	Free Car Park <i>and</i> Multi-storey free (11.% each)	-	On Street (free) <i>and</i> Multi-storey (both 8.3%)
	2018	Shopping Mall (58.8%)	On street (free) <i>and</i> Multi-storey (both 14.7%)	-	Dropped off (8.8%)
Urmston	2007	Precinct (36.4%)	Don't know name (22.7%)	Other (15.9%)	On-street (free) (13.6%)
	2018	Eden Square / Sainsbury's (71.7%)	On-street (free) (9.4%)	On-Street (Meter/pay & display) (5.7%)	Dropped off <i>and</i> Don't know name (both 3.8%)

Source: Question 13 of the 2007 In-Street Survey and Question 16 of the 2018 In-Street Survey

### Reasons for Choosing to Visit the Town Centre

- 4.32 Table 4.10 identifies the most popular reasons that influenced the respondent's visit the centre on the day of the survey. For all of the four centres, the most popular response in both 2007 and 2018 related to the subject centre's location and convenience for the respondents.
- 4.33 In Altrincham town centre, the second most popular reason for visiting the centre was due to the respondent working there, with this accounting for 10.7 of responses in 2007 and 8.7% of responses in 2018. In Sale, the second most popular answer remained the pedestrian friendly environment, which accounted for 6.7% of responses in 2007 and 11.8% of responses in 2018. In Stretford, the second most popular answer continued to be the centre's location close to relatives and friends, which was provided by 8.0% of respondents in 2007 and 9.0% of respondents in 2018.
- 4.34 Only in Urmston town centre has the second most popular reason for visiting the centre changed since 2007. In 2007, 8.5% of respondents stated that the purpose of their visit was to work in the centre; in 2018, the second most popular response was that the centre offered easy car parking (23.7%), followed then by the provision of cheap parking (14.4%). There is still generally a healthy level of respondents

who indicated that they visit the town centres of Altrincham (10.4% in 2007, 8.7% in 2018), Sale (1.3% in 2007, 9.8% in 2018) and Urmston (8.5% in 2007, 10.3% in 2018) because they work there. However, in Stretford town centre, the proportion of respondents indicating that they were in the centre on the day of the survey reduced significantly from 6.7% of respondents in 2007 to just 1.0% of respondents in 2018.

**Table 4.10: Reasons for the Visit to the Centre**

Centre	Year	1st	2nd	3rd	4th
Altrincham	2007	Near/convenient (58.6%)	Work here (10.4%)	Other (8.4%)	Close to friends/relatives (6.4%)
	2018	Near/convenient (60.7%)	Work here (8.7%)	Selection/choice of independent shops (8.0%)	Can access the town by tram <i>and</i> Good public transport (both 6.0%)
Sale	2007	Near/convenient (82.7%)	Pedestrian friendly <i>and</i> Selection of independent shops (6.7% each)	-	Particular shop/service <i>and</i> Other (both 5.3%)
	2018	Near/convenient (55.9%)	Pedestrian friendly environment (11.8%)	Feels safe (10.8%)	Work here (9.8%)
Stretford	2007	Near/convenient (58.7%)	Close to friends/relatives <i>and</i> Other (both 8.0%)	-	Work here (6.7%)
	2018	Near/convenient (74.0%)	Close to friends/relatives <i>and</i> Easy Parking (both 9.0%)	-	Good public transport (8.0%)
Urmston	2007	Near/convenient (64.6%)	Work here (8.5%)	Visit bank (6.1%)	Competitive prices <i>and</i> Other <i>and</i> Social reasons (all 3.7%)
	2018	Near/convenient (81.4%)	Easy parking (23.7%)	Cheap parking (14.4%)	Pedestrian friendly environment <i>and</i> Work here (both 10.3%)

Source: Question 5 of the 2007 In-Street Survey and Question 6 of the 2018 In-Street Survey

### Length of Time Spent in Town Centres

4.35 As Table 4.11 demonstrates, the top answer for the length of stay in each of the four centres is less than two hours in each case. Within Altrincham, respondents have consistently stated that they stay between one and two hours (41.4% in 2007 and 39.3% in 2018). The highest proportion of responses confirming that they stay longer than four hours is within Altrincham town centre at 10.0%.

- 4.36 In Sale, the most popular dwell time is between one and two hours, which was cited by 43.1% of respondents; in 2007, the most popular dwell time was between 30 minutes and one hour, which was cited by 42.7% of respondents. In Stretford, the most popular dwell time is up to 30 minutes, which was cited by 33.0% of respondents; in 2007, the most popular dwell time was between one and two hours, cited by 36.0% of respondents.
- 4.37 In total, 24.7% of respondents stated they stay less than an hour in Altrincham in 2018, and 24.5% in Sale. However, in Urmston this proportion is substantially higher at 62.9% and, in Stretford, even higher still at 65.0%.
- 4.38 These figures could indicate the propensity of respondents to make short trips to Stretford and Urmston town centres compared to Altrincham and Sale, perhaps indicating a lack of overall facilities encouraging increased dwell time.

**Table 4.11: Average Length of Time Spent in the Centre**

Centre	Year	1st	2nd	3rd	4th
Altrincham	2007	1-2 hours (41.4%)	2-3 hours (19.2%)	30 minutes-1 hour (15.8%)	0-30 minutes (9.4%)
	2018	1-2 hours (39.3%)	2-3 hours (23.3%)	30 minutes-1 hour (16.7%)	4 hours or more (10.0%)
Sale	2007	30 minutes-1 hour (42.7%)	1-2 hours (38.7%)	0-30 minutes <i>and</i> 2-3 hours (both 8.0%)	-
	2018	1-2 hours (43.1%)	30 minutes-1 hour (21.6%)	2-3 hours (20.6%)	4 hours or more (8.8%)
Stretford	2007	1-2 hours (36.0%)	30 minutes-1 hour (34.7%)	4 hours or more (12.0%)	0-30 minutes (10.7%)
	2018	0-30 minutes (33.0%)	30 minutes-1 hour (32.0%)	1-2 hours (28.0%)	2 hours or more (6% in total)
Urmston	2007	0-30 minutes (47.6%)	30 minutes-1 hour (28.1%)	1-2 hours (15.9%)	4 hours or more (4.9%)
	2018	30 minutes-1 hour (32.0%)	0-30 minutes (30.9%)	1-2 hours (27.8%)	2-3 hours (5.2%)

Source: Question 6 of the 2007 In-Street Survey and Question 7 of the 2018 In-Street Survey

### Dislikes of Centres

- 4.39 Table 4.12 below provides the principal dislikes for each of the four centres, as identified by respondents in 2007 and 2018. For all centres except Stretford, the top answer in 2018 is 'don't know', ranging from 32.0% in Urmston to 48.0% in Altrincham. Within Stretford town centre, the top answer from respondents in terms of their main dislike in 2018 is the limited/poor selection of independent shops (33.0%) and limited selection of multiple shops (32.0%), followed by respondents stating that

there are better facilities elsewhere (26.0%). The lack of a 'don't know' answer featuring in the top four suggests that residents generally have a clear view in respect of how the centre can improve. It is relevant to note that the second top answer in Altrincham town centre in 2007 was the unattractive environment (accounting for 19.7% of responses), whereas just 1.3% cited this as a reason to dislike the centre in 2018, indicating a substantial improvement in the town centre environment over the past 11 years.

4.40 In Sale town centre, the second most popular answer following 'don't know' is that respondents dislike the poor selection of independent shops (provided by 10.8% of respondents), which is also the second most popular answer in Urmston town centre (21.7%).

**Table 4.12: Main Dislikes of Centres**

Centre	Year	1st	2nd	3rd	4th
Altrincham	2007	Don't know (34.5%)	Unattractive environment (19.7%)	Limited/poor selection/choice of independent shops (19.2%)	Limited/poor selection/choice of multiple shops (12.8%)
	2018	Don't know (48.0%)	Cost of car parking (8.0%)	Limited/poor selection/choice of independent shops (7.3%)	Too many empty shops (5.3%)
Sale	2007	Don't know (41.3%)	Limited/poor selection/choice of multiple shops (16.0%)	Empty shops (14.7%)	Other (10.7%)
	2018	Don't know (45.1%)	Limited/poor selection/choice of independent shops (10.8%)	Lack of car parking <i>and</i> Lack of cleanliness of streets (both 7.8%)	-
Stretford	2007	Don't know (62.7%)	Other (14.7%)	It is run down/ depressing (6.7%)	Unattractive environment (5.3%)
	2018	Limited/poor selection/ choice of independent shops (33.0%)	Limited/poor selection/choice of multiple shops (32.0%)	Better facilities elsewhere (26.0%)	Unattractive environment (17.0%)
Urmston	2007	Unattractive environment (43.9%)	Limited/poor selection/choice of independent shops (32.9%)	Limited/poor selection/choice of multiple shops (22.0%)	Lack of cleanliness of streets (15.9%)
	2018	Don't know (32.0%)	Limited/poor selection/choice of independent shops (21.7%)	Limited/poor selection/choice of multiple shops (18.6%)	Facilities needed not available (13.4%)

Source: Question 10 of the 2007 In-Street Survey and Question 13 of the 2018 In-Street Survey

### Suggested Improvements to the Centres

4.41 Respondents were asked for their views in terms of how each of the centres could be improved. Table 4.16 identifies that the most popular suggestion in Altrincham in 2018 is to refurbish/improve existing shopping facilities (21.3%), followed by improving the range of independent/specialist shops (18.0%). In 2007, respondents stated that improving the market stalls would improve the centre (23.7%), followed by refurbishing/improving the existing shopping facilities (18.7%). The regeneration and refurbishment of Altrincham Market has occurred since the 2007 survey, reflecting the absence of the same response in 2018.

**Table 4.13: Most Popular Suggestions to Improve the Centre**

Centre	Year	1st	2nd	3rd	4th
Altrincham	2007	Improve the market stalls (23.7%)	Refurbish/improve existing shopping facilities (18.7%)	Reduce cost of parking (16.8%)	Improve street furniture <i>and</i> Nothing in particular (both 15.8%)
	2018	Refurbish/improve existing shopping facilities (21.3%)	Improve range of independent/specialist shops (18.0%)	No opinion <i>and</i> Nothing in particular (both 21.0%)	Reduce cost of parking (13.3%)
Sale	2007	Improve range of independent/specialist shops (18.7%)	Develop new shopping facilities (17.3%)	Clothes shops (16.0%)	Other new shop <i>and</i> Nothing in particular (both 13.3%)
	2018	Improve range of independent/specialist shops (25.5%)	New/improved cinema (23.5%)	Clean shopping streets (17.7%)	Nothing in particular (14.7%)
Stretford	2007	Nothing in particular (32.0%)	Improve range of independent/specialist shops (21.3%)	Improve market stalls (13.3%)	Reduce road congestion (10.7%)
	2018	Improve choice of multiple shops (47.0%)	Improve range of independent/specialist shops (34.0%)	Clean shopping streets (30.0%)	Improved range of places to eat (27.0%)
Urmston	2007	Develop new shopping facilities (45.1%)	Clean shopping streets (41.5%)	Improve range of independent/specialist shops (30.5%)	Improve choice of multiple shops (29.3%)
	2018	Improved range of independent/specialist shops (46.4%)	Improve street furniture/ floral displays (44.3%)	Improve market stalls (43.3%)	Improve choice of multiple shops (36.1%)

Source: Question 11 of the 2007 In-Street Survey and Question 14 of the 2018 In-Street Survey

4.42 The 2018 survey in Sale town centre identified that the most popular means by which to improve the centre is to increase the range of independent shops (cited by 25.5% of respondents), which was also

the most popular suggestion in 2007 (18.7%). In 2018, 23.5% of respondents also stated that a new cinema would improve the centre, followed by clean shopping streets (17.7%).

4.43 In Stretford town centre, it is interesting to note that in 2007, 32.0% of respondents did not identify any particular improvement for the centre but in 2018, 47.0% of respondents confirmed that an improved choice of multiple shops would improve the centre. This was then followed in second position by 34.0% of respondents who stated that an improved range of independent/specialist shops would improve the centre (which was a measure also identified by 21.3% of respondents in 2007). This range of measures identified to improve the town centre is likely reflective of the overall decrease in the centre's retail offer and its current high vacancy rate.

#### **Other Centres Visited Regularly**

4.44 Respondents were asked which other centres they visited regularly. The highest proportion of respondents in Altrincham in 2018 survey did not provide a specific location (26.0%), followed by 25.3% who mentioned the Trafford Centre, 24.7% who mentioned Manchester city centre, and 20.7% mentioned responded Sale. In 2007, 47.3% of respondents indicated that they also visit Manchester city centre, 37.9% indicated that they also visited the Trafford Centre, and 27.1% indicated that they also visit Sale.

4.45 Within Sale town centre, the top response in respect of centres regularly visited at both 2007 and 2018 is Altrincham town centre, which is unsurprising given the proximity of the two centres. Respondents in Sale also confirmed that they also visit Manchester city centre (30.4%), Trafford Centre (24.5%) and Stretford (16.7%) in 2018.

4.46 Respondents in Stretford in the 2018 survey stated that they also regularly visit Urmston town centre (46.0%) and the Trafford Centre (36.0%), and respondents in Urmston confirmed they visit Trafford Centre (47.4%) and Manchester city centre (44.3%). Interestingly, in 2007, 25.6% of respondents in Urmston stated that they also visit the Trafford Centre regularly, and as such, there has been a 21.8 percentage point increase in the proportion of respondents who regularly visit the Trafford Centre over the past 11 years. Whilst it is unsurprising that shoppers in Urmston also visit the Trafford Centre, given the proximity of the two, it is more surprising that the proportion of respondents who confirmed they also visited the Trafford Centre in 2007 was substantially lower. This may indicate that residents are more likely to choose to shop at out of centre destinations today, compared to 11 years ago, perhaps

due the accessibility and convenience, or due to the increased leisure provision and overall attraction of the Trafford Centre to meet a wide range of retail and leisure requirements.

**Table 4.14: Other Centres Visited Regularly**

Centre	Year	1 <sup>st</sup>	2 <sup>nd</sup>	3 <sup>rd</sup>	4 <sup>th</sup>
Altrincham	2007	Manchester city centre (47.3%)	Trafford Centre (37.9%)	Sale (27.1%)	None mentioned (12.8%)
	2018	None mentioned (26.0%)	Trafford Centre (25.3%)	Manchester city centre (24.7%)	Sale (20.7%)
Sale	2007	Altrincham (44.0%)	Trafford Centre (26.7%)	Stretford (25.3%)	Manchester city centre (22.7%)
	2018	Altrincham (64.7%)	Manchester city centre (30.4%)	Trafford Centre (24.5%)	Stretford (16.7%)
Stretford	2007	Manchester city centre (44.0%)	Trafford Centre (33.3%)	Altrincham <i>and</i> Urmston (both 18.7%)	-
	2018	Urmston (46.0%)	Trafford Centre (36.0%)	Manchester city centre (31.0%)	Sale (29.0%)
Urmston	2007	Stretford (56.1%)	Manchester city centre (35.4%)	Altrincham <i>and</i> Sale (26.8% each)	-
	2018	Trafford Centre (47.4%)	Manchester city centre (44.3%)	Sale <i>and</i> Stretford (both 20.6%)	-

Source: Question 15 of the 2007 In-Street Survey and Question 19 of the 2018 In-Street Survey

## Markets

- 4.47 Finally, turning to the respondents' views on the town centre markets in Altrincham and Urmston, questions were asked to the respondents about the frequency of visits to the markets and what respondents liked and disliked. Questions relating to the markets did not form part of the 2007 survey, so we are unable to compare answers with the 2018 results.
- 4.48 Firstly, respondents were asked whether they intended to visit the market during their trip to the centre. In Altrincham, 20.0% stated they would visit the market and 78.0% stated they wouldn't (with a further 2.0% stating they hadn't yet decided). Within Urmston, just 1.0% confirmed that they would be visiting the Urmston Market, with 99.0% stating that they wouldn't. It is important to recognise that just one respondent confirmed that they would be visiting the market on the day of the survey, and that the answers provided below are from this one person.
- 4.49 When asked how often the respondents visited each market, 26.7% of respondents who confirmed they would visit Altrincham market stated that they would visit once a week or more and less than once a fortnight. In addition, 23.3% stated they visit less than once a week and 20.0% stated they visit less than once a month.

**Table 4.15: How Often Respondents Visit the Market**

Centre	1 <sup>st</sup>	2 <sup>nd</sup>	3 <sup>rd</sup>	4 <sup>th</sup>
Altrincham	Once a week or more <i>and</i> Less than once a fortnight (26.7% each)	-	Less than once a week (23.3%)	Less than once a month (20.0%)
Urmston	Less than once a week (100.0%)	-	-	-

Source: Questions 21A and 21B of the 2018 In-Street Survey

- 4.50 Respondents were asked what they liked about the markets. Within Altrincham, 30.0% of respondents stated that they liked the friendly atmosphere and 26.7% stated they liked the quality of food. A further 20.0% stated that they liked the quality of non-food items, and the range of food and the opportunity to support local businesses.
- 4.51 Within Urmston, the one respondent confirmed that they like the ease of parking, the freshness of food, the friendly atmosphere and the good service within Urmston market.

**Table 4.16: Aspects Liked about the Markets**

Centre	1 <sup>st</sup>	2 <sup>nd</sup>	3 <sup>rd</sup>	4 <sup>th</sup>
Altrincham	Friendly atmosphere (30.0%)	Quality of food (26.7%)	Quality of non-food items <i>and</i> Range of food <i>and</i> Opportunity to support local business (all 20.0%)	-
Urmston	Ease of parking (100.0%)	Freshness of food (100.0%)	Friendly atmosphere (100.0%)	Good service (100.0%)

Source: Questions 22A and 22B of the 2018 In-Street Survey

- 4.52 In terms of dislikes, the majority of respondents in Altrincham (70.0%) confirmed that there were no aspects that they disliked about the market. A further 13.3% stated that a reason they disliked the Altrincham market was due to it being poor value for money and a further 10.0% stated that there were not enough stalls.

**Table 4.17: Aspects Disliked about the Markets**

Centre	1st	2nd	3rd	4th
Altrincham	Nothing (70.0%)	Poor value for money (13.3%)	Not enough stalls (10.0%)	Empty stalls <i>and</i> Poor range of food <i>and</i> The day of the week the market is held (all 3.3%)
Urmston	Nothing (100.0%)	-	-	-

Source: Questions 23A and 23B of the NEMS 2018 In-Street Survey

### Summary

4.53 The in-street survey has gleaned a large amount of information relating to respondents' views, which can be fully understood with reference to the complete tabulated results provided at Appendix 3. In summary, the following changes are considered to be indicative of the current role and performance of the four centres of Altrincham, Sale, Stretford and Urmston:

- the principal reason to visit all four town centres is still to go shopping, which emphasises that, whilst the offer of centres will need to broaden, retail remains a primary function;
- the most popular goods to purchase in all four town centres are food and grocery goods (which ranges from 55.3% of respondents in Altrincham and 81.1% in Stretford);
- the second most popular intended purchases in the four centres was either clothing and shoes (Altrincham and Sale) or toiletries and cosmetics (Stretford and Urmston);
- a relatively high proportion of respondents do not visit the centres for daytime or evening leisure purposes, with the lowest proportion of 'don't do this activity' responses being within Altrincham and Sale town centres;
- the principal leisure facility visited in the daytime in each of the four centres was restaurants/cafes and, within the evening, the principal facility visited in each of the centres was restaurants and cafes or pubs and bars;
- the average amount spent on food goods in Altrincham was the lowest but the amount spent on non-food goods was the highest out of the four centres. The amount spent on eating/drinking out during the day and the evening in Urmston town centre was the highest out of the four centres in each case;
- the most popular method of transportation by far for each of the four centres except Stretford was by car as a driver. The top response within Stretford was on foot, demonstrating the strength of the walk-in catchment to the town centre;

- the principal reason for choosing each of the centres was due to their relative proximity and convenience to the respondents. This answer remained consistent from the 2007 survey; and
- a very low proportion of respondents confirmed they were also visiting Urmston Market on the day of the survey. Of the respondents who confirmed they were also visiting Altrincham market on the day of the survey, 30.0% confirmed that they liked the friendly atmosphere and 26.7% confirmed they like the quality of food. A total of 70.0% confirmed that there were no aspects which they disliked about the market.

## 5.0 Healthcheck Summary and Conclusions

5.1 Paragraph 85 of the NPPF indicates that planning policies should promote the long term vitality and viability of town centres by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries. The same paragraph also states that town centres should accommodate a suitable mix of uses (including housing) and provide for development that reflects a centre's distinctive character.

5.2 Paragraph 002 of the Town Centres PPG indicates that the key way to set out a vision and strategy for town centres is through the development plan and (if needed) supplementary planning documents. Paragraph 006 of the Town Centres PPG identifies a range of indicators that should be assessed over time in order to establish the health of a town centre. The indicators include the following:

- diversity of uses;
- proportion of vacant street level property;
- commercial yields on non-domestic property;
- customers' experience and behaviour;
- retailer representation and intentions to change representation;
- commercial rents;
- pedestrian flows;
- accessibility – this includes transport accessibility and accessibility for people with different impairments or health conditions, as well as older people with mobility requirements;
- perception of safety and occurrence of crime;
- state of town centre environmental quality;
- balance between independent and multiple stores;
- extent to which there is evidence of barriers to new businesses opening and existing businesses expanding; and
- opening hours/availability/extent to which there is an evening and night time economy offer.

- 5.3 Comprehensive healthcheck assessments have been undertaken for the four town centres, the three district centres and one local centre. The healthchecks were drafted at the time of the previously published Town Centres PPG and as such, do not specifically outline all of the indicators referred to above. In any event, the additional indicators are not matters which undermine our conclusions in respect of the health of the centres as provided within the healthchecks.
- 5.4 The detailed healthchecks of the Borough's four town centres are provided at Appendix 4, and healthcheck assessments of the three district centres and Partington local centre are provided at Appendix 5. We provide an overview of centres' position in the retail hierarchy below<sup>31</sup>, before summarising the key conclusions from our healthcheck assessments.

### **Sub-Regional Retail Hierarchy**

- 5.5 Table 5.1 sets out the retail hierarchy on a sub-regional basis with reference to Venuescore's UK Shopping Venue Rankings 2016/17. Venuescore's index ranks nearly 3,500 retail venues in the UK (including town centres, standalone malls, retail warehousing and factory outlet centres) based on the strength of their current provision. Each retail venue is ranked with reference to the provision of national multiple retailers, including anchor stores, fashion operators, and non-fashion multiples. The score attached to each operator is weighted to reflect its overall impact on shopping patterns. For example, anchor stores such as John Lewis, Marks & Spencer and Selfridges receive higher weightings. Due to the way the rankings are compiled, relatively small centres can secure a relatively high rank if they are anchored by national multiple retailers.
- 5.6 Based on its score and the strength of its offer, Venuescore categorises each centre in order to help identify its role. The eight categories comprise: 'Major City', 'Major Regional', 'Regional', 'Sub-Regional', 'Major District', 'District', 'Minor District' and 'Local'. The position of retail destinations in the below Table 5.1 is derived from the 2016/17 Rankings; some competing centres are provided by way of context. Venuescore's Market Position Classification and Index, as set out in the below table, provide an indication as to the market that the venue serves; the higher the index score, the more upmarket the venue is.

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<sup>31</sup> Our summary table incorporates all centres that have been considered by the Venuescore 2016/17 UK Shopping Venue Rankings

- 5.7 Altrincham is categorised as a Sub-Regional centre and had a Venuescore of 113 at 2016/17. It ranked 217<sup>th</sup> of all UK centres surveyed in 2016/17, which represents an improvement of eight places from its 225<sup>th</sup> position at 2015/2016. The only other Sub-Regional centre in the authority area is Sale, which Venuescore ranked 312<sup>th</sup> out of all UK centres in 2016/17. This represents a very limited decline in respect of the centre's ranking of 311<sup>th</sup> in 2015/16, but is a significant improvement on Sale's ranking of 415<sup>th</sup> at 2010.
- 5.8 Altrincham is in relatively close proximity to Manchester city centre and the Trafford Centre, which affects its catchment and its role across the sub-region. The proximity of these competing venues is also reflected in Altrincham's Market Position Classification as many premium brands or retailers (who typically occupy a limited number of stores) will be of the view that they can serve the North West market from Manchester and the Trafford Centre.
- 5.9 Of the remaining centres, Stretford has the highest ranking (ranked 633<sup>rd</sup> position in the Venuescore rankings), followed then by Urmston (Eden Square Shopping Centre) (ranked 1,111<sup>th</sup>). These two centres have a substantially better offer (particularly in respect of national multiple operators) than Hale district centre (which is ranked 2,566<sup>th</sup>) and Timperley district centre (ranked 2,815<sup>th</sup>). However, whilst Urmston's ranking has improved since 2015/16 by nine places, Stretford's ranking has decreased quite considerably by 33 places since 2015/16.
- 5.10 Altrincham Retail Park, Trafford Retail Park and White City Retail Park are ranked 819<sup>th</sup>, 1,559<sup>th</sup> and 1,775<sup>th</sup> respectively.

**Table 5.1: Venuescore's Sub-Regional Shopping Hierarchy**

Retail Venue	Score 2016/17	Location Grade	Rank 2010	Rank 2013/14	Rank 2015/16	Rank 2016/17	Market Position Classification	Market Position Index
The Trafford Centre	313	Major Regional	37	29	32	30	Upper Middle	123
Altrincham town centre	113	Sub-Regional	229	242	225	217	Middle	99
Sale town centre	86	Sub-Regional	415	259	311	312	Middle	92
Stretford town centre	48	Major District	373	525	600	633	Lower Middle	81
Altrincham Retail Park	38	District	-	727	779	819	Middle	93
Eden Square Shopping Centre	29	Minor District	591	1,118	1,120	1,111	Lower Middle	84

Trafford Retail Park	20	Minor District	1,623	1,468	1,548	1,559	Lower Middle	86
Altrincham, Ashley Road	19	Local	-	1,468	1,618	1,625	Upper Middle	118
White City Retail Park	17	Local	1,526	1,406	1,618	1,775	Middle	104
Manchester, Chester Road	17	Local	-	1,792	1,709	1,775	Middle	91
Manchester, Barton Dock Road	16	Local	-	2,010	1,908	1,888	Lower Middle	88
Hale district centre	12	Local	1,096	2,306	2,577	2,566	Middle	96
Altrincham, Stockport Rd	11	Local	1,526	2,775	3,152	2,815	Lower Middle	84
Manchester, Old Trafford	10	Local	1,526	2,775	3,152	3,133	Lower Middle	77

Source: Venuescore UK Shopping Venue Rankings 2010, 2013/14, 2015/16 and 2016/17

5.11 Other (smaller scale) defined town centres within the Borough generally have a limited role and function and are identified as either being Minor District or Local centres (the exceptions to this are Sale Moor and Partington, which are not actually identified in the Venuescore rankings).

5.12 We provide healthcheck summaries below and our full assessments at Appendices 4 and 5.

### Principal Centres

#### Altrincham Town Centre

5.13 Altrincham is a historic market town and is, by some distance, the largest centre in Trafford. There are 392 units in the Goad centre boundary, accounting for 86,340 sq.m of floorspace. It has a particularly strong service sector, which has evolved significantly in recent years as a consequence of the regenerated Altrincham Market and through attracting a range of new independent operators. Consequently, Altrincham has developed a unique offer which supports substantial footfall.

5.14 Our survey recorded a total of 44 vacant units in Altrincham, which account for a total of 8,520 sq.m of retail floorspace and equate to 9.9% of the total stock of commercial floorspace. This figure is the same as the current UK average for vacant floorspace and is similar to the vacant floorspace recorded in 2007. We are aware that the vacancy rate has been relatively high in Altrincham for much of the past decade and the current lower vacancy rate reflects the resurgence in the town's fortunes in the past three or four years. Furthermore vacant floorspace is substantially lower than the average for the four town centres in Trafford, which is 15.1%.

- 5.15 Looking at the commercial floorspace within the recommended PSA boundary, as shown at Appendix 8, the vacancy rate is recorded as 4,890 sq.m which equates to 12.8% of the total stock of commercial floorspace, and 24 units which is 13.4% of the total. The proportion of vacant units and floorspace within the PSA is therefore higher within the PSA when compared to the wider Goad town centre boundary, principally due to the concentration of the number of vacancies along George Street, The Graftons, Stamford Square and Stamford New Road.
- 5.16 The centre is also well integrated to the wider public transport network, with Altrincham Interchange located in the east of the centre. In addition, the public realm, which has received considerable investment in recent years, is considered to be of a high standard and contributes to an attractive environment.
- 5.17 Altrincham's principal strength is considered to be its strong leisure service offer, of which Altrincham Market is a key anchor. Whilst the comparison goods offer is slightly more limited than may be expected for a centre of Altrincham's size (which is possibly a result of the proximity of the Trafford Centre), some interesting operators have opened in recent months and the centre accommodates some good high street names. Bringing forward additional residential development within or at the edge of the centre would present an opportunity to further strengthen the leisure service offer, and to support the centre as a whole.
- 5.18 Whilst the amount of comparison goods floorspace in the centre is lower than the national average, it is higher than the average figure across the four Trafford town centres. This is also reflective of Altrincham's stronger leisure service offer, which plays an important role in underpinning the centre.
- 5.19 It should also be noted that House of Fraser on George Street was saved from closure in mid-2018, and 4B George Street (which was recorded as 'under alteration' at the time of our visit) has now opened as Søstrene Grene. It is understood that the owner of the building currently occupied by House of Fraser will be redeveloped to create three units on the ground floor, with office and residential uses on the upper floors. No formal application has been submitted to date.
- 5.20 The centre also has 18 of the 30 major retailers that have been identified by Experian Goad as likely improving the appeal of a centre. These show an underlying strength and confidence in the centre, and despite the competition provided by higher order destinations, including the Trafford Centre, Altrincham remains an attractive and popular destination.

- 5.21 Whilst Altrincham is considered to be a highly vital and viable centre, it could perhaps improve further through additional comparison uses to underpin its overall function. Given its upward trajectory, we believe there is currently an important opportunity to attract additional retailers (principally comparison goods) in order to underpin its overall offer. Further diversification through the delivery of town centre residential and office uses will help to create an attractive environment and encourage additional footfall throughout both the day and evening and will assist in supporting other uses. The Altair and former House of Fraser sites will assist in bringing forward residential uses in the town centre and increase footfall.
- 5.22 The announcement of the impending closure of Debenhams within Altrincham will clearly be a loss to the high street but given the resurgence with regard to Altrincham high street in recent years, we are hopeful that the unit will not remain vacant for long, and alternative tenants will be found. However, given the size of the unit, it may be necessary to sub-divide the floorspace to ensure it is suitable for potential incoming tenants.

**Table 5.2: Altrincham SWOT Analysis**

Strengths	Weaknesses
Altrincham has a strong leisure offer with Altrincham Market being a key anchor. The centre's environmental quality and public realm are considered to be generally high, with the centre also having a good level of accessibility with links throughout Trafford from Altrincham Interchange.	The comparison goods offer is considered to be weaker than the size of the centre might suggest, although the offer in Altrincham is similar to the average for Trafford. This deflated offer is possibly the result of impacts from the Trafford Centre.
Opportunities	Threats
Growth in the amount of residential development within and on the edge of the centre should help to further strengthen the leisure offer, and has the potential to improve the existing comparison goods offer.	Potential diversification of uses at Trafford Centre, especially around leisure services, may have some potential to reduce the diversity and vitality of the sector in Altrincham. At present the centre appears too reliant on the mid-market food and drink offer.

### Sale Town Centre

- 5.23 Sale town centre is focussed around The Square Shopping Centre (which dates from the 1970s) and the pedestrianised part of School Road (which lies between Washway Road to the east and Springfield Road to the west), and comprises 259 units and 63,580 sq.m of floorspace within the Goad centre boundary. The centre serves a relatively extensive catchment, with residents of Sale, Sale Moor, Ashton-upon-Mersey and Brooklands looking to the town centre to help meet their retail needs. Whilst the shopping centre is of a somewhat tired appearance, the town centre is generally well maintained and

is underpinned by its strong convenience goods retail offer (the centre accommodates Aldi, Sainsbury's and Tesco). The composition of Sale has diversified in recent times with the Sale Waterside development. This included a number of community facilities, retail and leisure units and a considerable area of public realm which has increased the interaction between Sale town centre and the Bridgewater Canal.

- 5.24 Sale has a higher than average vacancy rate and an offer which is somewhat one-dimensional, being highly reliant on its convenience goods shopping anchors. In terms of the Experian Goad defined boundary, the vacancy rate within Sale is in excess of the national average with respect of floorspace and units. There are a total of 34 vacant units throughout the town centre, which represents 13.1% of all units and accounts for 9,980 sq.m of floorspace (which equates to 15.7% of the total stock of commercial floorspace). At 2017, just 6.8% of floorspace in Sale was vacant, which indicates that the issue in respect of vacancies is relatively recent.
- 5.25 However, if we focus on the vacancy rate within the defined town centre, the vacancy rate is considerably lower at 7.6% of the floorspace and 10.6% of the provision of units.
- 5.26 Sale's comparison goods operators are generally at the budget end of the market and there is a proliferation of 'pound' shops and household goods operators. The environment around The Square Shopping Centre is also uninspiring and in need of renewal, although the Maloneview scheme (detailed below) will substantially improve this part of the town centre. Notwithstanding this, the strength of the convenience goods offer (which is focussed around Aldi, Sainsbury's and Tesco) is such that parts of Sale benefit from strong footfall. However, we believe that the comparison goods and leisure service sectors could be improved in order that the centre can meet more of the needs of its catchment population.
- 5.27 Sale does benefit from a high level of accessibility, through the Metrolink and wider bus network, but public transport routes could be better linked to the town centre. As mentioned, the Town Centre Public Realm and Movement Strategy seeks to provide for improve access throughout the town centre in order to help address this issue. Public realm improvements may also help better utilise the Bridgewater Canal, which is one of the town's key assets.
- 5.28 In summary, Sale town centre would significantly benefit from a more diverse and modernised offer, in order that its appeal extends further than convenience goods shopping. Improvements to the public

realm and the centre’s evening offer could help underpin the centre’s future vitality and viability, and help attract further development. Residential development in the area could also improve footfall and help support local businesses. Indeed, the Council is minded to grant permission (subject to the signing of a Section 106 Agreement) an application for the demolition of existing buildings and construction of a new mixed-use scheme on The Square Shopping Centre Development Site (reference 94986/FUL/18), which will see the delivery of 202 residents units, alongside a new commercial scheme including retail and leisure uses. The scheme will encourage additional footfall into the town centre through both the residential and commercial elements of the proposed development, with knock-on benefits to the existing uses in the centre.

**Table 5.3: Sale SWOT Analysis**

Strengths	Weaknesses
Sale has a particularly strong convenience goods offer, which allows the catchment population to meet most of their needs close to home. The Sale Waterside development accommodates Council offices, the library and the Robert Bolt Theatre and is well used. The centre also accommodates a range of financial and business services, which provide an important local function.	The centre is of a somewhat tired appearance, particularly The Square Shopping Centre and along Scholl Road. The public realm is also dated and shopfronts are of a variable quality. The composition of the centre and the quality of operators does not necessarily reflect local catchment.
Opportunities	Threats
Further residential uses may help increase footfall and help underpin the vitality and viability of the catchment. Parts of Sale’s catchment are affluent and there is the potential to modernise the offer in order to provide more comprehensively for the needs of residents. Sale is in need of further key anchors in order to draw custom into the town, and the proposed Maloneview development would substantially diversify the town centre offer and support additional activity throughout both the day and the evening.	The centre (as defined by Experian Goad) has a higher than average vacancy rate, although this is inflated by two large vacant units on Washway Road which are situated outside of the defined town centre boundary. The period of time that the former Vao unit at Sale Waterside has been vacant is also a cause for concern, as are the increasing number of vacancies in The Square Shopping Centre. The centre is in transition and it is important that it ‘moves with the times’ in order to provide for its future vitality and viability.

Stretford Town Centre

5.29 Stretford is located in a densely populated area, and is the northern most town centre in Trafford. It is located at a prominent location on the A56 corridor, with good public transport links. In terms of the quantum of floorspace it accommodates and the number of units, Stretford is the smallest town centre in Trafford. At the time of our survey, there were 107 units in the centre which account for 25,410 sq.m of floorspace. The centre is dominated by Stretford Mall which was part of the late 1960s/early 1970s redevelopment of the town. A number of important community facilities are located in Stretford, such as Stretford Public Hall and Stretford Library.

- 5.30 The centre has suffered in recent years due to competition from other town centres and out-of-centre retail destinations, resulting in an increased vacancy rate which currently equates to 42.2% of floorspace. As a consequence, there have been significant changes at Stretford Mall the past few years, including the redevelopment of surface car parking on the western side of the Mall for an Aldi foodstore and the demolition of the southern part of the Mall (which includes the former market hall and O'Brien's public house). Within the Mall itself, the Stretford Foodhall is now open within the former Argos store. The Foodhall sells a range of convenience goods, whilst also being a café, bar and evening music venue. The new use increases the overall activity and footfall within this part of the Mall, whilst also providing an additional food and drink use along the A56.
- 5.31 In addition to the redevelopment of Stretford Mall a number of schemes have emerged in and around Stretford town centre in recent times (including the Refreshed Stretford Masterplan and the UA92 Campus) which provide significant opportunities to both improve and consolidate the centre's overall offer, and to improve the environmental quality of Stretford.
- 5.32 At present, Stretford town centre has issues in respect of the high vacancy rates throughout the centre, low levels of pedestrian activity, and a generally moderate standard of environmental quality. The centre has been impacted by custom migrating to higher order centres and large superstores, and there has been a lack of investment which has compromised its vitality. Whilst Stretford contains some important local facilities (and its offer has been boosted in recent years by the Aldi), its future vitality and viability is uncertain, and the delivery of the schemes as identified in the Refreshed Masterplan will be key to helping secure the future vitality and viability of the centre.

**Table 5.4: Stretford SWOT Analysis**

Strengths	Weaknesses
Stretford has a relatively good comparison goods offer (albeit not as strong as it has historically been), with the highest proportion of comparison floor space of any town centre in Trafford. However, the comparison operators are generally value/lower-end retailers. The centre also benefits from good connectivity, particularly on public transport. The new Foodhall has increased the food and drink offer within the centre and along the A56.	The centre suffers from high vacancy rates, which are both the highest of the Borough's town centre and higher than the national average. This negatively impacts the centre's composition, which has a poor service offer. Stretford Mall is an inward looking centre, offering no reason for people to 'pass through' and detracting from the rest of the centre. Stretford Mall is of its time and is not visually appealing.
Opportunities	Threats
Demolition work is ongoing in respect of the southern part of Stretford Mall, which previously accommodate the market and O'Brien's public house. The clearance of this site offers an opportunity to help address	The high vacancy rates, and the dated environmental quality of units surrounding the centre, threaten the overall vitality of the centre. Similarly the expansion of retail facilities on Chester Road/White City has

<p>problems arising from the inward-looking nature of the centre and to improve the overall quality of its offer. The Stretford Masterplan and UA92 can help to realise this. The recent opening of the Stretford Foodhall also has the potential to encourage additional food and drink uses along the A56, demonstrating investor and operator confidence in Stretford centre as a whole.</p>	<p>increased competition and reduced reasons to visit the centre.</p>
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Urmston Town Centre

- 5.33 Urmston is a pleasant and largely functional centre, focussed around Eden Square Shopping Centre and a strong service offer. The centre is located approximately 10 kilometres to the south west of Manchester city centre, and consequently is a prime commuter location. There are 189 units within the town centre, accounting for 33,290 sq.m of floorspace.
- 5.34 The centre’s comparison goods offer is limited (due to competitor destinations in the vicinity), but this has allowed Urmston to develop a number of niche and independent retailers. The realisation of the proposed M41 redevelopment of Urmston Market provides an opportunity to further diversify the service offer. The centre accommodates a diverse range of retailers and services that are considered suitable to serve the needs of the Urmston community.
- 5.35 Despite the proximity of competing retail destinations, such as Trafford Retail Park and the Trafford Centre, Urmston has successfully managed to maintain a vacancy rate below the national average and the average for Trafford town centre. Of the four town centres in Trafford, Urmston has the lowest vacancy rate in terms of units and floorspace. The vacancy rate is also lower than the national average, with 7.1% of floorspace vacant (compared to 9.9% nationally) and 9.5% of units (compared with 11.3% nationally). Vacant floorspace has decreased significantly from the level (18.5%) recorded in 2007.
- 5.36 The centre is divided into two distinct ‘halves’, with considerable lower levels of pedestrian activity noted to the south of the train line at the time of our visit. Consideration should be given to redeveloping areas of dilapidation or vacancy in this area, most notably Victoria Parade on High Road. Notwithstanding this, Urmston is considered to be a vital and viable centre.

**Table 5.5: Urmston SWOT Analysis**

Strengths	Weaknesses
<p>Eden Square Shopping Centre provides a modern, attractive centre, which benefits from the presence of Sainsbury’s as anchor and a good selection of other</p>	<p>The comparison goods offer is generally limited and lacks any significant clothing and footwear operators (this is not unexpected given the size of the centre and</p>

operators. The centre has a high level of accessibility to public transport, with Urmston train station located in the centre. The centre is generally pleasant and feels safe and secure. Urmston has the lowest vacancy rate for a town centre in Trafford.	its proximity to the Trafford Centre). The composition of uses is considered to be more indicative of a large district centre.
<b>Opportunities</b>	<b>Threats</b>
The M41 Urmston Market redevelopment, on the site of the current market, is considered to provide an ideal opportunity to diversify the offer in the centre. Potential reuse/redevelopment of the Victoria Parade is also a significant, as yet unrealised, opportunity.	Urmston is located in close proximity to the Trafford Centre and Trafford Retail Park, which could act to further reduce the vitality and viability of the centre in the future. This is particularly a concern for comparison goods operators.

### Hale District Centre

- 5.37 Hale is a diverse district centre, and is the largest such centre in Trafford. Overall there are 110 units located within Hale district centre. These account for 15,624 sq.m of commercial floorspace. The centre is located approximately 700 metres to the south of Altrincham town centre, but has historically been able to cultivate a distinct retail offer.
- 5.38 The centre is a popular destination with a number of high-end and independent retailers, and with a good level of provision of the immediate residential community which includes a range of leisure services and comparison goods operators. Although the centre is focussed around leisure service uses, the convenience and comparison offer is considered appropriate to serve the needs of the local community.
- 5.39 Vacant units are located throughout the district centre, with the consequent effect of no one part of Hale feeling 'dominated' by vacant buildings. The vacancy rate amounted to 11.0% of total units and 12.4% of the total stock of floorspace. However, some of the vacancies are larger units and the reoccupation of just a couple of units could result in the level of vacant floorspace being well below 10%.
- 5.40 Efforts should be made to diversify the convenience and comparison goods offer, especially as Altrincham town centre continues to diversify its range of leisure service operators and therefore acts as competition to the leisure operators in Hale. Whilst there appears to be a relatively high 'churn' in

the stock in Hale, it remains an attractive centre for operators and overall, Hale is considered to be a vital and viable district centre<sup>32</sup>.

**Table 5.6: Hale SWOT Analysis**

<b>Strengths</b>	<b>Weaknesses</b>
Hale is a diverse, well-used centre with a number of high-end leisure uses. Additionally the centre provides a range of services considered suitable to serve the needs of the surrounding residential areas.	The centre is dominated by services which reduce the amount of comparison (and to some extent convenience) floorspace, this is accentuated by the centre's small, period buildings which limit potential for large format retailers.
<b>Opportunities</b>	<b>Threats</b>
Vacancies provide an opportunity to diversify the service and/or convenience and comparison goods offer. Hale is an extremely attractive centre and therefore will appeal to a range of prospective tenants.	The vacancy rate is skewed by a number of large, vacant former restaurant units (such as the former Carluccio's), however long term uses should be secured to ensure the vitality of the centre. Hale's proximity to Altrincham means that its leisure offer may compete for part of the same market.

<sup>32</sup> Trafford Council has recently commissioned the preparation of Place Plans for Sale Moor and Hale, which will to provide a framework for future changes and any development opportunities to improve the vitality and sustainability of the centres.

Sale Moor District Centre

- 5.41 Located within a wider residential area, Sale Moor is a well-used district centre with a considerable range of service and comparison goods operators. In total there are 61 units within Sale Moor district centre. These account for a total of 5,804 sq.m of floorspace.
- 5.42 The centre has a good level of accessibility, and a generally functional environmental quality. However, the centre is dominated by vehicle movements as a result of its location adjacent to a major road junction, resulting in a poor level of pedestrian accessibility.
- 5.43 Despite having a good variety of service and comparison goods operators, the role and function of Sale Moor is slightly constrained by its lack of a large convenience goods retailer. However, it is clear that Sale Moor is a well-used centre with a low vacancy rate. As such, it is considered to be vital and viable.

**Table 5.7: Sale Moor SWOT Analysis**

Strengths	Weaknesses
Sale Moor currently has a good variety of service and comparison goods operators, with the centre appearing well used at the time of our visit. The centre is surrounded by housing and therefore is convenient and accessible to the surrounding catchment.	Sale Moor lacks a convenience goods retailer of a scale that is able to support some main food shopping trips, or any financial and business service operators. The centre is also dominated by cars, which impacts on pedestrian movement across the centre.
Opportunities	Threats
As the centre is focussed around a fairly busy junction, efforts should be made to improve the public realm and environmental quality of the centre. The Council has consulted on the future of Warrener Street car park, which in our experience often functions below capacity. The car park benefits from planning permission for a food retail development, but could accommodate a variety of uses, including residential.	There are a number of hot-food takeaways (11 in total). The concentration of these operators reduces the overall diversity of the centre.

Timperley District Centre

- 5.44 Timperley is an attractive centre, which accommodates a good range of retail operators, which are able to meet many of the day to day needs of the local community. There are 57 units within the district centre, accounting for a total of 6,191 sq.m of floorspace. It is focussed around the junction of Park Road and Stockport Road, which consequently results in a high number of vehicle movements through the centre. These reduce the overall accessibility of the centre for pedestrians.

5.45 The centre also has a high quality public realm which makes Timperley an attractive destination, despite its location at the junction of two moderately busy roads. The centre does lack a diversity in terms of its leisure service offer, and it is felt that there is a concentration of hot-food takeaways in Timperley. However, when considered as a whole, Timperley has a low vacancy rate, benefits from a good mix of operators, and is considered to be a vital and viable district centre.

**Table 5.8: Timperley SWOT Analysis**

Strengths	Weaknesses
Timperley has a low vacancy rate, with a convenience goods offer that is able to meet many of the day to day shopping needs of the local community, alongside a diverse range of other retailers and services. The centre also has a high quality public realm with a good level of accessibility. The centre sits within a primarily residential area and therefore benefits from a 'walk in' catchment.	The centre has relatively poor public transport links, with comparatively fewer bus services and no Metrolink access. There is also a concentration of hot-food takeaways.
Opportunities	Threats
As an established centre in a residential area the centre has strong community usage. There is also the potential to build on high quality public realm to strengthen the character and improve the appearance of the centre. There is potential for the centre to benefit from increased expenditure and footfall as a result of the proposed extensive residential allocation within the Revised Draft GMSF.	The gradual increase in Altrincham's leisure service offer could divert trade which may potentially otherwise be available to support food and drink operators located within Timperley.

### Partington Local Centre

5.46 Partington local centre was substantially redeveloped to create a modern commercial development opening in 2014 from which the centre has clearly benefited. The vacancy rate (formerly accounting for over 40% of floorspace and units) is now nil, and the centre is generally well-managed, although given its modern format, lacks any distinct character. There are 10 units within the local centre, accounting for 1,843 sq.m of floorspace.

5.47 Partington is a generally well-maintained centre, which, whilst of a small scale, appropriately meets some of the day to day needs of the surrounding residential community. This is reflected by the centre's proportionally strong convenience goods offer. Furthermore, although there remains a bank within the centre this only opens on occasional days, and any potential loss of this unit is a considerable threat with respect to the diversity of Partington's offer.

5.48 Its importance to the local community is heightened as a consequence of the area’s relative remoteness from other centres. However, the centre is well used, well-maintained and generally vital and viable.

**Table 5.9: Partington SWOT Analysis**

<b>Strengths</b>	<b>Weaknesses</b>
<p>Partington local centre is a modern purpose-built centre that is full let and appears to appropriately meet some of the day to day needs of the surrounding community. There is a decent range of convenience goods and service retailers in the centre, with no vacancies. The centre is clean, safe and secure. The commercial offer is supplemented by a good range of local facilities.</p>	<p>Due to the centre's limited size the retail offer lacks diversity, the comparison goods offer is considered to be poor and there are no retail services in Partington. In comparison with other centres, Partington has relatively poor transport connections. In addition, the public realm is limited and there are no benches to encourage users to linger.</p>
<b>Opportunities</b>	<b>Threats</b>
<p>Potential for residential development in areas surrounding Partington could see increased demand for services and space within the centre. Adjacent site could also possible accommodate further commercial development, which could further improve the centre’s range of shops and services.</p>	<p>The RBS bank within the centre is only open a few days per week, and the loss of this service would significantly reduce the total diversity of the centre.</p>

## 6.0 Population and Expenditure

### Study Area

- 6.1 In October 2018, a survey of 1,000 households was undertaken by NEMS within the defined Study Area in order to ascertain where residents go to undertake a range of shopping and leisure activities. As set out in the introductory Section 1 of this report, the Study Area is derived from that utilised by the previous 2007 Retail and Leisure Study, and is purposely drawn to incorporate part of the neighbouring authorities of Cheshire East, Manchester, Salford and Warrington.
- 6.2 It is important to note that the Study Area does not reflect the entirety of the Trafford Centre catchment, which is extensive and covers Greater Manchester, Cheshire, Lancashire, Merseyside and beyond. However, this is not considered problematic in the context of Borough-wide Study such as this, where the focus is on identifying needs arising within the Trafford authority area and the immediate surrounding area (where facilities in the Borough are able to meet needs in a sustainable manner). Should there be any requirement to review the future role and function of the Trafford Centre in detail, then this would more appropriately form part of a wider Study which would also consider the relative strength of higher order centres (including Manchester city centre), which compete most directly with the Trafford Centre.
- 6.3 The defined Study Area has been broken down into nine separate zones (in a manner which is also consistent with the 2007 Study) which reflect postcode sectors. The nine zones are considered to be representative of geographic areas that may accommodate broadly similar patterns of shopping behaviour. The below Table 6.1 sets out the postcode sectors which define each of the zones. The zones were used as the basis for the NEMS household survey, which is used to inform our assessment of shopping patterns (with relation to the market share of expenditure claimed by various destinations), which is set out at Section 7 of this report. The survey results also underpin the quantitative retail capacity assessment provided at Section 8. However, in order to consider the flow of expenditure to retail destinations, it is first necessary to estimate the population and future convenience and comparison goods expenditure apparent in the Study Area.
- 6.4 The Trafford Borough authority area broadly comprises Study Area Zones A to D, and it is these zones which we consider comprises the 'central area' for the purposes of the analysis. We have also given

consideration to the surrounding outer zones in order to understand the how residents in authority areas use facilities in Trafford.

**Table 6.1: Study Area Zones by Postcode Sector**

Survey Zone	Postcode Sectors
A	WA 13 9, WA13 0, WA14 1, WA14 2, WA14 3, WA14 4, WA14 5, WA15 6, WA15 7, WA15 8, WA15 9, WA15 0
B	M31 4, M41 5, M41 6, M41 7, M41 8, M41 9, M41 0
C	M33 2, M33 3, M33 4, M33 5, M33 6, M33 7
D	M15 4, M16 9, M16 0, M32 8, M32 9, M32 0
E	M15 5, M16 7, M16 0, M32 8, M32 9, M32 0
F	M15 5, M16 7, M16 8, M21 7, M21 8, M21 9, M21 0
G	M5 3, M5 4, M5 5, M30 7, M30 8, M30 9, M30 0, M50 3
H	WA13 0
I	WA16 6, WA16 7, WA16 8, WA16 0

## Study Area

- 6.5 The population within each postcode sector and each zone at 2019 has been calculated using Experian Micromarketer G3 data (2017 estimate, which was issued in December 2018). In estimating the future population of the Study Area, consideration has been given to the authorities' population projections across the timeframe of the Greater Manchester Spatial Framework (to 2037).
- 6.6 In this regard, we are informed by the Council that it is planning for Trafford Borough's population to increase from 238,729 persons at 2019 to 260,454 persons at 2037<sup>33</sup>. This equates to a population growth of 21,724 persons over the 18 year period (equating to an average annual population growth of 1,207 persons).
- 6.7 The Study Area zones cut across local authority areas, with some zones falling outside Trafford Borough (and in neighbouring authority areas such as Cheshire East, Manchester, Salford and Warrington). Where a zone incorporates a neighbouring authority area, there is a need for it to be subdivided in order to account for growth both inside and outside the authority area. For areas outside Trafford Borough, the use of Experian's own population forecasts is considered to be appropriate.

<sup>33</sup> This equates to the population growth identified for Trafford Borough by the Office for National Statistics 2016-based subnational population projections

- 6.8 In order to apportion Trafford’s future population growth in an appropriate manner, we have been provided with a summary schedule setting out the distribution of the Council’s housing supply at 2018 on a zonal basis. We have also given consideration to the two draft GMSF strategic housing allocations for Trafford – these being the New Carrington and Timperley Wedge allocations<sup>34</sup> – in distributing growth on a zonal basis. As a consequence of noting the zonal location of each part of the Council’s housing land supply, we are able to identify how future population growth may be delivered across the authority area in the period to 2037. Population growth (and available expenditure) has been considered at five year intervals working back from 2037. We also utilise additional reporting years of 2024 and 2029<sup>35</sup>.
- 6.9 Outside of Trafford Borough, Experian population forecasts have been used (2017 base year). Experian’s methodology in calculating projected change in population is based on a ‘demographic component model’, which takes into consideration birth and death rates, and net migration.
- 6.10 We set out below our assumed population growth on a zonal basis at Table 6.2.

**Table 6.2: Estimated Population Growth Across Study Area**

Zone	Population in Trafford Borough				Population Outside Trafford Borough			Total population growth at 2037
	Population at 2019	Proportion of future housing growth	Population increase (2019 to 2037)	Population at 2037	Population at 2019	Population increase (2019 to 2037)	Population at 2037	
A	75,094	18.6%	4,037	79,131	7,380	621	8,001	4,676
B	52,024	55.1%	11,979	64,003	-	-	-	11,979
C	61,678	2.1%	465	62,233	907	41	948	506
D	47,914	23.3%	5,057	52,971	12,106	1,947	14,053	7,004
E	2,925	0.9%	186	3,111	55,560	4,562	60,122	4,748
F	259	-	-	259	33,069	2,868	35,937	2,868
G	52	-	-	52	62,376	10,060	72,436	10,060
H	-	-	-	-	6,983	652	7,635	652
I	-	-	-	-	20,518	1,031	21,549	1,031
<b>Total</b>	<b>238,729</b>	<b>100.0%</b>	<b>21,724</b>	<b>260,454</b>	<b>202,225</b>	<b>21,782</b>	<b>224,025</b>	<b>43,524</b>

Note: Population at 2018 derived from Experian MMG3 data; distribution of growth in Trafford Borough is Nexus Planning estimate based on the methodology set out at Section 6 of this report; growth outside Trafford Borough is based on Experian growth forecasts

- 6.11 The above Table 6.2 indicates that the majority of future growth in Trafford Borough is to be located within the northern and western part of the authority area (within Zones B and D).

<sup>34</sup> As identified by the Greater Manchester Spatial Framework 2019 Draft, published for consultation in January 2019

<sup>35</sup> Equating to five years from base year 2019 (which is of relevance in respect of the consideration of planning application proposals) and ten years from base year (which is the timeframe of most relevance as identified by paragraph 85 of the NPPF)

- 6.12 We have apportioned forecast annual population growth in Trafford Borough equally across the Plan period (i.e. we plan for growth of 1,207 persons per annum).
- 6.13 Using the above methodology, Table 6.3 sets out our estimate of future population growth across the Study Area, utilising the housing land supply pipeline provided by Trafford Council, and Experian Micromarketer G3 data.

**Table 6.3: Estimated Study Area Population by Survey Zone**

Zone	2019	2022	2024	2027	2029	2032	2037	Methodology for Estimating Growth
A	84,493	85,295	85,837	86,637	87,180	87,934	89,169	Trafford housing land supply and Experian
B	52,024	54,020	55,351	57,348	58,679	60,675	64,003	Trafford housing land supply
C	62,675	62,759	62,812	62,897	62,952	63,038	63,181	Trafford housing land supply and Experian
D	60,020	61,311	62,203	63,417	64,163	65,257	67,024	Trafford housing land supply and Experian
E	58,485	59,455	60,067	61,402	61,423	62,135	63,233	Trafford housing land supply and Experian
F	33,328	33,804	34,071	34,616	34,952	35,480	36,196	Trafford housing land supply and Experian
G	62,428	64,445	65,710	67,490	68,533	70,060	72,488	Trafford housing land supply and Experian
H	6,983	7,094	7,162	7,312	7,398	7,503	7,635	Trafford housing land supply and Experian
I	20,518	20,795	20,919	21,096	21,217	21,371	21,549	Trafford housing land supply and Experian
<b>Total</b>	<b>440,954</b>	<b>448,978</b>	<b>454,133</b>	<b>462,215</b>	<b>466,496</b>	<b>473,454</b>	<b>484,478</b>	

- 6.14 The above table sets out our estimate that the Study Area population will increase from 440,954 persons at 2019 to 484,478 persons at 2037, which equates to a growth of 43,524 persons over the 18 year period.

### Retail Expenditure

- 6.15 In order to calculate per capita convenience and comparison goods expenditure, we have again utilised Experian Micromarketer G3 data, which provides detailed information on local consumer expenditure that takes into consideration the socio-economic characteristics of the local population.
- 6.16 The base year for the Experian expenditure data is 2017. Our methodology takes account of the fact

that some special forms of trading expenditure<sup>36</sup> is not available to support retail floorspace, and then allows for increases in per capita expenditure growth on an annual basis.

- 6.17 Figure 5 of Appendix 3 of ERPBN16 provides forecasts in respect of the proportion of convenience and comparison goods expenditure that will be committed through special forms of trading both now and in the future. We have 'stripped out' any survey responses which relate to expenditure committed via special forms of trading and have instead made an allowance derived from Experian's recommendations (which we consider to be the most appropriate means by which to account for such expenditure).
- 6.18 In considering special forms of trading, it should be noted that many products which are ordered online are actually sourced from a store's shelves or stockroom (particularly in the case of convenience goods). As such, expenditure committed in this manner acts to sustain shops and can be considered 'available' to support floorspace within the Study Area.
- 6.19 Accordingly, in order not to overstate the influence of special forms of trading on retailers, our methodology utilises Experian's 'adjusted' allowance for special forms of trading (which is provided at Figure 5 of ERPBN16). This allowance indicates that 3.4% of convenience goods expenditure and 15.5% of comparison goods expenditure is 'lost' from shops at base year 2017 through special forms of trading purchases.
- 6.20 Having made allowance for special forms of trading, we then take account of projected changes in expenditure in accordance with the recommendations provided by Figure 6 of Appendix 3 of ERPBN16. Experian provides overall growth rates and 'adjusted' rates, which account for any additional increases in expenditure lost to special forms of trading. We set out Experian's expenditure growth estimates below as our Table 5.4.
- 6.21 The latest growth rates suggest that Brexit will likely influence per capita expenditure growth in the short term, but that growth in comparison goods expenditure should pick up in the medium term as confidence in the economy returns. The outlook is less optimistic in respect of convenience goods growth, which is a consequence of shoppers embracing discount retailers and looking to secure value from the food shopping.

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<sup>36</sup> Identified as comprising sales via the internet, mail order, stalls and markets, door-to-door and telephone sales (i.e. all expenditure not available to traditional retail floorspace)

6.22 For convenience goods, Experian forecasts very limited per capita expenditure growth across the entire period to 2037. The position is even more pessimistic when account is taken of future growth in special forms of trading, with Experian’s forecasts suggesting that the growth in convenience goods expenditure available to actual stores will not exceed 0.1% per annum across the entire period 2019 to 2037. Overall, it is evident that per capita convenience goods expenditure is forecast to increase only very marginally in the period to 2037.

6.23 The position in respect of comparison goods expenditure is more positive. Experian forecasts that per capita comparison goods expenditure growth will increase from 2.8% at 2018 to 3.5% at 2023, and will thereafter remain between 3.1% and 3.3% per annum in the period from 2024 to 2037. Experian’s forecast suggests that there will be relatively healthy growth in comparison goods even after accounting for expenditure lost to special forms of trading.

**Table 6.4: Experian Retail Planner Briefing Note 16 Convenience and Comparison Goods Annual Growth Rates**

Year	Convenience Goods	Convenience Goods 'Adjusted SFT'	Comparison Goods	Comparison Goods 'Adjusted SFT'
2018	1.1	0.7	2.8	1.0
2019	0.4	0.1	2.6	1.5
2020	0.1	-0.1	2.8	1.8
2021	0.3	0.1	3.2	2.4
2022	0.0	-0.2	3.2	2.6
2023	0.2	0.0	3.5	2.9
2024	0.1	0.0	3.3	3.0
2025	0.1	0.0	3.2	2.9
2026	0.1	0.0	3.3	3.0
2027	0.1	0.0	3.2	3.0
2028	0.2	0.1	3.1	2.9
2029	0.1	0.0	3.2	3.0
2030	0.1	0.0	3.2	3.1
2031	0.2	0.1	3.3	3.2
2032	0.1	0.0	3.2	3.1
2033	0.2	0.1	3.3	3.2
2034	0.0	-0.1	3.1	3.1
2035	0.2	0.1	3.3	3.2
2036	0.1	0.1	3.3	3.2
2037	0.1	0.1	3.2	3.2

Source: Figure 6 of Appendix 3, Experian Retail Planner Briefing Note 16 (December 2018)

6.24 Growth in expenditure forecasts in the longer term (beyond the next ten years) should be treated with caution given the inherent uncertainties associated with predicting the performance of the economy

over time (particularly in the current economic and political climate). As such, assessments of this nature should be reviewed in a regular basis in order to ensure that forecasts over the medium and longer term reflect changing circumstances. In this regard, we also note that paragraph 85 of the revised NPPF requires local planning authorities to allocate sites to meet likely needs ‘...**looking at least ten years ahead**’, which differs from the previous requirement to meet needs across the entire plan period. We believe that this change directly reflects current economic conditions and changes in the retail sector in recent years.

- 6.25 By applying Experian’s recommendations in respect of special forms of trading and expenditure growth, we are able to produce expenditure estimates for each survey zone and the Study Area as a whole at 2019, 2022, 2024, 2027, 2029, 2032 and 2037.

#### Convenience Goods Expenditure

- 6.26 Taking into account the Study Area resident population and the available per capita convenience goods expenditure, we estimate that £985.7m<sup>37</sup> of convenience goods expenditure originates within the Study Area at 2019. The below Table 6.5 indicates that available Study Area convenience goods expenditure is forecast to then increase to £1,084.1m at 2037.

**Table 6.5: Total Available Study Area Convenience Goods Expenditure**

2019 (£m)	2022 (£m)	2024 (£m)	2027 (£m)	2029 (£m)	2032 (£m)	2037 (£m)
985.7	1,001.2	1,012.4	1,029.9	1,040.4	1,056.7	1,084.1

Source: Table 2a of Appendix 6  
In 2017 prices

- 6.27 Table 6.6 indicates that this represents an increase of £98.4m (or 10.0%) across the Study Area between 2019 and 2037. Given the slight fall in per capita convenience goods expenditure identified above, this increase can be attributed to the forecast growth in the Study Area’s population.

**Table 6.6: Growth in Available Study Area Convenience Goods Expenditure**

Growth 2019-22 (£m)	Growth 2019-24 (£m)	Growth 2019-27 (£m)	Growth 2019-29 (£m)	Growth 2019-32 (£m)	Growth 2019-37 (£m)
15.5	26.7	44.2	54.8	71.0	98.4

Source: Table 2a of Appendix 6  
In 2017 prices

<sup>37</sup> In 2017 prices, as is every subsequent monetary reference

6.28 We have assumed that around 75% of available convenience goods expenditure would take the form of main food shopping and that around 25% would take the form of top-up shopping (which relates to smaller purchases, often including staple items such as milk and bread)<sup>38</sup>. By applying this ratio, we estimate that main food shopping trips account for £739.3m of Study Area convenience goods expenditure at 2019, and top-up shopping trips account for £246.4m.

#### Comparison Goods Expenditure

6.29 For comparison goods, Table 6.7 sets out our estimate that the resident population of the Study Area will generate £1,382.8m of comparison goods expenditure at 2019. Available comparison goods expenditure is then forecast to increase significantly to £2,544.7m at 2037. As identified by Table 6.8, this represents a very substantial increase of £1,162.0m between 2019 and 2037. The large majority of this growth is forecast to occur in the longer term (i.e. after 2027).

**Table 6.7: Total Available Study Area Comparison Goods Expenditure**

2019 (£m)	2022 (£m)	2024 (£m)	2027 (£m)	2029 (£m)	2032 (£m)	2037 (£m)
1,382.8	1,504.4	1,611.8	1,789.1	1,913.3	2,128.7	2,544.7

Source: Table 8 of Appendix 6  
In 2017 prices

6.30 The identified increase in comparison goods expenditure growth is substantial, but it represents a level of annual growth that is more circumspect than that which has been achieved in the past. This is due both to a reduction in the overall level of growth when compared to that achieved in the early part of this millennium and as a consequence of further forecast increases in expenditure committed via special forms of trading (most obviously, internet shopping).

**Table 6.8: Growth in Available Study Area Comparison Goods Expenditure**

Growth 2019-22 (£m)	Growth 2019-24 (£m)	Growth 2019-27 (£m)	Growth 2019-29 (£m)	Growth 2019-32 (£m)	Growth 2019-37 (£m)
121.6	229.1	406.3	530.5	745.9	1,162.0

Source: Table 8 of Appendix 6  
In 2017 prices

6.31 We sub-divide comparison goods expenditure into eight categories, these being: 'DIY', 'Electrical' and 'Furniture' (collectively referred to as bulky goods); and, 'Clothing and Footwear', 'CDs, DVDs and Books', 'Health, Beauty and Chemist Goods', 'Small Household Goods', and 'Toys, Games, Bicycles and

<sup>38</sup> This is a fairly standard split applied in undertaking this exercise

Recreational Goods' (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zonal basis. Experian's estimates are reflected in the detailed expenditure tables set out at Table 7b of Appendix 6.

6.32 In considering expenditure growth, it should be noted that not all growth arising within the Study Area will be to support additional floorspace. Instead, account needs to be taken of: the market share of expenditure secured by retailers within the Borough; the claim made by existing retailers on expenditure growth (the future efficiency of retail floorspace); and, the expenditure that will be claimed by committed retail developments. We consider the matter of expenditure growth and future floorspace requirements in the following Section 8 of this report.

## 7.0 Market Research: Household Survey

### Market Share Analysis: Household Survey Results

- 7.1 The NEMS household survey identifies where residents travel to undertake a range of shopping and leisure activities. The summary of results provided in this section focusses on the market share secured by retail venues for various types of shopping.
- 7.2 The household survey is reproduced as part of Appendix 2 of this Study. In retail terms, the principal purpose of the survey is to establish:
- i) patterns of convenience goods spending, based on the location of:
    - the shop where the respondent last visited and visited 'the time before last' to undertake their main food shop<sup>39</sup>; and
    - the shop where the respondent last visited and visited 'the time before last' to undertake their top up food shop;
  - ii) patterns of comparison goods spending, based on the location of the respondent's last shopping trip to purchase the following types of comparison good:
    - clothing and footwear;
    - books, CDs, DVDs and stationery;
    - small household goods, such as home furnishings, clocks, jewellery, glass and china;
    - toys, games, bicycles and recreational goods;
    - chemist goods, including health and beauty items;
    - electrical goods, such as televisions, washing machines and computers;
    - DIY and gardening goods; and
    - furniture, carpets and floor coverings.

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<sup>39</sup> Both of the responses are recorded whether they are the same or different in order to gain a greater appreciation of shopping habits in the current marketplace, where it is not uncommon for shoppers to visit more than one large grocer in undertaking their main food shopping

7.3 The analysis that follows considers market shares for the above sub-sectors, but also identifies the overall market share of convenience and comparison goods expenditure secured by various destinations. In this regard, convenience goods expenditure has been considered (as established at Section 6) on the basis that approximately 75% of all such expenditure that goes through the tills of stores will be spent on main food shopping, and approximately 25% will be spent on top up food shopping. In terms of comparison goods, Experian Micromarketer G3 data is provided on a sectoral basis. Across the Study Area as a whole, Experian data indicates that residents' comparison goods expenditure is composed in the manner set out at Table 7.1

**Table 7.1: Experian Micromarketer Expenditure by Comparison Goods Sub-Sector**

Sector	Proportion of Overall Comparison Goods Expenditure
Clothing and footwear	27.9%
Books, CDs, DVDs and stationery	4.8%
Small household goods	11.6%
Toys, games, bicycles and recreational goods	11.9%
Chemist goods (including health and beauty)	13.9%
Electrical goods	15.2%
DIY and gardening goods	5.3%
Furniture, carpets and floor coverings	9.3%
Total	100.0%

Source: Derived from Table 8 of Appendix 6

7.4 The assessment of market shares set out below is based on the expenditure that flows to particular retail destinations. As such, in each case the identified turnover claimed by a particular destination is divided by the overall expenditure generated within the zone or overall Study Area in order to establish its market share. We are able to compare the current market share findings with those established in the 2007 Study, the analysis of which focussed principally on the levels of convenience and comparison expenditure retention within each zone.

7.5 Trafford's authority area is principally located within Zones A, B, C and D of the adopted Study Area, and this area is therefore of particular interest in considering market share. It is important to note however, that there are parts of Zones A, C and D which are located outside of Trafford Borough, and limited parts of Zones E, F and G which are located within the Borough. However, Zones A, B, C and D accommodate the vast majority of the Borough's residents.

7.6 In this regard, we expect Trafford’s convenience goods provision to secure almost all of the convenience goods turnover which originates within these four central zones (as convenience goods shopping is generally undertaken as close to home as possible). In respect of comparison goods, the role of the Trafford Centre and to a lesser extent Altrincham town centre, are such that they should also attract the large majority of such expenditure arising within Zones A to D.

### Convenience Goods Analysis

7.7 Our assessment of convenience goods market share is presented in four sections, as follows:

- we first consider the market share of main food and top up shopping expenditure claimed by all convenience goods facilities within the Trafford authority area;
- we then consider the convenience goods catchment of the Trafford authority area;
- the third part of our analysis considers the localised convenience goods retention rate within the four central zones; and
- our convenience goods market share analysis then concludes by identifying the dominant foodstores within particular zones.

#### Convenience Goods Market Share Secured by the Trafford Authority Area

7.8 Table 7.2 identifies the market share of main food and top up food expenditure claimed by foodstores located within Trafford. The table indicates that facilities in the Trafford authority area claim 84.2% of main food shopping expenditure and 87.3% of top up shopping expenditure that originates within the central Zones A to D. Overall, Trafford’s retailers claim 85.0% of convenience goods expenditure that originates within the central zones. Looking at the outer zones (Zones E to I), destinations within Trafford Borough claim a total of 21.6% of the available expenditure from these zones. Looking across the Study Area as a whole, Trafford authority destinations attract a total of 60.4% of the available expenditure.

**Table 7.2: Market Share of Convenience Goods Expenditure Secured by Facilities in Trafford**

Year	Type of Convenience Goods Shopping	Trafford Zones A-D	Outer Zones	Overall Study Area
2019	Main food shop	84.2%	24.1%	59.1%
	Top up food shop	97.3%	14.1%	58.8%
	Overall convenience goods	85.0%	21.6%	60.4%

Source: Table 4 of Appendix 6

### Convenience Goods Catchment of Trafford Authority Area

7.9 We set out below the market share claimed by convenience goods facilities in the authority area on a zonal basis. Consideration of the zonal market share provides an indication of the areas which look to destinations within Trafford Borough to meet their needs. We compare the 2019 figures with those derived from the 2007 Study in order to establish how shopping patterns have altered in the past decade.

**Table 7.3: Zonal Trafford Market Shares of Total Available Convenience Expenditure**

Zone	Trafford Authority Area 2019	Trafford Authority Area 2007	Change 2007 - 2019
A	82.9%	78.2%	+4.70%
B	95.7%	75.9%	+19.80%
C	88.7%	84.2%	+4.50%
D	73.9%	55.8%	+18.10%
E	28.7%	12.7%	+16.00%
F	28.1%	13.9%	+14.20%
G	18.6%	12.0%	+6.60%
H	16.4%	18.9%	-2.50%
I	9.0%	9.5%	-0.50%
<b>Total</b>	<b>60.4%</b>	<b>50.3%</b>	<b>+10.10%</b>

Source: Table 4 of Appendix 6

7.10 The above Table 7.3 demonstrates that the Trafford authority area claims the vast majority of convenience goods expenditure that originates within the central Zones A to D. In these zones, the convenience goods market share claimed by facilities within the authority ranges from 73.9% (in Zone D) to 95.7% (in Zone B). However, it is evident that destinations within Trafford claim a substantially lower proportion of the available expenditure generated by residents in Zones E to I, ranging from 9.0% in Zone I to 28.7% in Zone E. The lower levels of market share claimed by destinations within Trafford Borough is not unusual given that residents in these surrounding five zones will typically choose stores within the respective zones to meet their convenience shopping requirements (i.e. Zone E residents visit the Morrisons in Chorlton and the Asda in Hulme to meet their convenience goods shopping needs, and Zone F residents visit the Aldi and Tesco in Baguley).

7.11 Comparing the 2019 figures to those identified in 2007, we can see that the proportion of expenditure attracted to destinations in Trafford's administrative area has increased within Zones A to G. Looking at the central Zones A to D in particular, it is evident that the highest percentage increase in terms of

the proportion of convenience expenditure attracted to Trafford facilities is within Zones B and D (at 19.8 and 18.1 percentage points respectively). The increase in market share within Zone B is due to the opening of the Sainsbury's and Aldi in Eden Square, which has seen the shift in convenience shopping patterns from residents in Zone B back into Urmston town centre and away from destinations such as the Asda at Trafford Park. However, one of the key changes since the 2007 survey is the closure of the Tesco in Stretford Mall, and although an Aldi is now operating from the town centre, given that this replicates the offer in Urmston town centre, a higher proportion of shoppers are choosing to remain in Urmston to meet their needs.

7.12 In terms of Zone D, the provision of convenience stores has substantially altered since the 2007 survey was undertaken, with the opening of the Tesco Extra on Chester Road, the Aldi and M&S Simply Food at White City and the closure of the Tesco and opening of the Aldi at Stretford Mall. As such, the level of main food shopping provision in particular within Zone D has improved, having an effect on the proportion of convenience expenditure which is retained within the zone.

#### Localised Convenience Goods Retention Levels within Central Study Area Zones

7.13 Table 7.4 identifies the convenience goods retention rate within each zone. Such retention rates should only be viewed as a broad barometer of how local needs are being met, given that identified 'leakage' will typically be to an adjacent zone and zone boundaries are lines drawn on a plan based on postcode sectors. Again, the 2019 figures are compared to the 2007 figures from the previous Retail Study.

7.14 Notwithstanding this, it is evident that all but one zone benefit from a localised convenience retention rate over 50%. Zone H (Lymm) benefits from a retention rate of 23.8%, which reflects the absence of a large foodstore within the zone. It is evident that instead, residents located in Zone H are choosing destinations such as the Sainsbury's located on Rushgreen Road located in Lymm but just outside of the boundary, along with destinations located in Warrington.

7.15 In addition to the above, we note that in respect of Zones A to D:

- The principal destination for Zone A residents is the Sainsbury's Superstore located on Lloyd Street in Altrincham, which attracts a total of 30.1% of the available convenience expenditure residing from residents in the zone.
- The principal destination for Zone B residents is the Sainsbury's located in Eden Square in Urmston, which attracts a total of 27.7% of the available convenience expenditure residing in Zone 2.

- The principal destination for Zone C residents is the Sainsbury's in Sale, attracting a total of 22.6% of the available expenditure generated by Zone C residents.
- The available expenditure generated by Zone D residents is split between three destinations comprising the Aldi at Stretford Mall (17.4%), the Tesco on Chester Road (13.9%) and the Aldi at White City Retail Park (12.7%).

7.16 Looking at the shift in zonal retention rates since 2007, we can see that the retention levels have increased in Zones A, B and D and only reduced very slightly in Zone C. The highest increase in zonal retention is witnessed in Zone B, again due to the opening of the Sainsbury's and Aldi within Eden Square.

**Table 7.4: Localised Convenience Goods Retention Levels of Total Available Convenience Expenditure**

Zone	Area	Localised Retention Rate 2019	Localised Retention Rate 2007	Change 2007 - 2019
A	Southern (Altrincham)	84.1%	75.9%	+8.2%
B	Western (Partington and Urmston)	85.8%	52.3%	+33.5%
C	Eastern (Sale)	74.5%	74.7%	-0.2%
D	Northern (Stretford)	55.1%	36.8%	+18.3%

Source: Table 4 of Appendix 6 and Tables 8a and 8b of Appendix 4 of the 2007 Study

#### Dominant Foodstores within Central Study Area Zones

7.17 Table 7.5 provides the most popular destinations for convenience goods shopping at 2019, and compares this to the findings from the 2007 Study.

7.18 The consideration of zonal market shares generally indicates the food shopping journeys are generally undertaken in a sustainable manner and that most trips are undertaken to proximate destinations.

7.19 We can see from Table 7.5 below that the destination which receives the highest market share within each of the four zones has changed since 2007. We summarise the findings below:

- The principal convenience destination in Zone A is now the Sainsbury's in Altrincham attracting 30.1% of the total available expenditure, compared to 27.7% in 2007 (when it achieved the second highest market share). The market share to the Tesco Extra in Altrincham has substantially decreased from 27.7% in 2007 to 10.8% in 2019, but still achieves the second highest market share from Zone A residents.

- Within Zone B, the Sainsbury's and Aldi are now the top two principal destinations achieving a total of 27.7% and 22.7% of the available expenditure respectively. The Asda in Trafford Park also achieves a substantial proportion of the convenience expenditure at 18.0%, which has decreased from 31.1% in 2007.
- Zone C residents are spending the available convenience expenditure within the Sainsbury's and Tesco in Sale (22.6% and 17.9% respectively). In terms of the Tesco, this market share has reduced from 36.6% in 2007 but the market share attracted by the Sainsbury's has increased since 2007. The Aldi in Sale now achieves 14.2% of the available expenditure within Zone C.
- The principal destination within Zone D is the Aldi in Stretford Mall which attracts a total of 17.4% of the available expenditure generated by those residents. This is followed by the Tesco Extra on Chester Road which attracts 13.8% and the Aldi at White City Retail Park which attracts 12.7% of the available expenditure. None of these three stores were trading at the time of the 2007 study, and as such, have substantially shifted convenience shopping patterns for Zone D residents in particular. Furthermore, a key convenience facility at the time of the 2007 survey (the Tesco in Stretford Mall) has now ceased trading. The Tesco at Stretford Mall and the Tesco Extra on Chester Road had a period of trading simultaneously, but the Stretford Mall store was finally closed due to the larger store being located just 2km to the north east of the site<sup>40</sup>.

**Table 7.5: Market Share of Key Convenience Goods Shopping Venues by Zone (by Total Available Convenience Expenditure)**

Zone	2019			2007		
	Highest Market Share	Second Highest Market Share	Third Highest Market Share	Highest Market Share	Second Highest Market Share	Third Highest Market Share
A	Sainsbury's Superstore, Lloyds Street, Altrincham (30.1%)	Tesco Extra, Manor Road, Altrincham (10.8%)	Asda, George Richards Way, Altrincham (8.1%)	Tesco, Manor Road, Altrincham (32.4%)	Sainsbury's, Lloyds Street, Altrincham (27.7%)	M&S, Altrincham (5.0%)
B	Sainsbury's Superstore, Eden Square, Urmston (27.7%)	Aldi, Golden Square, Urmston (22.7%)	Asda, Barton Dock Road, Trafford Park (18.0%)	Asda, Barton Dock Road, Trafford Park (31.1%)	Somerfield (7.6%)	Other local shops (5.9%)
C	Sainsbury's, Curzon Road, Sale (22.6%)	Tesco, Hereford Street, Sale (17.9%)	Aldi, School Road, Sale (14.2%)	Tesco, Hereford Street, Sale (36.6%)	Sainsbury's, Curzon Road, Sale (18.9%)	Tesco Express, Manor Avenue (5.4%)
D	Aldi, Stretford Mall, Stretford (17.4%)	Tesco Extra, Chester Road, Stretford (13.9%)	Aldi, White City Retail Park, Trafford (12.7%)	Tesco, Stretford town centre (26.6%)	Asda, Trafford Park (12.5%)	Sainsbury's, Sale (3.8%)

Source: Tables 4 and 5 of Appendix 6 and Tables 10 to 14 of Appendix 4 of the 2007 Study

<sup>40</sup> Since the completion of the household survey, the Lidl has now commenced trading in the former PC World unit on Chester Road.

### Main Food and Top-up Food Shopping Split

7.20 It is useful to also analyse the differences in habits between main food and top-up food shopping trips within the zones in the Study Area. We provide below the respective analysis, focussing on the four central zones.

### Main Destinations for Main Food Expenditure by Zone

7.21 Table 7.6 below sets out the principal destinations for main food shopping expenditure on a zonal basis for the central Zones A to D. Within Zone A, the principal main food shopping destination is the Sainsbury's located on Lloyd Street in Altrincham which attracts 36.0% of main food shopping trips, followed by the Tesco on Manor Road which attracts 12.6%, and the total main food shopping retention rate within Zone A totals in 81.8%.

7.22 In Zone B, the Sainsbury's and Aldi stores in Eden Square in Urmston town centre are the principal destinations for main food shopping attracting 31.5% and 24.6% respectively, followed by the Asda in Trafford Park which attracts 22.2% of the main food shopping expenditure. Zone B retains 85.1% of the main food shopping trips.

7.23 Within Zone C, the Sainsbury's, Tesco and Aldi in Sale cumulatively attract 65.7% of the main food shopping trips of residents in Zone C, with the total retention rate equating to 71.9%. Finally in Zone D, the Aldi in Stretford attracts 17.6% of main food shopping trips, followed by the Tesco Extra on Chester Road which attracts 16.1% and the Aldi at White City, which attracts 15.0%. The main food zonal retention rate is substantially lower in Zone D at 53.9%. Residents in Zone D also choose to shop at the Asda in Trafford Park (10.0%) in Zone B to meet their main food shopping requirements, along with the Asda in Hulme (6.7%), amongst other destinations.

**Table 7.6: Market Share of Main Food Shopping Expenditure**

Zone	2018 Market Share			Zonal Main Food Shopping Retention
	Highest Market Share	Second Highest Market Share	Third Highest Market Share	
A	Sainsbury's, Lloyd Street, Altrincham (36.0%)	Tesco Extra, Manor Road, Altrincham (12.6%)	Asda, George Richards Way, Altrincham (7.8%)	81.8%
B	Sainsbury's, Eden Square, Urmston (31.5%)	Aldi, Golden Way, Urmston (24.6%)	Asda, Trafford Park (22.2%)	85.1%
C	Sainsbury's, Curzon Road, Sale (27.6%)	Tesco, Hereford Street, Sale (21.0%)	Aldi, School Road, Sale (17.1%)	71.9%
D	Aldi, Stretford Mall, Stretford (17.6%)	Tesco Extra, Chester Road, Stretford (16.1%)	Aldi, White City Retail Park, Trafford (15.0%)	53.9%

Source: Table 3 of Appendix 6

### Main Destinations for Top-Up Food Shopping by Zone

- 7.24 Turning to top-up shopping, Table 7.7 below sets out the principal top-up food shopping destinations for top-up food shopping expenditure on a zonal basis for Zones A to D. The Table indicates that residents choose a wider offer of convenience stores to meet their top-up shopping requirements, looking to smaller stores such as Co-op and Tesco Express foodstores which are often located closer to home but provide a smaller range of goods meeting day to day requirements such as purchasing milk and bread.
- 7.25 However, larger stores are still important convenience destinations within the four zones, with the Sainsbury's in Zone A, the Aldi and Sainsbury's in Zone B, the Tesco and Sainsbury's in Zone C and the Aldi and Tesco in Zone D all performing important top-up shopping functions.
- 7.26 The overall zonal retention rate for top-up shopping is higher than for the main food shopping, demonstrating again that residents will typically choose local stores to meet their top-up shopping requirements. Furthermore, the top destination in each zone is less prominent in terms of the proportion of shopping patterns, indicating a wider spread of shopping trips across a range of stores within each zone.

**Table 7.7: Market Share of Top-up Food Shopping Expenditure**

Zone	2018			Zonal Top-up Food Shopping Retention Rate
	Highest Market Share	Second Highest Market Share	Third Highest Market Share	
A	Sainsbury's Superstore, Lloyd Street, Altrincham (12.2%)	Co-op, Stockport Road, Timperley (11.7%)	M&S Foodhall, Ashley Road, Hale (9.4%)	91.1%
B	Aldi, Golden Way, Urmston (17.2%)	Sainsbury's, Eden Square, Urmston (16.0%)	Tesco Express, Partington Shopping Centre (8.5%)	87.8%
C	Co-op, Green Lane, Sale (9.9%)	Tesco Superstore, Hereford Street, Sale (8.8%)	Sainsbury's Superstore, Curzon Road, Sale (7.5%)	82.3%
D	Aldi, Stretford Mall, Stretford (16.7%)	Co-op, Barton Road, Stretford (8.7%)	Tesco Extra, Chester Road, Stretford (7.3%)	58.8%

Source: Table 3 of Appendix 6

## Comparison Goods Analysis

7.27 Our approach in respect of comparison goods is relatively similar to the above assessment of convenience goods shopping patterns. As such, we:

- first consider the market share of comparison goods expenditure (by sub-sector) claimed by all facilities within the Trafford authority area;
- then consider the comparison goods catchment of both the Trafford authority area, and the principal comparison destinations of the Trafford Centre and Altrincham town centre;
- identify the most popular comparison goods shopping destinations for residents of the Study Area; and
- then consider market share on a sectoral basis (for the critical clothing and footwear sector, and then for non-bulky and bulky goods).

### Comparison Goods Market Share Secured by Trafford Authority Area

7.28 As Table 7.8 identifies, the Trafford authority area secures a market share of 80.4% of comparison goods expenditure that arises within the central Zones A to D, and 40.1% of such expenditure that originates within the outer Zones E to I. As such, comparison goods retailers within the authority area claim 65.7% of all such Study Area expenditure.

**Table 7.8: Market Share of Comparison Goods Expenditure Secured by Facilities in Trafford**

Year	Type of Comparison Goods Shopping	Trafford Zones A-D	Outer Zones	Overall Study Area
2019	Clothing and footwear	73.7%	39.8%	60.9%
	Books, CDs, DVDs and stationery	82.6%	30.8%	63.7%
	Small household goods	69.6%	43.1%	60.2%
	Toys, games, bicycles and recreational goods	84.2%	45.6%	69.5%
	Chemist goods (including health and beauty)	91.8%	21.1%	65.9%
	Electrical goods	83.2%	56.6%	73.4%
	DIY and gardening goods	89.4%	46.6%	74.7%
	Furniture, carpets and floor coverings	81.3%	34.8%	64.9%
	Overall comparison goods	80.4%	40.1%	65.7%

Source: Tables 9 to 25 of Appendix 6

7.29 Table 7.9 below sets out the zonal comparison market share to Trafford Borough and the principal centres of the Trafford Centre and Altrincham town centre. We also include the 2007 Trafford authority

zonal market share figures to be able to analyse the differences in comparison shopping patterns over the past ten years or so.

7.30 The table demonstrates that the highest Trafford authority retention rates are within Zones A to D, which is expected given that these four zones broadly cover the Trafford authority area. Within these four zones, either Altrincham town centre or the Trafford Centre are the principal destinations for comparison goods expenditure. Within these four zones, all but Zone B has seen an increase in the proportion of expenditure attracted to Trafford authority destinations, with the highest increase being within Zone D, where the market share has increased from 54.5% to 71.7%, and increase in 17.2 percentage points since 2007.

7.31 In addition, the below Table 7.9 indicates that the vast majority of residents within central zones are able to meet their comparison goods shopping needs within Trafford. Within all of the central Zones A to D, facilities within the Trafford authority area are able to claim about seven out of every ten comparison goods pounds spent, with higher levels in Zones A to C. In addition, the Trafford authority area benefits from a comparison goods market share of 47.5% in Zone F, 45.6% in Zone G and 41.7% in Zone E.

**Table 7.9: Total Comparison Zonal Market Share Analysis**

Zone	Trafford Authority Area at 2019	Trafford Centre at 2019	Altrincham Town Centre at 2019	Trafford Authority Area at 2007
A	80.6%	11.5%	40.1%	73.2%
B	81.1%	29.4%	1.6%	81.7%
C	85.9%	27.1%	11.2%	80.2%
D	71.7%	22.9%	1.0%	54.5%
E	41.7%	15.6%	1.1%	35.7%
F	47.5%	8.7%	10.2%	51.6%
G	45.6%	26.6%	0.0%	42.4%
H	31.8%	7.8%	15.8%	28.7%
I	23.4%	7.6%	11.0%	22.0%
<b>Total</b>	<b>65.7%</b>	<b>19.1%</b>	<b>13.6%</b>	<b>59.9%</b>

Source: Table 25 of Appendix 6 and Appendices 5 and 6 of the 2007 Study

Notes: Total comparison market share at 2007 is the proportion of the non-bulky and bulky comparison expenditure retained within the Trafford authority area from Table 9b of Appendices 5 and 6, against the total available comparison expenditure within each zone

7.32 The above Table 7.9 indicates that the Trafford Centre secures approximately 29.4% of the comparison market share in Zone B, 27.1% in Zone C and 22.9% in Zone D, demonstrating the draw of the Trafford Centre to residents in these three zones. Altrincham town centre attracts a high proportion of the

comparison expenditure from Zone A residents at 40.1% of the available expenditure, and 15.8% of Zone H residents' expenditure.

7.33 The zones where both the authority area and the Trafford Centre and Altrincham town centre market shares are weak, are either relatively distant from both destinations, or benefit from good access to a competing centre. By way of example, the Trafford authority area secures:

- 31.8% of the available expenditure from Zone H residents, where instead, residents choose Lymm and Warrington centres to meet their comparison shopping requirements; and
- 23.4% of the available expenditure from Zone I residents, who choose Knutsford, Winsford and Northwich town centres to meet their comparison shopping requirements.

7.34 Overall, the Trafford authority area attracts nearly seven out of every ten pounds spent on comparison goods that originates within the Study Area, the Trafford Centre attracts nearly two out of every ten pounds and Altrincham town centre attracts just over one out of every ten pounds spent on comparison goods.

#### Dominant Comparison Goods Retail Destinations across the Study Area

7.35 Table 7.10 below sets out the turnover and market share for all comparison goods expenditure for the principal destinations within the Study Area. The table demonstrates that the Trafford Centre is still the principal comparison destination within Trafford, with the overall Study Area comparison market share based on available expenditure increasing from 13.8% in 2007 to 19.1% in 2019. This is followed by Altrincham town centre, which attracts a total of 13.6% of the available comparison expenditure, again which has increased since 2007 when it achieved 11.9% of the available comparison expenditure.

7.36 Altrincham Retail Park also remains an important comparison destination within the Study Area, attracting a total of 8.4% of the available expenditure, albeit this has decreased in market share since 2007, when it attracted 11.3% of the available comparison expenditure from across the Study Area.

7.37 In terms of other defined centres, Table 7.10 demonstrates that Sale, Urmston and Stretford town centres attract 4.0%, 2.3% and 2.1% of the available comparison expenditure respectively from across the Study Area. This level of market share has decreased slightly for Sale and Stretford town centres, but increased for Urmston town centre since 2007, from 1.4% to 2.3%.

**Table 7.10: Most Popular Comparison Goods Destinations within Study Area**

Study Area Destination	Comparison Goods Expenditure from Study Area Residents at 2019	Market Share of Study Area Expenditure at 2019	Comparison Goods Expenditure from Study Area Residents at 2007	Market Share of Study Area Expenditure at 2007
Trafford Centre	£263.9m	19.1%	£149.4m	13.8%
Altrincham Town Centre	£187.4m	13.6%	£12.9.1m	11.9%
Altrincham Retail Park, George Richards Way, Broadheath	£116.7m	8.4%	£122.6m	11.3%
Manchester City Centre	£101.7m	7.4%	-	-
White City Retail Park, Chester Road, Trafford	£63.3m	4.6%	£56.0m	5.2%
Trafford Retail Park, Neary Way, Trafford	£60.3m	4.4%	£53.7m	5.0%
Sale Town Centre	£54.8m	4.0%	£47.9m	4.4%
Urmston Town Centre	£32.4m	2.3%	£15.1m	1.4%
Stretford Town Centre	£29.3m	2.1%	£29.5m	2.7%
B&Q, Redclyffe Road, Trafford Park	£26.8m	1.9%	£17.6m	1.6%

Source: Table 25 of Appendix 6 and Appendices 5 and 6 of the 2007 Study

Notes: the Price Base of the 2007 figures is unknown. The total comparison expenditure attracted to each destination is a total of the non-bulky expenditure from Appendix 5 and the bulky expenditure from Appendix 6

### Dominant Comparison Goods Retail Destinations by Sector and Zone

- 7.38 It is not possible to undertake a detailed comparison of changes in shopping behaviour by comparison goods sub-sector as the previous retail planning advisors GVA, split the types of comparison shopping categories slightly differently to the approach adopted by retail consultants today. As such, providing a like-for-like comparison of shopping patterns is not possible to be undertaken on an accurate basis. However, we do provide some commentary below which analyses some of the findings from the 2007 study with regard to key destinations by using the 'raw' household survey results data provided by NEMS.
- 7.39 In particular, we provide a detailed analysis of clothing and footwear shopping trips below at Table 5.12 at 2019, and compare these to those identified in 2007. We concentrate on clothing & footwear shopping habits given the proportion of comparison expenditure spent on such goods from each resident. We provide an analysis in respect of the other seven categories of goods as part of the wider consideration of 'non-bulky' and 'bulky', comparison goods shopping trips below.

- 7.40 Looking principally at Zones A to D in the first instance, we can see that the Trafford Centre features within the top two destinations for residents in all four zones, ranging from 22.6% in Zone A to 55.3% in Zone B for clothing & footwear shopping. This was also the case in 2007, when the market share ranged from 14.9% in Zone A to 55.5% in Zone B.
- 7.41 Looking at Zone A, Altrincham town centre is the principal destination for clothing and footwear shopping, attracting 46.5% of all trips. In 2007, Altrincham town centre was also the principal destination for Zone A residents, albeit at the time of the previous survey, a total of 51.3% of respondents stated they shopped in the town centre for such goods, representing a decrease in 4.8 percentage points. We have seen an increase in market share attracted to the Trafford Centre since 2007 from 14.9% to 22.6%, accounting for the decrease in market share to the town centre. However, there has been a decrease in the proportion of trips attracted to Manchester City Centre from Zone A residents, from 13.8% in 2007 to 6.1% in 2019.
- 7.42 Turning to Zone B, the Trafford Centre, Manchester city centre and Trafford Retail Park have remained the top three destinations for clothing and footwear shopping since 2007, with the proportion of trips attracted by the Trafford Centre remaining broadly consistent between 2007 and 2019 at just over 55%.
- 7.43 Looking at Zone C, we can see that the Trafford Centre has remained the principal destination for clothing and footwear shopping, albeit the proportion of trips attracted by the destination has substantially increased since 2007 from 26.5% to 50.9% (an increase in 24.4 percentage points). Altrincham town centre attracts a total of 11.9% of trips, which has decreased since 2007 when it attracted 17.0% of clothing and footwear trips, a reduction in 6.1 percentage points. Furthermore, the proportion of trips attracted by Manchester city centre has also decreased considerably from 19.9% in 2007 to 9.7% in 2019, a reduction in 10.2 percentage points. The reduction in trips to Altrincham town centre and Manchester city centre relate to the increase in trips to the Trafford Centre.
- 7.44 Finally, in terms of Zone D, again we can see that Manchester city centre, the Trafford Centre and Stretford town centre are the top three destinations for clothing and footwear shopping, as was the case in 2007. However, the proportion of trips to Manchester city centre has reduced considerably from 42.6% in 2007 to 31.3% in 2018 and the proportion of trips to the Trafford Centre has increased from 22.8% in 2007 to 36.9% in 2019. Stretford's market share has remained broadly consistent between 2007 and 2019 at 11.8% in 2019, compared to 11.0% in 2007.

**Table 7.11: Market Share of Clothing and Footwear Trips by Zone**

Zone	2018			2007		
	Highest Market Share	Second Highest Market Share	Third Highest Market Share	Highest Market Share	Second Highest Market Share	Third Highest Market Share
A	Altrincham town centre (46.5%)	Trafford Centre (22.6%)	Altrincham Retail Park (7.0%)	Altrincham town centre (51.3%)	Trafford Centre (14.9%)	Manchester city centre (13.8%)
B	Trafford Centre (55.3%)	Manchester city centre (11.8%)	Trafford Retail Park (7.1%)	Trafford Centre (55.5%)	Manchester city centre (15.2%)	Trafford Retail Park (7.9%)
C	Trafford Centre (50.9%)	Altrincham town centre (11.9%)	Manchester city centre (9.7%)	Trafford Centre (26.5%)	Manchester city centre (19.9%)	Altrincham town centre (17.0%)
D	Trafford Centre (36.9%)	Manchester city centre (31.3%)	Stretford town centre (11.8%)	Manchester city centre (42.6%)	Trafford Centre (22.8%)	Stretford town centre (11.0%)
E	Manchester city centre (45.5%)	Trafford Centre (16.9%)	Lowry Outlet (6.0%)	Manchester city centre (57.1%)	Trafford Centre (16.7%)	Salford (5.7%)
F	Manchester city centre (21.8%)	Altrincham town centre (13.6%)	Trafford Centre (11.9%)	Manchester city centre (27.3%)	Altrincham town centre (21.9%)	Trafford Centre (15.4%)
G	Trafford Centre (45.0%)	Manchester city centre (14.8%)	Trafford Retail Park (6.9%)	Manchester city centre (33.4%)	Trafford Centre (25.5%)	Trafford Retail Park & Eccles (both 9.6%)
H	Warrington town centre (26.0%)	Altrincham town centre (22.0%)	Gemini Retail Park (15.4%)	Warrington town centre (35.3%)	Altrincham town centre (17.6%)	Trafford Centre (14.6%)
I	Altrincham town centre (18.7%)	Northwich town centre (16.6%)	Trafford Centre (11.8%)	Northwich town centre (23.8%)	Manchester city centre (13.3%)	Trafford Centre (12.4%)
<b>Total</b>	<b>Trafford Centre (34.2%)</b>	<b>Manchester city centre (17.7%)</b>	<b>Altrincham town centre (13.6%)</b>	<b>Manchester city centre (28.1%)</b>	<b>Trafford Centre (24.0%)</b>	<b>Altrincham town centre (15.6%)</b>

Source: Table 9 of Appendix 6 and Tables 5a, 6a, 7a and 8a of Appendix 5 of the 2007 Study

7.45 Overall across the Study Area as a whole, Trafford Centre is the principal destination for clothing and footwear shopping trips at 34.2%, which has increased since 2007 from 24.0% or 10.2 percentage points. Manchester city centre achieves a market share for clothing and footwear goods of 17.7%, which has decreased since 2007 by 10.4 percentage points. Finally, Altrincham town centre has remained the third most popular destination for clothing and footwear shopping trips at 13.6% in 2018, compared to 15.6% in 2007, a reduction in 2.0 percentage points.

#### Books, CDs and DVDs Goods

7.46 Across the Study Area as a whole, Altrincham town centre attracts 22.5% of the total shopping trips, followed by the Trafford Centre which attracts 17.7% of trips. Looking outside of the Study Area, Manchester city centre attracts 15.0% of all trips. In total, 62.0% of trips to purchase books, CDs and DVDs are to destinations in the Borough.

7.47 Looking in more detail at the shopping patterns within the central zones, for Zone A residents, Altrincham town centre is by far the principal centre for books, CDs and DVDs shopping trips, followed by the Trafford Centre which attracts 9.5% of trips. For Zone B, the principal centre is the Trafford

Centre which attracts 42.2% of trips, and for Zone C the principal centre is Sale town centre (29.4%), followed by the Trafford Centre (27.4%). Finally, for Zone D residents, Stretford town centre is the principal centre (27.6%), followed by Manchester city centre (21.4%).

#### Small Household Goods

7.48 Turning to small household goods shopping patterns, we can see that the principal destination across the Study Area as a whole is the Trafford Centre which attracts 21.6% of trips, followed by Altrincham town centre which attracts 9.9% of trips. The total proportion of trips attracted to the Borough's retail destinations is 61.1%.

7.49 The principal destination for Zone A residents is Altrincham town centre (23.0%), followed by Altrincham Retail Park (21.1%). For Zone B residents, the principal destination is the Trafford Centre (24.1% followed by Trafford Retail Park (18.9%). For Zone C residents, the principal destination is Trafford Centre (31.0%) followed by Sale town centre (21.1%) and for Zone D residents the principal destination is also the Trafford Centre (30.8%) followed by Urmston town centre (10.7%).

#### Recreational Goods

7.50 Looking at shopping patterns for recreational goods, across the Study Area as a whole, the principal destination for residents in Altrincham town centre (16.3%), followed by the Trafford Centre (15.9%). Shopping trips are more widely spread across a range of destinations in the Study Area for recreational goods. The total proportion of trips attracted to the Borough's retail destinations is 68.9%.

7.51 Focussing on the four central zones again, we can see that the principal destination for Zones A and C is Altrincham town centre at 51.0% and 21.5% respectively. For Zone B residents, the principal destination is Trafford Retail Park at 26.5% and for Zone D residents the principal destination is the Trafford Centre at 20.9%.

#### Chemist Goods

7.52 Turning to the final non-bulky comparison category of chemist goods, we can see that the principal destination across the Study Area as a whole is again Altrincham town centre (13.7%), followed by the Trafford Centre (10.8%).

- 7.53 The total proportion of trips attracted to the Borough's destinations is 63.6%. However, within Zones A to C, the Borough retention rate is substantially higher at between 92.1% (Zone B) to 97.3% (Zone C).
- 7.54 The top destination for purchasing chemist goods in Zone A is Altrincham town centre (54.6%), followed by Altrincham Retail Park (11.9%). In Zone B, the principal destination is Urmston town centre (38.8%), followed by Trafford Retail Park (16.2%). In terms of Zone C residents, the principal destination is Sale town centre (43.9%), and for Zone D residents the principal destination is Stretford town centre (28.7%).

#### Electrical Goods

- 7.55 Looking at the first of the three bulky categories of comparison goods of electrical goods, the household survey results demonstrate that the principal destination across the Study Area as a whole is White City Retail Park which attracts 19.8% of all trips, followed by the Trafford Centre which attracts 17.8%. In total, the proportion of trips attracted to the Borough's destinations totals in 74.9%.
- 7.56 Retail parks feature heavily in the top destinations for Zone A to D residents, with Altrincham Retail Park being the principal destination for Zone A and C residents at 38.0% and 28.5% respectively, and White City Retail Park being the principal destination for Zone B and D residents at 25.7% and 42.6% respectively.

#### DIY and Gardening Goods

- 7.57 The B&Q at Trafford Park is the principal destination for DIY and gardening shopping trips, which attracts a total of 33.7% of all trips, followed by Altrincham Retail Park which attracts 14.1% of trips. In total, 75.5% of trips from residents in the Study Area are attracted to destinations within Trafford Borough.
- 7.58 The principal destination for Zone A residents is Altrincham Retail Park which attracts 43.1% of trips and the principal destination for Zone B, C and D residents is the B&Q at Trafford Park which attracts 62.5%, 34.7% and 56.4% of trips respectively.

#### Furniture Goods

- 7.59 Finally turning to shopping patterns for furniture goods, the principal destination for residents across the Study Area as a whole is White City Centre Retail Park, which attracts 13.3% of all trips, followed by

Altrincham town centre which attracts 9.6% of all trips.

7.60 Looking at Zones A to D, the principal destination for Zone B and D residents is White City Retail Park at 22.1% and 23.4% respectively. For Zone A residents the principal destination is Altrincham town centre at 34.8%, followed by Altrincham Retail Park at 18.2% and for Zone C residents the principal destination is Sale town centre at 27.6%.

#### Non-Bulky and Bulky Market Shares Based on Available Expenditure

7.61 Table 7.12 below sets out the total non-bulky market share to the three principal destinations for the nine zones across the Study Area. In analysing the non-bulky market share, we include the expenditure attracted to the destinations for the following five categories of goods:

- Clothing & Footwear;
- CDs, Books & DVDs;
- Household Goods;
- Chemist Goods; and
- Recreation goods and toys.

7.62 For non-bulky goods expenditure, the Trafford Centre features within the top three principal destinations for each zone except Zones F and I. In addition, Altrincham town centre is also within the top three destinations within Zones A, C, F, H and I, indicating the attraction of the town centre to meet non-bulky comparison shopping needs across the majority of the Study Area.

7.63 The dominance of the Trafford Centre is shown clearly in Table 7.12, with particularly high proportions of non-bulky expenditure from residents in Zone B, C and D being spent at the destination. This is not unsurprising given the overall provision within the Trafford Centre from a non-bulky perspective in particular, and the overall deficiency of such an offer within Urmston, Sale and Stretford town centres (which is not necessarily unsurprising given the size and nature of these centres and functions that they perform).

**Table 7.12: Market Share of Non-Bulky Goods Expenditure**

Zone	2019		
	Highest Market Share	Second Highest Market Share	Third Highest Market Share
A	Altrincham town centre (46.7%)	Trafford Centre (14.0%)	Altrincham Retail Park (13.5%)
B	Trafford Centre (35.6%)	Trafford Retail Park (13.9%)	Urmston town centre (13.5%)
C	Trafford Centre (32.7%)	Sale town centre (20.1%)	Altrincham town centre (12.3%)
D	Trafford Centre (27.3%)	Manchester city centre (18.0%)	Stretford town centre (14.8%)
E	Manchester city centre (25.8%)	Chorlton district centre (19.0%)	Trafford Centre (16.3%)
F	Altrincham town centre (12.5%)	Manchester city centre (11.9%)	Altrincham Retail Park (9.7%)
G	Trafford Centre (28.9%)	Eccles town centre (11.1%)	Trafford Retail Park (6.9%)
H	Altrincham town centre (21.2%)	Lymm town centre (15.6%)	Trafford Centre (11.3%)
I	Knutsford town centre (24.4%)	Altrincham town centre (13.4%)	Northwich town centre (11.7%)
<b>Total</b>	<b>Trafford Centre (22.5%)</b>	<b>Altrincham town centre (15.6%)</b>	<b>Manchester city centre (9.7%)</b>

Source: Derived from Tables 10, 12, 14, 16 and 18 of Appendix 6

7.64 Turning to bulky goods, Table 7.13 below sets out the top three destinations for bulky goods expenditure for the residents of each of the nine zones in the Study Area. The comparison categories which comprise bulky goods are:

- Electrical goods:
- Furniture and furnishings; and
- DIY and Gardening Goods.

7.65 Table 7.13 indicates that either or both of Altrincham Retail Park and White City Retail Park are key destinations for bulky goods shopping within Zones A to G. This shift in market share away from town centres (which was the case for non-bulky shopping) is expected given that the retail parks provide a greater range of retailers selling bulky goods such as furniture and furnishings, DIY products and larger electrical goods, and the preference of shoppers to choose easy to access retail parks with adjacent and accessible car parking when shopping for such goods.

**Table 7.13: Market Share of Bulky Goods Expenditure by Zone**

Zone	Highest Market Share	Second Highest Market Share	Third Highest Market Share
A	Altrincham Retail Park (32.6%)	Altrincham town centre (25.2%)	John Lewis, Cheadle (10.4%)
B	White City Retail Park (20.0%)	Trafford Centre (15.1%)	B&Q, Trafford Park (11.9%)
C	Altrincham Retail Park (21.1%)	Sale town centre (18.6%)	Trafford Centre (14.1%)
D	White City Retail Park (29.6%)	B&Q, Trafford Park (11.6%)	Trafford Centre (11.4%)
E	White City Retail Park (30.2%)	Trafford Centre (13.7%)	John Lewis, Cheadle (9.2%)
F	Altrincham Retail Park (27.8%)	White City Retail Park (10.8%)	Broadway Retail Park (8.6%)
G	Trafford Centre (20.3%)	White City Retail Park (12.0%)	B&Q, Trafford Park (11.1%)
H	Warrington town centre (24.7%)	Gemini Retail Park (20.5%)	Lymm Village Centre (11.5%)
I	Northwich Retail Park (23.6%)	Northwich town centre (18.6%)	Knutsford town centre (12.0%)
<b>Total</b>	<b>Altrincham Retail Park (14.7%)</b>	<b>White City Retail Park (12.5%)</b>	<b>Trafford Centre (11.1%)</b>

Source: Derived from tables 20, 22 and 24 of Appendix 6

### Summary

7.66 The household survey results are provided in full at Appendix 2. In respect of convenience goods, the findings that are of greatest relevance to the future retail and centres strategy in Trafford are as follows:

- the authority area claims 84.2% of main food shopping expenditure and 24.1% of top up food shopping that originates in the central Zones A to D;
- convenience goods operators in Trafford benefit from relatively little expenditure from outside the authority area, which is not unexpected given the localised nature of convenience goods shopping;
- due to the new stores opening in both Urmston (Zone B) and Stretford (Zone D), the levels of convenience expenditure retention within these two zones has increased since the 2007 Study; and
- the discount foodstore sector is performing extremely well, with Aldi stores identified within the top three performing foodstores in Zones B, C and D.

7.67 In terms of comparison goods, our assessment has identified that:

- the vast majority of residents in central Zones A to D are able to meet their comparison goods

shopping needs within the Trafford authority area and principally at the Trafford Centre and Altrincham town centre, along with the out of centre retail warehouse destinations of Altrincham and White City Retail Parks;

- the overall Study Area market share of comparison goods expenditure claimed by the Trafford authority area has increased from 59.9% at 2007 to 65.7% at 2019;
- the comparison goods market share of the Trafford Centre from expenditure generated within the Study Area has increased from 13.8% to 19.1%; and
- the comparison goods market share of Altrincham town centre and Urmston town centre has increased in both cases by 1.7 and 0.9 percentage points respectively.

## 8.0 Assessment of Retail Capacity

8.1 Our retail capacity tables set out our step-by-step approach to estimating the expenditure surplus which is available to support additional retail floorspace and are provided at Appendix 6. A summary of our methodological approach, together with our findings, is provided below.

### General Approach to Estimating Capacity

8.2 Retail capacity modelling follows the basic principle that: *Available Expenditure* minus *Expected Turnover of Existing and Committed Floorspace* equals *Expenditure Surplus or Deficit*. We summarise the key considerations relating to each component of the equation below. An identified quantitative expenditure surplus indicates that there may be capacity to support additional retail floorspace (subject to there being no unacceptable impacts arising as a consequence of the increased provision).

#### Available Expenditure

8.3 As we set out in Section 6 of this report, available expenditure within a zone is calculated by multiplying the population at a given reporting year by the estimated per capita expenditure. The available expenditure takes into consideration:

- estimated population growth;
- forecast increases in per capita expenditure; and
- forecast increases in special forms of trading.

#### Turnover

8.4 The turnover relates to the expenditure required by existing retailers (and by retail commitments benefitting from an extant planning permission) in order to ensure that they trade viably. For convenience goods retailers, the expected 'benchmark' turnover of existing convenience goods facilities is calculated with reference to GlobalData Convenience and Comparison Goods Sales Densities of Major Grocers 2018 and Mintel Retail Rankings 2018 data<sup>41</sup>.

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<sup>41</sup> These datasets provide independent analysis of key grocery retailers' declared turnover and the overall floorspace in their portfolio in order to calculate national average sales densities

### Surplus/Deficit

- 8.5 The expenditure surplus (or deficit) is calculated by subtracting the turnover of existing and committed floorspace from the available expenditure in the authority area. A surplus figure effectively represents an under-provision of retail facilities within the Borough (which may indicate that additional floorspace could be supported), whereas a deficit would suggest a quantitative over-provision of retail floorspace.
- 8.6 Although a surplus is presented as a monetary figure, it can be converted to a potential floorspace requirement through the application of an appropriate sales density. In this regard, the floorspace requirement will vary according to operator and the likely sales density they could achieve. For example, in the case of comparison goods, non-bulky goods retailers tend to achieve higher sales densities than bulky goods retailers. However, within the bulky goods sector there is significant variation in the sale densities of bulky operators, with electrical retailers typically having higher sales densities than DIY or furniture retailers.
- 8.7 The turnover of destinations is generally considered with reference to retailers' net sales areas and all of the following floorspace figures relate to net floorspace.

### **Capacity for Future Convenience Goods Floorspace**

- 8.8 In order to identify the likely capacity available to accommodate additional convenience goods floorspace across the authority area, it is first necessary to consider the performance of the current provision. In this respect, the built up areas of Trafford already accommodate a reasonably good variety of foodstore operators. As such, we believe that many of the food shopping trips which originate within the Study Area, but are directed to facilities outside of the authority area, occur principally because the trip is convenient (i.e. close to home or work), rather than due to any significant deficiencies in Trafford's offer. Consideration of convenience goods shopping patterns on a zone-by-zone basis does not suggest that there is a significant problem with shoppers driving significant distances outside the authority area to access convenience goods shopping facilities. Given this, we believe that the existing convenience goods market share of 60.4% of Study Area convenience goods expenditure spent within the authority area is broadly appropriate and could be sustained in the future.
- 8.9 Based on the existing market share, we estimate that £595.1m of convenience goods expenditure which originates within the Study Area is claimed by retailers in Trafford Borough at 2019. We have given

consideration<sup>42</sup> to the likelihood of any material inflow of expenditure originating outside the Study Area to foodstores located within the Borough. In this regard, we are of the view that small to medium sized convenience stores and supermarkets will not generally be able to draw any material level of trade from outside the Study Area. The exception to this is where stores are located in the town centres of Altrincham and Sale, which we believe are able to secure a limited level of convenience goods inflow by virtue of their scale and location. We have assumed that convenience goods retailers in and around these two centres will be able to benefit from a level of inflow which equates to 5.0% of their overall turnover.

8.10 Elsewhere, we have allowed for 10.0% inflow for stores which are located in areas which provide for substantial custom from outside the Study Area. These areas comprise:

- White City Retail Park, which is subject to passing traffic some of which is travelling towards parts of the City of Manchester authority area and to Cheshire; and
- Trafford Retail Park, Trafford Park and the Trafford Centre, which benefit from convenience goods custom which originates from the Salford authority area and beyond.

8.11 Whilst we are aware that some convenience goods retailers in and around Trafford Retail Park and the Trafford Centre may benefit from a level of inflow in excess of 10.0%, at least part of such expenditure originates from customers living some distance away and we do not believe that it is appropriate to account for it when considering how to meet future requirements in a sustainable manner.

8.12 For each convenience goods retail destination, the identified survey derived turnover is compared to its expected benchmark performance (which is estimated with reference to company average sales densities and the estimated net sales areas of individual shops). Our assessment assumes a 'goods based' approach, which disaggregates expenditure by sector, as it is important to recognise that major foodstore operators generally also sell some comparison goods, such as clothing, household goods, books and CDs. To account for this, the typical split between convenience and comparison goods provision for each operator has been identified<sup>43</sup> and this multiplier has been applied to the estimated

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<sup>42</sup> With reference to the Study Area boundary, the location of foodstores within it, and the spatial distribution of the population that lies beyond it

<sup>43</sup> Generally sourced from GlobalData's Convenience and Comparison Goods Sales Densities of Major Grocers 2018 dataset. Detailed notes in respect of our approach in calculating net convenience goods sales areas are provided at Table 5 of Appendix 6

net floorspace<sup>44</sup> of each foodstore. This provides an indication of the likely floorspace dedicated to the sale of convenience goods at each store and provides for an estimation of convenience goods benchmark turnover.

- 8.13 The calculation of the estimated benchmark turnover of individual stores allows an assessment to be made in respect of individual retailers' trading performance and whether (on an aggregated basis) surplus expenditure exists to support additional floorspace. For smaller shops (where it is more difficult to collate accurate floorspace and sales density data), we assume that stores are trading 'in equilibrium' (i.e. the survey-derived turnover equates to the anticipated benchmark turnover).
- 8.14 Our assessment is summarised below at Table 8.1 and identifies that convenience goods floorspace in the authority area has an expected benchmark turnover of £556.5m at 2019, which is lower than the estimated survey derived turnover of £618.1m. As such, taken collectively, convenience goods floorspace is 'overtrading' (i.e. its turnover is more than would be expected by reference to company average performance) by £61.6m. The identified level of overtrading is equivalent to 11.1% of the identified benchmark turnover of provision.
- 8.15 On this basis, whilst our assessment identifies that the Borough's foodstores attract a greater than expected level of turnover, the level of overtrading is generally relatively modest and not of a level which is indicative of an urgent quantitative need.
- 8.16 In order to appraise the future capacity to accommodate additional convenience goods floorspace, it is necessary to consider how the performance of stores will be affected by forecast expenditure growth. Accordingly, Table 8.1 also sets out the anticipated increases in expenditure that will be available to convenience goods retailers within the authority area, assuming the current convenience goods market share is maintained. We have assumed that the benchmark turnover of floorspace will change going forward in accordance with the forecast changes in floorspace efficiency set out in ERPBN16.
- 8.17 Table 8.1 sets out our estimate that the convenience goods expenditure available to facilities in the Borough will increase to £627.8m at 2022, to £634.9m at 2024, to £645.8m at 2027, to £652.4m at 2029, to £662.6m at 2032, and to £679.8m at 2037. When the forecast increase in available convenience goods expenditure is compared to growth in the benchmark turnover of such floorspace, a more

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<sup>44</sup> The floorspace of individual stores is typically derived from Valuation Office Agency records

substantial convenience goods surplus of £115.5m is apparent at the final reporting period of 2037.

**Table 8.1: Identified Convenience Goods Expenditure Surplus in the Authority Area**

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Surplus Expenditure (£m)
2019	556.5	618.1	61.6
2022	560.9	627.8	66.9
2024	563.2	634.9	71.7
2027	564.3	645.8	81.5
2029	564.3	652.4	88.1
2032	564.3	662.6	98.3
2037	564.3	679.8	115.5

Source: Table 6a of Appendix 6

Notes: Assumes constant market share (60.4%) of Study Area expenditure claimed by facilities in Trafford Borough; allows for changes in benchmark turnover sales efficiency in accordance with Table 4b of Experian Retail Planner Briefing Note 16 In 2017 prices

8.18 In considering the future position in respect of the expenditure surplus that is potentially available to support additional convenience goods floorspace, it is also necessary to take into consideration commitments and the claim these may make on expenditure. We summarise relevant convenience goods commitments below at Table 8.2.

**Table 8.2: Convenience Goods Commitments in the Authority Area**

Zone	Location	Planning Application Reference	Proposal	Net Conv Sales (sq.m)	Conv Sales Density (£ per sq.m)	T'over at 2019 (£m)	Status
A	Atlantic Street, Altrincham	96088/FUL/18	Full application for the erection of a Class A1 discount foodstore with associated access, car parking, servicing and hard and soft landscaping	230	10,517	2.4	Extant
B	Land on Neary Way, Davyhulme	94865/HYB/18	Full application for A1 discount unit and outline for A1 non-food unit	1,120	10,517	11.8	Extant
				275	4,500	1.2	Extant
D	Former PC World premises, Chester Road	92714/FUL/17	Refurbishment, subdivision and extension of the existing comparison goods retail unit	1,090	9,814	10.7	Extant
G	Trafford Wharf Road	90738/FUL/17	Demolition of existing buildings and construction of residential towers with 2 commercial units	269	9,000	2.4	Extant
<b>Authority Area Total</b>				<b>2,984</b>		<b>28.6</b>	

Source: Table 6c of Appendix 6

Notes: Estimated sales density generally reflect operator where known or are considered to be typical for the type of development proposed; a threshold of 200 sq.m of net retail sales has been adopted for commitments (account is not made of commitments below this level on the basis that they will not materially impact on shopping patterns and capacity)

In 2017 prices

- 8.19 We estimate that extant retail planning permissions together provide approximately 2,984 sq.m of convenience goods sales floorspace across Trafford Borough, and that this floorspace would have a turnover of around £28.6m at 2019 (if it was all operational). The two most significant convenience goods commitments provide for discount foodstores at a site adjacent to Trafford Retail Park at Neary Way in Davyhulme and at the former PC World unit at Chester Road in Old Trafford. This latter development is now trading, but is included as a commitment as it opened in January 2019 (subsequent to the completion of the household survey).
- 8.20 Full details of the assumptions made in estimating the turnover of convenience goods commitments are provided in the notes that accompany Table 6c of Appendix 6.
- 8.21 Whilst the extant commitments make a substantial claim on available expenditure, a surplus of £33.1m remains available at base year 2019 which could support additional convenience goods floorspace. As the below Table 8.3 demonstrates, we estimate that this surplus will increase to £38.1m at 2022, to £42.8m at 2024, to £52.6m at 2027, to £59.2m at 2029, to £69.4m at 2032, and to £86.5m at 2037. The expenditure surplus at 2019 could support around 2,600 sq.m and 4,500 sq.m of additional convenience goods floorspace across the Borough, increasing to between 6,800 sq.m and 11,600 sq.m of floorspace at 2037.

**Table 8.3: Potential Requirement for Convenience Goods Floorspace in Authority Area After Commitments**

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2019	61.6	28.6	33.1	2,600	4,500
2022	66.9	28.8	38.1	3,000	5,100
2024	71.7	28.9	42.8	3,400	5,700
2027	81.5	29.0	52.6	4,100	7,000
2029	88.1	29.0	59.2	4,600	7,900
2032	98.3	29.0	69.4	5,400	9,300
2037	115.5	29.0	86.5	6,800	11,600

Source: Table 6d of Appendix 6

Notes: Assumes constant market share (60.4%) of Study Area expenditure claimed by facilities in Trafford Borough; allows for changes in benchmark turnover sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 16; minimum floorspace requirement based on an assumed sales density of £12,580 per sq.m at 2018 (which equates to the average sales density of the 'big four' foodstore operators); maximum floorspace requirement based on an assumed sales density of £7,379 per sq.m at 2018 (which equates to an average of Aldi, Lidl and other leading discount operators)

In 2017 prices

### Capacity for Future Comparison Goods Floorspace

- 8.22 Our methodology in calculating comparison goods capacity deviates from that employed in respect of convenience goods. This is because it is difficult to accurately estimate a benchmark turnover for comparison goods floorspace, both because of the number of units involved (which are occupied by a wide variety of retailers), and due to the variation in the trading performance of floorspace depending on its location, the character of the area and the nature of the catchment. As a consequence, we adopt the position for comparison goods floorspace that it is trading 'at equilibrium' at base year 2019 (i.e. our survey derived turnover estimate effectively equates to the benchmark trading performance).
- 8.23 We therefore assume that there is nil quantitative capacity to support additional comparison goods floorspace across the Borough at 2019. Going forward, we again assume that the performance of comparison goods facilities will be commensurate with the identified market share currently claimed by such provision with the authority area.
- 8.24 We have made a modest allowance for comparison goods inflow, which is based, in part, on the results of the in-street surveys carried out by NEMS in September 2018. The results indicate that Altrincham had the largest proportion of in-street respondents from outside the Study Area (equating to 16.7% of respondents), followed then by Sale (11.1%), Stretford (8.0%) and Urmston (7.6%). Given that some of these visitors may be in each centre for the purpose of work (or for other reasons unrelated to shopping), we have applied slightly lower inflow allowances to account for expenditure in these centres which originates outside the Study Area<sup>45</sup>.
- 8.25 We have again assumed that accessible out of centre destinations – namely Altrincham, Trafford and White City Retail Parks and the Trafford Centre – will be the subject of a 10.0% inflow rate. In the case of the Trafford Centre, this is substantially less than the overall level of inflow that will be apparent in reality, but is considered an appropriate allowance for the purpose of estimating future expenditure capacity arising from the Borough and its immediate catchment. Full details of our approach in respect of comparison goods inflow are provided at Table 25 of Appendix 6.
- 8.26 The inflow allowance has the effect of increasing the Borough's identified estimated comparison goods turnover from £909.0m to £1,012.1m (inflow therefore representing 10.2% of total turnover).

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<sup>45</sup> Equating to 15.0% in Altrincham, 10.0% in Sale, 5.0% in Stretford and 5.0% in Urmston

8.27 The £909.0m of comparison goods expenditure that originates within the Study Area and is claimed by facilities within Trafford Borough equates to a market share of 65.7% of all such comparison goods expenditure. By making provision for inflow and 'rolling forward' this market share, our assessment estimates that existing facilities within the Borough will attract £1,101.1m of comparison goods expenditure at 2022, increasing to £1,179.7m at 2024, to £1,309.4m at 2027, to £1,400.3m at 2029, to £1,558.0m at 2032, and then to £1,862.5m at 2037.

8.28 As Table 8.4 sets out, given forecast increases in comparison goods expenditure and allowing for annual forecast changes in the productivity of existing floorspace, we estimate that, at 2022, there will be an expenditure surplus of £12.3m to support additional comparison goods floorspace across the Borough. This surplus is forecast to increase to £377.6m at 2037.

**Table 8.4: Identified Comparison Goods Expenditure Surplus in the Authority Area**

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Surplus Expenditure (£m)
2019	1,012.1	1,012.1	0.0
2022	1,088.8	1,101.1	12.3
2024	1,150.6	1,179.7	29.1
2027	1,237.9	1,309.4	71.5
2029	1,295.5	1,400.3	104.8
2032	1,325.3	1,558.0	232.7
2037	1,484.9	1,862.5	377.6

Source: Table 26a of Appendix 6

Notes: Assumes constant market share (65.7%) of Study Area expenditure claimed by facilities in Trafford Borough; allows for changes in benchmark turnover sales efficiency in accordance with Table 4b of Experian Retail Planner Briefing Note 16 In 2017 prices

8.29 Once more, the above assessment does not take into consideration existing commitments and their claim on the identified expenditure surplus. Table 8.5 summarises current extant planning permissions that provide for additional comparison goods floorspace. We estimate that these commitments would have a total turnover of £36.6m if operational at 2019. The commitments take a variety of forms, including retail floorspace associated with larger mixed-use developments, comparison goods retail at foodstore developments, and extensions to large format retail units at retail parks.

8.30 The most substantial commitment is the planning permission to redevelop Barton Square<sup>46</sup>, which forms part of the offer of the Trafford Centre. Whilst the commitment actually results in an overall decrease in comparison goods floorspace, due to the nature of the proposal, which seeks permission

<sup>46</sup> Planning application reference 95596/FUL/18

for an unrestricted Class A1 permission instead of the restricted 'bulky' floorspace which had previously comprised Barton Square, the overall turnover will increase. Using the figures from the application submission (which were agreed by the Council's retail planning advisor), the estimated uplift in turnover arising from the commitment is expected to be in the order of £31.9m at 2019. However, based on the retail impact assessment submitted in support of the application, we assume that only around 35% of the turnover of the application proposal will be drawn from Trafford Borough and we have accounted for the commitment on this basis.

**Table 8.5: Comparison Goods Commitments in the Authority Area**

Zone	Location	Planning App. Reference	Proposal	Net Comp Sales (sq.m)	Comp Sales Density (£ per sq.m)	T'over at 2019 (£m)	Status
A	'Altair', Land at Oakfield Road/Moss Lane	90432/RES/17	Application for retail, commercial and leisure uses	1,061	5,000	5.3	Extant
B	Land on Neary Way, Davyhulme	94865/HYB/18	Full application for A1 discount unit and outline for A1 non-food unit	280	7,220	2.0	Extant
	Land on Neary Way, Davyhulme	94865/HYB/18	Full application for A1 discount unit and outline for A1 non-food unit	3,740	4,000	15.0	Extant
	Barton Square, Phoenix Way, Trafford Park	95596/FUL/18	Construction of new retail (Use Classes A1, A3 and A5) and leisure (Use Class D2) floorspace, reconfiguration of existing retail (Use Class A1) and leisure (Use Class D2) floorspace, enclosure of mall and provision of additional parking.	-	-	11.2	Extant
D	Former PC World, Chester Road	92714/FUL/17	Refurbishment, subdivision and extension of the existing comparison goods retail unit	273	5,830	1.6	Extant
				394	4,000	1.6	Extant
<b>Authority Area Total</b>				<b>5,748</b>		<b>36.6</b>	

Source: Table 6c of Appendix 6

Notes: Estimated sales density generally reflect operator where known or are considered to be typical for the type of development proposed; assumed turnover of Barton Square commitment is 35.0% of overall turnover which is reflective of the likely turnover that may be drawn from in and around Trafford Borough; a threshold of 200 sq.m of net retail sales has been adopted for commitments (account is not made of commitments below this level on the basis that they will not materially impact on shopping patterns and capacity)

In 2017 prices

8.31 In addition to the above commitments, we are aware that planning application reference 94986/FUL/18,

which provides for the development of a six-screen cinema together with retail and leisure floorspace<sup>47</sup> at The Square shopping centre in Sale, was resolved to be approved by Members (subject to legal agreement) at committee on 14 March 2019. In this regard, we note that the commercial units associated with this application are proposed to be the subject of a flexible consent (providing for retail or food and drink uses), and that the proposal redevelops existing retail floorspace. At the time of reporting, we believe that the majority of the commercial units would likely be occupied by food and drink retailers in practice. Whilst The Square redevelopment has not yet secured planning permission, due to the nature of the proposal, we believe that it is unlikely to result in a material revision in respect of the turnover of comparison goods commitments.

8.32 The identified potential requirement in respect of additional comparison goods floorspace is set out below at Table 8.6.

8.33 The table indicates that, once the turnover of the commitments has been accounted for, there remains capacity to support additional comparison goods floorspace over the medium to long term. A comparison goods expenditure surplus of £26.7m is apparent at 2027, increasing to £58.0m at 2029, to £184.7m at 2032, and then to £323.9m at 2037.

**Table 8.6: Potential Requirement for Comparison Goods Floorspace in Authority Area After Commitments**

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2019	0.0	36.6	-36.6	-6,100	-10,500
2022	12.3	39.4	-27.1	-4,200	-7,200
2024	29.1	41.6	-12.6	-1,800	-3,200
2027	71.5	44.8	26.7	3,600	6,200
2029	104.8	46.9	58.0	7,500	12,900
2032	232.7	47.9	184.7	23,500	40,300
2037	377.6	53.7	323.9	36,800	63,100

Source: Table 26d of Appendix 6

Notes: Assumes constant market share (65.7%) of Study Area expenditure claimed by facilities in Trafford Borough; allows for changes in benchmark turnover sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 16; minimum floorspace requirement based on an assumed sales density of £6,000 per sq.m at 2018; maximum floorspace requirement based on an assumed sales density of £3,500 per sq.m

In 2017 prices

8.34 The identified surplus could potentially support between 3,600 sq.m and 6,200 sq.m of additional

<sup>47</sup> As stated in the previous section of this report, we anticipate that this floorspace is most likely to be occupied by food and drink operators in practice, given the limited retailer interest in Sale and the likelihood of such units being attractive to restaurant and bar operators should the cinema development be successfully brought forward

comparison goods floorspace at 2027, increasing sharply to between 36,800 sq.m and 63,100 sq.m of floorspace at 2037. The minimum figure is based on the identified capacity being met through the delivery of 'high street' retail floorspace and the maximum figure relates to capacity being met by bulky goods floorspace or in smaller centres (both of which typically accommodate retailers which achieve lesser sales densities).

### Addressing Quantitative Capacity

- 8.35 It is important to reiterate that the above capacity assessment is a 'theoretical' exercise, based on forecast increases in population and expenditure. It also takes into consideration Experian's forecasts in respect of how existing retailers will need to increase their turnover in order to remain viable propositions.
- 8.36 In respect of convenience goods, the identified expenditure surplus is relatively modest in relation to the existing turnover of foodstores in the Borough. This effectively means that the overall level of provision is broadly in line with expectations. From our own observations, most foodstores in the Borough generally trade in an efficient and appropriate manner and symptoms of a pressing requirement for additional foodstores<sup>48</sup> are not generally apparent<sup>49</sup>. As a consequence, we believe that it is appropriate to consider the identified convenience goods expenditure surplus on the basis that it could be available to support appropriately located additional provision, subject to no unacceptable impacts arising from such development. It is not representative of any urgent need for additional provision and should not be used as justification to bring forward development that would result in unacceptable impacts arising within any of the Borough's centres.
- 8.37 In terms of comparison goods capacity, this is relatively substantial by the end of the reporting period to 2037, partly as a consequence of planned population growth. However, it is important to again reiterate that the comparison goods retail sector as a whole is generally depressed and that some centres within the Borough have struggled to retain comparison goods operators.
- 8.38 In this context, it is important to establish that the above quantitative capacity assessment does not, of itself, justify further proposals for out of centre retail and leisure floorspace. In this regard, we note that the stock of vacant floorspace within the eight centres in the Borough that were the subject of

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<sup>48</sup> Such as congestion in the approach to stores, difficulties in securing a car parking space, and queues at the tills

<sup>49</sup> One exception to this is the shortly to be replaced Aldi store at Altrincham Retail Park, which often has a congested car park at peak times

healthcheck assessments totals 34,420 sq.m<sup>50</sup>. As such, the existing vacant floorspace is such that it could (through refurbishment and redevelopment, if necessary) meet identified requirements beyond 2032.

- 8.39 Given the above, the key message from the capacity assessment is not that there is a pressing need for additional comparison goods retail floorspace. Instead, in the short term, there is too much stock. The priority should be to ensure that future retail requirements are directed towards the centres in order to bring about the re-occupation or redevelopment of vacant land and premises. Even if this is achieved, there may well be benefit in redeveloping some of the stock for other non-retail (and possibly non-commercial) uses.

### Qualitative Requirements

- 8.40 As we identified earlier in this section, we estimate that convenience goods retail facilities in Trafford Borough turn over £618.1m at 2018, which is in excess of their expected benchmark turnover of £556.5m. However, in examining the performance of specific stores, it is evident that Aldi's discount supermarkets are performing particularly strongly and that the performance of food superstores<sup>51</sup> is more variable<sup>52</sup>.
- 8.41 The below Table 8.7 provides an overview of the current performance of existing larger foodstores (which provide an estimated net convenience goods sales area of 857 sq.m or more<sup>53</sup>) in Trafford Borough with reference to their expected trading performance. There are a total of eight food superstores across the Borough<sup>54</sup>, which collectively have a convenience goods turnover of £333.8m, which is slightly higher than their anticipated benchmark turnover of £316.7m.
- 8.42 The food superstore with the strongest performance is the Sainsbury's at Lloyd Street in Altrincham, which has an estimated convenience goods benchmark turnover of £32.6m and an estimated survey

<sup>50</sup> Based on our surveys of the centres which were undertaken in October 2018

<sup>51</sup> Defined as having a net sales area of more than 2,500 sq.m

<sup>52</sup> In this regard it should be noted that, whilst household survey respondents have in the past perhaps been slightly reluctant to acknowledge that they undertake their main food shop at a discounter, this no longer appears to be the case. In addition, our methodology apportions convenience goods expenditure to foodstore destinations according to their identified market share. The methodology does not take into consideration that similar items are generally cheaper in Aldi and Lidl than in one of the 'big four' operators' stores. As such, the performance of discount operators is probably overstated and the performance of the 'big four' operators is probably understated

<sup>53</sup> Which equates to the convenience goods net sales area of the smallest discount supermarket operated by either Aldi or Lidl, this being the Aldi at Stretford Mall in Zone D

<sup>54</sup> Three Sainsbury's, three Tesco and one Asda stores

derived turnover of £70.4m (we therefore estimate that it is overtrading substantially by around £38.0m). By way of contrast, the Tesco Extra at Chester Road in Stretford has a convenience goods benchmark turnover of £64.4m and an estimated survey derived turnover of £34.9m (it is therefore undertrading by an estimated £29.5m).

8.43 Whilst the identified trading performance of the Tesco Extra is unusually poor, it is evident that, throughout the Borough (and the country as a whole), shoppers are frequently foregoing the previously dominant 'big four' foodstore operators in favour of discounters. As a consequence of this, we believe that it is highly unlikely that there will be any requirement in the foreseeable future for any further large food superstores in the area<sup>55</sup>. This is consistent with the current strategy of the 'big four' who are currently very circumspect in terms of their appetite to bring forward additional large superstores.

**Table 8.7: Performance of Convenience Goods Floorspace at Principal Foodstores at 2019**

Zone	Store	Gross Floorspace (sq.m)	Estimated Net Conv. Floorspace (sq.m)	Sales Density (£ per sq.m)	Benchmark Turnover (£m)	Survey Derived Turnover (£m)	Over-trading (£m)
A	Aldi, Broadheath	1,550	878	10,517	9.2	17.4	8.2
	Asda, Broadheath	6,783	2,507	13,268	33.3	30.4	-2.8
	Booths, Hale Barns	2,520	1,072	8,000	8.6	5.7	-2.9
	Sainsbury's, Altrincham	6,891	2,871	11,356	32.6	70.6	38.0
	Tesco Extra, Altrincham	9,111	3,068	13,401	41.1	33.2	-8.0
	Waitrose, Altrincham	3,123	1,529	12,569	19.2	16.8	-2.5
B	Aldi, Urmston	1,482	891	10,517	9.4	31.3	21.9
	Asda, Trafford Park	14,386	4,747	13,268	63.0	53.0	-10.0
	Sainsbury's, Eden Square	4,971	2,099	11,356	23.8	37.1	13.3
C	Aldi, Sale	1,804	1,085	10,517	11.4	22.5	11.0
	Marks & Spencer, Sale	1,717	977	10,176	9.9	2.6	-7.3
	Sainsbury's, Sale	5,719	2,033	11,356	23.1	40.6	17.5
	Tesco, Sale	7,231	2,638	13,401	35.4	34.1	-1.3
D	Aldi, Stretford	1,425	857	10,517	9.0	28.4	19.4
	Aldi, White City Retail Park	1,833	959	10,517	10.1	27.5	17.4
	Tesco Extra, Stretford	16,237	4,807	13,401	64.4	34.9	-29.5

Source: Table 5 of Appendix 6

Notes: The above summary table provides details of the trading performance of foodstores with a net convenience goods sales area of 857 sq.m or above, which correlates to the estimated net sales area of the smallest Aldi store in Trafford Borough (this being the store at Stretford Mall

In 2017 prices

8.44 We do, however, note that some Aldi discount foodstores are performing exceptionally well. The five Aldi stores in the Borough have a collective convenience goods benchmark turnover of £49.1m and an estimated survey derived turnover of £127.0m; as such, their convenience goods floorspace overtrades

<sup>55</sup> Indeed, in this regard, the Morrisons superstore at Trafford Road in Salford (within Study Area Zone G)

by an estimated £77.9m.

- 8.45 As set out at Section 2 of this report, both Aldi and Lidl have substantially improved their share of the national grocery market in recent years. Notwithstanding this, the very strong performance of Aldi foodstores across the Borough suggests that the market could support more of this type of provision and that there could well be further planning applications for such development in Trafford in the short to medium term (potentially including proposals to extend existing stores). In this regard, we note that both Aldi and Lidl have multiple requirements for new stores across the Borough at March 2018.
- 8.46 However, the identification of a relatively limited convenience goods expenditure surplus by this Study does not, of itself, justify such proposals, which should be considered on their merits in accordance with relevant policy tests.
- 8.47 Most particularly, planning applications which seek to provide additional food retail provision should be considered having regard to potential sequential alternative sites and the magnitude of impacts arising at any defined centre (and with reference to the qualitative benefits which may result from the delivery of additional convenience goods retail facilities).
- 8.48 In terms of the spatial distribution of convenience goods facilities, we believe that existing large-scale main food shopping facilities are generally sited in a sustainable manner. In this regard, we note that:
- the northern part of the Borough is served by the Asda at Trafford Park, the Sainsbury's at Urmston and the Tesco on Chester Road;
  - the central part is served by the Sainsbury's and Tesco stores at Sale; and
  - the southern part is served is served by the Asda, Sainsbury's and Tesco stores in Altrincham.
- 8.49 The most obvious existing deficiencies in provision appear to be in the Carrington/Partington and Sale Moor areas. Whilst Carrington is not currently a particularly residential area, there will be a very significant increase in dwelling numbers in the future<sup>56</sup> as a consequence of the proposed New Carrington Greater Manchester Spatial Framework housing allocation. As such, we envisage that it may be appropriate to provide for a further supermarket in or around the Carrington area in order to meet future residents' needs, which is likely to be able to cater for some made food shopping trips.

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<sup>56</sup> Equating to 6,100 dwellings across the period to 2037 and, potentially, up to 10,000 dwellings in total

- 8.50 Sale Moor has been the subject of interest from foodstore operators for some time. Most notably, planning permission was granted in July 2016 for a mixed-use development at the Warrener Street car park in Sale Moor, which included a foodstore<sup>57</sup>. We are aware that the proposed development is not proceeding as the Council opted not to sell part of the site to the developer<sup>58</sup>. Notwithstanding this, there is continued operator interest in the area in the form of Aldi's stated requirement for a store at East Sale. However, in order to meet this requirement, there is both a need to assemble a site (which will likely be difficult given the tight urban form of the area) and to ensure that any proposed development (should it come forward in an edge or out of centre location) would not have a significant adverse impact on Sale Moor district centre.
- 8.51 In addition, we note the draft Timperley Wedge Greater Manchester Spatial Framework housing allocation provides for significant growth<sup>59</sup> on land to the south east of Timperley and to the north east of Manchester Airport. The area within Trafford Borough that surrounds this site is the subject of a general underprovision in respect of convenience goods floorspace, but it is important to note that existing foodstores<sup>60</sup> in the City of Manchester authority area will be able to make some contribution to meeting needs that arise. Notwithstanding this, we believe that there is definite potential to provide a supermarket as part of the allocation (not least because the local centre associated with the Timperley Wedge draft allocation is currently proposed to be at the south of the site, which is relatively distant from existing foodstores in the Wythenshawe area).
- 8.52 We plot the distribution of the larger supermarkets and food superstores across Trafford Borough at Appendix 7.
- 8.53 Turning to comparison goods, the importance and relative dominance of the Trafford Centre and Manchester city centre mean that other centres in the Borough have a more localised role and function than might otherwise be the case. However, we believe that Manchester city centre is sufficiently close and sufficiently accessible to be able to meet some of Trafford residents' comparison goods needs.
- 8.54 Whilst the overall comparison goods retention rate in the Borough is good (and has increased slightly

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<sup>57</sup> Planning permission reference 87339/FUL/15

<sup>58</sup> The report to Council Executive of 26 June 2017 confirms that 'In December 2015 the Leader of the Council rejected to dispose of the Council owned Warrener Street Car Park to Kirkland Developments Ltd for a proposed 1,615 sq.m foodstore.'

<sup>59</sup> Equating to 2,400 dwellings across the period to 2037

<sup>60</sup> Including the Tesco Extra, Aldi and Lidl foodstores in close proximity to each other at Altrincham Road in Wythenshawe

since the undertaking of the 2007 Study), this is largely a consequence of the performance of the Trafford Centre. The comparison goods offer within Sale, Stretford and Urmston is relatively limited and is generally diminished from that which has been available at the centres historically. Altrincham retains a respectable level of comparison goods retailers and its offer in this regard has been buoyed by recent improvements in the centre, arising from the popularity of the rejuvenated market and public realm works. The decision by the Danish retailer, Søstrene Grene, to open one of its first UK stores in Altrincham is both a sign of confidence in the centre and also exemplifies the ability of moderately-sized centres to continue to attract comparison goods operators when they provide an attractive environment in which to locate.

- 8.55 Whilst the future of all four of Trafford's town centres is dependent on providing a balanced offer which goes beyond retail, sustaining an attractive comparison goods sector remains of importance to each. As such, it will continue to be important to carefully consider the impacts arising within the four centres (and, as relevant, the Borough's smaller centres) as a consequence of any further proposals to evolve or increase the comparison goods offer at out of centre retail parks or the Trafford Centre.

## 9.0 Assessment of Leisure Capacity

### Commercial Leisure: Bingo, Casinos, Cinema and Ten Pin Bowling

- 9.1 Our approach to the assessment of commercial leisure needs necessarily deviates from our retail methodology, in part because it is difficult to source some of the required information to undertake a similar exercise for the leisure sector<sup>61</sup>. In addition, the commercial leisure sector is different to the retail sector; large-scale leisure uses are relatively limited in number and customers often expect to travel at least some distance in order to access them. As such, we believe it is sensible to consider the general appropriateness of provision on a Study Area basis, with reference to the typical number of persons required to support particular uses.
- 9.2 Our assessment considers the typical population required to support bingo halls, casinos, cinema screens and ten pin bowling alleys, and is based around three key stages.
- 9.3 We firstly calculate the expected Study Area<sup>62</sup> and local authority population<sup>63</sup> for the relevant reporting years (2019, 2022, 2024, 2027, 2029, 2032 and 2037).
- 9.4 We then calculate the number of persons required to support a bingo hall, casinos, cinema screens and bowling alleys nationally, across the UK. We have identified the current level of provision across the UK with reference to the following sources:
- Mintel's Casinos and Bingo UK report (March 2018), which identifies that there are 355 bingo halls and 145 casinos across the UK;
  - the UK Cinema Association website<sup>64</sup>, which identifies that there are 4,309 cinema screens across the UK; and
  - Mintel's Ten Pin Bowling UK report (May 2017), which identifies that there are 5,242 bowling lanes across the UK.
- 9.5 We then apply the respective ratio to the Study Area population in order to gauge the 'benchmark'

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<sup>61</sup> Experian does not forecast improvements in sales efficiency for leisure operators, which is a critical element in translating a monetary surplus into a floorspace requirement

<sup>62</sup> Derived from Experian MMG3 data

<sup>63</sup> Derived from ONS 2016-based subnational population projections

<sup>64</sup> www.cinemauk.org.uk, consulted on 1 November 2018

level of provision for each type of provision.

- 9.6 We supplement our assessment with an overview of current patterns of commercial leisure trips throughout the Study Area (as identified by the NEMS household survey of October 2018) in order to identify any qualitative deficiencies in provision.

Bingo

- 9.7 The Study Area authority area accommodates three dedicated bingo halls, these being Club 3000 Bingo in Old Trafford, Mecca Bingo in Sale and Cosmo Bingo in Eccles (within the City of Salford authority area). In addition, a small number of respondents indicated that they visit the Gardeners Arms in Wythenshawe to play bingo. The location of each of these facilities means is such that at least one bingo hall is considered to be relatively accessible to most Study Area residents.
- 9.8 As Table 9.1 identifies, the most popular bingo halls are Mecca Bingo in Sale and Club 3000 in Old Trafford, which respectively secure 23.2% and 24.6% of trips to play bingo that originate within the Study Area. The third most popular destination is Cosmo Bingo in Eccles (which secures 14.6% of trips originating within the Study Area), followed then by the Gardeners Arms in Wythenshawe (2.2%). These four bingo facilities collectively secure 64.6% of all trips to play bingo that originate within the Study Area. The market share of trips secured by facilities within the Study Area is considered to be acceptable and reflective of an appropriate level of provision.

**Table 9.1: Market Share Secured by Bingo Halls**

Zone	Bingo Facility	A	B	C	D	E	F	G	H	I	Total
C	Mecca Bingo, Sale	0.0	0.0	45.6	27.6	0.0	0.0	0.0	0.0	100.0	23.2
D	Club 3000, Old Trafford	0.0	0.0	45.6	36.2	47.0	0.0	17.5	0.0	0.0	24.6
F	Gardeners Arms, Wythenshawe	0.0	0.0	8.8	0.0	0.0	0.0	0.0	0.0	0.0	2.2
G	Cosmo Bingo, Eccles	0.0	0.0	0.0	0.0	0.0	0.0	69.7	0.0	0.0	14.6
Outside Study Area	Buzz Bingo, Wythenshawe	72.4	0.0	0.0	0.0	0.0	100.0	12.8	0.0	0.0	16.7
	Mecca Bingo, Manchester	27.6	42.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.7
	Club 3000, Walkden	0.0	57.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.4
	Gala Bingo, Salford	0.0	0.0	0.0	36.2	53.0	0.0	0.0	0.0	0.0	9.6
<b>Total</b>		<b>100.0</b>									

Note: Market share derived from 2018 NEMS household survey 'weighted and filtered' results; table includes all destinations provided by household survey respondents

- 9.9 Mintel's Casinos and Bingo UK report identifies that there are 355 bingo halls across the UK, which

equates to a bingo hall for every 186,029 persons or thereabouts<sup>65</sup>. Accordingly, as the below Table 9.2 demonstrates, we estimate that the Study Area population of 440,954 persons could support around 2.4 bingo halls at 2019, increasing to around 2.6 bingo halls at 2037 based on the forecast population of 484,478 persons. Given that there are currently three bingo halls across the Study Area, we do not believe that there is any pressing requirement for further facilities across the period to 2037.

**Table 9.2: Bingo Hall Requirement in Study Area**

Year	Study Area Population	Typical Population Required to Support Hall	Potential Number of Halls Supported by Study Area	Current Number of Halls	Outstanding Potential Requirement
2019	440,954	186,029	2.4	3	-0.6
2022	448,978	186,029	2.4	3	-0.6
2024	454,133	186,029	2.4	3	-0.6
2027	462,215	186,029	2.5	3	-0.5
2029	466,496	186,029	2.5	3	-0.5
2032	473,454	186,029	2.5	3	-0.5
2037	484,478	186,029	2.6	3	-0.4

Note: Typical population to support bingo hall calculated with reference to the Mintel Casinos and Bingo UK 2018 report and to the ONS 2016 mid-year population estimates for the UK (population at 2017 has been used); bingo halls in Study Area are Mecca Bingo in Sale, Club 3000 in Old Trafford and Cosmo Bingo in Eccles

- 9.10 In considering the potential to accommodate additional bingo facilities, it is also important to recognise that the sector has been significantly affected by the ban on smoking in enclosed workplaces that came into force in 2007 as a consequence of the Health Act 2006. Subsequent to the Act's enforcement, new bingo hall openings are a rare event, which reinforces our view that it is unlikely that there will be any interest in providing additional provision in the Study Area in the foreseeable future.
- 9.11 As such, we do not believe that there is any requirement to plan for additional provision in the authority area in the period to 2037, but instead recommend that, in the event that any operator interest is apparent, proposals are judged on their own merits in accordance with relevant town centre planning policy.

#### Casinos

- 9.12 The Study Area accommodates one casino, this being the Grosvenor Casino on Regent Road in Salford which is to the far north of the Study Area. The casino is a modern, purpose-built facility with adjacent

<sup>65</sup> Based on the ONS 2016 mid-year population estimates for the UK, England and Wales, Scotland and Northern Ireland, which identifies a UK population of 66,040,229 persons at 2017

surface car parking, which is located just to the east of the River Irwell and close to Manchester city centre. Casinos are generally found within or adjacent to higher order centres and, as such, patrons may expect to travel some distance in order to visit a casino.

- 9.13 The household survey results identify a number of trips outside of the Study Area in order to visit casinos. However, all of the casinos visited by Study Area residents are located nearby in the City of Manchester authority area. The household survey suggests that the most popular casinos are the Grosvenor Casino in Didsbury and the Genting Casino in Manchester city centre, which respectively secure 35.4% and 34.9% of trips to casinos that originate within the Study Area.

**Table 9.3: Market Share Secured by Casinos**

Zone	Casino	A	B	C	D	E	F	G	H	I	Total
G	Grosvenor Casino, Salford	0.0	0.0	0.0	50.0	0.0	0.0	50.0	0.0	0.0	9.1
Outside Study Area	Genting Casino, Manchester	0.0	0.0	32.5	0.0	72.4	0.0	0.0	0.0	0.0	34.9
	Grosvenor Casino, Manchester	0.0	0.0	0.0	0.0	0.0	0.0	50.0	0.0	0.0	5.2
	Grosvenor Casino, Didsbury	0.0	0.0	58.4	0.0	0.0	100.0	0.0	0.0	0.0	35.4
	Manchester 235, Manchester	0.0	0.0	9.1	50.0	27.6	0.0	0.0	0.0	0.0	15.4
<b>Total</b>		<b>0.0</b>	<b>0.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>0.0</b>	<b>0.0</b>	<b>100.0</b>

Note: Market share derived from 2018 NEMS household survey 'weighted and filtered' results; table includes all destinations provided by household survey respondents

- 9.14 Mintel's Casinos and Bingo UK report identifies that there are 145 casinos across the UK, which equates to a casino for every 455,450 persons or thereabouts<sup>66</sup>. As the below Table 9.4 identifies, we estimate that the Study Area could support around 1.0 casino at 2019, increasing to around 1.1 casinos at 2037. Given that there is already a casino in the Study Area, we do not believe that there is any theoretical capacity to support additional provision. In addition, there is clearly an abundance of choice in terms of the existing provision in Manchester. As a consequence, we do not believe that there is any requirement to plan for additional casino provision in the Study Area in the period to 2037; any proposals should therefore be considered on their own merits in accordance with relevant policy.

<sup>66</sup> Based on the ONS 2016 mid-year population estimates for the UK, England and Wales, Scotland and Northern Ireland, which identifies a UK population of 66,040,229 persons at 2017

**Table 9.4: Casino Requirement in Study Area**

Year	Study Area Population	Typical Population Required to Support Casino	Potential Number of Casinos Supported by Study Area	Current Number of Casino	Outstanding Potential Requirement
2019	440,954	455,450	1.0	1	0.0
2022	448,978	455,450	1.0	1	0.0
2024	454,133	455,450	1.0	1	0.0
2027	462,215	455,450	1.0	1	0.0
2029	466,496	455,450	1.0	1	0.0
2032	473,454	455,450	1.0	1	0.0
2037	484,478	455,450	1.1	1	0.1

Note: Typical population to support casino calculated with reference to the Mintel Casinos and Bingo UK 2018 report and to the ONS 2016 mid-year population estimates for the UK (population at 2017 has been used); casino in Study Area is Grosvenor casino in Salford

### Cinemas

- 9.15 There were two permanent cinemas within Trafford Borough at the time of the household survey (Vue in Altrincham and Odeon at the Trafford Centre), with three further cinemas within the wider Study Area (Vue at Lowry Outlet Mall, Home in Manchester and Curzon in Knutsford). Subsequent to the undertaking of the household survey, Everyman opened a cinema in Altrincham in November 2018.
- 9.16 Collectively, the provision provides for most cinema-goers needs, with the multiples cinemas catering for mainstream tastes, and Home having a wider remit which includes showing independent and foreign language films. The two large multiplexes in the authority area together provide 26 screens<sup>67</sup>.
- 9.17 Table 9.5 demonstrates that (as would be expected), the three multiplexes within the Study Area secure the large majority (72.3%) of all trips to visit the cinema that originate within the Study Area. A more limited proportion of respondents use Home Manchester, with a lesser number still visiting the Curzon in Knutsford. Outside the Study Area, the most popular cinemas are Odeon in Manchester (which secures 5.7% of trips), Cineworld in Parris Wood (5.3%), and the AMC Cinema in Manchester (4.8%). The patterns of cinema use are logical and do not suggest any significant qualitative issue in respect of the spatial distribution of provision in the Study Area.

<sup>67</sup> Twenty screens at the Trafford Centre Odeon and six screens at the Altrincham Vue

**Table 9.5: Market Share Secured by Cinemas**

Zone	Cinema	A	B	C	D	E	F	G	H	I	Total
A	Vue, Altrincham	75.7	3.9	21.9	0.8	0.0	36.9	0.0	58.6	22.3	23.6
D	Home Manchester	0.9	0.0	2.1	0.8	17.2	0.0	1.2	3.1	4.7	3.7
	Odeon, Trafford Centre	8.1	52.8	43.1	48.4	14.4	18.6	32.1	19.8	8.8	28.7
G	Vue, Lowry Outlet Mall	2.4	28.3	23.4	26.7	12.7	17.6	52.2	0.0	0.0	20.0
H	Lymm Youth & Community Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.3	0.1
I	Curzon, Knutsford	1.5	0.0	0.0	0.0	0.0	0.0	0.0	6.1	41.0	2.6
Outside Study Area	AMC Cinema, Manchester	0.0	0.0	0.0	10.7	14.8	2.4	8.8	0.0	0.0	4.8
	Cineworld, Parrs Wood	8.0	1.8	0.0	1.7	15.6	16.7	0.0	0.0	1.2	5.3
	Odeon, Manchester	2.4	8.5	4.8	3.0	18.9	2.7	0.0	2.0	0.0	5.7
	Other	0.9	4.7	4.0	7.7	6.5	5.1	5.7	10.5	20.8	5.6
<b>Total</b>		<b>100.0</b>									

Note: Market share derived from 2018 NEMS household survey 'weighted and filtered' results; table includes all destinations located within the Study Area and those outside that secure a market share of at least 3.0%

9.18 The UK Cinema Association website estimates that there were 4,309 cinema screens in the UK at 2017, which equates to one screen for every 15,326 persons or thereabouts. On this basis, we estimate that the Study Area population could support around 28.8 cinema screens at 2019, increasing to around 31.6 screens at 2037.

9.19 As Table 9.6 demonstrates, we believe that there are currently 44 permanent cinema screens within the Study Area and that there is a theoretical surplus of 15.2 cinema screens at 2019, decreasing to 12.4 screens at 2037. Our assessment includes the three screens provided at the newly opened Everyman in Altrincham.

**Table 9.6: Cinema Screens Requirement in Study Area**

Year	Study Area Population	Typical Population Required to Support Cinema Screen	Potential Number of Cinema Screens Supported by Study Area	Current Number of Cinema Screens	Outstanding Potential Requirement
2019	440,954	15,326	28.8	44	-15.2
2022	448,978	15,326	29.3	44	-14.7
2024	454,133	15,326	29.6	44	-14.4
2027	462,215	15,326	30.2	44	-13.8
2029	466,496	15,326	30.4	44	-13.6
2032	473,454	15,326	30.9	44	-13.1
2037	484,478	15,326	31.6	44	-12.4

Note: Typical population to support a cinema screen calculated with reference to data provided by the UK Cinema Association website and to the ONS 2016 mid-year population estimates for the UK (population at 2017 has been used); permanent cinemas in Study Area are Odeon at Trafford Centre, Vue at Altrincham and the Lowry Outlet Mall, Home Manchester, Everyman at Altrincham, and Curzon at Knutsford

9.20 Given the above, we believe that the Study Area is currently well provided for in respect of cinema screens. However, we again note that planning application reference 94986/FUL/18, which provides for the development of a six-screen cinema together with retail and leisure floorspace<sup>68</sup> in Sale town centre, was resolved to be approved by Members (subject to legal agreement) at committee on 14 March 2019. Notwithstanding the existing cinema provision in the area, this proposal has the potential to act as a catalyst to regenerate Sale town centre through the introduction of additional uses which will broaden the offer and help support additional food and drink operators. As such, we believe that the Maloneview scheme should help to anchor the town centre going forward and ensure that its evening economy evolves.

9.21 Subsequent to the delivery of the Sale town centre scheme, we consider it highly unlikely that there will be any further cinema operator interest in the Borough in the foreseeable future.

#### Ten Pin Bowling

9.22 The Study Area accommodated a single ten pin bowling alley at the time of the household survey, this being Namco Funscape at the Trafford Centre. As the below Table 9.7 identifies, this facility attracted more than half (59.2%) of all trips to bowling alleys that originate within the Study Area. Most of the other trips are directed towards ten pin bowling alleys in the City of Manchester authority area, principally to the Tenpin bowling alley at Parrs Wood in Didsbury.

**Table 9.7: Market Share Secured by Ten Pin Bowling Alleys**

Zone	Cinema	A	B	C	D	E	F	G	H	I	Total
D	Namco Funscape, Trafford Centre	39.3	85.4	60.3	94.0	7.9	0.0	93.5	0.0	70.1	59.2
Outside Study Area	Tenpin, Parrs Wood, Didsbury	57.5	3.7	8.9	0.0	81.4	100.0	0.0	0.0	0.0	27.7
	All Star Lanes, Manchester	3.3	0.0	13.5	0.0	10.8	0.0	0.0	0.0	0.0	4.2
	Other	0.0	11.0	17.3	6.0	0.0	0.0	6.5	100.0	29.9	8.9
<b>Total</b>		<b>100.0</b>									

Note: Market share derived from 2018 NEMS household survey 'weighted and filtered' results; table includes all destinations located within the Study Area and those outside that secure a market share of at least 3.0%

9.23 Mintel's Ten Pin Bowling UK report identifies that there are 5,242 ten pin bowling lanes across the UK, which equates to a bingo hall for every 12,598 persons or thereabouts. Accordingly, we estimate that the Study Area could support around 35.0 bowling lanes at 2019, increasing to around 38.5 lanes at

<sup>68</sup> As stated in the previous section of this report, we anticipate that this floorspace is most likely to be occupied by food and drink operators in practice, given the limited retailer interest in Sale and the likelihood of such units being attractive to restaurant and bar operators should the cinema development be successfully brought forward

2037. This suggests a theoretical surplus of 5.0 bowling lanes at 2019, decreasing to 1.5 bowling lanes at 2037. As such, we do not believe that is any quantitative requirement to introduce any further bowling alleys within the Study Area in the period to 2037.

9.24 Our benchmarking assessment includes Atlantic Bowl which opened at Altrincham Retail Park in December 2018. This bowling alley provides 22 lanes and is located in the south of Trafford Borough. As such, the two bowling alleys are located such that most residents of the Study Area are reasonably close to a facility.

**Table 9.8: Ten Pin Bowling Lanes Requirement in Study Area**

Year	Study Area Population	Typical Population Required to Support Bowling Lane	Potential Number of Bowling Lanes Supported by Study Area	Current Number of Bowling Lanes	Outstanding Potential Requirement
2019	440,954	12,598	35.0	40	-5.0
2022	448,978	12,598	35.6	40	-4.4
2024	454,133	12,598	36.0	40	-4.0
2027	462,215	12,598	36.7	40	-3.3
2029	466,496	12,598	37.0	40	-3.0
2032	473,454	12,598	37.6	40	-2.4
2037	484,478	12,598	38.5	40	-1.5

Note: Typical population to support a bowling lane calculated with reference to the Mintel Ten Pin Bowling UK 2017 report and to the ONS 2016 mid-year population estimates for the UK (population at 2017 has been used)

### Food and Drink

9.25 Food and drink uses are not typically the subject of a quantitative assessment due to the difficulties in forecasting future growth in the sector over time (and an absence of data relating to how existing operators may need to increase their trading efficiency in the future in order to remain profitable). In addition, most new food and drink uses are relatively small-scale and can be readily accommodated within a centre (through the reoccupation or refurbishment of existing premises) without the need for any planning policy-led intervention.

9.26 As such, our consideration of the current food and drink offer within the Borough is a qualitative assessment based on the strength of the current offer and the opportunities that may exist to attract further operators in Altrincham, Sale, Stretford and Urmston.

9.27 Table 9.9 indicates that the centres of Altrincham, Sale and Urmston collectively attract a reasonably

substantial proportion of trips to eat out (equating to 32.8% of all such trips). Table 9.9 indicates that Altrincham town centre attracts 17.3% of trips to visit a restaurant that originate within the Study Area, Sale town centre attracts 7.9% of such trips, and Urmston town centre attracts 7.7%. The performance of Altrincham and Urmston is considered to be very encouraging, particularly as the latter centre is substantially smaller than Sale, but has a restaurant offer which is comparable in terms of its ability to support trips. Altrincham market share is reflective not just of the popularity of the Market Hall, but also of the new operators that have followed in its wake (including Bistrot Pierre, the Con Club and Sugo Pasta Kitchen),

9.28 By way of contrast, Stretford town centre only secures a market share of 0.5% of Study Area restaurant trips, which is reflective of Stretford Mall being focused around a daytime retail offer. As such, whilst there is some scope to improve Stretford's food and drink offer further, the format of the centre may to some degree restrict the growth of the centre's evening economy.

**Table 9.9: Market Share of Restaurant Trips**

Zone	Venue	A	B	C	D	E	F	G	H	I	Total
A	Altrincham Town Centre	53.0	1.0	17.8	3.8	0.0	22.7	0.0	4.4	7.6	17.3
	Hale Village Centre	10.3	1.0	1.2	1.1	1.3	4.6	0.0	1.7	5.7	3.5
	Timperley District Centre	9.5	0.0	4.1	0.0	0.0	5.0	0.0	0.0	0.0	3.2
B	Urmston Town Centre	0.0	53.0	0.0	9.3	0.0	1.4	1.6	0.0	0.0	7.7
C	Sale Town Centre	1.4	1.3	32.2	6.8	0.0	5.2	0.0	0.0	0.0	7.9
D	Trafford Centre	2.2	11.5	4.1	17.9	3.1	9.5	28.9	9.6	0.0	8.9
E	Chorlton District Centre	0.0	0.0	0.8	20.8	50.2	1.4	0.0	0.0	0.9	8.7
H	Lymm Village Centre	3.8	3.2	0.5	0.0	0.0	1.6	0.0	47.0	0.0	2.2
I	Knutsford Town Centre	1.2	2.3	0.0	0.0	0.0	0.0	1.0	6.1	60.4	3.9
Other	Inside Study Area	4.3	5.5	15.4	6.1	4.4	6.8	31.7	0.0	4.3	9.8
Outside Study Area	Didsbury District Centre	2.5	1.3	0.5	1.6	5.3	6.8	0.0	0.0	0.0	2.0
	Manchester City Centre	6.2	7.3	19.3	19.4	21.6	15.4	23.5	3.9	5.1	14.6
	Other, Outside Study Area	5.5	12.6	3.9	13.3	14.1	19.7	13.3	27.2	16.0	10.5
<b>Total</b>		<b>100.0</b>									

Note: Market share derived from 2018 NEMS household survey 'weighted and filtered' results; table includes all inside and outside the Study Area that secure a market share located within the Study Area and those outside that secure a total market share of at least 2.0%

9.29 Analysis of the survey results in respect of trips to visits pubs, bars and nightclubs, indicates that respondents generally visit a wider range of venues in order to drink and socialise than they do to dine. As such, venues typically secure a lower market share of trips to pubs, bars and nightclubs compared to their market share of restaurant trips. However, both Sale and Urmston town centres are notable exceptions to this trend, respectively securing 11.4% and 10.8% of respondents' trips to pubs, bars and nightclubs (which, in each case, is higher than the centre's market share in respect of restaurant trips). Sale town centre has a particular concentration of licensed premises around Sale Waterside and on

Northenden Road, and Urmston's popularity reflects the relatively large number of bars and pubs along Flixton Road. Both Sale and Urmston town centres are highly accessible to residents of the surrounding suburbs.

**Table 9.10: Market Share of Trips to Pubs, Bars and Nightclubs**

Zone	Venue	A	B	C	D	E	F	G	H	I	Total
A	Altrincham Town Centre	59.1	1.3	10.7	0.0	2.2	2.3	1.4	2.8	0.0	14.4
	Hale Village Centre	4.8	0.0	0.8	0.0	0.0	9.5	0.0	2.5	0.0	1.6
	Timperley District Centre	9.9	0.0	4.9	0.0	0.0	8.6	1.2	0.0	0.0	3.5
B	Urmston Town Centre	0.0	61.2	0.0	20.9	0.0	3.6	0.0	0.0	0.0	10.8
C	Ashton-on-Mersey Local Centre	0.9	1.7	7.5	0.0	0.0	0.0	0.0	0.0	0.0	1.9
	Marsland Road Local Centre	0.0	0.0	5.7	0.0	0.0	14.3	0.0	0.0	0.0	1.9
	Sale Town Centre	0.9	1.7	45.3	6.0	0.0	24.6	0.0	0.0	0.0	11.4
D	Stretford Town Centre	0.0	4.5	0.0	19.3	0.0	0.0	0.0	0.0	0.0	2.6
E	Chorlton District Centre, Manchester	0.0	1.7	1.2	22.3	71.0	0.0	0.0	0.0	0.0	10.4
G	Eccles Town Centre	0.0	1.3	0.0	0.0	0.0	0.0	34.0	0.0	0.0	4.8
	Monton Local Centre	0.0	0.0	0.0	0.0	0.0	0.0	25.6	0.0	0.0	3.5
H	Lymm Village Centre	5.3	0.0	1.2	0.0	0.0	2.6	0.0	84.1	8.0	3.3
I	Knutsford Town Centre	0.9	1.7	0.0	0.0	0.0	0.0	0.0	3.9	49.7	3.2
Other	Inside Study Area	1.2	1.3	8.3	2.8	3.1	2.3	6.9	0.0	14.1	4.5
Outside Study Area	Manchester City Centre	9.3	5.8	9.4	16.6	12.7	12.1	10.9	2.8	5.3	10.0
	Other, Outside Study Area	2.5	2.5	2.1	7.0	11.0	17.4	20.0	3.9	22.9	8.1
<b>Total</b>		<b>100.0</b>									

Note: Market share derived from 2018 NEMS household survey 'weighted and filtered' results; table includes all inside and outside the Study Area that secure a market share located within the Study Area and those outside that secure a total market share of at least 1.5%

- 9.30 Altrincham remains the most popular destination for trips to pubs, bars and nightclubs that originate within the Study Area, albeit its market share of 14.4% of such trips is less than its market share of restaurant trips. This is reflective of many of Altrincham's most popular evening venues being focused around eating as much as drinking.
- 9.31 In terms of future provision, whilst Altrincham benefits from a good range of restaurants and bars, the Altair development has the potential to accommodate additional food and drink operators. However, we believe that Altrincham's leisure offer has matured significantly in recent years and that there are no obvious deficiencies in its offer.
- 9.32 In Sale, the proposed redevelopment of The Square shopping centre – for a cinema, together with a number of retail and leisure units – provides the opportunity for Sale's evening economy to diversify. At present, Sale town centre's offer is principally focused around bars and pubs (and a few good quality independent restaurants), and the type of accommodation proposed at the Maloneview scheme should

support casual dining operators and national multiples (who often wish to locate in proximity to anchor uses, such as the proposed cinema). We believe that there is a clear opportunity to modernise Sale's leisure offer, which could be realised through the delivery of the proposed Maloneview scheme.

- 9.33 Urmston has a generally strong food and drink offer, which has supported a number of new openings in recent years. The proposed redevelopment of the market site at Railway Road to provide a food hall (which is provided for by planning permission reference 93629/FUL/18, which was approved on 18 October 2018), will further improve Urmston's offer. On completion of the market redevelopment (which is scheduled to commence trading by the end of 2019), the Urmston's food and drink offer will be particularly strong for a town of its size.

## 10.0 Out of Centre Retail

### Introduction

- 10.1 We set out below a review of the role, function and current performance of the four principal out of centre retail destinations in the Trafford authority area, these being: the Trafford Centre; Altrincham Retail Park; Trafford Retail Park; and, White City Retail Park.
- 10.2 The three retail parks provide important facilities to the residents of Trafford and further afield, accommodating some retailers who may not be able to locate within any of the Borough's town centres due to their specific business model requirements. The Trafford Centre offers a qualitatively different provision to the out of centre retail parks, given that the units within the centre replicate those typically found within defined centres and directly meet the requirements of 'traditional' high street operators.

### Household Survey Results

- 10.3 We first revisit the household survey results in order to consider both the performance of each out of centre venue (in terms of its turnover) and whether the facility meets convenience, non-bulky comparison or bulky comparison goods needs.
- 10.4 Table 10.1 indicates that the Trafford Centre has the greatest overall turnover (£269.9m at 2019) in terms of expenditure arising within the Study Area, followed then by Altrincham Retail Park (which has an overall turnover of £134.0m).

**Table 10.1: Turnover of Retail Park Destinations**

Retail Park	Convenience Goods Turnover (£m)	Non-Bulky Comparison Goods Turnover (£m)	Bulky Comparison Goods Turnover (£m)	Total Comparison Goods Turnover (£m)	Total Turnover (£m)
Trafford Centre	£6.0m	£218.3m	£45.7m	£263.9m	£269.9m
Altrincham Retail Park	£17.4m	£55.9m	£60.7m	£116.7m	£134.0m
Trafford Retail Park	£1.0m	£37.6m	£22.7m	£60.3m	£61.3m
White City Retail Park	£32.0m	£12.0m	£51.3m	£63.3m	£95.3m
<b>Total</b>	<b>£56.4m</b>	<b>£323.8m</b>	<b>£180.4</b>	<b>£504.2</b>	<b>£560.5</b>

Source: Convenience and comparison turnovers derived from Appendix 6

Notes: Non-bulky goods include clothing & footwear, small household, CDs, DVDs and Books, chemist goods, and recreational goods; bulky includes electrical goods, furniture, DIY and gardening goods

- 10.5 Table 10.2 considers the comparison goods market share of the four out of centre destinations, and demonstrates that they collectively claim 33.4% of non-bulky comparison goods Study Area expenditure, and 43.8% of bulky comparison goods expenditure. As such, the four out of centre destinations collectively have a greater comparison goods market share (36.5%) than that claimed by the four town centres (21.4%). It is evident that the role of the retail parks is principally to meet bulky comparison and convenience goods needs, and that they generally have a lesser role in respect of non-bulky goods provision (albeit Trafford Retail Park, in particular, performs both a non-bulky and bulky role). The principal exception to this is the Trafford Centre, which we consider below.
- 10.6 The total comparison market share based on available expenditure to the four destinations has increased in total since 2007 by 1.2 percentage points from 35.3% to 36.5%. However, the only increase in comparison market share between 2007 and 2019 has been to the Trafford Centre, which has increased from 13.8% to 19.1%. All of the other three destinations have experienced a decrease in market share between the two surveys.

**Table 10.2: Comparison Goods Market Share of Retail Park Destinations**

Retail Park	Non-Bulky Comparison Goods 2019	Bulky Comparison Goods 2019	Total Comparison Goods 2019	Total Comparison Goods 2007
Trafford Centre	22.5%	11.1%	19.1%	13.8%
Altrincham Retail Park	5.8%	14.7%	8.4%	11.3%
White City Retail Park	1.2%	12.5%	4.6%	5.2%
Trafford Retail Park	3.9%	5.5%	4.4%	5.0%
<b>Total</b>	<b>33.4%</b>	<b>43.8%</b>	<b>36.5%</b>	<b>35.3%</b>

Source: Derived from the Quantitative Assessment provided at Appendix 6

- 10.7 We set out below a consideration of the composition and role of each of the four out of centre destinations, and provide commentary on how the Council should continue to manage out of centre development through appropriate policy mechanisms.

### Composition and Role of the Trafford Centre

- 10.8 The Trafford Centre is a purpose built out of centre shopping destination, located approximately 8 kilometres to the north of Altrincham town centre and 2 kilometres to the north of Urmston town centre, in the north-west of the Borough and just off the M60. The centre comprises a total of approximately 181,000 sq.m of commercial floorspace, with approximately 12,500 adjacent free car

parking spaces. The centre contains over 200 Class A1 stores and over 60 restaurants, cafes and bars (Classes A3 and A5).

- 10.9 The Trafford Centre is highly accessible to car-borne shoppers, but the centre also benefits from being integrated into the wider public transport network. This includes the extension of the Metrolink network to the centre, due to open in 2021.
- 10.10 Construction of the Trafford Centre commenced in 1996 and it opened in 1998. It has expanded considerably over time, partly through the construction of Barton Square, which was granted permission by the Secretary of State in 2001 (reference H/UDC/OUT/43536) and which delivered an additional 33,667 sq.m of retail and leisure floorspace. Planning permission was also granted in 2013 to allow some Class A1 retail floorspace to be unrestricted, with the intention that this would be accommodated by Primark (references 79105/VAR/2012 and 79106/VAR/2012). The existing floorspace within Barton Square can be divided into the 18,089 sq.m which is restricted to the sale of bulky goods, 8,824 sq.m of unrestricted floorspace, and 6,754 sq.m of Class D2 leisure floorspace.
- 10.11 In addition to the above, planning permission was granted in August 2003 for the enclosure of the open area adjoining The Orient, through the construction of a new roof and elevation (reference H/56899).
- 10.12 Planning permission was most recently granted on 17 May 2019 (reference 95596/FUL/18) which will provide for a greater amount of unrestricted Class A1 comparison goods floorspace at Barton Square, and the introduction of additional Class A3 and A5 Uses. The permitted development will result in an uplift in the total amount of floorspace accommodated at Barton Square (when considering both the retail and the food and drink floorspace proposed), through the provision of floorspace at mezzanine level within existing units and new-build floorspace achieved through both infilling and small units at ground floor level. Conditions have been imposed on the decision notice to restrict the overall level of Class A1 floorspace (both restricted and unrestricted), Class D2 floorspace and Classes A3/A5 floorspace, along with restrictions on the minimum unit sizes.
- 10.13 The Trafford Centre now offers a wide range of leisure facilities including the cinema, crazy golf, an arcade and high-wire course on the outskirts next to the car park, alongside a wide range of fast food and sit-down restaurants and bars.

- 10.14 As a managed centre, the Trafford Centre is well-maintained and is a pleasant environment in which to spend time. One of the centre's key benefits is that it is immune from poor weather, making it a year round destination. There are obvious and frequent security patrols and visible CCTV which ensures a high standard of safety is maintained. The centre's location immediately adjacent to the M60 motorway, but also the presence of a substantial bus interchange (with the X50 Express bus service taking approximately 20 minutes to reach Manchester City Centre), ensures that the centre is accessible to a wide catchment area. This is further strengthened by the provision of 12,500 free parking spaces.
- 10.15 The centre is anchored by Debenhams, John Lewis and Selfridges which sit at either end and within the middle of the centre, acting as focal points and draws for shoppers to traverse along the internal malls. Alongside which there is a wide range of retailers, spanning both convenience goods, services and bulky and non-bulky comparison goods.
- 10.16 We provide at Table 10.3 below a summary of the Trafford Centre's composition, with reference to the sector categorisation used by Experian Goad.
- 10.17 As Table 10.3 demonstrates, the number and range of operators in the Trafford Centre suggests that it is able to meet different needs and, as such, is likely to encourage linked trips to purchase multiple items. This is also evident through reference to its overall Study Area comparison goods market share of 19.1%. Furthermore the wider 'Trafford City' area provides a diverse range of retail and service uses, included an Asda superstore, Costco wholesalers, B&Q, Chill Factore indoor winter sports facility, and the Trafford Golf Centre. Therefore, visitors are encouraged to the Trafford Centre and the surrounding area due to the wide offer and ability to increase dwell time with the other leisure uses present.
- 10.18 The Trafford Centre is a dominant comparison goods destination for residents particularly within Zones B to E and Zone G, within which the total comparison market share claimed within each respective zone is above 20.0%. The highest market share is within Zone B, from which 29.4% of the available comparison goods expenditure is attracted to the destination. By way of comparison, 12.8% is attracted to Urmston town centre. The popularity of the Trafford Centre is unsurprising given its proximity and overall range of retailers, but does demonstrate the Trafford Centre's dominance over the defined centres.
- 10.19 The Trafford Centre is categorised as a Major Regional centre and had a Venuescore of 313 at 2016/17. It ranked 30<sup>th</sup> of all UK centres surveyed in 2016/17, which represents a rise in rankings by two places

since the 2015/16 rankings.

**Table 10.3: Composition of the Trafford Centre**

Category	Number of Units	Proportion of Units (%)
Comparison: Clothing General	28	12.3
Comparison: Ladies Wear & Accessories	17	7.5
Comparison: Jewellery, Watches & Silver	15	6.6
Comparison: Footwear	15	6.6
Comparison: Toiletries, Cosmetics & Beauty Products	9	4.0
Comparison: Telephones & Accessories	7	3.1
Comparison: Mens Wear & Accessories	6	2.6
Comparison: Department & Variety Stores	5	2.2
Comparison: Toys, Games & Hobbies	4	1.8
Comparison: Hardware & Household Goods	4	1.8
Comparison: Electrical & Other Durable Goods	4	1.8
Comparison: Newsagents & Stationers	3	1.3
Comparison: Textiles & Soft Furnishings	2	0.9
Comparison: Greeting Cards	2	0.9
Comparison: Childrens & Infants Wear	2	0.9
Comparison: Art & Art Dealers	2	0.9
Comparison: Music & Video Recordings	1	0.4
Comparison: Leather & Travel Goods	1	0.4
Comparison: Ladies & Mens Wear & Acc.	1	0.4
Comparison: Furniture General	1	0.4
Comparison: Furniture Fitted	1	0.4
Comparison: Florists	1	0.4
Comparison: Crafts, Gifts, China & Glass	1	0.4
Comparison: Chemist & Drugstores	1	0.4
Comparison: Booksellers	1	0.4
Convenience: Bakers & Confectioners	6	2.6
Convenience: Grocers & Delicatessens	2	0.9
Convenience: Health Foods	1	0.4
Convenience: Confectionery, Tobacco & News	1	0.4
Financial and Business Service: Retail Banks	2	0.9
Leisure Service: Restaurants	27	11.9
Leisure Service: Cafes	12	5.3
Leisure Service: Fast Food & Take Away	11	4.8
Leisure Service: Sports & Leisure Facilities	6	2.6
Leisure Service: Bars & Wine Bars	2	0.9
Leisure Service: Public Houses	1	0.4
Leisure Service: Cinemas, Theatres & Concert Halls	1	0.4
Retail Service: Travel Agents	4	1.8
Retail Service: Opticians	2	0.9
Retail Service: Repairs, Alterations & Restoration	1	0.4
Retail Service: Post Offices	1	0.4
Retail Service: Dry Cleaners & Launderettes	1	0.4
Vacant	11	4.8
<b>Total</b>	<b>226</b>	<b>100%</b>

Note: Derived from Nexus Planning site visit of October 2018

- 10.20 The extant permission for the substantial redevelopment of Barton Square at the Trafford Centre will expand the centre further, by providing modern format floorspace for a greater range of retail and leisure operators at an otherwise very dominant commercial destination within the Borough. One of the key operators seeking occupation within the development is intended to be Primark, which has the potential to result in a shift in shopping patterns in respect of clothing and footwear goods.
- 10.21 Whilst the Trafford Centre does compete directly against Altrincham and the three other town centres in Trafford in respect of certain types of purchases, the overall restaurant and bar offer is qualitatively different to that which is offered in the town centres, particularly given that the offer at the Trafford Centre is focussed around national multiples, and the town centres contain a number of local independent restaurant, bar and pub operators. This is helpful in maintaining defined centres' dominance in this area (which is of particular relevance to the future vitality of Altrincham and Urmston). Whilst we note that in determining the recent planning application for the redevelopment of Barton Square, the Council came to the conclusion that the proposal will not have any significant adverse impacts on the trading performances of the defined town centres within the Borough, we recommend that careful consideration is given before granting additional planning permission for any further proposals which could further improve the offer at the Trafford Centre to the detriment of the four town centres.

### **Composition and Role of Altrincham Retail Park**

- 10.22 Altrincham Retail Park is located approximately 1 kilometre to the north of Altrincham town centre, just off the A56 and immediately to the north of the Bridgewater Canal. Altrincham Retail Park is located immediately to the east of the Broadheath residential area. The Retail Park was constructed following the grant of permission in August 1995 and currently consists of approximately 20,280 sq.m of commercial floorspace along with surrounding commercial units.
- 10.23 The retail park is anchored by Homebase, B&M Home Store, The Range and TK Maxx, with a diverse range of additional retailers providing a wide choice of different comparison goods (both bulky and non-bulky goods), supplemented by a limited leisure and limited convenience provision, comprising a McDonald's drive-thru and KFC (formerly Pizza Hut). In addition, an Aldi foodstore is accessed off Davenport Lane and a B&Q store (which is now closed and is in the process of being redeveloped for other uses) is accessed off Atlantic Street. Permission has recently been granted for the relocation of

the Aldi store from its current position, to be located on the former B&Q site accessed off Atlantic Street, approximately 130 metres to the south (reference 96386/FUL/18).

10.24 The below Table 10.4 provides a summary of the composition of Altrincham Retail Park, with reference to the sector categorisation used by Experian Goad. This table includes the Aldi, TK Maxx and Carpetright accessed off George Richards Way.

10.25 The diverse range of operators with a presence at Altrincham Retail Park suggests that the park is capable of meeting a range of retail needs, including convenience, non-bulky and bulky retail requirements. The relatively large scale of the retail park is reflected in its overall Study Area market share of 8.4%. The destination is particularly popular for Zone A, C and F residents, from which 19.3%, 11.2% and 15.0% of the available comparison expenditure generated by each zone respectively is attracted to the retail park.

**Table 10.4: Composition of Altrincham Retail Park**

Category	Number of Units	Proportion of Units (%)
Comparison: Carpets & Flooring	1	5.6
Comparison: Catalogue Showroom	1	5.6
Comparison: Chemist & Drugstore	1	16.7
Comparison: Department & Variety Store	3	5.6
Comparison: Electrical & Other Durable Goods	1	5.6
Comparison: Furniture General	1	5.6
Comparison: Gardens & Equipment	1	5.6
Comparison: Office Supplies	1	5.6
Comparison: Other Comparison Goods	1	5.6
Comparison: Sports, Camping & Leisure Goods	1	5.6
Comparison: Textiles & Soft Furnishings	1	5.6
Comparison: Toys, Games & Hobbies	1	5.6
Comparison: Vehicle Accessories	1	5.6
Convenience: Supermarkets	1	5.6
Leisure service: Fast Food & Take Away	2	11.1
Vacant	1	5.6
<b>Total</b>	<b>18</b>	<b>100.0%</b>

Note: Derived from Nexus Planning site visit of October 2018

10.26 The retail park was conceived following a series of outline and reserved matters approvals in 1994 and 1995. The original permissions restrict the sub-division of the units to no less than 930 sq.m (unless agreed in writing by the local planning authority) and indicate that that not more than 5% of the retail sales area shall be used for the sale of food (Condition 5 attached to outline permission reference

H/OUT/39995). As such, other than the sale of ancillary food from the units, the retail park cannot be used for the sale of convenience goods but can be used for the sale of all comparison goods.

10.27 There have been a series of permissions granted at the retail park which have achieved incremental changes to the use of the floorspace, the sub-division of the units and refurbishment of the elevations. In September 2014, permission was granted to vary the condition on the route planning permission to allow the sale of ancillary food and drink goods to enable B&M to trade from the retail park.

10.28 Permission was granted in 2018 for the refurbishment of the McDonalds's unit, to bring it in line with the company-wide improvements to create new entrance features, new canopies and new customer screens to order food from. Subsequent to this, KFC committed to taking the former Pizza Hut unit on the other side of George Richards Way.

10.29 The former B&Q unit is located off Atlantic Street to the south of Altrincham Retail Park. Two applications have recently been determined by the Council relating to the B&Q unit and the adjacent Aldi unit.

10.30 Firstly, an application for the demolition of part of the former B&Q unit, relocation of the Aldi to new, purpose built premises and the change of use of the existing Aldi to Use Class D2 (reference 96088/FUL/18) was granted planning permission in June 2019.

10.31 Secondly, planning applications (references 92478/FUL/17 and 96386/FUL/18) to change the use of the floorspace and subdivide the former B&Q into three distinct units were granted in February 2018 and March 2019 respectively. Atlantic Bowl and The Gym have now opened in parts of the former B&Q unit.

10.32 As a consequence of Altrincham Retail Park accommodating no fashion operators, its offer is somewhat differentiated from that of Altrincham town centre and the Trafford Centre. Applications to widen the use or create additional commercial floorspace should be judged on their own merits, but it is important to ensure that the vitality and viability of Altrincham town centre is protected (where possible) through the appropriate control of competing out of centre destinations.

### Composition and Role of Trafford Retail Park

- 10.33 Trafford Retail Park is located approximately 1.3 kilometres to the north of Urmston town centre, adjacent to the M60 motorway and in close proximity to the Trafford Centre. The areas to the east and south of the retail park are predominately residential in nature, and the retail park is therefore well positioned for the north-west Trafford catchment area. The retail park was developed following the grant of permission in May 1996.
- 10.34 The retail park comprises a total of approximately 13,210 sq.m of commercial floorspace with a range of restrictions across the units in terms of the types of goods that can be sold. The park also includes a Pizza Hut, KFC drive-thru, Nando's and McDonald's drive-thru fronting onto Barton Road.
- 10.35 The retail park is anchored by B&M, TK Maxx and Dunelm and smaller than both Altrincham and White City Retail Parks. Trafford Retail Park attracts a total comparison goods market share from residents across the Study Area of 4.4%, perhaps indicating that its offer is not as strong as Altrincham Retail Park. However, 12.8% of the available expenditure generated by Zone B residents is spent at Trafford Retail Park, albeit this is similar to the proportion of such expenditure claimed by Urmston town centre and substantially less than that claimed by the Trafford Centre.
- 10.36 The composition of Trafford Retail Park is summarised at Table 10.5 below, with reference to the sector categorisation used by Experian Goad.

**Table 10.5: Composition of Trafford Retail Park**

Category	Number of Units	Proportion of Units (%)
Comparison: Carpets & Flooring	1	7.1
Comparison: Chemist & Drugstore	1	7.1
Comparison: Department & Variety Store	2	14.3
Comparison: Discount & Variety Stores	1	7.1
Comparison: Other Comparison Goods	1	7.1
Comparison: Sports, Camping & Leisure Goods	1	7.1
Comparison: Telephones & Accessories	1	7.1
Comparison: Textiles & Soft Furnishings	1	7.1
Convenience: Supermarkets	1	7.1
Leisure service: Fast Food & Take Away	4	28.6
<b>Total</b>	<b>14</b>	<b>100%</b>

Note: Derived from Nexus Planning site visit of October 2018

- 10.37 Trafford Retail Park was originally constructed following the approval of outline permission in 1996. Following its construction, there have been numerous applications granted at the site to allow the

relaxation of the permitted range of goods which can be sold from the site to enable the occupation of units by specific retailers. For example, in 2002, permission was granted to enable TK Maxx and Boots to occupy Units 8A and 8b (reference H/52780); in 2005, permission was granted to allow open Class A1 non-food sales across 5,109 sq.m of floorspace (restricted to Units 2, 3, 6 and 8); in 2011, permission was allowed at appeal to enable Home Bargains to occupy Unit 3; and, in 2015, permission was granted to allow B&M to trade from Unit 7. Additional conditions attached to the permissions control the sub-division of the units and to control the use of the floorspace so as to restrict the sale of convenience and clothing and footwear goods in particular from the remaining units.

10.38 In light of the above, Trafford Retail Park, with the exception of TK Maxx and Sports Direct, does not accommodate any fashion retailers. The other operators present sell a range of household and home furnishing goods, along with recreational goods and pet supplies, including Home Bargains, Pets at Home, Sports Direct and Carpetright. The park is formed as a terrace of units fronting onto a large expanse of free car parking.

10.39 The retail park currently has one convenience goods operator, this being The Food Warehouse. However, a recent application for the erection of a Use Class A1 retailer and drive-thru unit (reference 94865/HYB/18) was approved in December 2018 on land at Neary Way to the immediate south of the retail park (known as Phase 2). The application was a resubmission of the same development approved by the Council in 2015. The foodstore is intended to be occupied by Aldi. This would work to further expand and diversify the retail park's offer and, whilst the Council has determined that the development would not have a significant adverse impact on the town centre, the scheme could still potentially draw shoppers away from Urmston town centre, particularly given its ease of access and adjacent car parking provision.

10.40 Trafford Retail Park currently comprises a range of convenience and comparison operators. In terms of the comparison operators present (and the current restrictions over the floorspace), these offer a range of both bulky and non-bulky comparison goods, including household furnishings, carpets and electrical goods, along with pet products and supplies, sports and outdoor equipment and chemist goods. The range of Class A3/A5 operators also encourage additional trips to the retail park from the surrounding highways network. Phase 2 of the Retail Park will seek to further diversify the offer.

10.41 Whilst Urmston town centre (the closest centre to Trafford Retail Park) does have a range of independent retail and leisure operators which ensure that the town centre is qualitatively different to

the offer of the retail park, there are some overlaps between the two, particularly with regard to the offer provided within the larger national multiple stores. As such, it is important that the Council continues to carefully assess additional planning applications which seek to further diversify the offer at the Retail Park including proposals submitted to loosen the controls over the floorspace.

### Composition and Role of White City Retail Park

- 10.42 White City Retail Park is located approximately 2.2 kilometres to the north east of Stretford town centre. It is located immediately adjacent to the A56 at the junction of White City Circle and is highly accessible to the surrounding catchment by private vehicle. It is also in close proximity to a number of bus stops. On the opposite side of the A56 are two additional bulky operators occupied by Harveys and DFS, and two additional leisure units occupied by KFC and Harry Ramsden's.
- 10.43 The main retail park located to the south of the A56 includes operators such as Currys PC World, DFS, Oak Furnitureland, Furniture Village, Aldi and M&S Foodhall. The Park attracts a total comparison goods market share from residents across the Study Area of 4.6%, which is slightly higher than Trafford Retail Park but still substantially less than Altrincham Retail Park. We estimate that the retail park will also benefit from a relatively substantial level of inflow of comparison and convenience expenditure due to its location on the edge of the Borough, and on an arterial route running into and out of Manchester city centre and Salford. As such, the retail park is likely to benefit from a proportion of trade from pass-by trips from those travelling along Chester Road.
- 10.44 We set out at Table 10.6 a summary of the composition of the retail park, with reference to the sector categorisation used by Experian Goad.

**Table 10.6: Composition of White City Retail Park**

Category	Number of Units	Proportion of Units (%)
Comparison: Discount & Variety Stores	1	4.3
Comparison: Furniture Fitted	1	4.3
Comparison: Furniture General	8	34.8
Comparison: Vehicle Accessories	1	4.3
Convenience: Supermarkets	3	13.0
Leisure service: Sports & Leisure Facilities	1	4.3
Leisure service: Fast Food & Take Away	3	13.0
Vacant	5	21.7
<b>Total</b>	<b>23</b>	<b>100.0%</b>

Note: Derived from Nexus Planning site visit of October 2018

- 10.45 The offer at White City Retail Park is mixed and is reflective of the type of goods that are purchased in out of centre locations. In particular, we note that White City Retail Park does not accommodate any clothing and footwear retailers, and therefore does not compete with any of the four town centres in respect of this sub-sector.
- 10.46 A series of applications have been permitted at White City over the past decade to expand the floorspace, relax the restriction over the types of goods which can be sold and modernise the external appearance of the park. These 'incremental' changes have resulted in a retail park which now offers a wide range of both comparison and convenience operators. However, it is important to note that the overall comparison goods market share secured by White City has in fact reduced since the previous survey, but this is likely due to the wider convenience goods offer now present compared to 2007, which has reduced the floorspace available for the sale of comparison goods.
- 10.47 One particular new chapter in the planning history for the retail park, was the issuing of a Certificate of Lawful Use or Development (LDC) in August 2008 (reference H/CLD/69691), which permitted the use of the three units to the east of the park (then occupied by Currys, Furniture Village and CSL), which allowed the sale of convenience goods from the entire floorspace, as no condition was imposed on the controlling permission to restrict the sales. Subsequent to the issuing of the LDC, an appeal was dismissed by the Secretary of State in 2011 for the construction of a 9,036 sq.m (gross) foodstore on the site (appeal reference APP/Q4245/A/10/2127223).
- 10.48 More recently, permission was granted to allow the amalgamation of Units 17 and 18 to enable Aldi to occupy the unit. This permission ultimately revoked the ability to use unit 3 for the sale of convenience goods as referred to in the LDC, and 'swapped' this use to Units 17 and 18, therefore only resulting in a very limited uplift in permitted convenience goods floorspace at the site.
- 10.49 As a result of the series of planning permissions at White City, the retail park has now substantially improved in appearance, and is now a modern, attractive retail park with a wider range of operators.
- 10.50 Indeed, an application (reference 95204/FUL/18) for the reconfiguration and extension of an existing Use Class A3 unit (formerly occupied by Pizza Hut) was approved in September 2018. Work is underway to implement this permission, and it is understood that the future tenant will be Nando's, further increasing the park's food and drink offer.

10.51 Whilst White City Retail Park has been recently refurbished to create a modern destination, it is still principally occupied by bulky retailers including Bensons for Beds, Dreams, Furniture Village, SCS and Wren Kitchens and therefore provides an important function to residents in Trafford and beyond. However, the recent refurbishment of the Park has enabled the overall offer to expand to include convenience operators consisting of Aldi, M&S Simply Food and Iceland, along with the sale of some convenience items from the Home Bargains. The remaining controls over the floorspace within the Retail Park provide the Council with sufficient control over potential future operators and the implications this could have on the health of the defined centres (and particularly Stretford).

### Summary and Conclusions

10.52 The out of centre retail provision within Trafford is varied and well distributed across the Borough. The Trafford Centre is the dominant out of centre destination within the Borough, and attracts the highest proportion of comparison shopping trips from residents within Trafford, which is unsurprising given its wide offer of both Class A1 and A3/A5 operators.

10.53 The out of centre retail parks at Altrincham, Trafford and White City each have a broad offer which goes beyond the 'traditional' retail park provision of offering just bulky goods. White City Retail Park is bulkier in nature, and includes a wide range of furniture and electrical operators but does not include a DIY or garden product retailer. Both Altrincham and Trafford Retail Parks include operators providing a wider range of goods including sports goods, chemist goods, household goods and some fashion goods. All three retail parks (and the Trafford Centre) also include operators selling convenience goods. The retail parks are also well served by ancillary Class A3/A5 operators, which add to the overall offer of the out of centre destinations.

10.54 In addition to the above, the standalone B&Q store at Trafford Park and the Homebase at Altrincham Retail Park also serve the Borough from a DIY and gardening perspective, albeit it is noted that the administrative area was previously better served through the provision of B&Q stores at Old Trafford and Altrincham.

10.55 Overall, we consider that Trafford is well served by out of centre retail floorspace, which meets the needs of residents through the provision of a range of operators who otherwise could not always occupy floorspace within one of the four town centres within Trafford. However, it will be important for the Council to continue to monitor applications for the potential expansion of floorspace or

relaxation of use due to the potential implications such applications could have on the health of defined centres within the Borough.

## 11.0 Summary and Recommendations

### Key Findings: Retail

- 11.1 The floorspace requirements identified in this Study are of some relevance to the determination of future planning applications, as they reflect the additional floorspace that could likely be accommodated in the Borough whilst allowing existing floorspace to benefit from turnover growth, such that the existing provision continues to trade in a viable manner. However, this is dependent on additional retail growth being brought forward in appropriate locations and the identification of an expenditure surplus does not necessarily mean that new floorspace can be accommodated without unacceptable adverse impacts arising within defined centres. In this regard, it is relevant to note that Trafford has a significant number of vacant commercial properties and it will be important to try to bring about the reuse and reoccupation of such floorspace, before further increasing the stock of out of centre floorspace.
- 11.2 As such, the identification of an expenditure surplus does not necessarily merit the allocation of additional retail floorspace in edge or out of centre locations, particularly when vacant units remain available within defined centres. Conversely, it is important that the below figures are not interpreted as a strict 'cap' on development as there is no test of 'need' set out in the NPPF. Instead, future proposals for additional retail floorspace should be assessed to determine their compliance with the relevant policies of the NPPF and the development plan.
- 11.3 As identified at Section 8 of this report, there is an identified convenience goods expenditure surplus that could support between 2,600 sq.m and 4,500 sq.m of additional convenience goods floorspace at 2019, increasing to between 6,800 sq.m and 11,600 sq.m at 2037. Over the ten year period to 2029 (which is identified in the new NPPF as being of particular relevance for plan-making purposes), the identified capacity equates to between 4,600 sq.m and 7,900 sq.m of additional convenience goods floorspace.
- 11.4 It is important to reiterate that our assessment is based on additional convenience goods floorspace coming forward in the shape of committed development (most notably the proposed discount foodstore adjacent to Neary Way at Trafford Retail Park). If such development is not delivered in practice, there will be additional convenience goods capacity across the short to medium term.

**Table 11.1: Potential Requirement for Convenience Goods Floorspace in Trafford Borough**

	2019 (sq.m)	2022 (sq.m)	2024 (sq.m)	2027 (sq.m)	2029 (sq.m)	2032 (sq.m)	2037 (sq.m)
Minimum Convenience Goods Floorspace	2,600	3,000	3,400	4,100	4,600	5,400	6,800
Maximum Convenience Goods Floorspace	4,500	5,100	5,700	7,000	7,900	9,300	11,600

Source: Table 6d of Appendix 6

- 11.5 There is a need to monitor commitments and, if such development is not delivered in practice, the identified expenditure surplus will increase further.
- 11.6 In respect of qualitative deficiencies in convenience goods provision, we believe that there may be the ability to accommodate additional convenience goods floorspace at:
- Sale Moor, subject to there being no unacceptable impact on the district centre; and
  - New Carrington and Timperley Wedge, in association with the significant housing development proposed through the Greater Manchester Spatial Framework 2019 Draft allocations.
- 11.7 The likely scale of convenience goods development that could be brought forward in Sale Moor will be dependent on the size and location of any potential site, and the resulting impacts arising at the existing district centre. The only site we are aware of in this location which offers genuine potential to accommodate such a development is the Warrener Street car park site, which already benefits from planning permission for a foodstore development, albeit the Council's Executive has previously resolved<sup>69</sup> to progress a mixed-use development focused around a smaller convenience store, 16 residential dwellings and 50 car parking spaces.
- 11.8 Whilst we are aware that there is uncertainty in respect of the extent of the Warrener Street car park that could be assembled for redevelopment, we believe that the site continues to have potential to accommodate a foodstore development of a scale that can support main food shopping trips. We are aware that the Council has very recently commissioned consultants<sup>70</sup> to undertake a Sale Moor Place Plan which will reconsider preferred uses for the site in the context of the findings of this Retail and Leisure Study.
- 11.9 The level of housing provision planned in Carrington (equating to 6,100 dwellings across the period to 2037 and, potentially, up to 10,000 dwellings in total) and at Timperley Wedge (equating to 2,400

<sup>69</sup> At Executive committee on 26 June 2017

<sup>70</sup> The consultancy team comprises Nexus Planning, Buttress, Curtins and Gillespies

dwellings across the same timeframe), allied to existing expenditure in the area<sup>71</sup>, is such that that each allocation is also likely to be able to support a food supermarket as part of the development.

11.10 Whilst it will be important to more precisely define the exact nature of the convenience goods retail provision as detailed proposals come forward for the allocation sites, we believe that each of the above destinations has the potential to accommodate a foodstore with a convenience goods floorspace of approximately 1,000 sq.m which is likely to cater for some main food shopping needs. On this basis, we believe that the three sites could potentially accommodate around 4,000 sq.m of convenience goods floorspace.

11.11 We are aware that there is developer interest in providing additional residential development on the southern side of the Manchester Ship Canal, around the proposed Wharfside Metrolink stop. In this regard, planning permission (reference 90738/FUL/17) was approved in December 2017 for the redevelopment of two residential towers, with two commercial units. Whilst high density development in this general location has the potential to substantially increase the residential population on the Trafford side of the canal (albeit from a relatively low base), we believe that new residents will be afforded good access to existing foodstores on Chester Road<sup>72</sup> and day-to-day provision at Media City. We therefore do not envisage a need for any further provision in this area for the foreseeable future.

11.12 Additional convenience goods floorspace is also likely to be delivered over the plan period in the form of small-scale convenience stores and petrol filling station kiosks which meet localised needs, and through the extension of existing stores. On this basis, we believe that, subject to the identification of appropriate sites and there being no unacceptable town centre impacts arising as a consequence of development, securing additional foodstore provision at Carrington, Sale Moor and Timperley Wedge should address identified quantitative capacity in the period to 2029 (i.e. the ten year period identified as being of principal relevance for plan-making purposes by paragraph 85 of the NPPF). However, we do not anticipate that any foodstore provision at Carrington and Timperley Wedge would be built out in the short term as prospective operators would likely require a meaningful element of the housing element of these allocations to be built out and occupied before trading from a nearby foodstore.

11.13 In terms of comparison goods, as Table 11.2 demonstrates, we estimate that there is capacity to support

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<sup>71</sup> Given the relatively strong existing performance of existing convenience goods provision within Study Area Zones A and B

<sup>72</sup> Including the Aldi, Lidl and Tesco stores

between 3,600 sq.m and 6,200 sq.m of additional comparison goods floorspace across Trafford Borough by 2027, increasing significantly to between 36,800 sq.m and 63,100 sq.m at 2037. Across the ten year period to 2029, there is a capacity for between 7,500 sq.m and 12,900 sq.m of comparison goods floorspace. As identified at Section 8 of this report, our quantitative assessment takes into consideration comparison goods expenditure which originates within and immediately adjacent to the Study Area, but does not make full provision for the level of inflow from across the region that is claimed by the Trafford Centre.

11.14 Whilst our assessment of capacity takes into account local expenditure that is claimed by the Trafford Centre, this does not, of itself, justify any future proposals to further extend the centre<sup>73</sup>.

11.15 In accordance with 'town centre' first principles, it will be important to try to accommodate future comparison goods floorspace within the Borough's defined centres (or on well-located edge of centre sites), rather than at out of centre locations. In considering any future proposals for large scale out of centre retail floorspace, it may also be necessary to consider whether such floorspace could be accommodated in Manchester city centre, given its close proximity and important role in meeting some of the comparison goods retail needs which arise within Trafford Borough.

11.16 In practice, it is evident that a significant amount of the identified comparison goods capacity could be accommodated through the reuse, refurbishment or redevelopment of vacant floorspace in the Borough. In this regard, our healthcheck assessments identified 34,420 sq.m of vacant commercial floorspace across the eight centres surveyed. As such, we do not believe that there is any pressing requirement to allocate any sites in Trafford Borough (beyond the Altair and Sale town centre redevelopment sites) to accommodate further comparison goods floorspace.

**Table 11.2: Potential Requirement for Comparison Goods Floorspace in Trafford Borough**

	2019 (sq.m)	2022 (sq.m)	2024 (sq.m)	2027 (sq.m)	2029 (sq.m)	2032 (sq.m)	2037 (sq.m)
Minimum Comparison Goods Requirement	-6,100	-4,200	-1,800	3,600	7,500	23,500	36,800
Maximum Comparison Goods Requirement	-10,500	-7,200	-3,200	6,200	12,900	40,300	63,100

Source: Table 6d of Appendix 6

11.17 Therefore, the headline finding from the comparison goods capacity assessment is not that there is a pressing requirement for 'additional' retail floorspace in the short to medium term. Instead, the current

<sup>73</sup> Beyond the recent Barton Square planning permission, which was approved in May 2019

priority is to find new uses for some of the existing stock.

### **Key Findings: Leisure**

- 11.18 In terms of the leisure sector, we believe that the Borough is generally well provided for in respect of bingo halls, casinos, cinemas and ten pin bowling alleys (these being the commercial leisure uses that require a substantial site to accommodate them and therefore of particular interest in studies of this nature).
- 11.19 Of these four sectors, we envisage that only the cinema sector is likely to be the subject of any significant change in provision in the next few years. In this regard, it is proposed that Sale town centre is to be the subject of a six-screen cinema development which would be accompanied by flexible retail and leisure units, and residential dwellings. Whilst we do not believe that there is a particular quantitative need for such a development (given the availability of cinema provision at Altrincham town centre, the Trafford Centre and Manchester city centre), Sale town centre is in clear need of regeneration and further attractors to bring residents into the centre (particularly in the evening). We believe that there will be clear benefits arising at Sale town centre as a consequence of the proposed Maloneview development.
- 11.20 In terms of the food and drink sector, Altrincham's offer has grown considerably in recent years (subsequent to the rejuvenation of its market) and the centre is now an extremely popular destination in which to socialise. This is evident both through the results of the household survey (which confirm that it is the most popular venue in the Study Area for both eating and drinking), and also the healthcheck assessment which confirms an increasing leisure service sector. We believe that Altrincham is well placed to continue to perform well in meeting the leisure needs of the surrounding population.
- 11.21 Urmston also 'punches above its weight' in terms of the food and drink sector, and is particularly popular as an eating and drinking venue. Its offer will improve further subsequent to the implementation of the proposed Market 41 redevelopment of its market which will provide a food hall in a similar vein to Altrincham's Market House.
- 11.22 We believe that significant opportunity exists in respect of the food and drink sector in Sale and that the proposed redevelopment of The Square should act as the catalyst in this regard. The type of accommodation proposed as part of Maloneview's proposed development may well be attractive to national multiple operators, and should provide an opportunity for a modernised offer to evolve. We

envisage that the food and drink sector would be the principal beneficiary of the delivery of a cinema over the short to medium term, but that the redevelopment of The Square should reinvigorate Sale such that it would also become a more attractive destination for comparison goods retailers over time. Notwithstanding this, it is important to recognise that Sale's existing evening economy already supports a number of licensed premises around Sale Waterside and Northenden Road, and that this part of the town centre is already a popular destination, particularly at the weekend.

11.23 Stretford's food and drink offer has perhaps historically been restricted by the format of the covered Stretford Mall shopping centre. However, Stretford Foodhall is now open within a unit in the Mall's Chester Road frontage which comprises a coffee shop, modern convenience store and 'streetfood' market. Further food and drink offer is expected to come forward along the A56 frontage, diversifying the offer of the centre.

11.24 In addition, the Lacy Street car park site and the Essoldo cinema could offer future potential to accommodate additional food and drink units. Accordingly, whilst we envisage that Stretford will likely continue to have a strong retail focus, there are clear opportunities to increase its food and drink offer, and to increase footfall during the evening.

### **Key Findings: Town Centres**

#### Altrincham Town Centre

11.25 Altrincham is a historic market town and is, by some distance, the largest centre in Trafford. It has a particularly strong service sector, which has evolved significantly in recent years as a consequence of the regenerated Altrincham Market and through attracting a range of new independent operators. Consequently, Altrincham has developed a unique offer which supports substantial footfall.

11.26 The convenience and comparison goods provision in Altrincham, in respect of floorspace and number of units, is broadly in line with UK national average levels and the average figure for Trafford's four town centres.

11.27 Altrincham's principal strength is considered to be its strong leisure service offer, of which Altrincham Market is a key anchor. The centre also benefits from a good environmental quality, with a strong public realm and a good level of accessibility with links from Altrincham Interchange to areas throughout Trafford and Greater Manchester.

- 11.28 Whilst Altrincham is considered to be a highly vital and viable centre, it could perhaps improve further through additional diversification in its offer. The growth in the amount of residential development in particular, should help to further strengthen the leisure offer and has the potential to encourage further investment in the town. In this regard, we are aware that, after a number of 'false starts', a new contractor has been appointed and the first phase of Altair (which has a residential focus) is due to commence on site shortly.
- 11.29 In addition, we note that the Council acquired, in February 2018, the Grafton Centre in order to bring about its redevelopment. In August 2018, an initial market testing exercise sought expressions of interest from potential development partners. The exercise resulted in 16 responses, proposing mixed-use schemes which comprised retail, leisure, food and drink, and residential uses. We understand that a development brief is now to be prepared for the site, but that, based on the expressions of interest received, it is highly unlikely that the site will accommodate a significant uplift in respect of retail floorspace compared to the existing level of provision.

#### Sale Town Centre

- 11.30 Sale town centre is focussed around The Square Shopping Centre (which dates from the 1970s) and the pedestrianised part of School Road (which lies between Washway Road to the east and Springfield Road to the west). The centre serves a relatively extensive catchment, with residents of Sale, Sale Moor, Ashton-upon-Mersey and Brooklands looking to the town centre to help meet their retail needs.
- 11.31 Whilst the shopping centre is of a somewhat tired appearance, the town centre is generally well maintained and is underpinned by its strong convenience goods retail offer (the centre accommodates Aldi, Sainsbury's and Tesco).
- 11.32 The make-up of Sale has diversified in recent times with the Sale Waterside development. This included a number of community facilities, retail and leisure units and a considerable area of public realm which has increased the interaction between Sale town centre and the Bridgewater Canal.
- 11.33 However, Sale has a vacancy rate in excess of the national average with respect to floorspace and units when considering the total provision within the Goad boundary. The high figure in respect of the proportion of floorspace that is vacant arises, in part, due to the three large units not currently being occupied: 22 Washway Road; the former Government Buildings on Cross Street; and, the former Vao restaurant at Sale Waterside. If these units were reoccupied, the overall quantum of vacant floorspace

would reduce significantly. Focussing on the vacancy rate within the defined town centre boundary, the proportions are substantially lower, indicating that a proportion of the vacant stock is located on the periphery of the boundary.

11.34 Sale town centre would significantly benefit from a more diverse and modernised offer, in order that its appeal extends further than convenience goods shopping. Indeed, the proposed redevelopment of The Square Shopping Centre to create new retail, leisure and residential floorspace will provide space for new operators within the town centre and encourage additional footfall both throughout the day and the evening. The delivery of this scheme will be an important factor in helping to maintain Sale's vitality and viability and providing a diverse offer to its residents.

11.35 Improvements to the public realm and the centre's evening offer could help underpin the centre's future vitality and viability, and help attract further development. In this regard, we note that Trafford Council commissioned Planit-IE and Civic Engineers to produce a Public Realm and Movement Strategy for Sale town centre, to improve the accessibility and movement across the centre. Continuing to deliver the strategies set out in the document will assist in improving the overall movement and public realm aesthetics within the town centre. Residential development in the area could also improve footfall and help support local businesses.

#### Stretford Town Centre

11.36 Stretford is the smallest town centre in Trafford and is located in a densely populated area, and is the northernmost town centre in Trafford. It is located at a prominent location on the A56 corridor, with good public transport links. The centre is dominated by Stretford Mall which was part of the late 1960s/early 1970s redevelopment of the town and also includes a number of important community facilities are located in Stretford, such as Stretford Public Hall and Stretford Library.

11.37 The centre has suffered in recent years due to competition from other town centres and out-of-centre retail destinations, resulting in an increased vacancy rate. As a consequence, there have been significant changes at Stretford Mall the past few years, including the redevelopment of surface car parking on the western side of the Mall for an Aldi foodstore and the demolition of the southern part of the Mall (which includes the former market hall and O'Brien's public house. However, the town centre is still subject to extremely high vacancy rates and has an environmental quality which is moderate, notwithstanding the recent improvements around the Chester Road entrance to the mall.

11.38 Whilst Stretford contains some important local facilities (and its offer has been boosted by the Aldi), its future vitality and viability is uncertain. However, Stretford is surrounded by large residential areas and the demolition of the southern part of the Mall provides an opportunity to introduce new uses which could support additional footfall and activity in the area. Indeed, a number of proposals have emerged in and around Stretford town centre in recent times (including the Stretford Masterplan, which was adopted in January 2018, and the proposed mixed use development at Lacy Street) that will provide significant opportunities to improve the retail and leisure offer of the centre, and to improve the environmental quality of Stretford. As identified above, Stretford Foodhall has now opened within Stretford Mall, in a unit facing Chester Road. The Foodhall is principally a destination for eating and drinking, and has helped to modernise Stretford's offer considerably and help increase footfall in the evening. Stretford has lost two traditional pubs in recent years (O'Brien's and The Drum<sup>74</sup>), and the provision of modern food and drink operations within the centre has the potential to make a significant contribution to its future viability.

#### Urmston Town Centre

11.39 Urmston town centre serves the communities of Urmston, Davyhulme and Flixton and is focussed around Eden Square, which replaced the dated shopping precinct which was demolished in 2007. Other key assets in the centre include Urmston Market and the Sainsbury's superstore. The centre also benefits from its proximity to Urmston railway station. Despite the proximity of competing retail destinations, such as Trafford Retail Park and the Trafford Centre, Urmston has successfully managed to maintain a vacancy rate below the national average and the average for Trafford's town centre. The centre accommodates a diverse range of retailers and services that are considered suitable to serve the needs of the Urmston community. The realisation of the M41 redevelopment of Urmston Market is thought to offer an opportunity to further diversify the service offer.

11.40 Notwithstanding its overall positive indicators of vitality and viability, the centre is divided into two distinct 'halves', with considerable lower levels of pedestrian activity noted to the south of the train line. Consideration should be given to redeveloping areas of dilapidation or vacancy in this area, most notably Victoria Parade on High Road. However, taken as a whole, Urmston is considered to be a vital and viable centre.

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<sup>74</sup> The latter of which is now occupied by a drive-thru McDonald's

### Key Findings: District and Local Centres

11.41 Our assessment of the three district centres of Hale, Sale Moor and Timperley, and the local centre of Partington, has demonstrated that each clearly provides a more localised role, providing a range of services for the surrounding residential areas which typically relate to day to day needs. We summarise the key findings in respect of each centre below.

- **Hale** is the largest district centre in Trafford and provides a range of high end and independent operators. The centre is focussed around a strong food and drink offer and provides a range of services considered suitable to serve the needs of surrounding residential areas. It is considered to be a vital and viable district centre with opportunities to enhance the overall convenience and comparison goods offer.
- **Sale Moor** is a well-used district centre with a considerable range of service and comparison goods operators. The centre has a good level of accessibility, and a generally functional environmental quality. However, the centre is dominated by vehicle movements as a result of its location adjacent to a major road junction. Our qualitative retail assessment has identified that Sale Moor would benefit from a food supermarket, subject to there being no unacceptable impact on the centre.
- **Timperley** district centre is focussed around the junction of Park Road and Stockport Road, which consequently results in a high number of vehicle movements through the centre. These reduce the overall accessibility of the centre for pedestrians. However, Timperley has a low vacancy rate, benefits from a good mix of operators, and is also considered to be a vital and viable district centre. Whilst Timperley district centre will likely benefit to some degree from the provision of residential dwellings as part of the Timperley Wedge Draft Greater Manchester Spatial Framework allocation, this proposed development is to have its own local centre<sup>75</sup>. As such, it will be important to ensure that the Timperley Wedge local centre is complimentary in terms of its scale, role and location to that of Timperley district centre.
- **Partington** local centre consists of a small, modern parade of shops which was completed and opened in 2014 following the demolition of the dated shopping precinct. It is considered to be generally well maintained and meets some of the day to day needs of the surrounding residential community. Its importance to the local community is heightened as a consequence of the area's relative remoteness from other centres. Whilst this Study has identified a requirement for an additional food supermarket to be brought forward as part of the New Carrington Draft Greater

<sup>75</sup> Which may, in line with the recommendations of this Study, accommodate a new foodstore of an appropriate scale

Manchester Spatial Framework allocation, we envisage that this would be part of Carrington itself and that an appropriately-sized store could likely be accommodated without unduly impacting on the day to day role of Partington. Given its role and function, we recommend that Partington remains a local centre.

### **Recommendation: Principal Centres Boundaries**

- 11.42 Paragraph 85 of the revised NPPF requires local planning authorities to **'define the extent of town centres and primary shopping areas'**, with there now being no specific requirement to identify primary and secondary frontages. It is apparent from the Government's Response to the Draft Revised National Planning Policy Framework Consultation document (July 2018) that this change seeks to encourage a more positive and flexible approach to planning for the future of town centres.
- 11.43 Annex 2 of the revised NPPF indicates that a primary shopping area is the **'Defined area where retail development is concentrated.'**
- 11.44 Annex 2 also identifies that a town centre is the **'Area defined on the local authority's policies map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area.'**
- 11.45 Notwithstanding the above, we believe that the offer in Trafford's centres is generally varied and that the retail uses are not typically located in a manner which lends itself to the identification of a primary shopping area ('PSA').
- 11.46 We note that the draft Land Allocations Plan (2014) Policies Map included town centre boundaries, primary shopping areas and primary and secondary frontages for the three town centres of Sale, Stretford and Urmston. However, the Composite Policies Map<sup>76</sup> does not designate primary shopping areas within the defined centres, and other than for Altrincham (which we discuss in more detail below), we do not believe that there is any requirement to differentiate between a PSA and a wider town centre boundary within the three town centres. Retail uses within each of the three centres are spread out across the extent of the town centre boundaries, and there are no specific areas within which retail uses are more concentrated than others within the town centres. As such, identifying a PSA within the three centres would not be appropriate, particularly when referring to the guidance contained within the

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<sup>76</sup> Which reflects the 'saved' land use policies of the Revised Trafford UDP and the land use policies of the Trafford Local Plan Core Strategy

NPPF.

- 11.47 Based on the above, for each of these centres, we have considered the existing centre boundary (as defined by the Composite Policies Map) and believe that, in each case, the boundary continues to represent the extent of the centre 'on the ground'.
- 11.48 We do note that the January 2018 Refreshed Stretford Masterplan seeks to deliver mixed-use developments on the Lacy Street car park and Essoldo Cinema sites, but to date, these schemes have not yet progressed to a stage which better indicates precisely the types of uses which will be delivered or indeed when they may materialise. As such, the boundary for Stretford (which accords with the adopted local plan boundary) reflects the range of uses and extent of such uses which are currently present within the centre.
- 11.49 The single centre where we believe that there is a requirement to revise the current town centre boundary is Altrincham.
- 11.50 The current Altrincham town centre boundary is identified by the Altrincham Town Centre Neighbourhood Business Plan. We have reviewed this boundary with reference to our town centre survey and the NPPF Annex 2 definition of a town centre.
- 11.51 On this basis, we recommend a single revision, relating to the area bounded by: Woodlands Road to the north; Stamford New Road to the east; Victoria Street and Stamford Street to the south; and, Church Street to the west. This area both accommodates a high concentration of main town centre uses (including large-scale office premises) and is sufficiently close to the retail core of Altrincham to accord with the Annex 2 definition. The area is contiguous with the remainder of the town centre and is also easily accessible, given that it lies on the 'right side' of Church Street and Woodlands Road.
- 11.52 The Altrincham Town Centre Neighbourhood Business Plan also defines a primary shopping frontage, but not a PSA. Altrincham is sufficiently large to merit the designation of a PSA and we believe that the area that accommodates a reasonably significant proportion of retail uses is bounded by Stamford Street to the north, Market Street to the west, Regent Road to the south and Stamford New Road to the east. The area encompasses the retail uses access of the pedestrianised areas off George Street, along with Altrincham Market, Stamford Quarter and properties on both sides of Stamford New Road.
- 11.53 It is accepted that, given Altrincham's varied offer, some of these areas accommodate substantial food

and drink uses (including Altrincham Market itself). However, all parts of the proposed PSA currently support retail uses and will continue to do so in the future. The exclusion of areas such as Greenwood Street and Stamford New Road from the PSA would result in a requirement for retail proposals in such areas to address the requirements of the sequential and impact tests. We believe that this would be inappropriate given the location of these areas and the type of premises provided.

11.54 We set out our recommendations in respect of Altrincham's PSA and town centre boundary (and confirm the extent of the other town centre boundaries) at Appendix 8.

11.55 The first iteration the of NPPF (published in March 2012) recommended that local authorities additionally define primary and secondary frontages and set policies that make clear which uses will be permitted in such locations. However, this policy requirement is deleted from the revised version of the NPPF. The Ministry for Housing, Communities and Local Government has confirmed that the deletion of this requirement is to encourage a more positive and flexible approach to planning for the future of town centres due to the rapid changes taking place in the retail and leisure industries. However, the removal does not preclude local planning authorities from identifying primary and secondary shopping frontages where their use can be justified.

11.56 However, in light of the above and in accordance with the NPPF, we do not consider there to be any benefit in defining primary and secondary frontages in Altrincham town centre due to the fact that retail and leisure uses are relatively mixed across the centre and in planning for the future of the centre, the take up of vacant units by a diverse mix of retail and service uses should be encouraged across the primary shopping area as a whole to help maintain its vitality and viability.

#### **Recommendation: Centres Hierarchy**

11.57 Town centres are defined at Annex 2 of the NPPF, however there is no longer any definition provided in the NPPG or Town Centre PG to differentiate between centres of different sizes.

11.58 The now superseded Planning Policy Statement 4: Planning for Sustainable Growth provided definitions of what forms a town, district and local centre at Annex B. These definitions are considered to be useful in setting the context of the centre hierarchy for Trafford. The definitions are provided below:

- **Town centre** - Town Centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas

they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability.

- **District centre** - District centres will usually comprise of groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.
- **Local centre** - Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.

11.59 The centres assessed across the Borough have been categorised by the different levels in the hierarchy by considering a range of factors to ensure that they are proportionate to the function in which they perform. Factors including the mix of uses provided, the social and community uses in the centres, the number of units and amount of floorspace present along with the overall role and function that the centres play within their locality, including the location of the centres within the administrative area.

11.60 We believe that Altrincham town centre is clearly the principal town centre in the Borough and has a catchment area which is more extensive than the other three town centres. By virtue of its retail and leisure offer, it is able to attract custom from across the Borough. Notwithstanding this, Sale, Stretford and Urmston continue to perform an important town centre role and each is underpinned by at least one foodstore which is capable of supporting main food shopping trips.

11.61 The district centres are clearly of a lesser role and function and although still provide an important retail, service and leisure offer to the surrounding catchments, this is on a smaller scale to the town centres. In terms of Partington, the overall offer is substantially less than the district and town centres and do not include the range of non-retail services which can be found in district centres. As such, its designation as a local centre is appropriate.

11.62 As such, we believe that the hierarchy of centres in the Borough identified at paragraph 19.11 of the Core Strategy remains appropriate. On this basis, we recommend that the hierarchy has four tiers as follows:

- **Main town centre:** Altrincham;
- **Other town centres:** Sale, Stretford and Urmston;
- **District centres:** Hale, Sale Moor and Timperley; and
- **Local centres,** including Partington.

### **Recommendation: Local Impact Thresholds**

11.63 Paragraph 89 of the NPPF states that it is appropriate to identify thresholds for the scale of edge of centre and out of centre retail and leisure development that should be the subject of an impact assessment. Any such threshold policy applies only to the impact test (all planning applications for main town centre uses that are not in an existing centre and not in accordance with an up-to-date development plan will generally be the subject of the sequential test<sup>77</sup>).

11.64 The purpose of applying an impact threshold within the development plan which deviates from the national threshold of 2,500 sq.m, is to allow the Council to retain appropriate control in respect of the potential for development to impact on the future health of defined centres within the Borough. By applying a lower threshold, applications for developments which could potentially have a harmful effect on the overall vitality and viability of a defined centre, will need to be supported by a proportionate impact assessment which sets out the potential trade diversion impact assumptions.

11.65 Paragraph 16 of the Town Centres PPG provides specific guidance in relation to floorspace thresholds and states:

**'The impact test only applies to proposals exceeding 2,500 square metres gross of floorspace unless a different locally appropriate threshold is set by the local planning authority. In setting a locally appropriate threshold it will be important to consider the:**

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

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<sup>77</sup> With the exception (in accordance with paragraph 88 of the NPPF) of small scale rural office proposals and other small scale rural development.

- 11.66 Using the above guidance, we set out the justification to support our view that a lower threshold should be applied across the hierarchy of centres within the Borough. To note, the current adopted policy (Core Strategy Policy W2.12) does not provide a locally set threshold for impact assessments, and instead refers to the requirement to demonstrate that the development satisfies the tests outlined in the current government guidance.
- 11.67 It is our view that applying a single threshold that applies to all types of centre in Trafford is not generally appropriate, given the different scale and nature of each of the centres. Instead, we recommend a tiered approach whereby the threshold applied to planning applications at edge-of-centre and out-of-centre locations varies in relation to the role and function of a particular centre.
- 11.68 In considering the setting of a local impact threshold, it is important to give consideration to the type of development (relating to convenience and comparison goods retail uses, and leisure uses) which would, in practice, provide space for key operators who could act to 'anchor' a centre. Should one of these anchor units or operators leave a centre, there will likely be the potential for a significant adverse impact to arise.
- 11.69 As such, where there is genuine potential for an application proposal to divert a material level of expenditure away from a defined centre, or potentially remove a key tenant from that centre, there will likely be a requirement to consider the impacts arising from the proposal in detail.
- 11.70 In respect of lower order centres, the introduction of even a small convenience store nearby (of the type operated by Sainsbury's Local or Tesco Express) may have the potential to impact on the ongoing viability of key operators. Small convenience stores operated by national multiple grocers can generate a relatively substantial turnover. If this is diverted from existing retailers in defined centres, the impact on the overall vitality and viability through the loss of spend and footfall, could be of a significant adverse magnitude.
- 11.71 Therefore, in implementing a local threshold policy, it is considered more appropriate to apply a range of thresholds in accordance with the type of centre the proposed development is proximate to. The thresholds should not only apply to new floorspace, but also to changes of use and variations of condition to remove or amend restrictions on how units operate or trade in practice. We provide our analysis below in respect of the Borough's town, district and local centres.

#### Town Centre Thresholds

11.72 We believe that town centre anchor units will typically provide at least 500 sq.m of gross floorspace. Such a unit could potentially accommodate an operator of importance, which is capable of attracting shoppers to a centre, thus increasing the potential for linked trips.

11.73 We note that there are a relatively limited number of units greater than 500 sq.m in the four town centres and that the vacancy rates vary throughout the defined centres. In summary:

- In **Altrincham town centre** less than 8% of the total stock of commercial units in the town centre have a greater floorspace than 500 sq.m, which includes the large format leisure units which accommodate the Vue cinema, the Pure Gym and Total Fitness gym operators, and the Silver Blades ice rink. The vacancy rate equates to 9.9% of total commercial floorspace and 11.2% of all units.
- In **Sale town centre** less than 12% of all units have a greater floorspace than 500 sq.m, which includes the Sale Leisure Centre and Waterside Arts Centre. The vacancy rate equates to 15.7% of total commercial floorspace and 13.4% of all units.
- In **Stretford town centre** less than 13% of all units have a greater floorspace than 500 sq.m, which includes the Aldi foodstore. This assessment also includes the former Tesco (which remains vacant) and the Pure Gym. The vacancy rate equates to 42.2% of total commercial floorspace and 34.6% of all units.
- In **Urmston town centre** less than 7% of the total stock measures greater than 500 sq.m, which includes the Sainsbury's superstore. The vacancy rate equates to 7.1% of total commercial floorspace and 9.5% of all units.

11.74 In this context, we recommend that the impact threshold of relevance to the four town centres is set at 500 sq.m for both retail and leisure proposals. This threshold would effectively be the default to be applied Borough-wide, should a proposal not fall within the criteria set out below which we recommend is applied to development in proximity to district and local centres.

11.75 The above recommendation is also reflective of the town centre vacancy rates and the potential for out of centre retail developments to become even stronger in the future at the expense of centres' vitality and viability. The four out of centre commercial destinations described in Section 10 all offer a range of comparison goods, which traditionally would have been sold from town centres. As such, the recommendation is reflective of the need to safeguard against the Borough's out of centre retail destinations becoming even stronger at the expense of the health of defined centres.

### District and Local Centre Thresholds

- 11.76 Due to the smaller scale of the district and local centres, and the relatively modest size of most of their commercial units, we consider it appropriate for a lower impact threshold of 200 sq.m to apply to potential development proximate to these centres. This is in keeping with their more localised role and function but demonstrate the potential implications out of centre developments could have on these centres.
- 11.77 Furthermore, the district and local centres are generally anchored by a national multiple convenience store (typically operated by Co-op, Marks & Spencer, Sainsbury's or Tesco). These operators underpin the function of such smaller centres, drawing in custom and encouraging linked trips to the other parts of the centre. Should the viability of such stores be impacted, there is a real risk of the role of the wider centre being undermined. There are relatively few units substantially larger than 200 sq.m in any of the district and local centres; as such, to lose an occupier of this magnitude could have a significant adverse impact on the centre as a whole.
- 11.78 Accordingly, in the local context, 200 sq.m constitutes a significant unit for both the district and local centres. The setting of a lower threshold for the lower tier of centres within the hierarchy will ensure that schemes which have the potential to result in significant adverse impacts are appropriately assessed, in order that appropriate consideration is given to the centres' vitality and viability in considering the acceptability of future development.
- 11.79 For the purpose of drafting future planning policy, it is important to qualify the area to which each local impact threshold will apply. We recommend that the threshold of relevance to the Borough's district and local centres (i.e. 200 sq.m) would be applicable within 800 metres of the boundary of the relevant centre. The distance of 800 metres is broadly commensurate with the potential walk-in catchments of smaller centres and is identified by Guidelines for Providing for Journeys on Foot (The Institution of Highways & Transportation, 2000) as being the 'preferred maximum' acceptable walking distance to a centre. We consider it to be appropriate for the higher threshold of 500 sq.m to apply Borough-wide (i.e. beyond 800 metres of these centres), due to the lesser likelihood of significant adverse impacts arising from retail, leisure and office development.

### Recommended Policy Approach

- 11.80 Based on the above, we are of the view that an impact assessment will be necessary to accompany

proposals for retail and leisure uses (including those relating to mezzanine floorspace and the variation of restrictive conditions) which are not located within a defined centre where:

- the proposal provides a gross floorspace in excess of 500 sq.m gross; or
- the proposal is located within 800 metres of the boundary of district or local centre and is in excess of 200 sq.m gross.

11.81 In our experience, it will only generally be development of a scale greater than these thresholds which could lead to a 'significant adverse' impact, which could merit the refusal of an application for town centre uses in accordance with the provisions of paragraph 90 of the NPPF. The setting of a 'tiered' threshold is consistently accepted by Inspector's at Local Plan Examination and, in our view, acts to appropriately ensure that only those proposals which could genuinely result in an unacceptable impact are the subject of an impact assessment.

11.82 It is important to emphasise that, whilst the locally set threshold would require the submission of an impact assessment for all edge-of-centre and out-of-centre developments exceeding the thresholds, national guidance states that the impact test should be undertaken in a proportionate and locally appropriate way, commensurate to the scale of development proposed. The level of detail would typically be agreed with planning officers during the pre-application process in order to avoid overly onerous requirements that may otherwise restrict and delay development opportunities from coming forward.

## Appendix 1: Map of Study Area and Zones

## Appendix 2: Household Survey Results

## Appendix 3: In-Street Survey Results

## Appendix 4: Town Centre Healthcheck Assessments

## **Appendix 5: District Centres and Partington Local Centre Healthcheck Assessments**

## Appendix 6: Quantitative Capacity Assessment

## Appendix 7: Distribution of Foodstores within Trafford Borough

## Appendix 8: Recommended Town Centre Boundaries

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