NEXUS PLANNING

Trafford Council

Retail and Leisure Study

Executive Summary

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Executive Summary

Instruction and Scope

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[1].

2. The 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.

3. To inform the findings of the Study, Nexus partnered with specialist consultancy NEMS Market Research Ltd in order to obtain empirical evidence through completion of a household telephone survey of 1,000 respondents and in-street surveys in the four town centres.

Planning Policy Context: the National Planning Policy Framework

4. The most recent iteration of the National Planning Policy Framework ('NPPF') was published in February 2019. It recognises that a flexible approach will be necessary to provide for the future vitality and viability of town centres, and incorporates a number of policies that impact on the findings of studies of this nature. 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. In respect of plan-making and the associated planning evidence base, the following policies are of greatest relevance.

5. Paragraph 20 of the NPPF indicates that development plans should set out an overall

[1] 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

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.

6. Paragraph 85 specifically relates to planning for town centres. It indicates that planning policies should:

- define a network and hierarchy of town centres and promote their long-term vitality and viability;
- define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations;
- retain and enhance existing markets;
- allocate a range of suitable sites in town centre to meet the scale and type of development likely to be needed, looking at least ten years ahead;
- 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; and
- recognise that residential uses can play a role in underpinning the vitality of centres.

Market Research

Household Surveys

7. 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. 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.

8. 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 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). The survey results also underpin the quantitative retail capacity assessment. However, in order to consider the flow of expenditure to retail destinations, it is necessary to estimate the population and future convenience and comparison goods expenditure apparent in the Study Area.

9. The household survey results are provided in full at Appendix 2 of the Study. 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.

10. 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.

In-Street Surveys

11. 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.

12. 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.

13. 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);
- 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 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.

Population and Expenditure

14. 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).

15. 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[2]. 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).

16. 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.

[2] This equates to the population growth identified for Trafford Borough by the Office for National Statistics 2016-based subnational population projections

17. 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[3] – 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[4].

18. 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). 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). Using this methodology, Table 1 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.

[3] As identified by the Greater Manchester Spatial Framework 2019 Draft, published for consultation in January 2019

[4] 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

Table 1: 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
Total	440,954	448,978	454,133	462,215	466,496	473,454	484,478	

19. 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.

Convenience Goods Expenditure

20. Taking into account the Study Area resident population and the available per capita convenience goods expenditure, we estimate that £985.7m[5] of convenience goods expenditure originates within the Study Area at 2019. The below Table 2 indicates that available Study Area convenience goods expenditure is forecast to then increase to £1,084.1m at 2037.

Table 2: 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 of main report
In 2017 prices

[5] In 2017 prices, as is every subsequent monetary reference

21. Table 3 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 3: 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 of main report
In 2017 prices

22. 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)[6]. 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

23. For comparison goods, Table 4 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 4: 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 of main report
In 2017 prices

24. The identified increase in comparison goods expenditure growth is substantial, but it

[6] This is a fairly standard split applied in undertaking this exercise

represents a level of annual growth that is more circumspect than that which has been achieved in the past. This is due both the 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 5: 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 of main report
In 2017 prices

Analysis of Out of Centre Provision

25. 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.

26. 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.

27. 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.

28. 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.

Assessment of Retail Needs

29. 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.

30. 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.

Convenience Goods

31. 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.

32. 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 6: 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 of main report

33. 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.

34. 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[7] to progress a mixed-use development focused around a smaller convenience store, 16 residential dwellings and 50 car parking spaces.

35. 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[8] 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.

36. 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

[7] At Executive committee on 26 June 2017
[8] The consultancy team comprises Nexus Planning, Buttress, Curtins and Gillespies

(equating to 2,400 dwellings across the same timeframe), allied to existing expenditure in the area[9], is such that that each allocation is also likely to be able to support a food supermarket as part of the development.

37. 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.

38. 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.

Comparison Goods

39. In terms of comparison goods, as Table 7 demonstrates, we estimate that there is capacity to support 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

[9] Given the relatively strong existing performance of existing convenience goods provision within Study Area Zones A and B

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.

40. 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[10].

41. 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.

42. 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 7: 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 of main report

Assessment of Leisure Needs

[10] Beyond the recent Barton Square planning permission, which was approved in May 2019

43. 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).

44. 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.

45. 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.

46. 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.

47. 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.

48. 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.

49. 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.

Health of Defined Centres and Future Strategy

50. 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.

51. We provide a summary below of the assessments for the four town centres, with full details in respect of all centres assessed provided in the Study.

Altrincham Town Centre

52. 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. 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.

53. 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.

54. 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.

55. In addition, we note that the Council acquired the Grafton Centre in February 2018 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

56. 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. 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).

57. 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.

58. 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.

59. 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.

60. 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

61. 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.

62. 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.

63. 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. Streford has lost two traditional pubs in recent years (O'Brien's and The Drum[11]), 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

64. 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.

Recommendations and Interventions

[11] The latter of which is now occupied by a drive-thru McDonald's

Key Recommendations: Town Centre Boundaries

65. Paragraph 85 of the newly published 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.

66. Annex 2 of the new NPPF indicates that a primary shopping area is the **'Defined area where retail development is concentrated.'** 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.'**

67. 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').

68. 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[12] 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 NPPF.

69. 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'.

[12] Which reflects the 'saved' land use policies of the Revised Trafford UDP and the land use policies of the Trafford Local Plan Core Strategy

70. 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.

71. The single centre where we believe that there is a requirement to revise the current town centre boundary is Altrincham. 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.

72. 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 is lies on the 'right side' of Church Street and Woodlands Road.

73. 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.

74. 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.

75. 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.

76. 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.

Key Recommendations: Centre Hierarchy

77. 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.

78. 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.

79. 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.

80. 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.

81. 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.

Key Recommendations: Local Impact Threshold

82. In accordance with the requirements of paragraph 89 of the NPPF, 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 just 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 should be subjected to the sequential test[13]).

83. 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

[13] With the exception of small scale rural development

'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.

84. 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

85. 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. 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.

86. 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.

District and Local Centre Thresholds

87. 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.

88. 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.

89. 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.

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