

# WIGAN BOROUGH RETAIL AND LEISURE STUDY 2007 TO 2027

MAY 2007



 **Wigan Council**

**NEMS** market research  
*Picking all the right boxes* ✓

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## **1.0 SCOPE AND PURPOSE OF THE STUDY**

- 1.1 Wigan Council has commissioned this Study from White Young Green Planning (WYG) to advise on the future retail and leisure strategy for the network of town centres in the Borough. The Council has commissioned the Study as part of its preparation of the Local Development Framework, which will replace the current Wigan Unitary Development Plan (UDP). This Study will be a principal component of the evidence base, informing the preparation of the LDF and its future public examination.
- 1.2 In terms of the network and hierarchy of centres within the Borough, the principal centres are: Wigan and Leigh. Other defined town centres which are part of this Study are; Ashton in Makerfield, Atherton, Golborne, Hindley, Pemberton, Standish and Tyldesley. There are a number of district and local centres in the Borough, the performance of which are not addressed by this Study.
- 1.3 The Study assesses the vitality and viability of the centres and the future retail need in those centres over the period 2007 to 2027. The Study also considers, in general terms, the role, function and distribution of smaller centres in the Wigan Borough. The Study has regard to the advice on such assessments set out in Planning Policy Statement 6 (2005) 'Planning for Town Centres'.
- 1.4 The Study includes an in-depth analysis of the retail and leisure provision in the nine town centres, assessment of the extent to which the centres are meeting the retail and leisure needs of local residents and the role of the centres in the local shopping network and the sub-regional shopping hierarchy.
- 1.5 The findings of the Study are intended to assist retail policy formulation in preparation of Development Plan Documents for the Wigan Local Development Framework (LDF). The Study is a material consideration in

determining planning applications for retail and leisure development within the Wigan Borough.

1.6 The purpose of this Study is to:

- Assess the performance of the nine town centres in the Borough (as identified in the Wigan UDP, April 2006) the convenience retail, comparison retail, leisure and other commercial sectors, identify the catchment area of the centres in the Borough and provide a quantification of the leakage of expenditure to destinations outside of the Borough;
- Deliver a detailed retail and leisure need capacity assessment for the nine town centres over the short term (to 2012), the medium term (to 2017), the long term (to 2022) and the ultra-long term (to 2027), including the consideration of alternative scenarios where appropriate to factor in developments that come forward and provide an assessment of the implications of the Grand Arcade;
- Provide a PPS6-compliant vitality and viability assessment of the nine town centres;
- Provide a broad commentary of the generic role and function of district and local centres within the Borough hierarchy;
- Provide advice on commercial demand and the physical capacity of the centres to accommodate the identified retail need and where this need is most appropriately met;
- Provide guidance on assessing future planning applications for new retail and leisure development on sites outside of existing centres;
- Provide an overview of current trends in the retail sector (**Appendix 1**);
- Provide a hierarchy of centres and popular destinations for various leisure activities;
- Provide a list of the main issues for retailing and leisure in the Borough
- Provide a list of possible options for addressing the issues identified;
- Provide a list of Local Development Framework monitoring indicators; and

- Deliver policy advice for the forthcoming LDF in terms of where the need and capacity identified can be most appropriately met in the Borough and how retail, leisure and other commercial policy should be framed.

## 2 METHODOLOGY

### Survey Data

- 2.1 Empirical data form the basis of the Study. As part of the Study, the following surveys were commissioned.

#### *Household Survey*

- 2.2 A Household Survey of 1,950 households in the Wigan Borough Area was undertaken by NEMS Market Research during December 2006 and early January 2007. WYG has discussed extensively with NEMS, and other market research companies including MORI, the appropriate quantum of interviews to undertake in a Household Survey. The industry standard is that a minimum of 100 interviews per sub-area is required. This is to ensure that there is no bias in the findings, which could occur, where a lesser number of interviews undertaken'. The minimum is achieved in this Study.

- 2.3 NEMS undertook the Household Survey in fifteen Survey Areas. Thirteen of these zones were based on the zones used in the 2001 Wigan Household Survey, with an additional two Survey Areas added which cover the Skelmersdale, Parbold and Wrightington area. The Survey Areas and post-code sectors within the zones comprise:

1. *Wigan* – WN1/1, WN1/2, WN1/3, WN3/4, WN3/5, WN5/0, WN6/7

2. *Pemberton* – WN3/6, WN5/7, WN5/8, WN5/9

3. *Shevington* – WN6/8, WN6/9

4. *Standish* – WN6/0

5. *Aspull* – WN2/1

6. *Ince* – WN2/2

7. *Hindley* – WN2/3, WN2/4

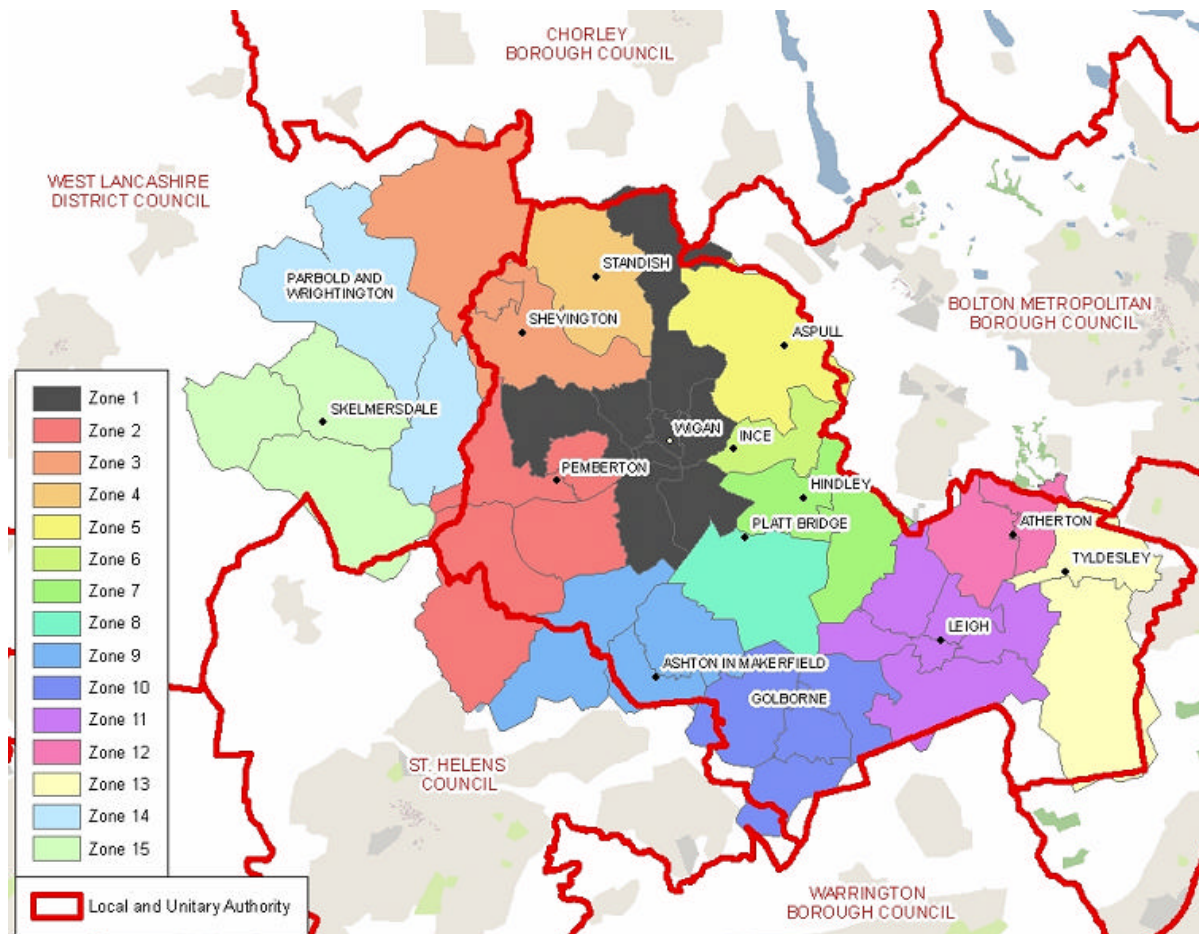
8. *Platt Bridge* – WN2/5

9. *Ashton-in-Makerfield* – WN4/0, WN4/8, WN4/9

10. *Golborne* – WA3/1, WA3/2, WA3/3

- 11. Leigh – WN7/1, WN7/2, WN7/3, WN7/4, WN7/5
- 12. Atherton – M46/0, M46/9
- 13. Tyldesley – M29/7, M29/8
- 14. Parbold and Wrightington – WN8/0, WN8/7
- 15. Skelmersdale – WN8/6, WN8/8, WN8/9

**Figure 2.1 Map of the Household Survey Area**



- 2.4 The Study Area incorporates a wider area than that which comprises the Borough of Wigan. The Study Area has been extended to the west to include Zone 14 – Parbold and Wrightington and Zone 15 – Skelmersdale. This is because the sphere of influence of the Borough, and particularly that of the principal town Wigan, extends beyond the Borough boundary.
- 2.5 The Household Survey is designed to generate data on convenience and comparison shopping patterns and leisure activity in the Wigan Borough Area, and to determine residents' perceptions on the quality of shopping and leisure

provision available. The tabulated results of the Household Survey are contained at **Appendix 3**.

#### *In-street Survey*

2.6 In January 2007 NEMS conducted an In-street Survey of 629 visitors to the nine town centres. These In-street Surveys were distributed as follows: Ashton-in-Makerfield – 60 surveys, Atherton – 61 surveys, Hindley – 60 surveys, Golborne – 61 surveys, Pemberton – 60 surveys, Standish – 60 surveys, Tyldesley – 62 surveys, Leigh – 105 surveys and Wigan – 100 surveys.

2.7 This In-street Survey is designed to generate data on perceptions of the town centres, frequency of visits and the main purposes for which the town centre is used, particularly with regard to shopping and leisure habits. The tabulated results for the In-street Survey are contained at **Appendix 4**.

#### *Pedestrian Flow Counts*

2.8 The Retail Study is informed by a pedestrian flow survey undertaken by NEMS in each of the nine town centres. NEMS recorded the pedestrian flow at a number of count points, to inform the vitality and viability assessments. The tabulated results of the pedestrian counts are included at **Appendix 5**.

#### *Town Centre Business Surveys*

2.9 Wigan Council and WYG conducted a survey of all commercial businesses in the nine town centres. A detailed summary of the responses are contained at **Appendix 6**, however the number of surveys distributed and returned for each centre are as follows:

- **Ashton-in-Makerfield:** 202 surveys distributed,  
47 surveys returned (23% response rate);
- **Atherton:** 147 surveys distributed,  
36 surveys returned (24% response rate);
- **Golborne:** 132 surveys distributed,

- **Hindley:** 27 surveys returned (20% response rate);  
137 surveys distributed,  
47 surveys returned (34% response rate);
- **Leigh:** 328 surveys distributed,  
81 surveys returned (25% response rate);
- **Pemberton:** 122 surveys distributed,  
23 surveys returned (19% response rate);
- **Standish:** 120 surveys distributed,  
47 surveys returned (39% response rate);
- **Tyldesley:** 111 surveys distributed,  
30 surveys returned (27% response rate);  
and
- **Wigan:** 468 surveys distributed,  
115 surveys returned (25% response rate).

### **Assessing the ‘Vitality and Viability’ of the Town Centres**

2.10 Indicators of vitality and viability, set out in Paragraph 4.4 of PPS6, are used as a basis for the assessment of the well being of the town centre. These indicators are as follows:

- **Diversity of main town centre uses (by number, type and amount of floorspace):** An Experian land use plan is used to assess the diversity of uses in Ashton-in-Makerfield, Atherton, Hindley, Leigh and Wigan. In Golborne, Pemberton, Standish and Tyldesley where no Experian information is available, WYG have undertaken it’s own town centre survey;
- **The amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations:** WYG includes all retail and leisure floorspace in the Wigan area in the assessment (office development will be looked at in a separate study under the Council’s employment land review);

- **The potential capacity for growth or change of centres in the network:** WYG has considered the opportunity for the town centres to expand, including considering the scope for more intensive development on previously developed land;
- **Commercial Operator representation and intentions to change representation:** derived from the land-use surveys, town centre business surveys (**Appendix 7**), FOCUS reports for outstanding retailer demand (**Appendix 8**) and work undertaken by Donaldson's (**Appendix 9, 10 and 11**);
- **Shopping rents:** the average Zone A rents paid in centres, derived from published Valuation Office Agency data, where available, and based on advice from Donaldson's;
- **Proportion of vacant street level property:** derived from the land-use surveys;
- **Commercial yields on non-domestic property (i.e. the capital value in relation to the expected market rental):** derived from Valuation Office Agency data;
- **Pedestrian flows:** from pedestrian flow counts undertaken by NEMS Market Research;
- **Accessibility:** from In-street Survey responses and our own assessment;
- **Customer and residents' views and behaviour:** from the In-street, business and Household Surveys;
- **Perception of safety and occurrence of crime:** from In-street Surveys and business survey responses; and
- **State of the City/town centre environmental quality:** from In-street Survey, business surveys and field work observations.

2.11 The completed vitality and viability assessments are included at **Appendix 12**.

## Calculating Quantitative ‘Capacity’

### *Retail - Convenience and Comparison Goods*

- 2.12 The Study is undertaken using a goods-based methodology, i.e. the sale of goods by type (convenience and comparison) as advocated by PPS6.

*‘local planning authorities should assess the likely future demand for additional retail...floorspace, having regard to a realistic assessment of...forecast expenditure for specific classes of goods to be sold, within the broad categories of convenience and comparison goods’. [Paragraph 2.34]*

- 2.13 Household Survey data is used to calculate the market shares<sup>1</sup> for the town centres, and freestanding destinations in the Wigan Borough Area. Market shares are projected forward to 2012, 2017, 2022 and 2027 in order to assess the future short, medium, long and ultra long term ‘expenditure capacity’. The statistical tables are contained at **Appendix 13**. The capacity assessment is undertaken using population growth rates taken from ONS-based Sub-national projections for the Wigan Borough Area for Zones 1 to 13, whilst for Zones 14 and 15 ONS projections for the West Lancashire area have been utilised.

- 2.14 For Wigan and Leigh, an additional comparison floorspace capacity table has been included to indicate the impact of the Grand Arcade Shopping Centre on these two centres. Whilst there will be an impact on other shopping centres in the Borough, the extent of the change in comparison goods turnover is extremely difficult to quantify.

### *Expenditure from Outside of the Study Area*

- 2.15 The Study Area adopted is drawn broadly, so as to include the majority of the catchment population who use destinations in the Borough for convenience and comparison shopping and leisure activities. However a proportion of turnover, generated by visitors and those passing through Wigan, will be drawn from outside of the Study Area. It is likely that the great majority of this

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<sup>1</sup> Market share: the proportion of expenditure directed to a centre/retail destination within any given Study Area.

inflow of expenditure is incidental to travel; such inflow is common to all larger towns.

- 2.16 The proportion of destinations' convenience and comparison turnovers drawn from outside of the Study Area cannot be quantified. An assumption could be made, although caution should be exercised as an overestimate of inflow could lead to an overestimate of capacity/need. Therefore this Study does not make an allowance for expenditure in-flow from outside of the Study Area. However, for guidance only and in light of the Study Area adopted, the in-flow to Wigan Town Centre is very unlikely to be in excess of 5% of total turnover in the comparison retail sector. In respect of convenience retailing, in-flow is likely to be no more than 2.5%. The in-flow to the other centres is likely to be no greater than 2.5% in the comparison retail sector and 1.25% in the convenience retail sector.

#### *Capacity Projections*

- 2.17 Capacity figures are given for 2012 as this is five years from the base date of the Study and for 2017, 2022 and 2027, giving medium, long and ultra-long term considerations of capacity; a five year time span is advocated at paragraph 3.10 of PPS6 as being appropriate for considering the 'need' for additional retail floorspace in respect of development proposals:

***'The need for additional floorspace should be assessed no more than five years ahead, as sites in centre may become available within that period. Assessing the need beyond this time period might pre-empt future options for investment in centres, except where large town centre schemes are proposed and where a longer time period might be appropriate to allow for site assembly' [Paragraph 3.10]***

- 2.18 The 2012 capacity figure is a useful guide as to whether Wigan Council needs to allocate sites for new retail development as part of the process of preparing a Development Plan Document. Decisions over planning applications should be in accordance with the Development Plan Documents, unless material considerations indicate otherwise. Accordingly, it is important that the Development Plan Documents have a clear strategy for retail and leisure development over the period it covers.

2.19 The Study is an important material consideration in Development Control decisions. In accordance with national planning guidance on the location of new retail development, the quantitative 'capacity' identified should be accommodated within town centres prior to other sites being considered. For sites outside town centres to be acceptable, it will be necessary to demonstrate that there are no alternative sites within town centres to meet any identified need, where centres are in the catchment area of a proposed development.

2.20 The advice is that medium and longer term capacity (in this Study, over the periods to 2017, 2022 and 2027) should be viewed with some caution and it is not intended that it be satisfied on out-of-centre sites (unless there is good reason to do so) because this may prejudice future town centre opportunities that are yet to become available, but may become available beyond 2012.

#### *Market Share Calculations*

2.21 In order to calculate convenience and comparison expenditure per head, WYG has utilised Experian MicromarketerG3 data, which provide detailed information on local consumer expenditure and which take into account the socio-economic characteristics of the local resident population. For convenience retail goods, expenditure is broken down into:

- 'main-convenience' (shoppers' usual destinations for bulky convenience shopping); and
- 'top-up convenience' (shoppers' usual destinations for top-up shopping, undertaken in-between bulk convenience shopping trips).

2.22 For comparison retail goods, the exercise is undertaken on the basis of 'non-bulky' goods (clothes and shoes, other household goods) and 'bulky' goods (Furniture and Carpets, Electrical and DIY). For the purposes of the statistical analysis, the market shares are combined into overall 'convenience' and 'comparison' capacities in line with Government guidance in PPS6.

### *Growth Rates*

- 2.23 In estimating future 'capacity', the spending power of the catchment population is projected forward on the basis of forecast growth rates as contained in Experian Retail Planner Briefing Note 4.0 (October 2006). In terms of convenience goods, Experian identify a forecast growth rate of +0.7% per annum between 2006 and 2015 (Table 3.2 of Retail Planner Briefing Note 4.0). For the purposes of this study this forecast growth rate has been utilised up to 2027.
- 2.24 For comparison goods, Experian identifies different forecast growth rates for bulky and non-bulky comparison goods (including DIY goods). In this respect, the forecast growth rate for DIY goods is identified to be +2.6% per annum, +4.2% for bulky goods and +3.6% for non-bulky goods. Therefore, where appropriate these forecast growth rates have been applied
- 2.25 Scope is incorporated in the calculations to allow existing town centre floorspace to improve its trading performance by 1.5% per annum (comparison retail floorspace only), through floorspace efficiencies, as a means of safeguarding and enhancing town centre vitality and viability in line with Development Plan strategies. There is no set rule for taking into account improved floorspace efficiencies. This Study adopts conservative estimates for the growth in per capita expenditure. Accordingly, it is reasonable to adopt relatively conservative estimates for increases in floorspace efficiency. 1.5% is an appropriate, and conservative, estimate of increases in floorspace efficiency.

### *Internet Shopping*

- 2.26 The Household Survey records the extent to which residents of the Study Area, for convenience and comparison shopping, use the Internet. The capacity assessment adopts a constant market share approach throughout (i.e. the market share of each destination is applied to the total expenditure available at 2012, 2017, 2022 and 2027). Internet shopping is addressed in the same manner. It is assumed that Internet shopping purchases will

continue at the same rate; overall spending on convenience and comparison goods using the Internet will increase, but the market share will remain constant.

- 2.27 There is not a consensus in the retail planning industry as to how Internet purchases are likely to change in coming years. It is for this reason, and to achieve consistency between Internet shopping and other shopping destinations, that a constant market share approach is adopted. Of course, in common with an increase in the market share of any shopping destination, the knock-on effect is a reduction in the market share of other destinations. Hence, if it transpires that the Internet is increasing its market share then the market share of tangible retail destinations will reduce.

*Sequential Approach*

- 2.28 PPS6 (Paragraph 2.41) states that any need for new retail floorspace should be met in appropriate locations within existing centres. On this basis, the 'need' for additional retail floorspace includes both in centre and out-of-centre facilities. Any growth in spending identified for out-of-centre retail facilities, based on current market share, has been amalgamated with the growth identified for the town centre that is nearest to it. This need should be met in the first instance by new retail floorspace in the town centre and not by new edge of centre or out of centre retail floorspace. Under the terms of national planning guidance, all new retail development should be directed to town centres in the first instance. PPS6 indicates that this principle is applicable equally to bulky goods.

***'...it will not be sufficient for an applicant to claim merely that the class of goods proposed to be sold cannot be sold from the town centre'.  
[Paragraph 3.16]***

- 2.29 Wigan and Leigh are the principal shopping destinations in the Borough. These main town centres should be the principal location for new retail and leisure development. Investment should also be channelled to the other towns in the administrative area and growth in spending elsewhere in the Borough should be satisfied by new retail and leisure facilities in the other

towns. It is in the interests of social inclusion that the broader growth effected in the urban area be directed to the town centres rather than to less central sites, unless there is good reason for this.

- 2.30 It is an optimum aim for the town centres to attract all of the expenditure growth, which is apportioned to them when applying current market share. This could come about through significant qualitative improvements in the current retail offer; this should be an aspiration of the Council.

#### *Leisure*

- 2.31 The Leisure assessment is undertaken in four key commercial leisure sectors: Bingo; Cinema; Health and Fitness; and Ten-Pin Bowling on a Borough-wide basis. The preferred location for commercial leisure development is Wigan Town Centre and Leigh Town Centre, as the principal centres in the Borough.
- 2.32 Household Survey data is used to assess the propensity for residents in the Study Area to undertake bingo and health and fitness activities, from which capacity is deduced. With respect to capacity for cinema and ten pin bowling facilities, this is derived using the population of the Borough and the national average participation rates in such activities. The leisure patterns in the Study Area are recorded in the tables at **Appendix 14**.
- 2.33 The leisure assessment uses the same population scenarios as the retail assessment.
- 2.34 WYG has devised a robust methodology for calculating the need for additional commercial leisure provision. The assessment works in a different way to that undertaken for retailing, for two reasons:
- Projecting forward current patronage rates will not generate a quantitative need in the same way that projecting forward current market share in the convenience and comparison retail sectors does. Quantitative need in the

commercial leisure sector is derived from increased participation rates; and

- In the leisure sector, qualitative deficiency, resulting in a latent demand, must be taken into account. For a proportion of the population who do not partake in leisure activities, such as Bingo, Cinema, Health and Fitness or Ten-Pin Bowling, the reason behind this may be an absence of provision.

2.35 WYG assesses the participation rates in the Study Area against provision and the requisite provision at national average participation rates. From this any deficiency in facilities is calculated. The extent of any current deficiency and the margin between requisite provision (at a national average) and actual provision will determine the need for new provision in the Wigan Borough. In addition it will identify the capacity for new facilities and the need to identify sites to accommodate them.

2.36 Capacity figures are given for 2012, five years from the base date of the Study, as advised by PPS6. The 2012 figure is a guide as to whether the Council needs to allocate, or retain existing allocated sites, for new commercial leisure development as part of the emerging Development Plan Document. The leisure element of the Study is an important material consideration in Development Control decisions.

2.37 As with retail, assessing longer-term capacity (in this Study over the periods to 2017, 2022 and 2027) should be viewed with some caution and it is not intended that any need over this period be satisfied on out of centre sites (unless there is good reason to do so) as this may prejudice future opportunities in the town centre that are yet to become available, but may do so beyond 2012.

2.38 For the Health and Fitness sector, capacity is calculated as a straightforward ratio of potential participation amongst the Study Area population compared with the population required to support a large format Health and Fitness Centre; the assessment is geared towards large-format health and fitness

centres, usually with multiple activities, which will have a broadly similar requirement in terms of catchment population. In the other sectors (Bingo, Cinema and Ten Pin Bowling) capacity is calculated in terms of the number of potential annual visits by the Study Area population and the population/visits required to support such facilities.

2.39 For Ten-Pin Bowling, capacity is assessed in terms of the number of lanes that could be supported. In the Cinema sector, the same assessment is made in terms of the number of screens that could be supported. For Health and Fitness Clubs and Bingo Halls, capacity is expressed in terms of the number of facilities that could be supported.

2.40 As highlighted previously for Bingo and Health and Fitness activities the calculations have been based on the proportion of residents who partake in such activities, as derived from the Household Survey. However for Ten Pin Bowling and Cinema activities, capacity is calculated using the total population of the Study Area.

2.41 Wigan and Leigh are the principal towns and should be the preferred location for new commercial leisure development. It is in the interests of social inclusion that any broader capacity generated in the urban area is directed to the smaller town centres rather than out of centre locations, unless there is good reason for this.

2.42 It is an optimum aim for the Borough's town centres to attract any new commercial leisure facilities that are developed to meet any quantitative need, qualitative need and latent demand for participation.

### **Qualitative Need**

2.43 In addition to any quantitative need, there may also be a qualitative need for new retail or leisure provision. This is informed by the Household Survey, which will identify the extent to which, in the convenience retail sector, retail

facilities are overtrading and where shopping and leisure expenditure is leaking from the Study Area to destinations outside of it. The In-street Survey too, seeks to identify any qualitative deficiencies in existing provision as perceived by visitors to the town centre. The analysis of need for additional retail and leisure floorspace takes into account any qualitative deficiency in existing provision, in advising appropriate strategies for future development.

### **3 SHOPPING IN WIGAN BOROUGH**

#### **The In-street Study Area**

- 3.1 NEMS conducted an in street survey of 629 visitors, undertaken at each of the following centres in the Wigan Borough: Ashton-in-Makerfield (60 surveys undertaken), Atherton (61), Hindley (60), Golborne (61), Leigh (105), Pemberton (60), Standish (60), Tyldesley (62) and Wigan (100).
- 3.2 Respondents were asked about their activities in the centres, frequency of visit, convenience and comparison shopping patterns, leisure activities, mode of travel and perceptions of the destination on a range of criteria.
- 3.3 The importance of undertaking In-street Surveys is that, unlike the household Household Surveys, respondents are actively using the town centres. The answers are therefore related to the centres themselves, rather than shopping patterns in general. They serve to assess the vitality and viability of the centre, with respect to its use, people's perceptions and the facilities it has to offer. In contrast, the Household Survey is used to identify the proportion of residents in the Study Area who use retail and leisure destinations.
- 3.4 The findings of the In-street Surveys are presented in the vitality and viability assessments, contained at **Appendix 4**.

#### **The Household Survey**

- 3.5 The Study Area is shown on the plans at **Appendix 2**, and the Household Survey itself if included at Appendix 3.
- 3.6 The analysis of the Household Survey exclude the 'don't regularly buy these goods' and 'don't know/ can't remember' responses.
- 3.7 Normal convenience shopping patterns will comprise of more than one destination and the assessment is divided into main-convenience and top-up

shopping. The assessment assumes that 80% of spending is directed to main convenience shopping and the residual 20% is directed to top-up shopping. There is no set rule for this breakdown, but the WYG estimates are reflective of standard practice in the completion of retail studies.

3.8 With respect to comparison shopping the amount of spending generated has also been apportioned to five different categories of comparison goods: Electrical, Furniture, and DIY which together comprise bulky goods, and clothing and footwear and other household goods, which comprise non-bulky goods. The proportion of expenditure directed towards each category has been derived from the Experian MicromarketerG3 reports for each of the fifteen Survey Areas.

3.9 The analysis below is based upon the interviewees' main destinations for convenience shopping ('main-convenience' and 'top-up' shopping) and for comparison shopping ('non-bulky goods', 'bulky goods' and 'DIY goods'). The statistical analysis (**Appendix 13**) assesses market share in main convenience, top-up convenience and the comparison sectors and then combines the convenience and comparison data sets to provide a capacity assessment for the broad convenience and comparison retail goods categories as is advised by PPS6.

3.10 The analysis of market share set out below relate to market share in the Study Area only. Please note that the market shares given below are based on the proportion of expenditure attracted by each destination, as opposed to the proportion of shopping trips. For example for Clothing and Footwear goods the market shares shown in Table 8, Appendix 13, indicate the proportion of shopping trips made by residents in the Study Area. However, the market shares shown below are derived from Table 9, Appendix 13, and comprise the proportion of the expenditure directed to shopping destinations by residents of the Study Area.

## Comparison Shopping

### *Non Bulky Goods - Clothing and Footwear Goods (Appendix 13, Table 9)*

Across the fifteen Survey Areas, 50.3% of expenditure was retained within the Borough of Wigan, with 46.2% being directed towards destinations outside of Wigan Borough and the remaining 3.5% being spent via the internet.

Wigan Town Centre achieves a market share of 31.8% of expenditure by residents in the Survey Area. Although Wigan draws from all the fifteen Survey Areas, it attracts a significantly lower proportion of expenditure in Zone 11 – Leigh (5.6%), Zone 12 – Atherton (2.0%) and Zone 13 – Tyldesley (1.6%). This is unsurprising given the distance of these Survey Areas from Wigan Town Centre. Wigan Town Centre attracted the largest proportion of market share from Zone 1 – Wigan (57.0%) and Zone 8 – Platt Bridge (56.9%).

Leigh Town Centre accounted for 8.3% of clothing and footwear expenditure across the Study Area. Leigh draws the majority of its expenditure from Zone 11 – Leigh (34.1%) and Zone 12 – Atherton (20.8%). It draws no expenditure whatsoever from Zone 1 – Wigan, Zone 3 – Shevington, Zone 4 – Standish, Zone 5 – Aspull and Zone 14 – Parbold and Wrightington in the clothing and footwear sector.

Other destinations in Wigan which attracted expenditure in the clothing and footwear sector comprised: Robin Park (5.9%), Golborne Town Centre (0.6%), Ashton-in-Makerfield Town Centre (0.4%), Atherton Town Centre (0.3%), Hindley Town Centre (0.3%), Standish Town Centre (0.3%), Tyldesley Town Centre (0.3%) and Pemberton Town Centre (0.2%). 'Other' destinations in the Borough, which predominately consists of out-of-centre facilities in Wigan and Leigh, account for a further 2.0% of expenditure by residents in the Survey Area.

The most popular destinations outside of Wigan Borough that residents in the Survey Area visited for clothing and footwear purchases were Manchester City Centre (7.8%), Bolton Town Centre (7.8%) and the Trafford Centre (7.3%).

### *Non Bulky Goods - Other Household Goods (Appendix 13, Table 17)*

Overall the market shares of destinations within the Wigan Borough in the 'other household goods sector', which includes such items such as books, jewellery and stationery, are as follows: Wigan Town Centre – 27.5%, Leigh Town Centre – 11.3%, Robin Park – 7.1%, Golborne – 1.0%, Hindley – 1.1%, Atherton – 0.9%, Ashton-in-Makerfield – 0.8% and Standish – 0.1%. Out-of-centre facilities in the Borough (excluding Robin Park) account for a further 3.2% of expenditure.

Overall destinations within Wigan Borough attract some 52.9% of expenditure by residents in the Survey Area on other household goods. 34.2% of other household goods expenditure is leaked to destinations outside of Wigan Borough, with 12.6% being spent over the internet/ catalogue/ mail order/ TV. The destinations outside of the Survey Area which attracted the highest proportion of other household goods were: the Trafford Centre (6.1%), Bolton Town Centre (4.5%), Manchester City Centre (3.6%) and St Helens Town Centre (3.4%).

Wigan Town Centre draws the majority of its expenditure in the other household goods sector from Zone 1 – Wigan (52.8% market share), Zone 4 – Standish (47.7%), Zone 5 – Aspull (43.2%), Zone 2 – Pemberton (42.0%) and Zone 3 – Shevington (40.3%). As would be expected Leigh Town Centre draws most of its expenditure in this sector from the zones located in the east of the Borough, namely: Zone 11 – Leigh (47.7%), Zone 13 – Tyldesley (25.9%), Zone 10 – Golborne (20.6%) and Zone 12 – Atherton (19.1%).

*Overall Non Bulky Shopping Patterns (Appendix 13, Table 20)*

3.11 The overall non bulky market shares of expenditure for destinations in the Borough have been calculated by adding the expenditure on ‘clothing and footwear’ goods and ‘other household goods’ together, as shown in Table 20 of Appendix 13. In order to ascertain the market share of facilities within a particular town centre, the expenditure directed towards facilities within that town centre is divided by the total non-bulky goods expenditure recorded by residents in the Study Area, and multiplied by 100 to provide a percentage of expenditure attracted to that town centre. For example for Wigan Town Centre, Table 20 indicates that facilities located within the town centre attract £210.82m of non-bulky goods expenditure. This is then divided by the total non-bulky goods expenditure by residents in the Study Area (£725.8m) and multiplied by 100, to provide the percentage of non-bulky goods expenditure of residents in the Study Area which is directed towards Wigan Town Centre, which in this example is 29.9% (to one decimal place). The same process can be repeated for bulky goods, total comparison goods, main convenience, top-up convenience and total convenience goods expenditure, using the statistical tables contained in Appendix 13.

3.12 Consequently, overall expenditure market shares in the non bulky sector are:

- Ashton-in-Makerfield Town Centre **0.6%;**
- Atherton Town Centre **0.7%;**
- Golborne Town Centre **0.9%;**
- Hindley Town Centre **0.8%;**
- Leigh Town Centre **10.2%;**
- Pemberton Town Centre **0.1%;**
- Standish Town Centre **0.1%;**

▪ Tyldesley Town Centre	<b>0.1%;</b>
▪ Wigan Town Centre	<b>29.1%;</b>
▪ Ince	<b>0.2%;</b>
▪ Robin Park	<b>6.7%;</b>
▪ Platt Bridge	<b>0.1%;</b>
▪ Other destinations in Wigan	<b>2.5%;</b>
▪ Bolton MBC	<b>7.3%;</b>
▪ Manchester CC	<b>5.1%;</b>
▪ Sefton Council	<b>2.6%;</b>
▪ St Helens Council	<b>3.7%;</b>
▪ Trafford Council	<b>6.5%;</b>
▪ Warrington Council	<b>3.4%;</b>
▪ West Lancashire DC	<b>2.3%</b>
▪ Other outside Survey Area	<b>7.6%; and</b>
▪ Internet Sales	<b>9.5%.</b>

### *Bulky Goods*

#### *DIY Goods (Appendix 13, Table 13)*

It is evident from examination of the Household Survey results that out-of-centre facilities, particularly B&Q stores, attract the largest proportion of DIY expenditure by residents in the Survey Area. Within Wigan Borough the destinations which attracted the highest proportion of DIY spending were B&Q, Robin Park (29.4%) and B&Q, Leigh (19.3%). Behind these facilities in terms of the proportion of the expenditure which they attracted came Wickes, Robin Park (4.6%), Leigh Town Centre (3.6%), Wigan Town Centre (3.6%), and Focus, Tyldesley (3.3%).

Overall destinations within the Borough of Wigan attracted 73.3% of total expenditure on DIY goods, which is the highest retention rate out of any of the five categories of comparison goods. 25.8% of expenditure on DIY goods is directed to destinations outside of the Survey Area, most significantly B&Q, Bamber Bridge (6.9%) and B&Q, Winwick (5.2%). 0.9% is spent via the internet/ online/ catalogue/ mail order/ TV. Leakage was highest in Zone 15 – Skelmersdale (71.4%), Zone 5 – Aspull (61.1%) and Zone 10 – Golborne (49.0%).

In the zones to the west of the Borough: Zone 1 – Wigan, Zone 2 – Pemberton, Zone 3 – Shevington, Zone 4 – Standish, Zone 6 – Ince, Zone 8 – Platt Bridge, Zone 9 – Ashton-in-Makerfield and Zone 14 – Parbold and Wroughton, the B&Q at Robin Park attracted the most DIY goods spending by residents. The B&Q in Leigh was however the destination which attracted the highest proportion of expenditure in Zone 7 – Hindley, Zone 11 – Leigh, Zone 12 – Atherton. In Zone 13 – Tyldesley, the Focus in Tyldesley was the single destination that attracted the greatest proportion of DIY expenditure (40.5%).

### *Electrical Goods (Appendix 13, Table 15)*

Overall destinations within Wigan Borough retained 67.6% of expenditure by residents in the Study Area on electrical goods. 22.6% of expenditure on electrical items was directed to destinations outside of Wigan Borough and 9.8% was spent online. Principal leakage was to destinations in the Borough of Bolton which cumulatively attracted 7.6% of electrical goods expenditure: this was split between Bolton Town Centre (4.1%), Middlebrook Retail Park (2.8%) and Horwich Town Centre (0.7%).

Destinations within Wigan Borough which attracted expenditure in the electrical goods category comprised: Robin Park (27.9%), Wigan Town Centre (14.5%), Leigh Town Centre (11.5%), Parsonage Retail Park, Leigh (6.8%), Atherton Town Centre (1.6%), Hindley Town Centre (1.1%), Ashton-in-Makerfield Town Centre (0.5%), Golborne Town Centre (0.4%), Tyldesley Town Centre (0.3%), Standish Town Centre (0.2%), Aspull Village (0.2%), Pemberton Town Centre (0.1%) and Platt Bridge (0.1%). 'Other' out-of-centre destinations in Wigan Borough account for a further 3.1% of electrical goods expenditure.

Residents living in Zone 1 – Wigan, Zone 2 – Pemberton, Zone 3 – Shevington, Zone 4 – Standish, Zone 7 – Hindley, Zone 9 – Ashton-in-Makerfield, Zone 14 – Parbold and Wroughton and Zone 15 – Skelmersdale were more likely to use Robin Park as their main destination for electrical goods, whilst in Zone 5 – Aspull, Zone 6 – Ince and Zone 8 – Platt Bridge, Wigan Town Centre was the single destination that attracted the greatest proportion of electrical goods expenditure. Leigh Town Centre attracted the largest proportion of market share in Zone 10 – Golborne, Zone 11 – Leigh, Zone 12 – Atherton and Zone 13 – Tyldesley.

### *Furniture Goods (Appendix 13, Table 11)*

57.0% of expenditure on furniture goods by residents in the Survey Area is retained at destinations within Wigan Borough. Destinations in Wigan which attract expenditure include: Wigan Town Centre (16.8%), Leigh Town Centre (14.8%), Robin Park (11.5%), Pemberton Town Centre (3.7%), Ashton-in-Makerfield Town Centre (3.0%) and Atherton Town Centre (1.7%).

As would be expected, Wigan Town Centre attracts the majority of its expenditure from the zones nearest to it. Wigan Town Centre did however draw from all zones in the Survey Area except Zones 12 – Atherton and 13 – Tyldesley, although out-of-centre facilities in Wigan did draw from these two zones. It is notable that Wigan Town Centre attracted expenditure from residents in the additional Zone 14 – Parbold and Wroughton and Zone 15 – Skelmersdale, indicating that the draw of Wigan Town Centre extends beyond Wigan Borough boundaries. Wigan Town Centre drew the highest proportion of its expenditure from Zone 1 – Wigan (34.9%).

Leigh Town Centre drew expenditure from all zones in the Survey Area except Zone 1 – Wigan, Zone 4 – Standish, Zone 14 – Parbold and Wroughton and Zone 15 – Skelmersdale. The majority of its expenditure, however, came from Zone 11 – Leigh (55.8%), Zone 13 – Tyldesley (35.3%), Zone 10 – Golborne (32.0%) and Zone 12 – Atherton (25.6%).

40.1% of furniture goods expenditure is directed to destinations outside of Wigan Borough, and 2.9% is spent online. Key destinations outside of Wigan Borough which attracted expenditure from residents in the Survey Area included Bolton Town Centre (6.2%), Middlebrook Retail Park, Bolton (5.4%) and Warrington Town Centre (5.4%).

*Overall Bulky Goods (Appendix 13, Table 19)*

3.13 The Household Survey records the following bulky goods market shares:

▪ Ashton-in-Makerfield Town Centre	<b>1.6%;</b>
▪ Atherton Town Centre	<b>1.4%;</b>
▪ Golborne Town Centre	<b>0.2%;</b>
▪ Hindley Town Centre	<b>0.8%;</b>
▪ Leigh Town Centre	<b>10.8%;</b>
▪ Leigh out-of-centre	<b>8.0%;</b>
▪ Pemberton Town Centre	<b>1.4%;</b>
▪ Standish Town Centre	<b>0.2%;</b>
▪ Tyldesley Town Centre	<b>0.5%;</b>
▪ Wigan Town Centre	<b>12.7%;</b>
▪ Robin Park	<b>24.0%;</b>
▪ Other destinations in Wigan	<b>4.2%;</b>
▪ Bolton MBC	<b>8.1%</b>
▪ Manchester CC	<b>1.2%;</b>
▪ Preston CC	<b>2.1%;</b>
▪ Sefton Council	<b>1.6%;</b>
▪ St Helens Council	<b>3.2%;</b>
▪ Warrington Council	<b>4.7%;</b>
▪ West Lancashire DC	<b>1.8%</b>
▪ Other outside Survey Area	<b>7.0%; and</b>
▪ Internet Sales	<b>5.2%.</b>

*The Role of Comparison Stores in the Borough*

3.14 The Household Survey records the following comparison goods market shares for comparison goods as a whole. These are based on the total comparison goods expenditure directed to each of destinations, as shown in Table 18, Appendix 13:

▪ Ashton-in-Makerfield Town Centre	<b>0.9%;</b>
▪ Atherton Town Centre	<b>0.9%;</b>
▪ Golborne Town Centre	<b>0.7%;</b>
▪ Hindley Town Centre	<b>0.8%;</b>
▪ Leigh Town Centre	<b>10.4%;</b>

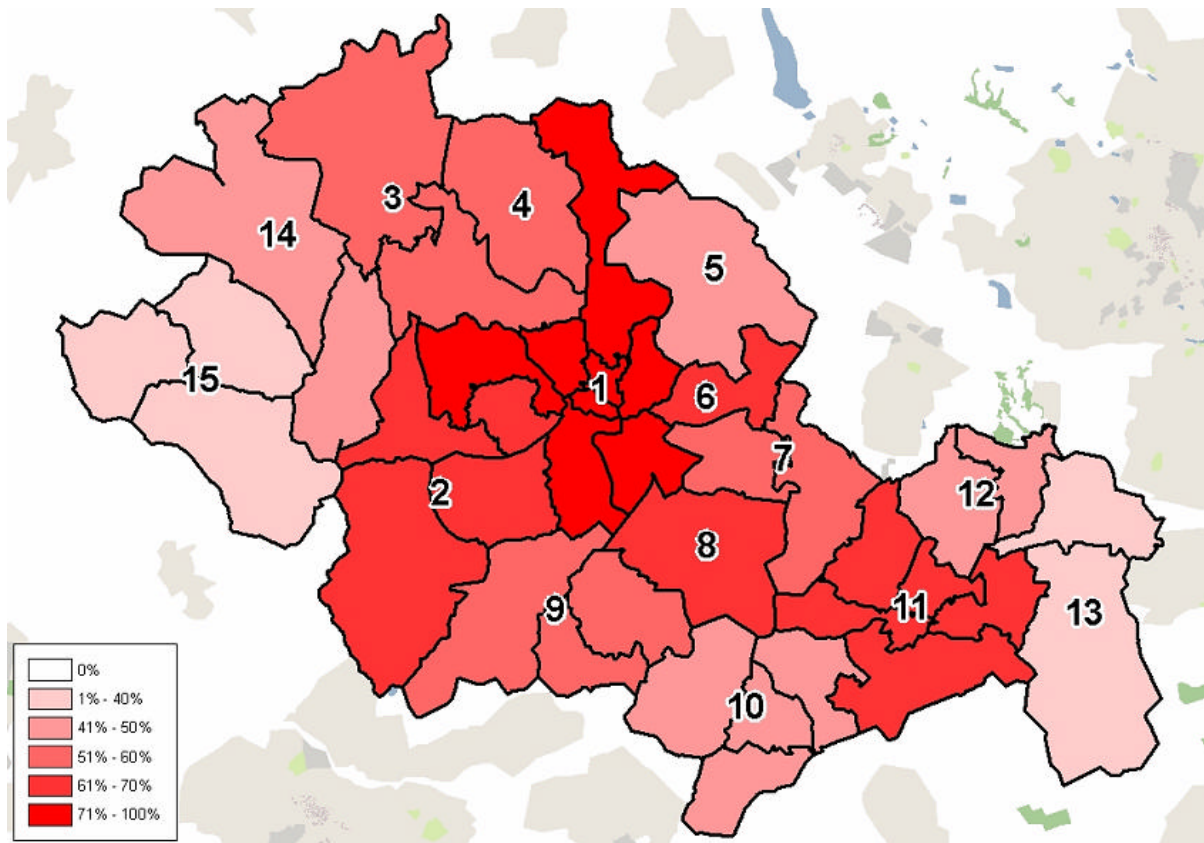
▪ Leigh out-of-centre	<b>3.5%;</b>
▪ Pemberton Town Centre	<b>0.5%;</b>
▪ Standish Town Centre	<b>0.2%;</b>
▪ Tyldesley Town Centre	<b>0.2%;</b>
▪ Wigan Town Centre	<b>23.8%;</b>
▪ Robin Park	<b>12.2%;</b>
▪ Other destinations in Wigan	<b>2.2%;</b>
▪ Bolton MBC	<b>7.6%;</b>
▪ Liverpool CC	<b>1.1%;</b>
▪ Manchester CC	<b>3.9%;</b>
▪ Preston CC	<b>1.1%;</b>
▪ Sefton Council	<b>2.3%;</b>
▪ St Helens Council	<b>3.5%;</b>
▪ Trafford Council	<b>4.6%;</b>
▪ Warrington Council	<b>3.8%;</b>
▪ West Lancashire DC	<b>2.2%</b>
▪ Other outside Survey Area	<b>5.5%; and</b>
▪ Internet Sales	<b>8.1%.</b>

3.15 Overall destinations within the Borough of Wigan retain 56.2% of total comparison goods expenditure, with 35.7% being directed towards destinations outside of the Study Area and 8.1% spent over the internet. Wigan Town Centre attracts the greatest proportion of comparison goods expenditure in the Study Area with a market share of 23.8%. This is followed by Robin Park (12.2%) and Leigh (10.4%). Bolton MBC attracts the highest proportion of expenditure in the Study Area that is spent outside of the Borough of Wigan, with a market share of 7.6%. However, this is below the proportion of spending undertaken over the internet, with this accounting for 8.1% of comparison goods expenditure by residents of the Study Area.

3.16 The Borough of Wigan retains a significant proportion of spending in all of the five categories of comparison goods. The highest retention is in the DIY sector with 73.3% of expenditure by residents in the Study Area being retained. This is followed by electrical goods (67.6%), furniture goods (57.0%), other household goods (52.9%) and clothing and footwear (50.3%). The Household Survey indicates the comparison retail provision in Wigan Borough is used by a meaningful proportion of the shopping public.

3.17 Figure 3.1 below shows the comparison goods penetration of destinations within Wigan Borough; that is the proportion of spending by residents of each Survey Zone that is retained by destinations in the Borough. Comparison goods penetration maps have also been produced for each of the nine town centres, and these are included at Appendix 15.

Figure 3.1 Comparison goods penetration of destinations in Wigan Borough



### Convenience Shopping

#### *Main Convenience Shopping (Appendix 13, Table 4)*

Convenience-shopping patterns show a greater degree of dispersal than comparison patterns. The principal main convenience shopping destinations in the Study Area are: ASDA, Robin Park (15.8%). ASDA, Atherleigh Wav. Leigh (13.0%). Tesco Extra, Central Park Wav. Wigan (11.2%) ASDA, Edge Green Lane, Golborne (6.9%), Morrison's, Makerfield Wav, Ince (5.5%), Tesco, Crabtree Lane, Atherton (5.3%) and Sainsbury's, Worthinton Wav, Marus Bridge (5.3%). These seven stores account for 63.0% of the main food shopping expenditure generated in the Study Area.

Overall destinations within Wigan Borough retain 82.2% of main food expenditure by households in the Study Area. 16.2% of main food expenditure is directed towards destinations outside of the Study Area, and 1.6% is spent over the internet. Leakage is predominately to destinations in West Lancashire which have an overall market share of 8.0%; the majority of this is accounted for by the ASDA at Ingram Road, Skelmersdale, which has a market share of 6.1% across the Study Area as a whole.

In terms of individual centres in the Borough (including edge-of-centre but excluding out-of-centre facilities: see Table 4, Appendix 13 for a composition list), the following proportion of market shares were recorded: Robin Park (15.8%), Wigan (3.7%), Atherton (5.7%), Hindley (4.1%), Leigh (1.3%), Tyldesley (0.9%), Ashton-in-Makerfield (0.9%), Standish (0.9%), Newtown Local Centre (0.5%), Pemberton (0.3%), Platt Bridge Local Centre (0.3%), Golborne (0.2%), Orrell Local Centre (0.2%), Shevington Local Centre (0.2%) and Beech Hill Local Centre (0.1%). Other freestanding destinations in Wigan Borough account for 47.9% of expenditure. With respect to market shares achieved by markets in the centres which have them, this has been grouped with proportion of expenditure directed towards the town centre. For example, the market share of Wigan Market has been included in the market share of 'Wigan Town Centre'.

The proportion of main food expenditure retained within the Wigan Borough was highest in Zone 11 - Leigh (98.7%), Zone 1 - Wigan (98.2%) and Zone 8 - Platt Bridge (95.9%). Conversely retained was lowest in Zone 15 - Skelmersdale (4.4%) and Zone 14 - Parbold and Wroughton (38.3%).

3.18 The pattern of main convenience shopping in the Study Area, derived from Table 4, Appendix 13, is:

#### Town and Local Centres

▪ Ashton-in-Makerfield Town Centre/ edge of centre	<b>0.9%;</b>
▪ Atherton Town Centre/ edge of centre	<b>5.7%;</b>
▪ <i>Tesco, Crabtree Lane</i>	<i>5.3%</i>
▪ <i>Local Shops, Atherton</i>	<i>0.4%;</i>
▪ Golborne Town Centre/ edge of centre	<b>0.2%;</b>
▪ Hindley Town Centre/ edge of centre	<b>4.1%;</b>
▪ <i>Tesco, Cross Street</i>	<i>4.0%;</i>
▪ <i>Other, Hindley</i>	<i>0.1%;</i>
▪ Leigh Town Centre/ edge of centre	<b>1.3%;</b>
▪ Pemberton Town Centre/ edge of centre	<b>0.3%;</b>
▪ Standish Town Centre/ edge of centre	<b>0.9%;</b>
▪ Tyldesley Town Centre/ edge of centre	<b>0.4%;</b>
▪ Wigan Town Centre/ edge of centre	<b>3.7%;</b>
▪ Beech Hill Local Centre	<b>0.1%;</b>
▪ Newtown Local Centre	<b>0.5%;</b>
▪ Orrell Local Centre	<b>0.2%;</b>
▪ Platt Bridge Local Centre	<b>0.3%;</b>
▪ Shevington Local Centre	<b>0.2%;</b>

### Freestanding stores in Wigan

▪ ASDA, Robin Park	15.8% ;
▪ ASDA, Edge Green Lane, Golborne	6.9% ;
▪ ASDA, Atherleigh Way, Leigh	13.0% ;
▪ Morrison's, Makerfield Way, Ince	5.5% ;
▪ Sainsbury's, Parsonage Retail Park	3.5% ;
▪ Tesco Extra, Central Park Way	11.2% ;
▪ Sainsbury's, Worthington Way, Marus Bridge	5.3% ;
▪ Other destinations in Wigan	2.7% ;
▪ Bolton MBC	2.8% ;
▪ Chorley BC	1.4% ;
▪ St Helens Council	1.5% ;
▪ West Lancashire DC	8.0% ;
▪ ASDA, Ingram Road, Skelmersdale	6.1% ;
▪ Other West Lancashire	1.9% ;
▪ Other outside Survey Area	2.5% ; and
▪ Internet Sales	1.6% .

### *Top-up Shopping (Appendix 13, Table 4)*

The Household Survey also recorded top up convenience shopping patterns. Destinations within the Borough attracted 82.0% of the top-up spending by residents in the Study Area. The remaining 18.0% was directed towards destinations outside of the Borough.

The market share of centres within Wigan Borough in terms of top-up convenience spending are as follows: Robin Park – 15.8%, Wigan Town Centre – 11.0%, Leigh out-of-centre – 7.7%, Leigh Town Centre – 7.1 %, Ashton-in-Makerfield Town Centre – 4.6%, Atherton Town Centre – 5.2%, Hindley Town Centre – 4.9%, Standish Town Centre – 4.2%, Pemberton Town Centre – 2.6%, Golborne Town Centre – 2.0% and Tyldesley Town Centre – 1.5%. In terms of individual stores the facilities in the Borough that attracted the greatest proportion of top-up shopping were local shops, highlighting the localised nature of top-up convenience shopping with residents less likely to use large-format supermarkets for such purposes. With respect to market shares achieved by markets in the centres which have them, this has been grouped with proportion of expenditure directed towards the town centre. For example, the market share of Wigan Market has been included in the market share of 'Wigan Town Centre'.

In Zone 1 (Wigan) facilities in and around Wigan Town Centre attracted the highest proportion (58.0%) of top-up expenditure.

In Zone 2 (Pemberton) top-up spending was split between a variety of destinations including: Sainsbury's, Worthington Way, Marus Bridge (17.8%), Pemberton (15.8%), ASDA, Robin Park (15.1%), St Helens (15.1%), Wigan (12.3%) and Orrell Local Centre (9.6%).

With regard to Zone 3 (Shevington) the destination which attract the highest proportion of top-up food expenditure is Shevington Local Centre (21.2%).

In terms of Zone 4 (Standish) Standish Town Centre attracted a significant 79.0% of top-up food expenditure, with the Somerfield being the most prolific individual trader attaining a market share of 61.4% of top-up expenditure.

Facilities in Wigan (both in-centre and out-of-centre) attracted 39.5% of top-up expenditure in Zone 5 (Aspull), which was the highest single proportion attributed to any destination. This was split between Wigan Town Centre (23.7%) and out of centre Tesco Extra at Central Park Way (15.8%).

Hindley Town Centre attracted 46.2% of top-up food expenditure in Zone 6 (Ince), all of which was accounted for by the Tesco on Cross Street.

In Zone 7 (Hindley) Hindley Town Centre was again the destination that attracted the highest proportion of top-up expenditure with a market shares of 59.0%. This was split between Tesco, Cross Street (33.7%), local shops (20.0%) and Kwik Save, Ladies Lane (5.3%).

In Zone 8 (Platt Bridge) top-up spending was directed towards a variety of destinations including Wigan Town Centre (21.4%) and Golborne (17.9%).

With respect to Zone 9 (Ashton-in-Makerfield) Ashton-in-Makerfield Town Centre achieved the highest proportion of top-up market share of 56.9%.

The ASDA store at Edae Green Lane, Golborne was the destination which attracted the highest proportion of top-up food spending in Zone 10 (Golborne) with a market share of 38.2%, followed by Golborne Town Centre (30.3%).

In Zone 11 (Leigh) Leigh Town achieved a notable top-up expenditure retention of 49.1%, followed by the ASDA, Atherleigh Way, Leigh (27.8%) and the Sainsbury's, Parsonage Retail Park, Leigh (15.4%).

Atherton Town Centre attracted 79.8% of top-up expenditure in Zone 12 (Atherton), which was split between local shops (46.8%) and Tesco, Crabtree Lane (32.9%).

The Somerfield, Shuttle Street, Tyldesley and Tyldesley Town Centre were the destination in Zone 13 (Tyldesley) that attracted the largest proportion of top-up spending, with respective market shares of 27.2% and 20.7%.

In Zone 14 (Parbold and Wroughton) facilities in Skelmersdale received some 53.0% of the top-up expenditure by residents in the catchment.

In Zone 15 (Skelmersdale) Skelmersdale attracted 93.9% of top-up spending. The ASDA on Ingram Road, Skelmersdale had a market share of 45.5%.

The Borough performs well in the top-up convenience shopping sector, with the needs of each sub area met, in the main, by stores within those centres. There is a limited leakage of top up convenience expenditure to destinations outside of the Study Area.

3.19 Top-up shopping patterns in the Study Area as a whole are:

Town and Local Centres

▪ Ashton-in-Makerfield Town Centre/ edge of centre	<b>4.6%;</b>
▪ Atherton Town Centre/ edge of centre	<b>5.2%;</b>
▪ <i>Tesco, Crabtree Lane</i>	2.4%
▪ <i>Local Shops, Atherton</i>	2.8%;
▪ Golborne Town Centre/ edge of centre	<b>2.0%;</b>
▪ Hindley Town Centre/ edge of centre	<b>4.9%;</b>
▪ <i>Tesco, Cross Street</i>	3.4%;
▪ <i>Other, Hindley</i>	1.5%;
▪ Leigh Town Centre/ edge of centre	<b>7.1%;</b>
▪ Pemberton Town Centre/ edge of centre	<b>2.6%;</b>
▪ Standish Town Centre/ edge of centre	<b>4.2%;</b>
▪ Tyldesley Town Centre/ edge of centre	<b>1.5%;</b>
▪ Wigan Town Centre/ edge of centre	<b>11.0%;</b>
▪ <i>Morrison's, The Galleries</i>	3.1%;
▪ <i>Other, Wigan</i>	7.9%;
▪ Newtown Local Centre	<b>0.4%;</b>
▪ Orrell Local Centre	<b>1.3%;</b>
▪ Platt Bridge Local Centre	<b>0.3%;</b>
▪ Shevington Local Centre	<b>0.2%;</b>

Freestanding stores in Wigan

▪ ASDA, Robin Park	<b>3.5%;</b>
▪ ASDA, Edge Green Lane, Golborne	<b>3.4%;</b>
▪ ASDA, Atherleigh Way, Leigh	<b>5.4%;</b>
▪ Sainsbury's, Parsonage Retail Park	<b>2.2%;</b>
▪ Sainsbury's, Worthington Way, Marus Bridge	<b>4.3%;</b>
▪ Tesco Extra, Central Park Way	<b>3.9%;</b>
▪ Other destinations in Wigan	<b>13.5%;</b>
▪ Bolton MBC	<b>1.4%;</b>
▪ St Helens Council	<b>2.8%;</b>
▪ West Lancashire DC	<b>10.8%;</b>
▪ <i>ASDA, Ingram Road, Skelmersdale</i>	2.7%;
▪ <i>Other West Lancashire</i>	8.1%;
▪ Other outside Survey Area	<b>4.0%;</b> and
▪ Internet Sales	<b>0.0%.</b>

3.20 The overall pattern of convenience shopping, combining the main-convenience and top up shopping findings, is:

Town and Local Centres

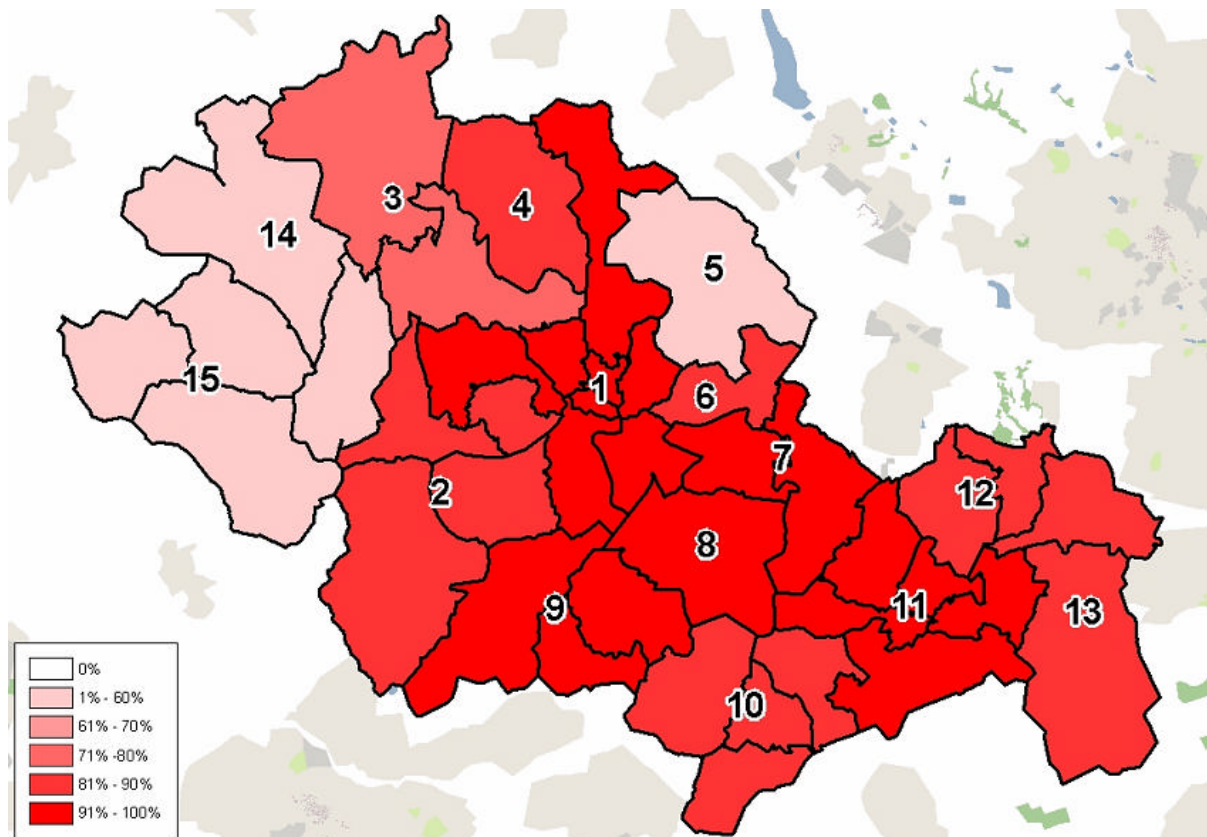
▪ Ashton-in-Makerfield Town Centre/ edge of centre	<b>1.6%;</b>
▪ Atherton Town Centre/ edge of centre	<b>5.6%;</b>
▪ <i>Tesco, Crabtree Lane</i>	4.7%
▪ <i>Local Shops, Atherton</i>	0.9%;
▪ Golborne Town Centre/ edge of centre	<b>0.6%;</b>
▪ Hindley Town Centre/ edge of centre	<b>4.3%;</b>
▪ <i>Tesco, Cross Street</i>	3.9%;
▪ <i>Other, Hindley</i>	0.4%;
▪ Leigh Town Centre/ edge of centre	<b>2.4%;</b>
▪ Pemberton Town Centre/ edge of centre	<b>0.8%;</b>
▪ Standish Town Centre/ edge of centre	<b>1.5%;</b>
▪ Tyldesley Town Centre/ edge of centre	<b>0.6%;</b>
▪ Wigan Town Centre/ edge of centre	<b>5.2%;</b>
▪ <i>Morrison's, The Galleries</i>	3.1%;
▪ <i>Other, Wigan</i>	2.1%;
▪ Newtown Local Centre	<b>0.5%;</b>
▪ Orrell Local Centre	<b>0.4%;</b>
▪ Platt Bridge Local Centre	<b>0.3%;</b>
▪ Shevington Local Centre	<b>0.1%;</b>

Freestanding stores in Wigan

▪ ASDA, Robin Park	<b>13.3%;</b>
▪ ASDA, Edge Green Lane, Golborne	<b>6.2%;</b>
▪ ASDA, Atherleigh Way, Leigh	<b>11.5%;</b>
▪ Morrison's, Makerfield Way, Ince	<b>4.7%;</b>
▪ Sainsbury's, Parsonage Retail Park	<b>3.2%;</b>
▪ Sainsbury's, Worthington Way, Marus Bridge	<b>5.1%;</b>
▪ Tesco Extra, Central Park Way	<b>9.7%;</b>
▪ Other destinations in Wigan	<b>4.5%;</b>
▪ Bolton MBC	<b>2.5%;</b>
▪ Chorley BC	<b>1.2%;</b>
▪ St Helens Council	<b>1.8%;</b>
▪ West Lancashire DC	<b>8.5%;</b>
▪ <i>ASDA, Ingram Road, Skelmersdale</i>	5.5%;
▪ <i>Other West Lancashire</i>	3.0%;
▪ Other outside Survey Area	<b>3.3%;</b> and
▪ Internet Sales	<b>1.3%.</b>

3.21 Figure 3.2 below indicates the convenience penetration of destinations in Wigan Borough, based on the proportion of expenditure attracted to destinations in the Borough by residents in each of the Survey Zones. Similar maps have been produced for each of the nine town centres in the Borough, and these are contained as Appendix 15.

**Figure 3.2 Convenience goods penetration of destinations in Wigan Borough**



*The Role of Convenience stores in the Borough*

3.22 Table 5 of Appendix 13 compares the turnover of individual stores and town centres in the Borough, as derived from the Household Survey, against the expected turnover of stores according to their sales density. This gives an indication of whether a store is trading at the company average, is over-trading or is under-trading. In terms of Wigan Town Centre, the results indicate that the centrally located Morrison’s store in Wigan is over-trading marginally by £0.6m, whilst other convenience stores in Wigan Town Centre were seen to be under-trading by £10.5m. Consequently, Wigan Town

Centre as a whole is seen to be under-trading by some £9.9m. In terms of out-of-centre facilities in Wigan, the Tesco Extra on Central Park Way is over-trading by £4.4m and the Lidl on Darlington Street was under-trading by £1.5m.

3.23 Leigh Town Centre is identified to have a market share of 2.4% of convenience spending: which translates to a monetary value of some £13.8m. However convenience facilities in Leigh Town Centre overall were under-trading by £9.0m. However, it is notable that the out-of-centre ASDA store at Atherleigh Way, Leigh, is overtrading by a significant £13m, whilst the Sainsbury's at Parsonage Retail Park is overtrading by £1.1m. The Lidl on Spinning Jenny was recorded to be turning over approximately £0.6m less than would be expected considering company average sales densities.

3.24 The remaining town centres performed as follows:

- Ashton-in-Makerfield: was seen to be under-trading by £2.7m, with all centrally located facilities under-trading;
- Atherton: convenience facilities were seen to be over-trading by £8.2m, largely due to the Tesco on Crabtree Lane which was over-trading by £8.3m;
- Golborne: Although local shops in Golborne Town Centre are over-trading the Lidl on High Street is under-trading; cumulatively town centre facilities are overtrading by £0.5m. The ASDA store on Edge Green Lane is overtrading by £9.6m;
- Hindley: convenience facilities in Hindley were under-trading by £9.6m with all convenience stores under-trading;
- Pemberton: although the Tesco Express at Ormskirk Road was under-trading by £0.8m, the remaining convenience facilities were over-trading by £0.7m. Resultantly, the town centre is under-trading by £0.1m;
- Standish: Standish is over-trading by £0.9m. Although the Somerfield is over-trading by £1.7m, remaining convenience facilities are under-trading by £0.9m; and

- Tyldesley: in-centre facilities are all under-trading by some £1.3m, with the Somerfield supermarket outside the town centre under-trading by a further £2.0m.

3.25 Wigan has a number of free-standing large-format supermarkets that are not affiliated to any defined town centre. The ASDA at Robin Park has a turnover of £75.1m which is the largest turnover of any individual store in the Study Area. It has a market share of 13.3%. This store is seen to have an estimated turnover of £61.1m according to the company average sales density. In light of this, the store is over-trading by £14.0m. The Morrison's store at Makerfield Way, Ince was identified to have a turnover of £26.5m against an expected £39.5m, and was thus under-trading by £12.9m. The Sainsbury's at Worthington Way, Marus Bridge was under-trading marginally by £1.0m.

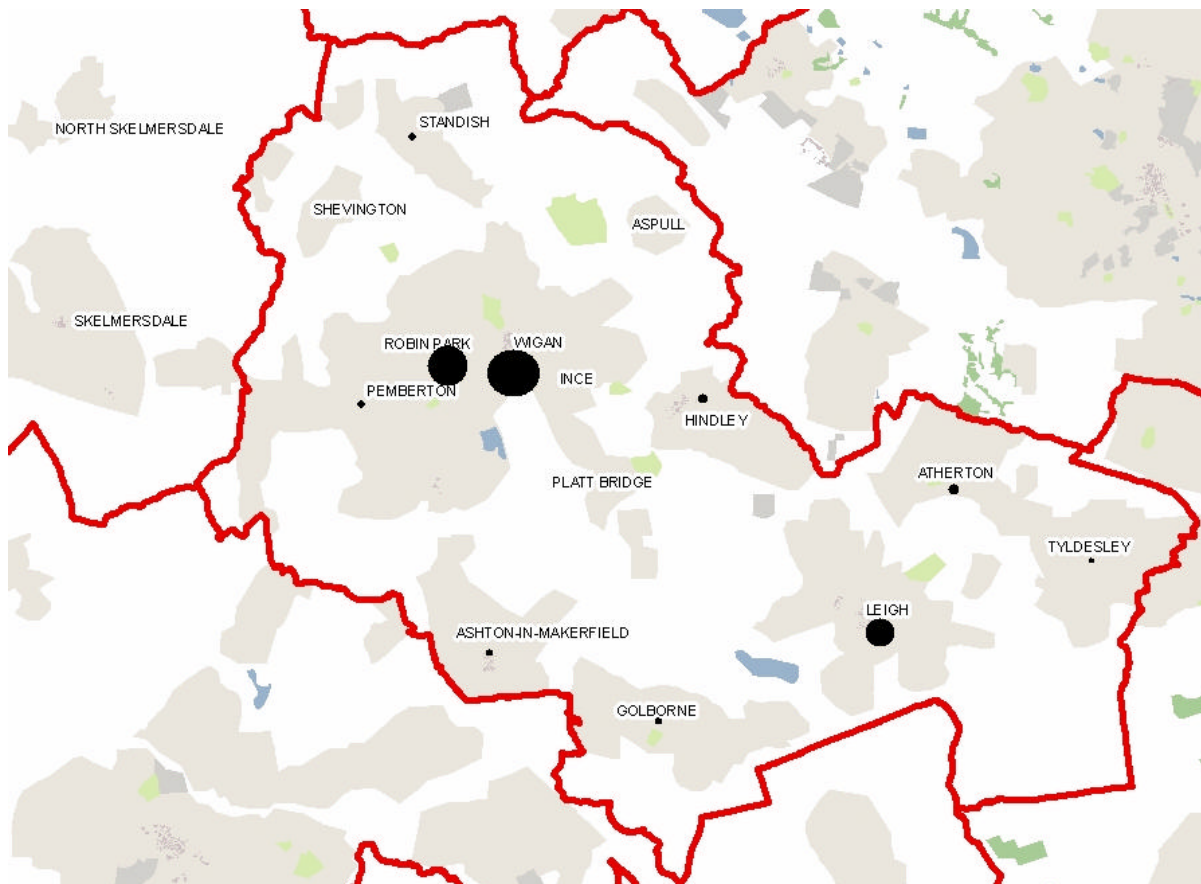
### Retail Hierarchy

3.26 Figure 3.3 indicates the convenience and comparison turnover of the nine town centres in Wigan Borough, together with the turnover of Robin Park. The turnover for the nine town centres comprises facilities located within the town centre or in edge-of-centre locations only, and does not include out of centre facilities. The ranking of centres at 2006 has then been compared to that at 2001, based on the turnover of comparison and convenience goods taken from the 2001 Retail Study.

Figure 3.3: Hierarchy and Market Share

DESTINATION	RANK			TURNOVER CONVENIENCE (£m)	TURNOVER COMPARISON (£m)	TOTAL TURNOVER (£m)	MARKET SHARE (%)
	2006	2001	CHANGE 2001-2006				
Wigan	1	1	-	29.0	253.7	282.7	17.4
Robin Park	2	2	-	75.1	129.9	205.0	12.6
Leigh	3	3	-	13.8	110.5	124.3	7.6
Atherton	4	4	-	31.4	9.7	41.1	2.5
Hindley	5	5	-	24.2	8.4	32.6	2.0
Ashton-in-Makerfield	6	6	-	9.1	9.9	19.0	1.2
Golborne	7	10	+3	3.2	7.0	10.2	0.6
Standish	8	8	-	8.6	1.6	10.2	0.6
Pemberton	9	9	-	4.4	5.2	9.6	0.6
Tyldesley	10	7	-3	3.4	2.5	5.9	0.4
<b>TOTAL</b>	-	-	-	<b>202.2</b>	<b>538.4</b>	<b>740.6</b>	<b>45.5</b>

**Figure 3.4: Hierarchy and Market Share**



*N.B. Map is for indicative purposes only  
Wigan MBC Local Authority Licence No. 100019578, 2006*

- 3.27 Wigan Town Centre is the dominant destination in the Borough with an overall market share (comparison and convenience goods combined) of 17.4% in expenditure terms, which equates to a monetary value of £282.7m. This includes in-centre and edge-of-centre facilities only, as defined by Wigan Council. Wigan Town Centre is predominately a comparison goods destination, with comparison expenditure comprising some 90% of all expenditure that is directed towards Wigan Town Centre.
- 3.28 Robin Park is the second largest destination in terms of the proportion of expenditure that it attracts. Robin Park has a turnover of £205.0m (comprising both comparison and convenience goods) by residents of the Study Area, which translates to a market share of 12.6%. Expenditure at Robin Park is approximately 37% convenience to 63% comparison spending. Leigh Town Centre has the third largest turnover of destinations in Wigan Borough in terms of the proportion of expenditure that it attracts, attaining an

overall market share of 7.6%. This is comprised of approximately 63% comparison goods spending and 37% convenience goods spending.

- 3.29 The remaining seven town centres in the Borough cumulatively account for a market share of 7.9% of expenditure in the Study Area. When considering in-centre and edge-of-centre facilities in each town centre, Atherton has the largest market share of 2.5%, followed by Hindley (2.0%), Ashton-in-Makerfield (1.2%), Golborne (0.6%), Standish (0.6%), Pemberton (0.6%) and Tyldesley (0.4%). Atherton, Hindley, Standish and Tyldesley perform a convenience shopping role for their catchment population, with the turnover of the convenience sector in these town centres being significantly above the turnover of the comparison sector. Golborne is predominantly a comparison destination, with the comparison sector in Golborne having a far higher turnover than the convenience sector. In Ashton-in-Makerfield expenditure is split 52/48 between comparison and convenience goods, whilst in Pemberton spending is split approximately 55/45 between comparison and convenience goods.
- 3.30 The centres in the Borough all serve both convenience and comparison shopping needs, although only Wigan Town Centre, Leigh Town Centre and Robin Park are used by a significant percentage of the Study Area population. This reflects their designation in the Wigan UDP, within which Wigan and Leigh are defined as Main Town Centres. The smaller town centres would not be expected to occupy a significant position in the provision of retail goods, although they do perform an important role in catering for the shopping needs of their local catchment populations.
- 3.31 Each of the destinations in Figure 3.3 has been ranked on the basis of total comparison and convenience expenditure identified through the 2006 Household Survey. This rank has then been compared to the rank achieved in the 2001 Wigan Retail Study, again based on the total turnover of each centre in both the comparison and convenience goods sectors. It is evident that there has been little change in hierarchy between 2001 and 2006, as all

destinations have remained in the same place except for Golborne, which has increased its rank by three places to 7<sup>th</sup>, and Tyldesley which has declined by three places to 10<sup>th</sup>. Wigan was the dominant destination at both 2001 and 2006, followed by Robin Park and Leigh.

## **4 COMPARISON WITH WIGAN RETAIL STUDY (2001)**

- 4.1 Examination of the results obtained through the 2001 Household Survey, conducted as part of the 2001 Wigan Borough Retail Study, enable the change in strength within the Borough as a whole, and within individual centres within the Borough, to be examined. However, the 2006 Household survey incorporated two additional surveys zones (Zones 14 and 15) covering the Skelmersdale area. As such, the figures below detail the market shares achieved in the 2001 Household survey against those achieved in the 2006 Household Survey, although within the latter the results for Zone 14 and Zone 15 have been removed.
- 4.2 The data below is based on the market share of expenditure achieved in 2001 and 2006. In all cases the 'town centre' refers to facilities located within the town centre or edge-of-centre only, with out-of-centre retail facilities being excluded from the calculations. In addition the term Study Area here is used to refer to the 2001 Study Area i.e. Zones 1 to 13.
- 4.3 It should be noted that 2001 and 2006 Household Surveys each used a different questionnaire. Furthermore, different methodologies were adopted in 2001 and 2006 when calculating market shares and so the results are not directly comparable to each other. For example, whilst the 2006 data includes the proportion of expenditure spent via the internet, the 2001 Study excludes the proportion of expenditure for which the internet accounts. Nevertheless, the data can give an indication of the change in market shares that has occurred in Wigan over the 2001 to 2006 period.

### **Convenience Goods Retailing**

- 4.4 The following market shares were achieved for convenience (main and top-up shopping combined) retailing in Wigan in 2001 and 2006:

<u>Town and Local Centres</u>	<u>2001</u>	<u>2006</u>	<u>Change</u>
Ashton-in-Makerfield Town Centre	<b>2.3%</b>	<b>1.8%</b>	<b>-0.5%</b>
▪ Atherton Town Centre	<b>6.8%</b>	<b>6.3%</b>	<b>-0.5%</b>
▪ <i>Tesco, Crabtree Lane</i>	5.6%	5.4%	-0.2%
▪ <i>Local Shops, Atherton</i>	1.2%	0.9%	-0.3%
▪ Golborne Town Centre	<b>0.8%</b>	<b>0.6%</b>	<b>-0.2%</b>
▪ Hindley Town Centre	<b>2.8%</b>	<b>4.8%</b>	<b>+2.0%</b>
▪ Leigh Town Centre	<b>3.1%</b>	<b>2.8%</b>	<b>-0.3%</b>
▪ Pemberton Town Centre	<b>1.1%</b>	<b>0.8%</b>	<b>-0.3%</b>
▪ Standish Town Centre	<b>2.8%</b>	<b>1.6%</b>	<b>-1.2%</b>
▪ Tyldesley Town Centre <sup>2</sup>	<b>2.5%</b>	<b>2.0%</b>	<b>-0.5%</b>
▪ Wigan Town Centre	<b>6.9%</b>	<b>5.5%</b>	<b>-1.4%</b>
▪ <i>Morrison's</i>	4.8%	3.4%	-1.4%
▪ <i>Other Wigan Town Centre</i>	2.2%	2.2%	-0.0%
▪ Newtown Local Centre	<b>0.4%</b>	<b>0.5%</b>	<b>+0.1%</b>
▪ Platt Bridge Local Centre	<b>0.5%</b>	<b>0.3%</b>	<b>-0.2%</b>
▪ Shevington Local Centre	<b>0.7%</b>	<b>0.4%</b>	<b>-0.3%</b>
<u>Freestanding stores in Wigan</u>			
▪ ASDA, Robin Park	<b>16.0%</b>	<b>13.9%</b>	<b>-2.1%</b>
▪ ASDA, Edge Green Lane, Golborne	<b>6.9%</b>	<b>7.0%</b>	<b>+0.1%</b>
▪ ASDA, Atherleigh Way, Leigh	<b>13.1%</b>	<b>13.0%</b>	<b>-0.1%</b>
▪ Morrison's, Makerfield Way, Ince	<b>7.2%</b>	<b>5.4%</b>	<b>-1.8%</b>
▪ Sainsbury's, Parsonage Retail Park	<b>4.0%</b>	<b>5.4%</b>	<b>+1.4%</b>
▪ Tesco Extra, Central Park Way	<b>6.1%</b>	<b>10.1%</b>	<b>+4.0%</b>
▪ Sainsbury's, Marus Bridge	<b>3.7%</b>	<b>5.4%</b>	<b>+1.7%</b>
▪ Other Wigan	<b>0.6%</b>	<b>3.7%</b>	<b>+3.1%</b>
<b>TOTAL WIGAN BOROUGH</b>	<b>88.3%</b>	<b>90.1%</b>	<b>+1.8%</b>

4.5 The data above indicates that as a whole the proportion convenience expenditure of residents of the Study Area that is retained by Wigan Borough has increased by 1.8%, from 88.3% to 90.1%, between 2001 and 2006. This indicates a strengthening of the retail sector over the period. However, it is apparent that only one of the nine town centres defined in the adopted UDP, Hindley, has increased its market share over the period (by 2.0 percentage points), with all other centres undergoing a decline in market share. The

<sup>2</sup> Includes Somerfield, Shuttle Street, Tyldesley

largest decline in town centre market share was recorded in Wigan Town Centre, which experienced a decline of 1.4% solely attributable to the Morrison's store.

4.6 Shopping patterns in Wigan have mirrored those nationally, with a growing trend for residents to choose out-of-centre destinations over town centres when purchasing convenience goods. Indeed, the most significant growth in market share was recorded at the Tesco Extra store, Central Park Way, Wigan, which witnessed an increase in market share from 6.1% in 2001 to 10.1% in 2006, a rise of 4.0 percentage points. Over the same period the market share of 'other' stores in Wigan (comprising small out-of-centre freestanding stores) increased by 3.1 percentage points.

4.7 It should be highlighted that the largest decline in market share was actually witnessed by an out-of-centre facility; the ASDA at Robin Park, which has suffered a decline of 2.1 percentage points over the period. However, it remains the most significant destination in Wigan at 2001 and 2006 for convenience goods shopping.

### **Comparison goods**

#### **Overall comparison goods**

4.8 The following market shares were achieved for comparison goods (bulky goods and non-bulky goods combined) retailing in Wigan in 2001 and 2006

	<u>2001</u>	<u>2006</u>	<u>Change</u>
Ashton-in-Makerfield Town Centre	<b>1.1%</b>	<b>1.1%</b>	<b>-</b>
▪ Atherton Town Centre	<b>1.2%</b>	<b>1.0%</b>	<b>-0.2%</b>
▪ Golborne Town Centre	<b>0.2%</b>	<b>0.7%</b>	<b>+0.5%</b>
▪ Hindley Town Centre	<b>0.7%</b>	<b>0.9%</b>	<b>+0.2%</b>
▪ Leigh Town Centre	<b>9.5%</b>	<b>11.8%</b>	<b>+2.3%</b>
▪ Pemberton Town Centre	<b>0.7%</b>	<b>0.4%</b>	<b>-0.3%</b>
▪ Standish Town Centre	<b>0.1%</b>	<b>0.2%</b>	<b>+0.1%</b>
▪ Tyldesley Town Centre	<b>0.5%</b>	<b>0.3%</b>	<b>-0.2%</b>

▪ Wigan Town Centre	<b>41.0%</b>	<b>24.4%</b>	<b>-16.6%</b>
▪ Ince	<b>0.1%</b>	<b>0.1%</b>	<b>-</b>
▪ Robin Park	<b>8.0%</b>	<b>12.2%</b>	<b>+4.2%</b>
▪ Other destinations in Wigan	<b>7.8%</b>	<b>6.0%</b>	<b>-1.8%</b>
<b>TOTAL WIGAN BOROUGH</b>	<b>70.9%</b>	<b>59.1%</b>	<b>-11.8%</b>

4.9 The information above indicates that destinations within the Borough as whole have suffered a decline in market share over the 2001 to 2006 period. At 2001 destinations within the Borough retained 70.9% of expenditure by residents in the Study Area; however this fell to 59.1% at 2006, a decline of 11.8 percentage points or 16%.

4.10 It is significant to note that Wigan Town Centre experienced the greatest decline in the Borough, decreasing its market share from 41.0% in 0001 to 24.4% in 2006. Tyldesley Town Centre and Atherton Town Centre were the only other two centres to experience a decline in market share over the period, with a fall of 0.2 percentage points. Robin Park recorded the largest increase in market share in Wigan Borough with a rise of 4.2 percentage points, followed by Leigh Town Centre (+2.3%), Golborne Town Centre (+0.5%), Hindley Town Centre (+0.2%) and Standish Town Centre (+0.1%). Ince and Ashton-in-Makerfield Town Centre maintained the same market share at 2001 and 2006, whilst 'other' destinations in Wigan underwent a 11.8 percentage point fall in market share.

4.11 The change in comparison market share will now be explored in more detail on the basis of bulky and non-bulky goods.

### **Non-bulky goods**

4.12 The following market shares were achieved for non-bulky goods retailing in Wigan in 2001 and 2006:

	<u>2001</u>	<u>2006</u>	<u>Change</u>
▪ Ashton-in-Makerfield Town Centre	<b>0.5%</b>	<b>0.7%</b>	<b>+0.2%</b>
▪ Atherton Town Centre	<b>0.8%</b>	<b>0.8%</b>	<b>-</b>
▪ Golborne Town Centre	<b>0.1%</b>	<b>1.0%</b>	<b>+0.9%</b>
▪ Hindley Town Centre	<b>0.3%</b>	<b>0.9%</b>	<b>+0.6%</b>
▪ Leigh Town Centre	<b>9.0%</b>	<b>11.6%</b>	<b>+2.6%</b>
▪ Pemberton Town Centre	<b>0.2%</b>	<b>0.0%</b>	<b>-0.2%</b>
▪ Standish Town Centre	<b>0.0%</b>	<b>0.2%</b>	<b>+0.2%</b>
▪ Tyldesley Town Centre	<b>0.3%</b>	<b>0.1%</b>	<b>-0.2%</b>
▪ Wigan Town Centre	<b>49.1%</b>	<b>29.7%</b>	<b>-19.4%</b>
▪ Ince	<b>0.0%</b>	<b>0.2%</b>	<b>+0.2%</b>
▪ Robin Park	<b>2.0%</b>	<b>6.8%</b>	<b>+4.8%</b>
▪ Other destinations in Wigan	<b>1.4%</b>	<b>2.7%</b>	<b>+1.3%</b>
<b>TOTAL WIGAN BOROUGH</b>	<b>63.7%</b>	<b>54.7%</b>	<b>-9.0%</b>

4.13 At 2001 facilities within Wigan attracted 63.7% of expenditure by residents in the Study Area for non-bulky goods. At 2006 facilities in the Borough retained 54.7% of expenditure meaning that the market share of non-bulky goods expenditure in Wigan Borough declined by 9.0 percentage points over the 2001 to 2006 period.

4.14 Wigan Town Centre experienced the greatest fall in non-bulky goods market share over the period, with a decline from 49.1% in 2001 to 29.7% at 2006. Although the Household Survey questionnaires were slightly different at 2001 and 2006 it is evident that this change in market share represents a marked decline. It should be highlighted, however, that the 2006 Household Survey was undertaken before the Grand Arcade opened, and it is exactly this type of decline that the scheme seeks to address.

4.15 Over the 2001 to 2006 period Robin Park experienced the most significant rise in market share, up from 2.0% in 2001 to 6.8% in 2006. Most of the nine UDP defined town centres also increased the market share for which they account in the non-bulky goods sector, most notably Leigh which recorded a 2.6 percentage point rise. Notwithstanding this Atherton Town Centre did not

change its market share over the period, and Pemberton Town Centre and Tyldesley Town Centre both suffered a decline of 0.2 percentage points.

### **Bulky goods**

4.14 The following market shares were achieved for bulky goods retailing in Wigan in 2001 and 2006:

	<u>2001</u>	<u>2006</u>	<u>Change</u>
▪ Ashton-in-Makerfield Town Centre	<b>2.5%</b>	<b>1.8%</b>	<b>-0.7%</b>
▪ Atherton Town Centre	<b>2.2%</b>	<b>1.6%</b>	<b>-0.6%</b>
▪ Golborne Town Centre	<b>0.4%</b>	<b>0.2%</b>	<b>-0.2%</b>
▪ Hindley Town Centre	<b>1.7%</b>	<b>0.9%</b>	<b>-0.8%</b>
▪ Leigh Town Centre	<b>10.8%</b>	<b>12.2%</b>	<b>+1.4%</b>
▪ Pemberton Town Centre	<b>2.0%</b>	<b>1.2%</b>	<b>-0.8%</b>
▪ Standish Town Centre	<b>0.4%</b>	<b>0.2%</b>	<b>-0.2%</b>
▪ Tyldesley Town Centre	<b>1.1%</b>	<b>0.6%</b>	<b>-0.5%</b>
▪ Wigan Town Centre	<b>21.6%</b>	<b>13.1%</b>	<b>-8.5%</b>
▪ Ince	<b>0.3%</b>	<b>0.0%</b>	<b>-0.3%</b>
▪ Robin Park	<b>22.5%</b>	<b>23.8%</b>	<b>-1.3%</b>
▪ Other destinations in Wigan	<b>22.9%</b>	<b>12.8%</b>	<b>-10.1%</b>
<b>TOTAL WIGAN BOROUGH</b>	<b>88.4%</b>	<b>68.4%</b>	<b>-20.0%</b>

4.15 In terms of bulky goods expenditure retained by destinations in Wigan Borough, it is evident that this has declined significantly over the 2001 to 2006 period. At 2001 destinations in Wigan Borough accounted for 88.4% of bulky goods expenditure, however this fell to 68.4% at 2006. This represents a decline of 20.0 percentage points or some 23%. Indeed, from examination of the market shares for individual destinations within the Borough, it is apparent that all have declined except for Leigh Town Centre, which has increased its market share from 10.8% to 12.2% over the period.

4.16 'Other' destinations in Wigan, which comprise freestanding out-of-centre stores and retail parks (excluding Robin Park), recorded the greatest decline

in market share of 10.1 percentage points, although Wigan Town centre also suffered a notable decline of 8.5 percentage points.

## **Conclusions**

4.17 In conclusion it can be seen that whilst convenience destinations in the Borough have strengthened their position over the period, attracting a larger proportion of expenditure at 2006 compared to 2001, the opposite is true for comparison goods and the market share of Wigan Borough has declined.

4.18 In terms of Wigan Town Centre this has experienced a decline in both the convenience sector (by 1.4 percentage points) and the comparison sector (by 16.6 percentage points). Most notably the non-bulky goods sector has declined by 19.4 percentage points over the period, although this was before the Grand Arcade had begun trading. Although Leigh Town Centre suffered a slight decline in convenience market share (by 0.3 percentage points), the town has strengthened its position with respect to comparison goods (by 2.3 percentage points).

4.19 With regard to the other town centres:

- Ashton-in-Makerfield Town Centre: Convenience market share declined by 0.5 percentage points whilst comparison market share remained unchanged;
- Atherton Town Centre: Both convenience and comparison market share declined, by 0.5 and 0.2 percentage points respectively;
- Golborne Town Centre: Convenience market share fell by 0.2 percentage points with comparison expenditure market share growing by 0.5 percentage points;
- Hindley Town Centre: Convenience market share increased by 2.0 percentage points and comparison market share by 0.2 percentage points;

- Pemberton Town Centre: Convenience and comparison market shares both fell by 0.3 percentage points;
- Standish Town Centre: Although the market share of convenience expenditure declined by 1.2%, comparison goods market share rose by 0.1%; and
- Tyldesley Town Centre: The market share of both convenience and comparison goods declined, by 0.5 percentage points and 0.2 percentage points respectively.

4.20 Out-of-centre destinations on average accounted for a larger proportion of convenience and comparison goods market share at 2006 compared to 2001 which reflects national trends. However, in terms of comparison goods whilst the proportion of non-bulky goods expenditure attracted to out-of-centre destinations increased, the proportion of non-bulky goods for which they account actually fell.

## 5 LEISURE IN WIGAN BOROUGH

### Introduction

- 5.1 In addition to an assessment of convenience and comparison retail shopping patterns in the Borough, this Study considers current provision of and additional need for commercial leisure provision: cinema; ten-pin bowling; bingo halls; and health and fitness clubs.

### Leisure Provision

#### *Cinema*

- 5.2 There is one cinema in the Borough; the 11-screen Empire Cinema located at Robin Retail Park. Other cinemas nearby include the 11–screen Cineworld in St Helens and the 12-screen Vue Cinema at Middlebrook Leisure Park, Bolton.

#### *Ten-Pin Bowling*

- 5.3 The Borough contains two ten-pin bowling alleys: Leigh Superbowl, Windermere Road, Leigh and AMF Bowling, Wallgate, Wigan. Leigh Superbowl contains 14 bowling lanes, whilst AMF Bowling has 28 lanes.

#### *Bingo Halls*

- 5.4 The Borough has several large format bingo halls. A Gala Bingo Club is situated on Crompton Street, Wigan, whilst another Gala Bingo Club is located at Robin Park. In addition BJ's Luxury Bingo is located on Ellesmere Street, Leigh.

#### *Health and Fitness Clubs*

- 5.5 A total of 33 health and fitness clubs of various sizes were identified in the Study Area. This includes 6 facilities located in Skelmersdale. The health and fitness clubs identified include registered membership-based health and

fitness clubs and Council run facilities. Examples of health and fitness clubs identified in the Borough of Wigan include: Ashton Leisure Centre, JJB Health and Fitness Clubs, Wigan International Pool, Fitness First and FY Gym. A full list of the health and fitness clubs identified is included in this report at Appendix 14 (Table 6F)

## **Leisure Activity**

5.6 The NEMS Household Survey included questions on the use of centres in the Study Area for: Health and Fitness; Entertainment; and Nightlife. The findings of the research are summarised at Appendix 14; Table 2 and Table 3 at Appendix 14 use the findings of the Household Survey to identify the attraction of the principal centres in the Borough.

### *Indoor Sports Activity (Health and Fitness)*

5.7 The Household Survey identifies that the last centres visited by residents of the Borough for health and fitness activity (of the 64% of residents who undertake such activity) are:

▪ Ashton-in-Makerfield	<b>6.5%;</b>
▪ Atherton	<b>4.3%;</b>
▪ Golborne	<b>1.9%;</b>
▪ Hindley	<b>3.0%;</b>
▪ Leigh	<b>9.6%;</b>
▪ Pemberton	<b>0.0%;</b>
▪ Standish	<b>1.0%;</b>
▪ Tyldesley	<b>1.6%;</b>
▪ Wigan	<b>21.4%;</b>
▪ Robin Park	<b>15.6%;</b>
▪ Other destinations in Wigan	<b>7.0%; and</b>
▪ Other outside of Wigan	<b>28.1%.</b>

5.8 Wigan is the principal destination in the Borough for health and fitness activity. Across the Study Area as a whole, of those residents who indicated that they undertook health and fitness activity 21.4% did so in Wigan, followed

by Robin Park (15.6%) and Leigh (9.6%). 28.1% of residents conducted their health and fitness activities outside of the Borough of Wigan. The Study Area extends into Skelmersdale and indeed health and fitness facilities in Skelmersdale Town Centre attain a market share of 7.1% across the Study Area as a whole.

5.9 Table 7 at Appendix 14 projects forward health and fitness club use in the Study Area. In order to do this, the Study Area has been divided into two areas: east and west. The east area comprises Zone 10 (Golborne), Zone 11 (Leigh), Zone 12 (Atherton) and Zone 13 (Tyldesley), whilst the west area contains Zone 1 (Wigan), Zone 2 (Pemberton), Zone 3 (Shevington), Zone 4 (Standish), 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). The estimated population of each area that undertake health and fitness activities at 2007, 2012, 2017, 2022 and 2027 is then determined, using the predicted population of each area and the results of the Household Survey. The need for any additional health and fitness facilities can then be derived on the basis that on average 2,000 memberships are required to support a health and fitness club. The need for additional health a fitness provision is considered in Section 8.

*Entertainment (Cinema, theatre, restaurants)*

5.10 The Household Survey identified that 77% of households in the Study Area undertake entertainment activities, such as visiting the cinema, theatre or restaurants. When asked which town/ city centre residents last visited for entertainment purposes, the following answers were recorded:

▪ Ashton-in-Makerfield	<b>1.1%;</b>
▪ Atherton	<b>1.0%;</b>
▪ Golborne	<b>1.5%;</b>
▪ Hindley	<b>0.8%;</b>
▪ Leigh	<b>3.3%;</b>
▪ Pemberton	<b>0.0%;</b>
▪ Standish	<b>1.6%;</b>
▪ Tyldesley	<b>0.5%;</b>

▪ Wigan	<b>22.0%;</b>
▪ Robin Park	<b>5.2%;</b>
▪ Other destinations in Wigan	<b>3.3; and</b>
▪ Other outside of Wigan	<b>59.9%.</b>

5.11 It is evident that Wigan, with a market share of 22.0%, is the only centre in the Borough to attract a significant proportion of residents for entertainment purposes. Indeed the majority of residents in the Study Area who do carry out entertainment activities (59.9%) do so outside of Wigan. The most popular destinations outside of Wigan were seen to be Manchester City Centre and Bolton Town Centre, which had market shares of 21.6% and 7.3% respectively. Leakage was high in all of the 15 zones, but increased with distance from Wigan: leakage was highest in Zone 15, Zone 14 and Zone 13.

5.12 The need for additional cinema provision is considered in Section 8.

#### *Bingo*

5.13 Just 14% of residents in the Study Area indicated that they participated in bingo. Of those that did play bingo, the most popular destinations in the Borough were Wigan (28.3% market share), Leigh (22.1%) and Robin Park (9.9%). All other centres in Wigan recorded visits for bingo: this pattern is to be expected given the location of Wigan's three large-format bingo halls. There was a modest leakage of 26.1% of bingo trips to facilities outside of the Wigan Borough.

5.14 The need for further bingo facilities in the Borough is explored in Section 8.

#### *Nightlife*

5.15 The Household Survey indicated that some 49% of residents in the Study Area visited public houses, bars and clubs during the evening.

5.16 Amongst those residents who do undertake such nightlife activities, the centres visited are:

▪ Ashton-in-Makerfield	<b>4.9%;</b>
▪ Atherton	<b>2.9%;</b>
▪ Golborne	<b>2.2%;</b>
▪ Hindley	<b>2.4%;</b>
▪ Leigh	<b>13.1%;</b>
▪ Pemberton	<b>1.3%;</b>
▪ Standish	<b>1.8%;</b>
▪ Tyldesley	<b>2.3%;</b>
▪ Wigan	<b>30.5%;</b>
▪ Robin Park	<b>0.1%;</b>
▪ Other destinations in Wigan	<b>6.1; and</b>
▪ Other outside of Wigan	<b>32.4%.</b>

5.17 Overall the Borough retains 67.6% of trips for nightlife by residents who participate in this activity, with 32.4% being leaked outside Wigan. Leakage is to a variety of different centres, including Skelmersdale which is within the Study Area but outside the Borough. Within Wigan the most popular destinations for nightlife are: Wigan (30.5%) and Leigh (13%).