## 6 ROLE OF DISTRICT AND LOCAL CENTRES IN WIGAN BOROUGH

### Overview

6.1 The remit of this Study does not extend to consideration of the role and function of District and Local centres. However, the Council intends to undertake future research into the role and function of such centres and how they relate to and complement the higher order centres in the Borough. Accordingly, as a lead-in to this future work, this Study makes some broad commentary of the generic role and function of District and Local centres within a Borough hierarchy.

6.2 District and Local Centres are an important part of the shopping hierarchy in Wigan Borough, complementing the retail, leisure and service provision in the larger centres.

6.3 Considering local centres specifically, PPS6 (2005) recognises the importance of local centres and states that:

> **'In promoting and enhancing existing centres, regional planning bodies and local planning authorities should consider the network of local centres and their relationship in the hierarchy…local planning authorities should consider whether there is a need to rebalance the network of centres to ensure that there is a more even distribution of town centre uses, and that people's everyday needs are met at the local level'. [Paragraph 2.9]**

6.4 Annex A to PPS6 defines a local centre as:

> **'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 laundrette'.**

6.5 WYG considers that the Annex A defined uses are indeed 'key local centre uses'. However, based upon additional research on typical provision within local centres, WYG has identified other key local centre uses and services to be: ATM machines; off licences; hair dressers; and beauty salons.

Accordingly, WYG considers that a local centre that is functioning fully will contain all or the majority of these services:

- Grocery store;
- Markets, Farmers' Markets and Produce;
- ATM;
- Newsagent;
- Sub Post Office;
- Pharmacy;
- Hot Food Takeaway;
- Laundrette;
- Off-licence;
- Hairdressers; and
- Beauty Salon.

6.6 It is important to note also that local centres provide a social as well as a commercial role and are an important aspect of community life, coherence and well-being. Community uses in local centres are as important to local centres as commercial uses. Uses such as nurseries, play groups, schools, local authority service centres, community centres, social clubs and groups, medical centres and religious centres are important local facilities.

6.7 This Study focuses on higher order centres and principally the commercial uses within centres, but in the forthcoming District and Local Centres Study it will be important to consider social and community uses as these play as important a role as commercial uses in the vitality and viability of smaller centres.

**The Importance of a Grocery Store and other Uses Commonly Found in Local Centres**

6.8 There is no common pattern as to what constitutes a District or Local centre. Previous research by WYG has identified that, although the existence of a grocery store is the most common factor to a local centre, a grocery store is present in most District Centres but only 75% of defined local centres.

6.9 Centres without a grocery store tend to be very small scale in nature. It is reasonable to conclude that a District or Local centre should provide a grocery store. A District or Local centre without a grocery store is deficient of the principal commercial outlet that should be provided.

6.10 Research by WYG has identified that the next most common use found in District and Local centres, after a Grocery store, is a hot food take-away (about 60% of all centres). There is a hairdressers' in some 55% of District and Local Centres and a newsagent in 41%. A significant proportion of District and Local centres will provide entertainment uses, such as pubs and bars, and a variety of financial and professional services.

**Local Centres in Wigan Borough**

6.11 The Wigan UDP (Policy S1) identifies 25 Local Centres in the Borough. The UDP does not define any District Centres.

**Population Supporting a Local Centre**

6.12 WYG has undertaken considerable work previously with regard to the population that supports a local centre. In general terms, WYG has identified that, nationally, local centres support typically a population of some 5,000 to 7,500 people. Although the adopted Wigan UDP does not define any District Centres, for information purposes a District Centre will support, typically, between 15,000 and 20,000 residents.

6.13 The Local Centres in Wigan Borough serve an average population of 12,080 residents. As such, it will be critical to establish whether some of the larger defined Local Centres are, in fact performing more of a District Centre role. There may be a need to reconsider the definitions of the centres, with some of the defined Local Centres becoming District Centres as part of the Local Development Framework review of Development Plan policy.

**Distribution of Local Centres**

6.14 WYG considers that it will also be important to review the spatial distribution of Local Centres in Wigan Borough. This is required, so that an assessment can be made of the appropriateness of current Local Centre distribution. Lower order centres (District and Local Centres) should be distributed evenly throughout an authority area to ensure that all residents have appropriate access to local facilities and that the network of local centres supports the higher order centres effectively. WYG recommends that the Council conducts a detailed review of the distribution and offer of the defined Local Centres within the Borough area.

**Planning for the Future of Local Centres**

6.15 WYG research undertaken indicates that there is no set characteristic that defines a local centre. However, it is clear that the purpose of local shopping centres is to meet local shopping and service needs and play a subordinate role to higher order centres in the retail hierarchy.

*Population Base*

6.16 Given that large parts of the Borough are urban in nature but at distance from higher order centres, the Council should be considering options for the role and function of its existing Local Centres to ensure that these complement the existing network of higher order retail and commercial centres in the Borough.

*Services Provided*

6.17 There is a broad range of possibility in the potential total number of commercial units in Local Centres as each Local Centre serves different catchment populations. The role of a Local Centre is dependent upon shops and services available elsewhere and the proximity of other Local Centres and centres higher in the retail hierarchy. In planning for new local centres, it will be important to consider the proximity of other existing and potentially competing centres. As set out above, a population of 5,000 (or 2,000 households) is a reasonable indicator of the catchment population required to support a local Centre.

6.18 In general terms, a Local Centre serving a small catchment area should have: a grocery store of at least 500 sq. m floorspace (some larger Local Centres may have an, often free-standing, small to medium sized foodstore of 1,000 sq. m to 1,500 sq. m; a newsagent; and an ATM. The ATM will often be inside the grocery store. Other uses that should be expected in a Local Centre are a hot food takeaway and hairdressers'. In social and community terms, a Local Centre would normally be expected to comprise a community centre of some form, doctors' surgery or health centre and, in larger Local Centres, a library and educational facilities.

6.19 A Local Centre should be underpinned by a grocery store and it is reasonable to question whether a collection of shops or services without a grocery store (or newsagent selling groceries) can be viewed as a Local Centre realistically.

6.20 PPS6 identifies that a Local Centre might also include a post office and a pharmacy. WYG research indicates that, in reality, only a larger Local Centre might include a post office or a pharmacy and, again, these may often be ancillary to a grocery store or a newsagent. In a Local Centre of larger size, other uses that are expected are a beauty salon, an off-licence and a laundrette.

6.21 WYG advises that any new Local Centre should provide, as a minimum, five or six units comprising: a grocery store; a newsagent; an ATM; a hot food takeaway; and a hairdressers'. These uses will meet local shopping and service needs and constitutes a small format Local Centre.

6.22 The proximity of any new centre to existing Local Centres or other higher order centres will determine whether there is scope for a large formant centre, or smaller centre, which might also include a pharmacy, laundrette, off licence and post office. Often the grocery store will function as an off-licence and a post office and pharmacy may be provided as part of a grocery store.

*Large Format Superstores*

6.23 Large format superstores often have the characteristics of a Local Centre, as most have hot food takeaway counters, cafes and newsagents in addition to their principal grocery role. Many also have a number of concessions providing services such as: laundrette and dry cleaning; shoe repairs and key cutting; post office; pharmacy; opticians; and photographic laboratories.

6.24 Caution should be exercised in identifying large format superstores as local Centres for two reasons. In PPS6 terms, the identification of a centre as a local centre conveys it to town centre status and the ability to extend its offer with much greater ease. Secondly, a local centre should be integrated with and part of a residential area; the benefit being that the local population is able to walk to the centre. Freestanding foodstores are typically separate from residential areas and to not encourage trips made by foot. Accordingly, although such stores may demonstrate characteristics of a Local Centre in terms of the range of goods and services offered, their functional characteristics are very different to those which should be promoted to serve local shopping and service needs.

# 7 WIGAN RETAIL ASSESSMENT

## Retail Need and Capacity

*Overview*

7.1 The statistical tables at Appendix 13 use the findings of the Household Survey to calculate the need and capacity for new retail floorspace in the Borough of Wigan, in the convenience and comparison sectors, over the periods to 2012, 2017, 2022 and 2027. The calculations at Appendix 13 give a short, medium, long and ultra-long term view of need and capacity.

7.2 The capacity calculations are purely theoretical and based upon projected growth in population and spending and adopting a constant market share for all retail destinations. It must be borne in mind that factors such as a changing economic climate, the level of commercial demand, competition from other centres and destinations, the potential growth in Internet usage, and planning and urban regeneration strategies will all affect the future retail performance of centres and their ability to maintain, or exceed, current market share. Notwithstanding this the figures provided are a bench-mark based upon current market share.

7.3 In order to calculate the capacity for new retail floorspace in the Borough, an average sales density for convenience retailing has been adopted of between £5,000/ sq. m and £10,000/ sq. m, and for comparison floorspace between £3,500/ sq. m and £5,000/ sq. m. In terms of convenience retailing, the average sales density used is based on the sales densities of leading large format and discount food retailers as identified by Verdict and Mintel Retail Rankings. With respect to comparison goods sales densities, these are based on the sales densities of a range of non-food retailers such as high-street retailers and warehouse type traders.

7.4 The Study will inform the LDF and the retail need and capacity identified in this Study is of direct relevance to this. In the context of development control, PPS6 advises that, in considering applications for retail development, local planning authorities should project need forward no more than five years, except where major town centre development proposals are involved. As set out in Section 2, paragraph 3.10 of PPS6 considers a five year timeframe as being appropriate for considering the 'need' for additional retail floorspace.

7.5 Indicative need and capacity assessments are provided for 2017, 2022 and 2027, but should be viewed with some caution. Any identified need or capacity beyond 2012 is not justification for new retail floorspace outside of existing centres, as this could prejudice from coming forward more central sites, that, although not available for retail development at present, may become available between now and 2012 or after 2012.

7.6 The quantitative need for new floorspace is derived from growth in spending power, as a result of year-on-year growth in per capita spending and population growth. The quantitative assessment is on a constant market share basis; i.e. assuming that retail destinations retain their current market shares in the convenience and comparison retail sector. It is assumed that existing comparison retail floorspace within centres will increase its turnover by 1.5% per annum as a result of floorspace efficiencies; a proportionate adjustment is made to the need figures to account for these floorspace efficiencies. No adjustment is made in respect of convenience goods retailing.

7.7 In assessing the combined qualitative and quantitative need for additional convenience goods floorspace (the capacity), account is taken of the trading performance of existing stores, in comparison with company average trading performance, so as to factor-in any under or over-trading. The performance of out of centre foodstores, relative to company average, is taken into account where these are associated reasonably with a town centre. A minority of purely free-standing stores, with no relationship to a centre, are not included in the assessment of quantitative need.

7.8 However, growth in expenditure pro-rata to the current market shares of edge-of-centre and out of centre retail facilities is aggregated to the need and capacity identified by centre where appropriate. This is based upon the principle that all new retail floorspace should be accommodated within defined town centres in the first instance. Only after all potential town centre opportunities have been exhausted should less central sites be considered.

*The Sequential Approach*

7.9 In identifying sites for retail development, and other key town centre uses, through the LDF process and considering planning applications submitted for such development a sequential approach as advocated by PPS6 should be adopted. This means that first preference should be given the town centre site, followed by edge of centre sites and then out of centre sites that are accessible by a choice of means of transport. In undertaking the sequential approach in connection with the submission of a planning application, retailers, other commercial operators and developers should employ a degree of flexibility in format although this should not be onerous to the extent that trading from a site would be so far removed from an operator's business model that it would not be viable. In context with flexibility in format, where possible the need and capacity identified should be met within existing units that are vacant in town centres before new build development is considered.

*The Grand Arcade Development*

7.10 The Grand Arcade shopping development in Wigan opened on 22 March 2007. This comprises 23,063 sq. m of (net) of commercial floorspace and it is appropriate for this Retail Study to model the likely effects of the new floorspace on comparison retail trading patterns in Wigan and the wider Borough area. In the assessment below, capacity is assessed firstly without consideration of the Grand Arcade and then secondly with the new floorspace taken into account.

7.11 For the purposes of the second assessment, taking into account the Grand Arcade, a number of assumptions are made. These are that: the Grand

Arcade will have reached a settled pattern of trading by 2008 (this will be its first full year of trading); 50% of the Grand Arcade turnover will be expenditure transferring from existing floorspace in Wigan Town Centre (Debenhams and Bhs principally who have moved from existing premises in the town to the Grand Arcade); 10% will be from other retailers in Wigan Town Centre; 10% will be from retailers in Leigh; 30% will be 'claw-back' of expenditure which is generated currently in the Borough and spent outside of it; and the likely trade draw from other defined centres destinations in the Borough will be *de minimis* and is not given any numerical value in this assessment.

7.12 WYG is aware that at least some of the floorspace vacated in other parts of Wigan Town Centre will be occupied by new retailers (Wilkinsons is to take the ground floor of Debenhams for example). This will lead to a net increase in the turnover of the town centre and this is taken into account in assuming that 40% of the turnover of the Grand Arcade will derive from outside of Wigan Town Centre. The overall effect of the Grand Arcade will be some transfer of trade within the town but, overall, an uplift in its turnover.

7.13 The 2001 Wigan Retail Study identified capacity for 17,400 sq. m of additional comparison retail floorspace over the period to 2006. WYG undertook the 2001 Study on a business basis, rather than a goods basis as is adopted for the 2007 Study, and so the capacity will actually be slightly greater as there is an element of comparison goods sales from convenience retail businesses. That being said, there is limited comparison retail sales from convenience retail businesses in Wigan Town Centre and so the additional capacity will be nominal.

7.14 Given that the revised need and capacity assessment below, which takes account of the Grand Arcade, starts at 2008 (the first full year of trading) it is also appropriate to extrapolate the 2001 capacity forward to include 2007 and take into account that actual growth in comparison retail spending (on a year on year) basis was at greater rate than estimated in the 2001 Study. The implication of this is that WYG considers that the Grand Arcade is meeting the need for additional comparison retail floorspace in Wigan over the period 2001 to 2007. Accordingly, the need and capacity identified in Table 7.3 (2008 onwards) is over and above that met by the Grand Arcade. However research undertaken by Experian indicate that growth in comparison goods expenditure in the long term is unlikely to increase at the rate experienced in recent years.

## Wigan

*Quantitative Retail Need – **Wigan***

7.15 Table 7.1 sets out the convenience and comparison retail need for Wigan Town Centre over the periods to 2012, 2017, 2022 and 2027. An allowance is made for existing comparison retail floorspace increasing its efficiency by 1.5% per annum. No allowance is made for floorspace efficiencies in existing convenience floorspace.

**TABLE 7.1: QUANTITATIVE NEED – WIGAN TOWN CENTRE* (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE WIGAN AREA)***

| YEAR | CONVENIENCE | | COMPARISON | |
|---|---|---|---|---|
| | £(m) | Sq. m (net) | £(m) | Sq. m (net) |
| AT 2007 | | | | |
| BY 2012 | **12.0** | **1,200-2,400** | **54.2** | **10,840-15,486** |
| BY 2017 | **23.5** | **2,350-4,700** | **124.8** | **24,960-35,657** |
| BY 2022 | **34.9** | **3,490-6,980** | **213.4** | **42,680-60,971** |
| BY 2027 | **45.7** | **4,570-9,140** | **322.1** | **64,420-92,029** |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m
Average Sales Density Comparison – Assumed to be £3,500/ sq. m and £5,000/sq. m
** For convenience goods this includes: ASDA, Robin Park; Morrison's Makerfield Way, Ince; Sainsbury's, Worthington Way, Marus Bridge; Tesco Express, Poolstock Lane; and Spar, City Road, Kitt Green.*
** For comparison goods this includes: Robin Park, Newtown/ Wigan; B&Q, Wigan (Robin Park/Newtown); Wickes, Wigan (Robin Park/Newtown); Homebase, Marus Bridge, Wigan; Marus Bridge, Wigan; and Sainsbury's, Marus Bridge, Wigan.*

*Convenience Goods*

7.16 Without taking account of the performance of existing stores, in the short term (over the period to 2012), there would be a need for a modest increase in retail floorspace. The need identified would be met by a small to medium sized foodstore (i.e. a discount retailer type store). Over the period to 2017, the need will increase to a level where two to three small sized stores or a small store and a medium sized store could be accommodated. In the longer term (2022 and beyond), there is a need for additional convenience retail provision on the scale of a large format foodstore.

7.17 There are not any commitments for convenience retail floorspace in Wigan Town Centre.

*Comparison Goods*

7.18 Without taking account of the Grand Arcade floorspace and the effect this will have, there is need in the short term for a significant extension of town centre comparison retail floorspace (up to 15,486 sq. m (net) at 2012). The need is set to increase over the periods to 2017, 2022 and 2027 and there will be substantial capacity even in the medium term. For example, between 2017 and 2022 there is capacity identified for a comparison retail floorspace of a similar size to the Grand Arcade. Within ten years, there is scope for expansion of comparison goods retailing in Wigan Town Centre on the scale of that provided at the Grand Arcade.

7.19 The Grand Arcade is a major town centre development and will increase significantly the market share and comparison goods retail turnover of the town. Given that this assessment is undertaken on the basis of projecting market share forward, the increased market share of Wigan as a result of the Grand Arcade commencing trading will have the knock-on effect of generating still greater capacity for new floorspace in the town. This, coupled with high levels of growth in year on year spending per person, is the reason for the significant capacity for additional floorspace in Wigan.

7.20 As set out above, it is assumed for the purposes of this assessment that the Grand Arcade is meeting the need for additional comparison retail floorspace in Wigan over the period 2001 to 2007. Accordingly, it is reasonable to assume that an element of the capacity identified over the period 2007 to 2012 is accounted for by the Grand Arcade. WYG considers that, on this basis, there is no requirement for any additional comparison retail floorspace at the current time. Table 7.3 below adjusts the need assessment to take account of the trading performance of the Grand Arcade. From 2008 onwards, additional capacity for comparison retail floorspace is being generated as the need absorbed by the Grand Arcade is accounted for already.

*Qualitative Retail Capacity – **Wigan***

7.21 The undertrading, when compared to company average performances, of existing convenience retail floorspace in Wigan (principally the Morrison's foodstore) means that the need identified in the short to medium term can be absorbed by existing floorspace attaining company average trading levels.

7.22 There is capacity for additional convenience retail floorspace in the period beyond 2012. This can be reconsidered in a future review of this Study and there is no requirement immediately for the Council to plan for additional convenience retail floorspace in the town, including in the drafting of the Local Development Framework.

7.23 On the above basis, the Council need not plan for any further foodstores in the town centre in the short term. In the longer term there is capacity for a medium format foodstore.

**TABLE 7.2: QUALITATIVE CAPACITY – WIGAN TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE WIGAN AREA)***

| YEAR | CONVENIENCE | |
|---|---|---|
| | £(m) | Sq. m (net) |
| AT 2007 | **-** | **-** |
| BY 2012 | **5.0** | **500-1,000** |
| BY 2017 | **16.5** | **1,650-3,300** |
| BY 2022 | **28.0** | **2,800-5,600** |
| BY 2027 | **38.7** | **3,870-7,740** |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m

** This includes: ASDA, Robin Park; Morrison's Makerfield Way, Ince; Sainsbury's, Worthington Way, Marus Bridge; Tesco Express, Poolstock Lane; and Spar, City Road, Kitt Green.*

*Taking into Account the Grand Arcade and Other Commitments – **Wigan***

7.24 The statistical assessment at Appendix 13 (Table 24a to 25) takes account of the Grand Arcade and the up-lift in town centre that it will bring about. The need assessment is restarted at 2008, which is assumed to be the first full, settled trading year of the development, and is based upon the town's market share increasing on a pro rata basis from a 2008 start point of a fully trading Grand Arcade with replacement retailers occupying those units in the town centre vacated by retailers who have relocated to the Grand Arcade

(Debenhams and Bhs for example). It is assumed that the Grand Arcade will turnover £115.4m at a sales density of £5,000/sq. m.

7.25 The increased turnover of the town, as a result of the Grand Arcade trading fully and 40% of its turnover (assumed) being drawn from outside of the Wigan area, is that the capacity pro-rata to the town's market share increases to a level which is above that identified in Table 7.1. Table 7.3 identifies considerable capacity for additional comparison retail floorspace in the town and that there will be scope for additional floorspace akin to that provided at Grand Arcade by 2017.

7.26 There is a commitment at Millgate/Riverway (approved November 2006) for a mixed-use development which includes 1,687 sq. m (gross) of Class A1, Class A3 and Class A4 retail floorspace. Up to 390 sq. m (gross) of this could be Class A1 comparison retail floorspace. This commitment listed will need to be subtracted from the capacity identified for Wigan Town Centre.

7.27 The Council will need to consider carefully where to plan for the additional floorspace, particularly given the quantum of floorspace that need is identified for. The long term retail comparison retail capacity is a matter for careful strategic consideration and does not provide a carte blanche for retail development in out of centre locations. The scale of the need suggest that comprehensive redevelopment, of potentially an area such as Wallgate and the Pier Quarter, will need to be planned for if the need is to be met within the town centre and natural extensions of it.

**TABLE 7.3: QUALITATIVE CAPACITY – WIGAN TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE WIGAN AREA)* FACTORING IN THE GRAND ARCADE DEVELOPMENT**

| YEAR | COMPARISON | |
|---|---|---|
| | £(m) | Sq. m (net) |
| | | |
| BY 2012 | **50.0** | **10,000-14,286** |
| BY 2017 | **140.0** | **28,000-40,000** |
| BY 2022 | **246.5** | **49,300-70,429** |
| BY 2027 | **376.2** | **75,240-107,486** |

Average Sales Density Comparison – Assumed to be £3,500/sq. m and £5,000/sq. m

** This includes: Robin Park, Newtown/ Wigan; B&Q, Wigan (Robin Park/Newtown); Wickes, Wigan (Robin Park/Newtown); Homebase, Marus Bridge, Wigan; Marus Bridge, Wigan; and Sainsbury's, Marus Bridge, Wigan.*

## Leigh

*Quantitative Retail Need – **Leigh***

7.28 Table 7.4 sets out the convenience and comparison retail need for Leigh Town Centre over the periods to 2012, 2017, 2022 and 2027. An allowance is made for existing comparison retail floorspace increasing its efficiency by 1.5% per annum. No allowance is made for floorspace efficiencies in existing convenience floorspace.

**TABLE 7.4: QUANTITATIVE NEED – LEIGH TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE LEIGH AREA)**

| YEAR | CONVENIENCE | | COMPARISON | |
|---|---|---|---|---|
| | £(m) | Sq. m (net) | £(m) | Sq. m (net) |
| AT 2007 | | | | |
| BY 2012 | **5.4** | **540-1,080** | **20.2** | **4,040-5,771** |
| BY 2017 | **10.7** | **1,070-2,140** | **46.5** | **9,300-13,286** |
| BY 2022 | **15.8** | **1,580-3,160** | **79.6** | **15,920-22,743** |
| BY 2027 | **20.7** | **2,070-4,140** | **120.2** | **24,040-34,343** |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m
Average Sales Density Comparison – Assumed to be £3,500/ sq. m and £5,000/sq. m

*Convenience Goods*

7.29 Without taking into account the trading performance of existing foodstore in Leigh, there is need in Leigh in the short term for a small to medium sized foodstore. By 2012, the need is sufficient to support a small supermarket (of the size occupied typically by discount retailers) or an extension to existing provision. The need will increase over the medium to long term, to the extent that by 2022 there will be a need for a medium sized foodstore and by 2027, potentially, a larger format store.

*Comparison Goods*

7.30 In the comparison goods sector, a substantial need is identified. In the short term, there is a need for additional floorspace which would be a meaningful extension to existing town centre provision. The need for additional comparison goods floorspace will increase considerably in the medium to long term, to the extent that, in the long term, Leigh could accommodate expansion of comparison retail floorspace at the same scale that that Grand Arcade delivered to Wigan Town Centre in 2007.

*Qualitative Retail Capacity – **Leigh***

7.31 Existing convenience retail floorspace in Leigh is undertrading marginally. Table 7.5 indicates that the capacity for additional convenience floorspace, once undertrading at existing floorspace is taken into account, is less than the need identified in Table 7.4; an element of the need identified could be absorbed by existing floorspace attaining company average trading levels. There is still, however, sufficient capacity to support a small foodstore in the short term and more substantial additional provision in the longer term.

**TABLE 7.5: QUALITATIVE CAPACITY – LEIGH TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE LEIGH AREA)**

| YEAR | CONVENIENCE | |
|---|---|---|
| | £(m) | Sq. m (net) |
| AT 2007 | **4.5** | **450-900** |
| BY 2012 | **9.9** | **990-1,980** |
| BY 2017 | **15.1** | **1,510-3,020** |
| BY 2022 | **20.3** | **2,030-4,060** |
| BY 2027 | **25.2** | **2,520-5,040** |

Average Sales Density Comparison – Assumed to be £5,000/sq. m and £10,000/sq. m

*Taking into Account the Grand Arcade - Quantitative Retail Capacity – **Leigh***

7.32 The modelling of the effect of the Grand Arcade development trading at full capacity by 2008 includes a trade draw of 10% (£11.5m) of turnover from Leigh. Accordingly, it is appropriate to remodel the capacity assessment. There is a marginal reduction in capacity (of about 10% over the period to 2027) but still significant capacity for comparison retail expansion in Leigh.

**TABLE 7.6: QUALITATIVE CAPACITY – LEIGH TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE LEIGH AREA) FACTORING IN THE GRAND ARCADE DEVELOPMENT**

| YEAR | COMPARISON | |
|---|---|---|
| | £(m) | Sq. m (net) |
| | | |
| BY 2012 | **17.3** | **3,460-4,943** |
| BY 2017 | **40.9** | **8,180-11,686** |
| BY 2022 | **70.8** | **14,160-20,229** |
| BY 2027 | **107.7** | **21,540-30,771** |

Average Sales Density Comparison – Assumed to be £3,500/sq. m and £5,000/sq. m

*Commitments – **Leigh***

7.33 There are three commitments in Leigh comprising:

- Grasmere Street (approved November 2004) for a 7,432 sq. m of bulky goods retail warehousing;

- Bradshawgate (approved June 2005) for a mixed-use development which comprises 935 sq. m (net) of Class A1 and Class A3 floorspace. Up to 815 sq. m (gross) of this could be Class A1 comparison retail floorspace; and
- The redevelopment of the former KwikSave on King Street as an Aldi. The Aldi foodstore will comprise some 1,526 sq m (gross) of retail floorspace which represents a reduction of approximately 200 sq m on the former KwikSave store.

7.34 The commitments listed at Paragraph 7.33 will need to be subtracted from the capacity identified for Leigh Town Centre.

7.35 Furthermore, it should be borne in mind that the effect of the Grand Arcade in Wigan, as modelled in this assessment, is to draw £11.5m of turnover from Leigh. On this basis, the quantum of expenditure available to new floorspace, over the period to 2012, should be reduced from £17.3m to £1.8m, to allow for existing retail floorspace to recover ground following the impact of the Grand Arcade scheme. There is, obviously, a continuing effect over the period to 2027, whereby the need to be met should be based upon the pro-rata growth in spending minus the £11.5m to return existing floorspace to current trading levels. This is shown in Table 7.7 below.

**TABLE 7.7: QUALITATIVE CAPACITY – LEIGH TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE LEIGH AREA) FACTORING IN THE GRAND ARCADE DEVELOPMENT AND EXPENDITURE REQUIRED FOR LEIGH TO RETURN TO ORIGINAL TRADING POSITION**

| YEAR | COMPARISON | |
|---|---|---|
| | £(m) | Sq. m (net) |
| | | |
| BY 2012 | **1.8** | **360-514** |
| BY 2017 | **25.4** | **5,080-7,257** |
| BY 2022 | **55.3** | **11,060-15,800** |
| BY 2027 | **92.2** | **18,440-26,343** |

Average Sales Density Comparison – Assumed to be £3,500/sq. m and £5,000/sq. m

## Ashton-in-Makerfield

*Quantitative Retail Need – **Ashton-in-Makerfield***

7.36 Table 7.8 sets out the convenience and comparison retail need for Ashton-in-Makerfield Town Centre over the periods to 2012, 2017, 2022 and 2027. An allowance is made for existing comparison retail floorspace increasing its efficiency by 1.5% per annum. No allowance is made for floorspace efficiencies in existing convenience floorspace.

**TABLE 7.8: QUANTITATIVE NEED – ASHTON-IN-MAKERFIELD TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE ASHTON-IN-MAKERFIELD AREA)**

| YEAR | CONVENIENCE | | COMPARISON | |
|---|---|---|---|---|
| | £(m) | Sq. m (net) | £(m) | Sq. m (net) |
| AT 2007 | | | | |
| BY 2012 | **0.6** | **60-120** | **1.4** | **280-400** |
| BY 2017 | **1.1** | **110-220** | **3.2** | **640-914** |
| BY 2022 | **1.7** | **170-340** | **5.5** | **1,100-1,571** |
| BY 2027 | **2.2** | **220-440** | **8.3** | **1,660-2,371** |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m
Average Sales Density Comparison – Assumed to be £3,500/ sq. m and £5,000/sq. m

*Convenience Goods*

7.37 There is a need, over the period to 2027, for a modest increase in convenience goods floorspace. In the short to medium term, this would provide scope for extensions only to existing floorspace although in the longer term could be sufficient to support the development of an additional small foodstore.

*Comparison Goods*

7.38 In the short term, there is a need for a modest increase in the town's comparison retail floorspace. The capacity by 2012 would support two or three small shop units. In the medium term there is more substantial capacity, but still only the need sufficient to support a small number of additional shop units. In the long term and ultra-long term, the need identified is more substantial and over the periods to 2022 and 2027 there is scope for a more meaningful expansion of comparison retail floorspace in the town.

*Qualitative Retail Capacity – **Ashton-in-Makerfield***

7.39 The quantitative need identified for convenience retail floorspace is however accounted for by addressing undertrading in existing floorspace. Table 7.9 demonstrates that there is no capacity for additional convenience retail floorspace once the current trading performance of existing floorspace is taken into account.

**TABLE 7.9: QUALITATIVE CAPACITY – ASHTON-IN-MAKERFIELD TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE ASHTON-IN-MAKERFIELD AREA)**

| YEAR | CONVENIENCE | |
|---|---|---|
| | £(m) | Sq. m (net) |
| AT 2007 | - | - |
| BY 2012 | - | - |
| BY 2017 | - | - |
| BY 2022 | - | - |
| BY 2027 | - | - |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m

*Commitments – **Ashton-in-Makerfield***

7.40 There is currently one commitment for retail development in Ashton-in-Makerfield, at the former British Gas site on York Street. The scheme, granted full planning permission in February 2004, provides for up to 2,191 sq. m (net) of comparison retail floorspace. This commitment meets the need identified for additional comparison retail floorspace over the period to 2017 and beyond. On this basis, there is no requirement for the Council to identify any additional sites for retail development in the town as part of the LDF process. This need for additional floorspace can be reconsidered in any future review of this Study.

## Atherton

*Quantitative Retail Need – **Atherton***

7.41 Table 7.10 sets out the convenience and comparison retail need for Atherton Town Centre over the periods to 2012, 2017, 2022 and 2027. An allowance is made for existing comparison retail floorspace increasing its efficiency by 1.5% per annum. No allowance is made for floorspace efficiencies in existing convenience floorspace.

**TABLE 7.10: QUANTITATIVE NEED – ATHERTON TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE ATHERTON AREA)**

| YEAR | CONVENIENCE | | COMPARISON | |
|---|---|---|---|---|
| | £(m) | Sq. m (net) | £(m) | Sq. m (net) |
| AT 2007 | | | | |
| BY 2012 | **1.7** | **170-340** | **1.3** | **260-371** |
| BY 2017 | **3.4** | **340-680** | **3.1** | **620-886** |
| BY 2022 | **5.1** | **510-1,020** | **5.2** | **1,040-1,486** |
| BY 2027 | **6.7** | **670-1,340** | **7.9** | **1,580-2,257** |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m
Average Sales Density Comparison – Assumed to be £3,500/ sq. m and £5,000/sq. m

*Convenience Goods*

7.42 There is limited need for additional convenience goods floorspace in the town in the short to medium term. The need identified over the period to 2012 is sufficient only to support a modest extension to existing provision and the need identified over the period to 2017 would support at most a small format convenience store. In the long and ultra-long term, there is more significant capacity which could support a small to medium-sized foodstore.

*Comparison Goods*

7.43 In common with the convenience goods sector in Atherton, the need identified in the comparison goods sector provides limited scope for additional floorspace in at least the short to medium term. The need identified by 2012 would support no more than three or four small shop units, whereas the need identified by 2017 would support a small parade of shops or one or two larger premises. In the long and ultra-long term, there is more substantial capacity for additional floorspace which would provide for a more meaningful expansion of the town centre.

*Qualitative Retail Capacity – **Atherton***

7.44 Convenience retail floorspace in Atherton is overtrading. This overtrading means that there is immediate capacity for up to 1,640 sq. m (net) of additional convenience retail floorspace. This capacity would support a medium-sized foodstore. By 2012, there is scope for a foodstore of up to 2,000 sq. m (net), which is a medium sized foodstore or a larger format store if it is also providing a comparison shopping role.

7.45 The effect of the overtrading is to increase the scope for additional convenience retail floorspace significantly and the Council should plan for a new town centre foodstore in Atherton to both meet the need identifies and address the current overtrading. By 2012, the Council should look to have provided for up to 2,000 sq. m (net) of convenience retail floorspace and up to 400 sq. m (net) of comparison retail floorspace. This could be in the form of a medium sized foodstore with a range of comparison goods lines over and above typical convenience goods.

**TABLE 7.11: QUALITATIVE CAPACITY – ATHERTON TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE ATHERTON AREA)**

| YEAR | CONVENIENCE | |
|---|---|---|
| | £(m) | Sq. m (net) |
| AT 2007 | **8.2** | **820-1,640** |
| BY 2012 | **9.9** | **990-1,980** |
| BY 2017 | **11.6** | **1,160-2,320** |
| BY 2022 | **13.3** | **1,330-2,660** |
| BY 2027 | **14.9** | **1,490-2,980** |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m

*Commitments – **Atherton***

7.46 There are no current commitments for retail development in the town.

## Golborne

*Quantitative Retail Need – **Golborne***

7.47 Table 7.12 sets out the convenience and comparison retail need for Golborne Town Centre over the periods to 2012, 2017, 2022 and 2027. An allowance is made for existing comparison retail floorspace increasing its efficiency by 1.5% per annum. No allowance is made for floorspace efficiencies in existing convenience floorspace.

**TABLE 7.12: QUANTITATIVE NEED – GOLBORNE TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE GOLBORNE AREA)**

| YEAR | CONVENIENCE | | COMPARISON | |
|---|---|---|---|---|
| | £(m) | Sq. m (net) | £(m) | Sq. m (net) |
| AT 2007 | | | | |
| BY 2012 | **2.1** | **210-420** | **1.0** | **200-286** |
| BY 2017 | **4.1** | **410-820** | **2.4** | **480-686** |
| BY 2022 | **6.2** | **620-1,240** | **4.1** | **820-1,171** |
| BY 2027 | **8.0** | **800-1,600** | **6.2** | **1,240-1,771** |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m
Average Sales Density Comparison – Assumed to be £3,500/ sq. m and £5,000/sq. m

*Convenience Goods*

7.48 There is a limited need for additional convenience goods retail floorspace in the short term; up to 420 sq. m (net) will provided scope for a small convenience store or an extension to existing provision only. In the medium term, over the period to 2017, there is scope for more substantial, but still very much local top up shopping needs, foodstore. In the long term and ultra-long term, the need would support a medium sized foodstore of the scale occupied by Co-op, KwikSave and deep-discounters Aldi, Lidl and Netto.

*Comparison Goods*

7.49 The need identified for additional comparison goods floorspace is similarly limited. In the short term the need would support two or three small shop units only. By 2017, the medium term need will support a small parade of shops or one or two larger units. In the long term and ultra-long term, there is scope for a more meaningful expansion of comparison retail provision in the town centre.

*Qualitative Retail Capacity – **Golborne***

7.50 The existing convenience retail floorspace in Golborne is overtrading considerably. On this basis, there is immediate capacity for up to 2,000 sq. m (net) of additional convenience retail floorspace. This capacity is set to increase to up to 2,420 sq. m over the period to 2012 and, thereafter: to 2,820 sq. m (net) by 2017; 3,240 sq. m (net) by 2022; and 3,600 sq. m (net) by 2027. The implication of this immediate capacity for additional convenience retail floorspace is that the Council should seek to identify a location, or locations, to meet this capacity identified. There is immediate capacity for a medium sized foodstore in the town.

**TABLE 7.13: QUALITATIVE CAPACITY – GOLBORNE TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE GOLBORNE AREA)**

| YEAR | CONVENIENCE | |
|---|---|---|
| | £(m) | Sq. m (net) |
| AT 2007 | **10.0** | **1,000-2,000** |
| BY 2012 | **12.1** | **1,210-2,420** |
| BY 2017 | **14.1** | **1,410-2,820** |
| BY 2022 | **16.2** | **1,620-3,240** |
| BY 2027 | **18.0** | **1,800-3,600** |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m

*Commitments – **Golborne***

7.51 There are no current commitments for retail development in the town.

## Hindley

*Quantitative Retail Need – **Hindley***

7.52 Table 7.14 sets out the convenience and comparison retail need for Hindley Town Centre over the periods to 2012, 2017, 2022 and 2027. An allowance is made for existing comparison retail floorspace increasing its efficiency by 1.5% per annum. No allowance is made for floorspace efficiencies in existing convenience floorspace.

**TABLE 7.14: QUANTITATIVE NEED – HINDLEY TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE HINDLEY AREA)***

| YEAR | CONVENIENCE | | COMPARISON | |
|---|---|---|---|---|
| | £(m) | Sq. m (net) | £(m) | Sq. m (net) |
| AT 2007 | | | | |
| BY 2012 | **1.7** | **170-340** | **1.1** | **220-314** |
| BY 2017 | **3.3** | **330-660** | **2.6** | **520-742** |
| BY 2022 | **4.9** | **490-980** | **4.5** | **900-1,286** |
| BY 2027 | **6.4** | **640-1,280** | **6.8** | **1,360-1,943** |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m
Average Sales Density Comparison – Assumed to be £3,500/ sq. m and £5,000/sq. m
* For convenience goods this includes the Tesco, Express, Atherton Road, Hindley Green

*Convenience Goods*

7.53 Table 7.14 identifies very limited need for additional convenience retail floorspace in Hindley. The need is meaningful only by 2017, when there is scope for a small sized convenience store or an extension to existing provision. In the long term and ultra-long term, over the period to 2027, there is scope for a small to medium sized foodstore only.

*Comparison Goods*

7.54 There is similarly limited need for additional comparison retail floorspace. The need identified over the period to 2012, of up to 314 sq. m (net), would support two or three small format shop units. By 2017, then need would support a similar number of units again and, therefore, maybe up to six in total. In the long term and ultra-long term there is scope for a more meaningful expansion of town centre comparison retail floorspace, but the need identified is still modest in context with the existing floorspace provision in the town.

*Qualitative Retail Capacity – **Hindley***

7.55 The existing convenience retail floorspace in Hindley is undertrading and undertrading to the extent where all of the need identifies in Table 7.14 would be met by improved performance at the town's existing convenience retail outlets. The Council does not need to plan for any additional convenience retail floorspace in Hindley in the short, medium or long term. There is a requirement to plan, in the short to medium term, for a modest expansion of comparison retail floorspace.

**TABLE 7.15: QUALITATIVE CAPACITY – HINDLEY TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE HINDLEY AREA)***

| YEAR | CONVENIENCE | |
|---|---|---|
| | £(m) | Sq. m (net) |
| AT 2007 | - | - |
| BY 2012 | - | - |
| BY 2017 | - | - |
| BY 2022 | - | - |
| BY 2027 | - | - |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m
* This includes the Tesco, Express, Atherton Road, Hindley Green

*Commitments – **Hindley***

7.56 There are no current commitments for retail development in the town.

**Pemberton**

*Quantitative Retail Need – **Pemberton***

7.57 Table 7.16 sets out the convenience and comparison retail need for Pemberton Town Centre over the periods to 2012, 2017, 2022 and 2027. An allowance is made for existing comparison retail floorspace increasing its efficiency by 1.5% per annum. No allowance is made for floorspace efficiencies in existing convenience floorspace.

**TABLE 7.16: QUANTITATIVE NEED – PEMBERTON TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE PEMBERTON AREA)**

| YEAR | CONVENIENCE | | COMPARISON | |
|---|---|---|---|---|
| | £(m) | Sq. m (net) | £(m) | Sq. m (net) |
| AT 2007 | | | | |
| BY 2012 | **0.2** | **20-40** | **0.7** | **140-200** |
| BY 2017 | **0.5** | **50-100** | **1.6** | **320-457** |
| BY 2022 | **0.7** | **70-140** | **2.8** | **460-800** |
| BY 2027 | **0.9** | **90-180** | **4.2** | **840-1,200** |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m
Average Sales Density Comparison – Assumed to be £3,500/ sq. m and £5,000/sq. m

*Convenience Goods*

7.58 There is very limited need identified for additional convenience retail floorspace in Pemberton. Even in the ultra-long term, over the period to 2027, there is scope only for a modest expansion of existing provision. The Council does not need to make provision for additional convenience retail floorpsace in Pemberton.

*Comparison Goods*

7.59 The need identified in the comparison retail sector is more substantial than that identified in the convenience retail sector, but is still very limited. In the short term, over the period to 2012, there is scope for up to 200 sq. m of additional comparison retail floorspace which would provide for two small format shop units. There is a more substantial need identified in the long term and ultra-long term, but this would still support a parade of small format shop units.

*Qualitative Retail Capacity – **Pemberton***

7.60 Table 7.17 illustrates that existing convenience retail floorspace in Pemberton is undertrading marginally and on this basis the capacity for additional floorspace is less still than the already limited need identified in Table 7.17.

**TABLE 7.17: QUALITATIVE CAPACITY – PEMBERTON TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE PEMBERTON AREA)**

| YEAR | CONVENIENCE | |
|---|---|---|
| | £(m) | Sq. m (net) |
| AT 2007 | **-** | **-** |
| BY 2012 | **0.1** | **10-20** |
| BY 2017 | **0.3** | **30-60** |
| BY 2022 | **0.6** | **60-120** |
| BY 2027 | **0.8** | **80-160** |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m

*Commitments – **Pemberton***

7.61 There are no current commitments for retail development in the town.

## Standish

*Quantitative Retail Need – **Standish***

7.62 Table 7.18 sets out the convenience and comparison retail need for Standish Town Centre over the periods to 2012, 2017, 2022 and 2027. An allowance is made for existing comparison retail floorspace increasing its efficiency by 1.5% per annum. No allowance is made for floorspace efficiencies in existing convenience floorspace.

**TABLE 7.18: QUANTITATIVE NEED – STANDISH TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE STANDISH AREA)**

| YEAR | CONVENIENCE | | COMPARISON | |
|---|---|---|---|---|
| | £(m) | Sq. m (net) | £(m) | Sq. m (net) |
| AT 2007 | | | | |
| BY 2012 | **0.5** | **50-100** | **0.2** | **40-57** |
| BY 2017 | **0.9** | **90-180** | **0.5** | **100-143** |
| BY 2022 | **1.4** | **140-280** | **0.8** | **160-229** |
| BY 2027 | **1.8** | **180-360** | **1.3** | **260-371** |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m
Average Sales Density Comparison – Assumed to be £3,500/ sq. m and £5,000/sq. m

*Convenience Goods*

7.63 Table 7.17 identifies limited need for additional convenience goods retail floorspace. In the short term, there is scope only for a modest extension of existing provision. It is only in the long term and ultra-long term that there is need potentially for new convenience retail floorspace of a freestanding nature.

*Comparison Goods*

7.64 In common with the convenience retail sector, the capacity identified in the comparison retail sector is very limited. There is scope for one or two additional small shop units in the short to medium term and, potentially, a number of shop units in the longer term. The Council does not, however, need to plan for any meaningful expansion of comparison retail floorspace in Standish.

*Qualitative Retail Capacity – **Standish***

7.65 Table 7.19 demonstrates that existing convenience retail floorspace in Standish is overtrading marginally and that there is an immediate capacity for up to 180 sq. m (net) of additional convenience retail floorspace. The capacity identified would support a modest extension to existing provision. In the short term, to 2012, there is scope for up to 280 sq. m (net) of additional convenience retail provision, which is sufficient to provide for a small convenience store meeting local shopping needs. The Council should consider the scope for a small additional convenience store in the town by 2012.

**TABLE 7.19: QUALITATIVE CAPACITY – STANDISH TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE STANDISH AREA)**

| YEAR | CONVENIENCE | |
|---|---|---|
| | £(m) | Sq. m (net) |
| AT 2007 | **0.9** | **90-180** |
| BY 2012 | **1.4** | **140-280** |
| BY 2017 | **1.8** | **180-360** |
| BY 2022 | **2.3** | **230-460** |
| BY 2027 | **2.7** | **270-540** |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m

*Commitments – **Standish***

7.66 There are no current commitments for retail development in the town.

## Tyldesley

*Quantitative Retail Need – **Tyldesley***

7.67 Table 7.20 sets out the convenience and comparison retail need for Tyldesley Town Centre over the periods to 2012, 2017, 2022 and 2027. An allowance is made for existing comparison retail floorspace increasing its efficiency by 1.5% per annum. No allowance is made for floorspace efficiencies in existing convenience floorspace.

**TABLE 7.20: QUANTITATIVE NEED – TYLDESLEY TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE TYLDESLEY AREA)**

| YEAR | CONVENIENCE | | COMPARISON | |
|---|---|---|---|---|
| | £(m) | Sq. m (net) | £(m) | Sq. m (net) |
| AT 2007 | | | | |
| BY 2012 | **0.5** | **50-100** | **0.8** | **160-229** |
| BY 2017 | **1.1** | **110-220** | **1.8** | **360-514** |
| BY 2022 | **1.6** | **160-320** | **3.0** | **600-857** |
| BY 2027 | **2.1** | **210-420** | **4.6** | **920-1,314** |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m
Average Sales Density Comparison – Assumed to be £3,500/ sq. m and £5,000/sq. m

*Convenience Goods*

7.68 Table 7.20 demonstrates that there is a limited need for additional convenience retail floorspace in Tyldesley, which, in the short to medium term, is sufficient only to provide for an extension to existing provision but in the long term and ultra-long term would be sufficient to support an additional small format but freestanding foodstore. There is a commitment in Tyldesley (in an out of centre location) for a Lidl foodstore of 1,437 sq. m (gross). The net sales area will be in excess of 1,000 sq. m and absorbs all of the capacity in Tyldesley for additional convenience goods retail floorspace.

*Comparison Goods*

7.69 The need for additional retail floorspace in the comparison goods sector is similarly limited. In the short term, there is a need for two to three additional shop units. In the medium term, this increase to a capacity for five to six units and in the long term and ultra-long term, there is scope for a more meaningful expansion of convenience retail provision. The Council should consider making provision for a modest expansion of comparison retail activity in Tyldesley.

*Qualitative Retail Capacity – **Tyldesley***

7.70 Table 7.21 demonstrates that existing convenience retail floorspace in Tyldesley is undertrading and, on this basis, there is no capacity for additional convenience retail floorspace at any point over the period to 2027. The need identified is absorbed by the undertrading of existing floorspace.

**TABLE 7.21: QUALITATIVE CAPACITY – TYLDESLEY TOWN CENTRE (INCLUDING GROWTH PRO-RATA TO THE CURRENT MARKET SHARE OF EDGE OF CENTRE/OUT OF TOWN CENTRE FLOORSPACE IN THE TYLDESLEY AREA)**

| YEAR | CONVENIENCE | |
|---|---|---|
| | £(m) | Sq. m (net) |
| AT 2007 | - | - |
| BY 2012 | - | - |
| BY 2017 | - | - |
| BY 2022 | - | - |
| BY 2027 | - | - |

Average Sales Density Convenience – Assumed to be £5,000/sq. m and £10,000/sq. m

*Commitments – **Tyldesley***

7.71 Although located in an out-of-centre location (approximately 500 metres from the defined Town Centre) there is currently a commitment for a Lidl store off Printshop Lane (1,437 sq m gross). This could improve the market share of convenience shopping in the Tyldesley Area.

## 8 WIGAN LEISURE ASSESSMENT

*Cinema*

8.1 There is an 11 screen cinema in the Wigan Borough, located at the commercial leisure development at Robin Park. The capacity analysis at Appendix 14 indicates that there is capacity currently for 10 additional screens in the Study Area, on the basis of: the resident population (2007); annual average visits per person (of 3.0 at 2007); and the number of visits required to support a cinema screen (50,900).

8.2 For the purposes of this assessment, the Study Area is divided into: a west area (Zone 1 (Wigan), Zone 2 (Pemberton), Zone 3 (Shevington), Zone 4 (Stanidsh), Zone 5 (Aspull), Zone 6 (Ince), Zone 7 (Hindley), Zone 8 (Platt Bridge), Zone 9 (Ashton-in-Makerfield), Zone 14 (Parbold and Wrightington) and Zone 15 (Skelmersdale)); and an east area (Zone 10 (Golborne), Zone 11 (Leigh), Zone 12 (Atherton) and Zone 13 (Tyldesley)).

8.3 The east area is currently not served by any cinema facilities and is seen to have capacity for seven screens. There is an outstanding commitment at Leigh Sports Village for a cinema which has outline planning permission; although at the time of this Study no firm proposals had been brought forward. As such, it has not been considered in this assessment. The west area has capacity for four screens, over and above the existing 11-screen facility at Robin Park.

8.4 Average annual visits per person, as informed by Mintel, are said to be 3.0 visits/ person at 2007. This is predicted to increase to 3.4 visits/ person at 2012, 4.0 visits/ person at 2017, 4.3 visits/ person at 2022 and 4.6 visits/ person at 2027. The population of Wigan is also set to increase over the 2007 to 2027 period. Consequently, the capacity for additional cinema screens in the Borough will increase to 13 at 2012, 18 at 2017, 21 at 2022 and 24 at 2027. New facilities would encourage those cinema-goers leaving the Borough currently (some 45% of the population), to use improved facilities within it. This is accounted for in the capacity assessment and it is assumed that any new facilities would result in a claw-back of leaked patronage.

8.5 Any new cinema provision should, in the first instance, be located within the defined town centre areas of Wigan and Leigh.

*Bingo*

8.6 There are three large-format registered bingo halls in Wigan Borough (BJs Bingo, Leigh - Gala, Crompton Street, Wigan and Gala, Robin Park). The capacity assessment at Appendix 14 indicates that there is capacity currently for up to five additional bingo halls in the Study Area. This is calculated from the number of residents in the Study Area who partake in bingo activities, multiplied by the average number of visits per participating person per year (17.6) divided by the total number of annual visits needed to support a club (86,364 visits). Although the number of residents participating in bingo will increase to 2027, the residual capacity will remain at five bingo halls over the period 2007 to 2027.

8.7 The Council should be supportive of any proposal for a large-format bingo hall in Wigan Borough, provided that that the proposal is within a defined town centre and it will contribute to the overall vitality and viability of that centre. However, it is important to highlight that from discussions with a number of major bingo operators we have been advised that their current acquisition programmes are currently on hold. The lack of activity is due to the impending smoking ban. It is understood that the bingo operators in Scotland (where a smoking ban already exists) have suffered particularly badly as a consequence of the smoking ban.

8.8 Although our assessment identifies capacity for additional bingo facilities in the Wigan Borough, the commercial reality is that operators are unlikely to acquire new premises until at least 2008 and until the true implications of the smoking ban has been realised. Therefore, it is unknown whether there is commercial demand in the long-term for any additional facilities in the Borough.

*Bowling*

8.9 Wigan Borough has two ten pin bowling destinations; AMF Bowling at Wallgate, Wigan, which provides 28 lanes, and Leigh Superbowl on Windermere Road, which has 14 lanes. The capacity assessment at Appendix 14 indicates that there is currently no requirement for additional lanes in the Borough, and indeed there is currently an oversupply in the ten pin bowling sector. Bowling capacity is calculated by multiplying the population of the Study Area by the average UK participation rate in bowling (11%), which is then divided by the number of visits required to support a lane (1,250).

8.10 Projecting participation rates forward to 2027 there is no identified need for additional the pin bowling facilities in Wigan over the period.

*Health and Fitness*

8.11 There are currently 33 health and fitness clubs in the Study Area, of different types and sizes and offering a broad variety of facilities and activities (this includes a number of health and fitness clubs located in the Skelmersdale area). The capacity assessment at Appendix 14 indicates the need in the Study Area for further health and fitness facilities, derived from the participation rate in such activities from the Household Survey and the average number of memberships required to support a club of 2,000 (average derived from Mintel, 2005).

8.12 The assessment indicates that up to four additional health and fitness clubs could be accommodated currently in Wigan Borough: two in the east area and two in the west area. This capacity is set to remain at four health and fitness clubs over the period to 2027.

8.13 However it should be noted that there have been two recent proposals for new health and fitness clubs in the Leigh area. Consequently, should these proposals go ahead then it is likely that the identified capacity for new health and fitness facilities in the east of the Borough will be met.

8.14 The Council should be supportive of new proposals for health and fitness clubs over the plan period, particularly in the west of the Borough, and these should be located within existing town centres in the first instance.

## 9 OVERVIEW AND CONCLUSION: THE WAY FORWARD

### Introduction

9.1 The purpose of this section is to bring together, on a centre by centre basis, the principal findings of Section 7 (retail) and Section 8 (leisure) of this report and set out WYG's recommendations for addressing the capacity issues identified. Two final sections then provide some general advice on retail and leisure in the Borough, to assist specifically with production of the LDF, and establish LDF monitoring indicators which should be addressed in the LDF and monitored on an annual basis to refresh regularly the retail and leisure strategy for Wigan Borough.

### Principal Findings and Centre by Centre Advice

*Wigan*

9.2 The principal findings and recommendations for Wigan are:

- The 2001/2002 Wigan Retail Study identified Wigan as the principal centre in the Borough and a very successful comparison retail destination. The empirical research undertaken in 2006 suggests that over the period 2001/2002 to 2006/2007 the market share of Wigan (in the catchment area adopted for the 2001/2002 Study) in both the convenience and comparison goods sectors has declined and the decline in the comparison goods sector is very significant;
- The Grand Arcade development should arrest the decline in the town's comparison goods market share and return it to 2001/2002 levels;
- The Grand Arcade is meeting the comparison retail capacity identified in the 2001/2002 Study for the period 2001 to 2007;
- Wigan is characterised by a number of successful out of centre convenience retail stores, but the convenience retail provision in the town centre is poor;
- Existing convenience retail floorspace in Wigan, overall, is under-trading and on this basis there is no need for additional convenience retail floorspace until after 2012;
- There is significant capacity in the short, medium and long term (including growth pro-rata to the current turnover of Robin Park) for up to 14,286 sq. m (net) of additional comparison goods floorspace;
- By 2017, the comparison goods floorspace capacity is 40,000 sq. m (net);
- Growth in the Wigan comparison retail sector (through Grand Arcade and future development over the periods to 2012 and 2017) is necessary to

compete with other higher order centres in the sub-region, which too are expanding their comparison retail offer;

- The extent of the comparison retail capacity means that comprehensive development/ redevelopment is required to meet the floorspace requirement.
- A town centre expansion area/areas will need to be planned for;
- Retail development in Wigan over the periods to 2012 and 2017 should concentrate on the Wigan Wallgate area, if opportunities for redevelopment come forward, and the 'Pier Quarter' – the area between Wigan Wallgate and Wigan Pier; and
- In the leisure sector, there is no requirement for cinema provision in the west of the Borough. The Wigan area already has sufficient cinema provision. In other leisure sectors, there is an identified need for additional Bingo hall provision across that Borough and a need for an additional health and fitness club in the west of the Borough, which would be located most appropriately in Wigan.

*Leigh*

9.3 The principal findings and recommendations for Leigh are:

- Leigh is a successful comparison goods destination, the most important destination in the east of the Borough and the second most important centre behind Wigan;
- There is considerable need identified for additional comparison goods floorspace in the short term to 2012 and the medium term to 2017;
- Whether or not there is a need to plan for additional new comparison retail floorspace will be dependent upon whether the commitment at Grasmere Street comes forward, as this could absorb the capacity for additional floorspace over the period to 2017 if it is developed;
- It is also important to note that this Retail Study anticipates that Leigh will be in a period of recovery over the coming five years, given the assessed trade draw of £11.5m to the Grand Arcade development in Wigan. It will take Leigh five years to recover to its pre-Grand Arcade position on the basis of the assessment made in this Retail Study;
- Convenience retail floorspace in Leigh trades at expected levels;
- The short term capacity in the convenience retail sector is limited. Medium term capacity is more substantial and could provide for a medium sized foodstore;
- The key issue for Leigh is to remain competitive with the higher order centres, particularly in light of major town centre schemes in the higher order centres with which Leigh competes;
- It is important that opportunities are identified through the LDF process to meet the need identified, particularly in the convenience retail sector, and to bolster the role and profile of Leigh as a shopping destination;
- Although successful relatively in both the convenience and comparison retail sectors, Leigh is fragile and has the potential to spiral into a decline in the face of increased competition. It will be important to balance the limited quantitative need with the qualitative need for improvements;

- If the Grasmere Street commitment does not come forward, then the level of capacity identified could not be met through infill or piecemeal development – it would need opportunities to be identified for comprehensive development/redevelopment; and
- In the leisure sector, Leigh is the appropriate town to redress the deficiency in cinema provision in the east of the Borough. There is a demonstrable need for a cinema of up to10-screen. There is a need for two additional health and fitness clubs in the east of the Borough, although this is could be met by recent proposals.

*Ashton in Makerfield*

9.4 The principal findings and recommendations for Ashton in Makerfield are:

- Ashton in Makerfield is a poor convenience retail destination;
- There is limited convenience retail provision and the existing provision is under-trading;
- There is no quantitative capacity for additional convenience goods floorspace – the need is absorbed in its entirety by the under-trading foodstores' advancing towards benchmark turnovers;
- The town fairs better marginally as a comparison retail shopping destination, but is fragile and needs improving;
- There is a commitment for 2,191 sq. m (net) of comparison goods retail floorspace at York Street. The commitment meets the need for additional floorspace in Ashton in Makerfield to 2017, if it comes forward;
- If the York Street scheme does not come forward, then the LDF should be looking to make provision from a fairly sizable extension of comparison retail activity in the town; and
- In the leisure sector, there is no pressing need to make provision for additional commercial facilities in Ashton in Makerfield.

*Atherton*

9.5 The principal findings and recommendations for Atherton are:

- Atherton is a successful convenience retail destination. Existing convenience retail floorspace is overtrading;
- There is considerable quantitative capacity in the longer term for additional convenience retail floorspace;
- It is important for Atherton to preserve and enhance its role as a convenience shopping destination;
- The town is also a successful comparison retail destination and although the need for additional floorspace that is identified is limited, it will be important for the LDF to ensure that sites are available to meet this need;
- If the need, in both the convenience and comparison retail sectors is not met in Atherton, then the centre will decline and it will fall behind other destinations in the local area and elsewhere in the Borough;

- Given the identified need for additional convenience and comparison retail floorspace, the LDF should be looking to bring forward a site/sites for mixed convenience and comparison retail development;
- In the leisure sector, there is no pressing need to make provision for additional facilities in Atherton.

*Golborne*

9.6 The principal findings and recommendations for Golborne are:

- Golborne is a very successful town in the convenience retail sector;
- Existing convenience retail floorspace in Golborne is overtrading considerably and there is an immediate need for a medium-sized foodstore;
- The LDF should consider options for addressing this need, looking first at town centre sites within Golborne and then other sites in the town's hinterland if a central site in Golborne is not available;
- The town is less successful as a comparison retail destination, but there is capacity for additional comparison retail floorspace identified;
- It is important that the capacity for both convenience and comparison goods floorspace is met, to maintain Golborne's position in the hierarchy and keep the town competitive against other retail destinations;
- The comparison retail capacity could be met either through in-fill amongst the existing commercial centre or through a non-food offer in any foodstore that might be forthcoming; and
- In the leisure sector, there is no pressing need to make new provision for additional facilities in Golborne.

*Hindley*

9.7 The principal findings and recommendations for Hindley are:

- Convenience retail floorspace in Hindley is under-trading and consequently, there is no capacity for additional convenience retail floorspace in the town;
- In the comparison retail sector, Hindley provides a role of ancillary destination relative to the higher order centres;
- There is a modest capacity for additional comparison retail floorspace in the short term, which becomes more significant in the medium and long term;
- Hindley is a fragile centre and the LDF should plan for some considered expansion, at least in the comparison retail centre, to increase retail activity and achieve an element of modernisation in the retail environment and retail offer;
- Hindley needs to compete with the other smaller town centres in the area and elsewhere in the Borough; and
- In the leisure sector, there is no pressing need to make new provision for additional facilities in Hindley.

*Pemberton*

9.8 The principal findings and recommendations for Pemberton are:

- Pemberton is one of the smallest defined town centres in the Borough;
- The existing convenience retail floorspace in the town is under-trading marginally, and there is limited capacity for additional convenience retail floorspace;
- There is no requirement to identify a site/sites in Pemberton to meet the assessed need for additional convenience retail provision as this can be addressed adequately by improvements to existing provision;
- Similarly, there is modest capacity in the comparison retail sector although this is slightly more pronounced than the need in the convenience retail sector;
- The objective for Pemberton should be to continue to meet local shopping needs, and to perform its local shopping role as ancillary to the higher order centres in the Borough;
- Pemberton should not look to compete with other higher order centres, but develop its complementary role; and
- In the leisure sector, there is no pressing need to make new provision for additional facilities in Pemberton.

*Standish*

9.9 The principal findings and recommendations for Standish are:

- Standish performs a local, and principally convenience, shopping role;
- There is very limited capacity in Standish for additional retail floorspace in both the convenience and comparison retail sectors;
- The objective of the LDF should be to protect the local shopping role that Standish performs. There is no requirement to allocate sites for either comparison or convenience retail development or leisure development.

*Tyldesley*

9.10 The principal findings and recommendations for Tyldesley are:

- Tyldesley is one of the weaker centres in the Borough – it clearly faces considerable competition from higher order centres;
- Convenience floorspace in the town is under-trading and there is no capacity for additional floorspace;
- There is a modest requirement to plan for additional comparison retail floorspace;
- The objective of the LDF with regard to Tyldesley should be to improve its overall health and performance as a centre and bolster the town's position in the local hierarchy. Action needs to be taken to give Tyldesley more of a competitive edge when it is trading against other centres that draw trade from the same local area;

- There is some justification for improving the centre by allocating sites for retail development and seeking to encourage development. The LDF should look to determine how the poor performance of Tyldesley can be reversed; and
- In the leisure sector, there is no pressing need to make new provision for additional facilities in Tyldesley.

**Overall Strategy**

9.11 The overall LDF Strategy for retailing and leisure should be to achieve a better balance of provision across the Borough and to ensure that where capacity is identified, provision is made for the meeting of this capacity through the identification of sites.

9.12 In the comparison retail sector, Wigan town centre has declined markedly over the period 2001/2002 to 2006/2007. The Grand Arcade should address this, but if Wigan is to remain competitive with other higher order centres in the sub region further comparison retail floorspace will need to be provided and this will need to be through town centre expansion and comprehensive development/redevelopment. Leigh is a strong comparison retail destination, but will be affected by the Grand Arcade. The comparison retail capacity in Leigh may already be met by commitments. Elsewhere in the Borough comparison retail provision needs to be improved, and development encouraged through the allocation of sites through the LDF process, to maintain the performance of individual centres and the retail hierarchy.

9.13 In the convenience retail sector, all new provision should be in town centres in the first instance. The quantitative need is limited in most centres, but there is a clear qualitative deficiency in foodstore provision in the south and west of the Borough which should be addressed through the identification of appropriate sites as part of the LDF process.

9.14 In the leisure sector, there is a need to plan for a new multi-screen cinema to serve the east of the Borough; this would be best located in Leigh. There is also a need for two additional health and fitness clubs in the east of the

Borough and there are recent proposals for two new health and fitness clubs in Leigh. There is a need for a further two facilities in the west of the Borough and these would be best located in Wigan. There is also a need for up to five bingo halls, and these should be encouraged within centres throughout the Borough.

**LDF Monitoring Indicators**

9.15 With regard to LDF Monitoring Indicators, WYG advises that the Council establishes a framework for monitoring:

- market share of centres in the convenience and comparison retail sectors (through periodic updates of the retail and leisure study);
- planning application submissions, in respect of quantum of floorspace applied for and planning permissions granted;
- floorspace developed and floorspace vacated on a centre by centre basis;
- monitoring the composition of town centres by undertaking in-house town centre surveys to update the GOAD/WYG surveys;
- vacancy rates in centres; and
- national multiples/independent traders balance.

## GLOSSARY OF TERMS

| | |
|---|---|
| **Capacity** - | Retail capacity in terms of this report refers to surplus/ deficit of expenditure (£m) which represents the difference between the expenditure and turnover of the identified facilities. |
| **Study Area** - | This represents the household survey area, which is based on postal sectors. |
| **Experian -** | The database used to identify population, expenditure and socio-economic breakdown of the study area population. |
| **Comparison Goods** - | Comparison goods relate to items not obtained on a frequent basis, these include clothing, footwear, household and recreational goods (Table 3, Annex A, PPS6). |
| **Convenience Goods** - | Convenience goods relate to everyday essential items including confectionary, food, drinks, newspapers and magazines (Table 3, Annex A, PPS6). |
| **Expenditure per capita** - | This is the average spend of each person within the defined study area on a variety of retail goods. |
| **Expenditure** - | Expenditure is calculated by taking the population within a defined area and then multiplying this figure by average annual expenditure levels for various forms of goods. |
| **Expenditure Forecasts -** | This assessment has been undertaken using the ‘goods based’ approach as prescribed in PPS6, the information |

on consumer retail expenditure forecasts have been derived from Experian Retail Planner Briefing Note 4.0.

Forecasts based on the anticipated increase in expenditure per annum for a variety of goods as identified by Experian (+0.7% per annum for convenience goods, +2.6% per annum for DIY goods, +4.2% for bulky goods and +3.6% per annum for non-bulky goods).

**Gross Floorspace -** This represents the level of total floorspace or footprint of a specific development (i.e. sales area, storage, checkouts, café, display, etc).

**Net Floorspace** - This entails the level of internal area devoted to the sale of goods.

**Market Share -** Market shares derived from the household survey results, which are based on the proportion of expenditure attracted to a particular centre/ facility.

**National Multiple -** This is a retail or service operator which is or part of a network of nine or more outlets.

**Price Base -** The price base for the study is 2004; all prices are or have been adjusted to 2004 in order to be consistent.

**Sales Density -** Retail capacity figures are expressed in term of floorspace, relying on the application of assumed sales density figures to the surplus expenditure identified. This is based on the typical turnover of a store by square metre/ foot.

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| **Turnover -** | The turnover figure relates to the annual turnover generated by existing facilities. |

## Acronyms

| | |
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| **FOCUS -** | Commercial operator information provider |
| **GOAD -** | Experian GOAD |
| **LDF -** | Local Development Framework |
| **MHE -** | Management Horizons Europe |
| **NEMS** | NEMS Market Research Company |
| **ORC -** | Independent retail management consultancy |
| **PPS6 -** | Planning Policy Statement 6 |
| **psm -** | Per Square Metre |
| **psf -** | Per Square Foot |
| **sq m -** | Square metres |
| **UDP -** | Unitary Development Plan |
| **VOA -** | Valuation Office Agency |
| **WYG -** | White Young Green |