TRAFFORD COUNCIL

BOROUGH RETAIL AND LEISURE STUDY

EXECUTIVE SUMMARY

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EXECUTIVE SUMMARY

1.1 The purpose of this study is to provide a robust evidence base on the capacity for additional retail and leisure development within Trafford Borough in the period to 2021. This will enable the Council to proactively plan for future needs through its Local Development Framework (LDF), develop appropriate policies and town centre strategies, and to exercise their development control function.

Methodology

1.2 The basis of the study is a quantitative appraisal of capacity and forward demand. The key elements of our approach are set out below. In order to understand existing shopping patterns and to model existing flows of available expenditure to the main retail destinations within the Borough, a household telephone survey of c. 1,800 local residents was completed across nine catchment zones. Trafford was divided into four sub-borough catchment zones to reflect the respective catchment areas of the four principal town centres (Altrincham, Sale, Stretford and Urmston):

- **Zone A – Southern Catchment (Altrincham, Hale and Timperley);**
- **Zone B – Western Catchment (Urmston, Partington, Trafford Park);**
- **Zone C – Eastern Catchment (Sale, Sale Moor); and**
- **Zone D – Northern Catchment (Stretford / Old Trafford).**

1.3 The other catchment areas defined for the purposes of the study reflect the areas immediately adjacent to the borough such as Salford, Lymm and Manchester. This allows for a full picture to be built-up of the performance and draw of the town centres and other retail destinations within Trafford to be built up.

1.4 In addition to the ‘catchment’ household telephone survey, a total of 510 in-centre shopper surveys were also completed for the four main town centres and Partington in order to understand views and opinions on the local centres and what changes / improvements could be made to persuade local residents to visit more often. These survey results underpin our qualitative assessment and inform the wider retail study recommendations.

Quantitative Assessment

Convenience

Altrincham (Southern) Zone

1.5 Our quantitative assessment shows that the existing foodstore provision within the southern catchment presently retains 75.5% of main food expenditure and 77.1% of top-up food shopping. The primary destinations for the main food shopping trips are the two main foodstores in Altrincham with Tesco and Sainsbury's, which command c. 66% of expenditure between them. Given this strong market share and town centre performance, we conclude that there is no overriding quantitative need to formally allocate any sites for additional convenience goods floorspace in **Altrincham** town centre through the LDF process.

1.6 However, notwithstanding the lack of demonstrable need for new provision in Altrincham, our assessments have revealed that the existing foodstore provision within **Hale, Timperley** and **Hale Barns** are not presently meeting local needs. Therefore, we believe that there is a qualitative need for new foodstore provision of an appropriate scale to enhance the vitality and viability of the centres as local retail destinations.

1.7 In relation to the proposed local centre at **Broadheath**, which has been allocated for a considerable period of time in the adopted UDP, our assessment confirms that there is a quantitative and qualitative need for new convenience provision within the locality.

1.8 Overall, with respect to convenience provision within the southern catchment zone, we recommend that the Council encourages proposals for new foodstore provision within the existing (and proposed) district and local centres.

Sale (Eastern) Zone

1.9 As with Altrincham, our assessment shows a strong market share performance (72.2% main food; 81.9% top-up) from existing town centre foodstore provision. Therefore, on this basis, we conclude that there is no overriding requirement or need for any additional convenience provision within **Sale** town centre through the LDF process. Whilst planning permission remains extant for the development of a new Aldi foodstore, additional convenience provision is not a priority for Sale town centre.

1.10 With respect to **Sale Moor** district centre, given the present quantitative and qualitative deficiencies in the existing convenience offer, we recommend that the Council encourages new foodstore proposals, of an appropriate scale, through its forthcoming LDF.

Stretford (Northern) Zone

1.11 Our review finds that the existing foodstore provision within the catchment is clearly underperforming, retaining only c. 32% of main food expenditure and 50% of top-up expenditure. On this basis, we consider that the Stretford catchment requires robust Council intervention through the LDF process in order to address the identified quantitative and qualitative deficiencies.

1.12 To this extent, whilst the need for new higher order convenience provision in the northern zone has already been recognised through the grant of planning permission for a new medium sized Tesco foodstore at Stretford Leisure Centre, a balanced policy response will be required.

1.13 With respect to proposals for a revised larger foodstore at Stretford Leisure Centre, the Study suggests that planning policies should recognise the potential quantitative and qualitative benefits arising and the associated benefits of a comprehensive sports-led regeneration of the wider Old Trafford area. However, any policy support must be firmly grounded on the basis of satisfactory resolution of the retail policy issues relating to retail impact, sequential compliance and disaggregation.

1.14 Allied to the emerging policy position on the Stretford Leisure Centre site, given the town centre first approach advocated by PPS6, the Council should encourage qualitative improvements in the convenience offer at Stretford town centre through its LDF. To this extent, we recommend that the Council should engage with the Mall owners in order to investigate the potential for redevelopment of the Mall to include new higher order foodstore provision.

1.15 With respect to the wider northern zone, we do not consider that there is overriding need to proactively plan for change in any of the local centres (e.g. Trafford Bar), although we would recommend that the potential impact of the Tesco at Stretford Leisure Centre on existing local centre provision within the Old Trafford locality (e.g. Aldi, Iceland) is fully assessed.

Urmston (Western) Zone

1.16 Notwithstanding the existing deficiencies in the town centre foodstore provision at present (c. 5.7% main food market share), it is anticipated that the provision of a new medium-sized Sainsbury's store within **Urmston**, which is scheduled to open in 2009, will substantially address the quantitative and qualitative deficiencies in the existing convenience offer and enable the town centre to claw-back expenditure presently being drawn to the large out-of-centre Asda store at Trafford Park and the Tesco Extra in Irlam (Salford). Therefore, we do not consider there to be any scope for any convenience goods allocations through the LDF within the short to medium term.

1.17 With respect to **Partington**, it is clear that the existing local centre is deficient and failing to meet local shopping needs, thereby precipitating unsustainable food shopping patterns. Consequently, in light of the fact that Partington is defined as one of the most deprived wards in Trafford and that PPS6 is explicit in its support for new retail facilities in deprived areas, we recommend that the Council proactively plans for the provision of a new medium sized foodstore of c. 2,500 to 2,750 m^2 (gross) to address existing deficiencies.

Non-Bulky Comparison

Altrincham (Southern) Zone

1.18 Our assessment shows that whilst Altrincham is performing relatively well (c. 50.8% market share) in light of strong competition from higher order centres such as Manchester, there is potential to improve and consolidate non-bulky comparison goods provision through the LDF process.

1.19 In the short-term, whilst the ongoing redevelopment of the Stamford Quarter will deliver a significant quantitative and qualitative benefit to the town centre, we consider that securing a further qualitative uplift in the town centre retail offer will be very important if Altrincham is to fulfil its role as sub-regional centre within the North West retail hierarchy, as supported by emerging RSS.

1.20 To this extent, we consider that the Altair scheme is a major opportunity within Altrincham to meet the identified future quantitative and qualitative need. We therefore recommend that the site is maintained as an allocation within the LDF and the scheme is further promoted to ensure that the quantitative and qualitative need identified through our capacity assessment is not taken up by sequentially inferior schemes which may not deliver the wider qualitative benefits.

1.21 With respect to the wider town centre, we conclude that there is no requirement to allocate any other additional sites through the LDF to meet for future non-bulky comparison needs. However, it will be particularly important for the Council to work with existing landowners, retailers and town centre stakeholders to bring about qualitative improvements to the existing town centre offer.

Sale (Eastern) Zone

1.22 We anticipate that Sale town centre will continue to perform a secondary role within the sub-regional retail hierarchy, with local residents looking towards the larger centres to meet their main non-bulky shopping needs. Therefore, whilst there is some potential to increase Sale's non-bulky market share and thus generate capacity to support new retail floorspace, the Council's priority through the LDF process should be to secure qualitative improvements to the existing town centre offer through consolidation and improvement rather than significant growth.

Stretford (Northern) Zone

1.23 Given the relatively poor town centre performance (12.6% market share from the northern zone), it is clear that there is scope for significant improvement within northern catchment non-bulky comparison retail offer in qualitative terms. As per our conclusions in relation to future convenience provision, it is clear that a dual approach is required in order to address existing deficiencies.

1.24 In the first instance, whilst the focus should be on exploring opportunities to secure a significant qualitative uplift in the existing comparison retail offer of the Mall Shopping Centre, given the overriding short-term need for new non-bulky comparison provision, we consider that the larger Tesco store proposals at Stretford Leisure Centre should be recognised for the reasons previously set out in our conclusions. However, this forward policy support should again be conditional on satisfactorily addressing the PPS6 issues in relation to impact, sequential compliance and disaggregation.

1.25 Allied to the support for new non-bulky provision at Stretford Leisure Centre, the Council should seek to actively encourage a qualitative uplift in the existing non-bulky comparison offer within Stretford Mall Shopping Centre. Whilst a significant quantitative expansion in the town centre retail offer will be dependent on the comprehensive redevelopment / reconfiguration of the existing centre in the longer-term, encouragement of physical improvements, including investment in physical (e.g. exterior façade) and other townscape initiatives, would significantly enhance the shopping experience for local shoppers and improve the attractiveness of the town centre to retailers in the short term.

1.26 Therefore, we recommend that the Council, working in conjunction with the Mall owners, should fully explore the potential for quantitative expansion in the town centre non-bulky comparison offer.

Urmston (Western) Zone

1.27 As with our convenience assessment, we believe that the ongoing redevelopment will significantly improve the quantum and quality of retail floorspace within the town centre and address existing deficiencies in its retail offer. We therefore consider that there is no practical scope or need to allocate sites through the LDF for non-bulky comparison floorspace in the short to medium term.

1.28 In the meantime, we recommend that LDF policies should be focussed on delivering qualitative benefits to the wider town centre, including detailed consideration of the redevelopment potential of key development opportunity sites on the southern side of the town centre.

The Trafford Centre

1.29 Whilst our assessment shows that The Trafford Centre is trading strongly from the defined catchment zones, a wider regionally-based assessment would be required in order to fully understand the extent of its influence. Therefore, in light of emerging RSS guidance which confirms that there is no present scope to identify the centre as a regional centre, we recommend that the Council maintain its existing policy position through the LDF in terms of continuing to treat the centre as an out-of-centre location and thus subject to the PPS6 tests.

Retail Warehousing (Bulky Comparison)

1.30 On the basis of the existing deficiencies in non-bulky provision within the principal town centres allied to the strength of existing bulky goods provision within Altrincham, Trafford and White City Retail Parks, we do not consider that the improvement or expansion of bulky goods retail provision within the Borough is an immediate priority for the Council in its LDF.

1.31 However, should proposals come forward for additional (bulky) retail warehouse floorspace that cannot be realistically accommodated within the existing town centres, then we recommend that the Council continue to focus additional retail development on existing retail park destinations and seek to prevent the development of standalone retail warehouse units across the borough.

Leisure Uses

1.32 Whilst it is difficult to proactively plan for leisure development given that the sector is dynamic and operator-led, on the basis of our assessment of existing and proposed leisure provision within the Borough, we do not consider that there is significant need for the Council to proactively plan for future leisure development during its forthcoming LDF. However, should any new policy compliant leisure proposals emerge then we recommend that the Council should be supportive of appropriate proposals, subject to wider planning considerations.

1.33 In terms of developing the evening economy within the respective centres, whilst there has been considerable development in Altrincham and Sale through the Denmark Street and Waterside mixed-use schemes, the primary focus of the evening economy remains on traditional non family-orientated drinking establishments. Therefore, the Council should continue to seek to encourage higher order family orientated restaurants within the main town centres in order to increase dwell times.

1.34 With respect to Urmston and Stretford town centres, whilst we anticipate that the *Ask* development in Urmston will also qualitatively improve the café / restaurant offer within the town, the evening economy provision in Stretford needs significant improvement beyond the existing snooker hall and public house. The deficiency in leisure provision within Stretford town centre, which is presently constrained by the Mall operating hours, needs to be addressed by the Council working in partnership with the existing Mall owners, as part of a wider consideration of the future role of Stretford town centre.

1.35 The Council should seek to actively avoid the over-concentration of 'evening' uses given the potential impacts on the amenity of local residents. There are specific management issues in relation to ensuring that the evening economy does not impact on the daytime economy and we anticipate that the Council will continue to take a strong leadership role through its Town Centre Management Team.

The Retail Hierarchy

1.36 Drawing on the conclusions set out above, we have considered the current appropriateness of the existing retail hierarchy within the Borough, as presently defined by the adopted UDP. In summary, we consider that there should be an elevation in Altrincham's status to sub-regional centre in order to enable the Council to proactively plan for investment and expansion at a scale appropriate to a sub-regional centre, as encouraged by emerging RSS policy. It will enable the Council to position and 'benchmark' Altrincham alongside other RSS defined sub-regional centres such as Macclesfield, Warrington and Stockport, all of which have planned proposals for significant town centre redevelopment.

1.37 Moving down the existing hierarchy, whilst our quantitative and qualitative assessment has identified significant variances in the existing performance of the three town centres within the Borough (Sale, Stretford and Urmston) and the challenges facing them, we consider that the role of the centres will not substantively change over the LDF period. With respect to the third tier of centres in terms of Hale, Sale Moor and Timperley, whilst our assessment shows that the centres do not fulfil a role expected in terms of convenience provision, we do not consider that there is any merit in changing the status of the three district centres within the borough retail hierarchy.

1.38 The final matter in respect of the appropriateness of the existing borough retail hierarchy going forward through the LDF is the future status of Partington local centre. Whilst our quantitative assessment for Partington identifies the need for new convenience provision, we do not consider that there is any merit in changing the centre status nor that failure to elevate the centre in the borough retail hierarchy would prejudice the development of a new medium-sized foodstore.

Development Control

Town Centre Boundaries

1.39 We recommend that the existing town centre boundaries, as presently defined within the adopted UDP, are appropriate for the purposes of future retail / town centre policy through the LDF. With respect to the district centre boundaries, whilst they should broadly remain as presently defined within the adopted UDP, we recommend that the Council updates the boundary for **Hale** to reflect the recent Tesco Express development and considers a minor extension to the boundary within **Sale Moor** to reflect the development opportunity site identified in our area specific assessment. We do not recommend any changes to the existing district centre boundaries for Timperley.

Primary and Secondary Frontages

1.40 Whilst the main and secondary shopping frontages for the town and district centres within the borough are set out within Appendix H of the adopted UDP, we recommend that the Council should identify the primary and secondary shopping areas for each of the respective town and district centres on any future proposals map for the avoidance of doubt and for ease of reference.

1.41 With respect to forward policy, we recommend that in light of the amendments to the use class order (disaggregation of A3 uses etc.) that the Council consider the preparation of a Shopping and Shop Front Supplementary Planning Document (SPD) to further expand on existing UDP frontage policies. An SPD could specifically address the following points:

- To ensure a balance is maintained between A1 and non-A1 uses in secondary shopping frontages. An over-concentration policy could be constructed whereby the total proportion of non-retail units along any secondary frontage, should not exceed a specified percentage (e.g. 50%) of the total shopping frontage, taking into account both existing and committed changes of use;
- To prevent not more than 3 adjoining shop units or a certain distance (e.g. 15 metres) of any continuous frontage being occupied by non-A1 uses; and
- To prevent proposals that isolates individual shop units and creates a deserted and inactive shopping frontage during the day.

1.42 The preparation of an SPD would enable the Council to appropriately deal with the perceived over-concentration of non-retail (class A3 – A5) uses (particularly within Hale district centre) and formulate individual 'trigger' points for each centre so as to identify as to where the balance between retail and non-retail uses may impact on the vitality and viability of a centre as a retail destination.