



Nathaniel Lichfield
& Partners
Planning. Design. Economics.

**Wigan Retail and Leisure
Study**

Wigan Metropolitan Borough
Council
July 2014

41374/02/PW/SMH/RHt

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1.0 Introduction

1.1 Wigan Metropolitan Borough Council (the Council) commissioned Nathaniel Lichfield & Partners (NLP) to prepare a borough-wide retail and leisure study. The study is required to assess the current convenience and comparison retail and leisure offer and to quantify the need for new floorspace over the period covered by the Wigan Local Plan Core Strategy (the Core Strategy), adopted September 2013. It is undertaken having regard to the requirements set out in the National Planning Policy Framework (NPPF) and the Planning Practice Guidance. The study updates the evidence base, replacing the Wigan Borough Retail and Leisure Study of 2007 (the 2007 study) and a subsequent 2009 Capacity Assessment Update (the 2009 update). This new study is written to inform policy development and application across the borough.

1.2 This 2014 study:

- 1 assesses retail patterns and expenditure 'leakage' and quantifies the performance of centres/destinations;
- 2 assesses the future need and capacity for retail floorspace in the borough over the period to 2026;
- 3 considers whether current retail provision is meeting the demands of borough residents and whether there is a need to increase competition and/or influence the retail mix;
- 4 advises on how any identified quantitative and qualitative need for new convenience and comparison retail floorspace might be best met over the period to 2026;
- 5 advises on potential threats to the future retail health of the borough and town centres;
- 6 includes a desk-based analysis of existing commercial leisure provision and assesses potential future requirements;
- 7 compares commercial leisure provision in Wigan with provision in other administrative areas that have the potential to divert leisure spending away from Wigan Borough; and
- 8 provides a comparison with the findings of the 2007 study and 2009 update regarding performance of retail destinations across the borough, the need and capacity for new retail floorspace and quality of leisure provision.

2.0

Retail and Commercial Leisure Trends

National Retail Trends

2.1

The economic downturn is still having a significant impact on the retail sector. A number of national operators have failed (e.g. Barratts, Blockbuster, Borders, Clinton Cards, Comet, Firetrap, Game, Habitat, HMV, JJB Sports, Jessops, La Senza, Land of Leather, MFI, Past Times, Peacocks and Woolworths), leaving major voids within centres and retail parks. That said, and despite well-documented concerns about a proliferation of non-retail uses, initiatives including encouraging temporary/'pop-up' businesses and the innovative use of space have in some centres delivered positives from an increasing number of voids.

2.2

Consolidation is also occurring. Argos recently announced the closure of a significant number of shops in its portfolio. Many town centre development schemes are delayed or abandoned. The demand from traditional retail warehouse operators is also reduced. B&Q is in the process of reducing the size of its 'Warehouse' format store, with the surplus floorspace being promoted for occupation by foodstore operators including Morrisons and Sainsbury's. The B&Q Frith Street (Newtown) store is an example of this planned consolidation.

2.3

Some of the main food store operators have seen a reduction in growth, with planned schemes delayed or abandoned. The principal large foodstore operators are developing fewer new stores, and those built-out tend to be of a smaller scale than the superstore that typified development programmes of the previous decade. Heightened popularity amongst consumers for the 'deep discount' operators is resulting in the other principal operators focussing attentions on competing in this budget sector.

2.4

Assessing future expenditure levels within this study needs to take into account the effects of the economic downturn and the slow rate of recovery, particularly in the short term. Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the Core Strategy period. This study takes a long term view for the Core Strategy period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be carefully considered and a balanced approach taken.

Expenditure Growth

2.5

Historic retail trends indicate that expenditure grows consistently in real terms, generally following a cyclical growth trend. The underlying trend shows consistent growth and is expected to continue in the future. However, the recent economic downturn led to negative growth at its deepest point and a recent trend of limited growth is expected to continue in the short term ahead of upturn and recovery as part of the cyclical process.

- 2.6 In the past, expenditure growth fuelled growth in retail floorspace, including major out-of-centre development in the 1980s and 1990s. The economic downturn slowed growth considerably and a return to previous levels of growth is unlikely to be achieved, at least in the short term. However, the underlying trend over the medium and long term is expected to lead to a need for further retail floorspace. NLP anticipates these national trends will be mirrored in Wigan Borough.

New Forms of Retailing

- 2.7 New forms of retailing have emerged in recent years as an alternative to more traditional high-street shopping. Home/electronic shopping has expanded considerably with increasing growth in the use of personal computers/tablets/mobile phones and the internet. Smart phone technology, Apps, QR (Quick Response) codes, internet-connected glasses and other technological advances are set to increase the proportion of shopping transactions undertaken remotely. Trends within this sector will have implications for retailing within Wigan Borough.
- 2.8 The growth in home computing, smart phone usage and interactive TV is likely to lead to a growth in remote shopping and will have further effects on retailing in the high street. Food retailers are developing and operating so-called 'dark stores', from which goods are picked and delivered, but there is not any access to the public.
- 2.9 Whilst online shopping has experienced rapid growth since the late 1990s, the latest available data suggests it remains a limited proportion of total retail expenditure. Recent trends suggest continued strong growth in this sector, albeit there is still uncertainty about its longer-term prospects and the potential effects on the high street. Experian Retail Planning Note 11 (September 2013) states:
- “Non-store retailing continues to grow rapidly, outpacing traditional forms of spending. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales well into the long term. There were 52.7 million internet users in the UK (representing 84.1% of the population) in mid-year 2012 according to Internet World Stats. So growth of the internet user base will be less of a driver than in the past decade. But growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boost internet retailing. We expect that the SFT market share will continue to increase over the forecast period, although the pace of e-commerce growth will moderate markedly after about 2020. Our forecast has the SFT share of total retail sales reaching 17.4% by 2020 rising to 20% by the end of the 2020s.”*
- 2.10 This study makes an allowance for future growth in e-tailing based on Experian projections.
- 2.11 The implications on the demand for retail space are unclear. Some retailers and particularly foodstores operate online sales from their traditional retail

premises. Growth in online sales may not always mean that there is a reduction in the need for retail floorspace.

- 2.12 Given that internet shopping is likely to continue increasing in proportional terms, despite uncertainties over the nature and magnitude of growth, this assessment adopts relatively cautious growth projections for retail expenditure.

Retail Operators

- 2.13 In addition to new forms of retailing, operators have also responded to changing customer requirements e.g. extended opening hours and Sunday trading increasing significantly in the 1990s. Retailers have also responded to stricter planning controls by changing their trading formats. Some major food operators introduced smaller store formats capable of being accommodated within town centres, such as the Morrison's 'M Local', Tesco 'Express' and 'Metro', Sainsbury 'Local' and M&S 'Simply Food' formats. Asda has moved into the smaller store market through the acquisition of Netto. Food operators have also entered the local convenience store market, including Tesco 'Express' and M&S 'Simply Food' convenience stores linked to petrol filling stations. The expansion of European discount food operators continues and at rapid pace, building upon sustained growth in last decade. This trend is evident in Wigan Borough, with Aldi and Lidl currently trading from 10 stores.
- 2.14 Foodstore operators have a rolling programme of store extensions and reinvigoration, particularly Asda, Sainsbury's and Tesco. Since 2012, Tesco in particular has concentrated on refreshing its existing stores, rather than pursuing new build. The main foodstore operators, faced with potential saturation in the grocery market, attempted to increase the sale of non-food products within their foodstores, including clothing and electrical goods. The recent recession halted this trend, is now reversing it and is part of the reason why consolidation and down-sizing are strategies being employed by the foodstore operators.
- 2.15 Comparison retailers have also responded to recent market conditions. The bulky goods retail warehouse sector has rationalised and operators have scaled down store sizes, amidst a climate of mergers and failures. Other traditional high street retailers, including Boots, Poundstretcher and TK Maxx, have sought large out-of-centre stores. The charity shop sector has grown steadily over the past 20 years and there is no sign that this trend will halt. The discount comparison retail sector has also grown significantly in recent years with major expansion from the likes of 99p Stores, B&M Bargains, Family Bargains, Home Bargains, Poundland, Poundstretcher and Quality Save.
- 2.16 The economic downturn has had, and is likely to continue to have, an impact on the retail sector; a sector that failed to protect itself properly against shifting economic conditions. Within town centres, many high street multiple comparison retailers have changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq. m) with an increasing polarisation of activity into the larger regional and sub-regional centres. The food operators have returned to town centre with their smaller

format convenience stores, and the growth in the charity and discount sectors has led to a reoccupation of vacant floorspace. Short term, the pop-up shop and permissive temporary change of use has the potential to reduce vacancy rates and increase footfall. Longer term, retail to residential permitted development rights and a single town centre use class are initiatives which could bring about further change in the character of town centres.

Leisure Trends

- 2.17 The demand for commercial leisure facilities has increased significantly during the last 25 years. The growth in the commercial leisure sector was particularly strong during the late 1980s and again in the mid-1990s. Average household expenditure on leisure services increased in real terms by 93% between 1984 and 1995 (source: Family Expenditure Survey), and by a further 48% between 1995 and 2005. The sector has experienced more limited growth since 2005. Many analysts consider that the commercial leisure market has reached saturation in some sub-sectors, such as bingo, large format multiplex cinemas and tenpin bowling. The economic downturn since 2008 has curbed further growth in leisure spending and this sector is an early casualty of reduced disposable income, albeit the concept of the 'staycation' has delivered positive repercussions for the domestic commercial leisure industry.
- 2.18 The mid-1990s saw the expansion of major leisure parks which are generally anchored by a large multiplex cinema and offer other facilities such as ten-pin bowling, bingo, nightclubs, health and fitness clubs, themed destination restaurants, pub/restaurants, children's nurseries and budget hotels. Commercial leisure facilities have typically been located on the edge of town centres or in out-of-centre locations, with good road access. Many leisure uses have also emerged as part of or adjacent to retail warehouse parks. Robin Park in Wigan Borough is an example of this.
- 2.19 The cinema market remains an important sector as this is often an anchor leisure use and provides footfall for other uses. Operators such as City Screen, Mainline Pictures and Reel Cinemas have opened new cinemas or taken over small cinemas in recent years.
- 2.20 Digital projection has driven a trend towards development of cinemas with fewer screens, and town centre locations are back in vogue. Town centre cinemas tend to occupy a smaller footprint and are typically developed alongside other commercial businesses, including cafés, bars and restaurants. Eagles Meadow in Wrexham is a good example of a commercial development scheme in a central area anchored by a cinema, as is the extension to intu Potteries in Stoke-on-Trent. The planned redevelopment of the Galleries/Marketgate shopping centre in Wigan town centre is following the same trend.
- 2.21 In November 2012 Cineworld acquired the arthouse cinema chain Picturehouse, which operates from 21 locations. The acquisition of Picturehouse extended the Cineworld Group portfolio to over 120 venues. In

2013, Cineworld confirmed that it is on track to open a further 25 locations by the end of 2017 with new picture houses opening in Glasgow, Gloucester and Wembley by the end of 2013. In January 2014 Cineworld secured expansion internationally, in Eastern Europe and Israel, when it purchased 100 multiplex cinemas from the Cinema City International (CCI) portfolio.

2.22 Odeon is also continuing investment to improve and expand its estate, which has recently included a new food and drink partnership, with Costa Coffee opening outlets in cinema foyers. Cineworld has introduced Starbucks outlets at a number of sites.

2.23 Vue has also identified further opportunities for multiplex cinemas in the UK, with the intention to explore new acquisition opportunities.

2.24 Although the private health and fitness market has remained strong, it is the no-contract, budget operators such as easyGym, Pure Gym and The Gym Group that are currently seeking premises across the UK and continue to grow rapidly. This is evidenced in Wigan where in 2012 *Xercise4less* purchased a 15 year lease to operate from the former MFI retail warehouse on Chapel Lane. DW Sports Fitness and Total Fitness also operate gym facilities in Wigan. The economic downturn and squeeze on disposable income has had an impact on established multiple operators, most notably Fitness First, which was recently forced to close a number of outlets as a result of falling membership revenues.

2.25 Since the late 1990s the high street has seen a significant increase in the number of cafés, coffee shops and sandwich emporia. This includes the Caffé Nero, Costa Coffee and Starbucks coffee shop chains and sandwich providers Eat, Pret a Manger and Subway, alongside a growth in high-end independent retailers. A 2012 report predicts that increased competition from brands such as Harris and Hoole and Greggs Moment would lead to a 25% growth in coffee shops over the next five years. Tesco entering the takeaway market with its Tesco Express Food to Go chain will provide greater competition in this sector.

2.26 A trend for 'posh' fast food, started by the likes of Gourmet Burger Kitchen, has extended into the independent sector and is delivering new vibrancy to some high streets, but may be short-lived.

Commercial Leisure – Wigan Borough

2.27 NLP has completed a desk-based study of the commercial leisure uses in Wigan Borough, setting this in context with provision in locations outside of the borough that has the potential to divert expenditure away from facilities in Wigan.

Catchment Potential

2.28 Commercial leisure facilities outside of 'destination' attractions attract the majority of their trade from residents living within 20 minutes' travel time. Large leisure facilities which typically include an offer such as multiplex

cinema, ten-pin bowling, ice rink and family entertainment centre tend to be developed as large out-of-centre leisure parks as they require a large catchment population. That said, there is a marked trend away from out-of-centre leisure facilities with cinema-led mixed use developments returning to town centres on the back of advances in digital screening technology meaning that a greater number of smaller cinemas can be operated efficiently.

- 2.29 The 2012 population of Wigan Borough is estimated at 317,800. The catchment area for facilities in the borough is likely to extend beyond its boundary and leisure facilities in neighbouring authority areas will also draw residents of Wigan out of the borough for leisure activity. Middlebrook Retail and Leisure Park has a cinema and bowling alley and is located fewer than 10 minutes from Aspull. The Trafford Centre with a range of leisure facilities is within a 20 minute drive of Leigh.
- 2.30 The regional centres of Manchester and Liverpool offer extensive leisure opportunities and will draw people out of Wigan Borough to use such facilities.

Cinemas and Theatres

- 2.31 Within the Wigan Borough boundary there are currently two multiplex cinemas. Empire is located at Robin Park and there is a Cineworld in Leigh. Data from the NLP VeNU¹ database shows that the Empire cinema has 11 screens and 2,548 seats² and that Cineworld has 7 screens and 1,306². Opening of Cineworld Leigh post-dates publication of the 2007 study, which identified capacity for a new multiplex cinema in the borough. Proposals for redevelopment of The Galleries/Marketgate in Wigan town centre include a seven screen cinema³.
- 2.32 There are other multiplex cinemas within 20 minute drive from Wigan which include an Odeon at the Trafford Centre, a Vue at Middlebrook Retail Park and a Cineworld in St Helens.
- 2.33 Cineworld in Didsbury (Manchester) is the nearest cinema to Wigan Borough with 'D-Box' chairs installed. The chair is designed to move and vibrate using state of the art technology to introduce a new cinema experience. Enhanced cinema experience may well attract residents of Wigan to travel beyond its boundaries to access entertainment facilities.
- 2.34 Attached at **Appendix 1** is NLP 'CINeSCOPE'⁴ intelligence for the North West region. The North West focus of the CINeSCOPE model maps the location and scale of existing, committed and proposed cinema outlets, and using population density data identifies potential 'hotspots' for future provision. Wigan Borough is not identified as a hotspot, but the conclusions of CINeSCOPE should be viewed in context with potential latent demand. The results of the household surveys that inform this study identify that the Morrisons foodstore

¹ NLP VeNU is a comprehensive living database of cinemas and screens

² NLP Venu database

³ Planning application submitted June 2014

⁴ NLP CINeSCOPE is a cinema capacity model for UK locations informed by NLP Venu and demographic data and trends

in The Galleries shopping centre is used as a main-food shopping destination and there is strong evidence to suggest that it attracts a high proportion walk-in trade. The cinema at Robin Park is not realistically walkable from the town centre and there is not a direct public transport link. This suggests that there might be latent demand for cinema provision in the central area, where it is accessible as a walk-in destination and by public transport.

- 2.35 Chorley is identified, and there is potential for new cinema provision in the higher order Wigan town centre to address this identified shortfall in provision. Capacity is also identified in Bolton and Oldham; two towns where commitments exist.
- 2.36 Wigan Little Theatre, at the edge of Wigan town centre, stages traditional and contemporary productions.

Health and Fitness Clubs

- 2.37 The 2007 study identifies 27 health and fitness clubs in the borough. The study identifies that up to four additional health and fitness clubs could be accommodated over the period to 2027.
- 2.38 The Wigan Life Centre including a 25 metres swimming pool and fitness suite opened in 2011 on the site of the former Olympic pool.
- 2.39 The health and fitness clubs identified in the 2007 study are still operational. The DW Sports and Fitness Club at Robin Park is the former JJB Health and Fitness Club.
- 2.40 Since the 2007 study was published the Council has received a significant number of planning applications proposing new health and fitness clubs in Wigan, which have met with approval. Schemes include the provision of gyms, dance studios and swimming pools with most health and fitness developments contributing towards larger mixed-use proposals.

Ten-pin Bowling

- 2.41 In 2007 there were two ten-pin bowling alleys in Wigan: Leigh Superbowl at Windermere Road; and AMF Bowling at Wallgate, Wigan. Leigh Superbowl closed in 2010 and proposals have come forward for a change of use to non-food retailing.
- 2.42 The 2007 study identified a lack of requirement for additional bowling lanes in the borough, noting an oversupply in the sector; the closure of AMF bowling substantiates this. The impact of the economic downturn on levels of disposable income suggests that any capacity for growth in the ten-pin bowling sector will be in the longer term.
- 2.43 Nationally, commentators have coined the term 'Boutique bowling' for the re-invention of ten-pin bowling delivered alongside 'posh' fast food. 'All Star Lanes' and 'Dog Bowl' in Manchester are examples of 'Boutique bowling' facilities. The pairing of these facilities with an upmarket food and drink offer

has given ten-pin bowling a makeover and a much needed twist to begin to re-establishing its image in the leisure market.

Bingo

- 2.44 Consistent with the 2007 study, there are three large-format registered bingo halls in Wigan Borough (BJs Bingo, Leigh, Gala, Crompton Street, Wigan and Gala, Robin Park). The 2007 study identified capacity for up to five additional bingo halls in the study area over the period to 2027 having regard to trend based growth in patronage.
- 2.45 The 2007 study referred to the smoking ban as a key factor in stalling bingo operators from bringing forward new sites. Since 2007 the Council has not received any applications for new bingo facilities, extensions or improvements which indicates a potential stagnation in this sector.

Indoor Play Centres

- 2.46 The 2007 study did not include a section commenting upon provision in Wigan of indoor play centres. This perhaps reflects the limited number of such facilities at the time. Since 2007 there has been a marked rise in the number of such facilities nationally, which are seen as a key growth area in the commercial leisure sector.
- 2.47 Originally indoor play centres were primarily provided as enticement to chain operator family pub-restaurants but in recent years the independent operator has started to dominate the industry. In Wigan there is a Wacky Warehouse attached to the Red Robin Pub at Robin Park; this facility follows the more traditional indoor play format as it is associated with a food and drink establishment. Wigan also has Gioco play centre, Rumble Tumble, Bizzee Kids and Pipsqueaks play café which are all independent indoor play businesses.
- 2.48 The Council has seen a significant number of applications for indoor play centres since 2007. This is consistent with the national trend which has seen steady and sustained growth in this area of the leisure industry.

3.0

New Research: 2014 Surveys

Household Telephone Surveys

3.1

In March 2013 RMG Clarity conducted a household telephone survey to inform a planning application for a foodstore proposal at Frith Street, Wigan⁵. RMG Clarity conducted 1,000 telephone interviews across 11 of the 15 sub-zones from the 2007 study, including two sub-zones in the West Lancashire administrative area. In March 2014 NEMS market research carried out a second telephone housing survey, conducting 400 telephone interviews across the four sub-zones excluded from the RMG Clarity survey. The two household surveys utilised the same questionnaire and their combined findings inform this study. The plan at **Appendix 2** illustrates the study area and the fifteen sub-zones. Table 3.1 details the postcode sectors in each sub-zone.

Table 3.1 Study Area Survey Zones

Survey Zone	Postcode Sector(s)
1.Wigan	WN1 1, WN1 2, WN1 3, WN3 4, WN3 5, WN 50, WN6 7
2.Pemberton	WN3 6, WN5 7, WN5 8, WN5 9
3.Shevington	WN6 8, WN 6 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	WA 3/1, WA 3/2, WA 3/3
11.Leigh	WN 7/1, WN 7/2, WN 7/3, WN 7/4, WN 7/5
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

3.2

The study area and sub-zones used in this 2014 study are consistent with those used in the 2007 study and 2009 update.

3.3

The new household survey questionnaires are similar to the household survey questionnaire used with the survey that informs the 2007 study and the 2009 update. There is scope for an assessment of any material changes in shopping patterns and a comparison is provided later in this report. **Appendix 3** includes the questionnaire and raw results of the household surveys. Commentary on shopping patterns is provided in Section 4.0 and the results inform the capacity assessments at Section 6.0.

⁵ Proposal by B&Q Plc/WM Morrison Supermarkets Plc for the subdivision and part occupation by a Morrisons store of the existing B&Q Warehouse at Frith Street Wigan (Application Ref: A/14/78931)

In Street Surveys

- 3.4 In May 2014 the Community Engagement Team at the Council carried out 280 surveys across eight town centres in the borough. Golborne is the only centre that the Council did not survey. Table 3.2 shows the number of surveys carried out and how these were split geographically.

Table 3.2 Location and Quantity of In-Street Surveys

Town Centre	Number of Surveys
Wigan	64
Leigh	36
Ashton-in-Makerfield	51
Atherton	20
Tyldesley	21
Standish	32
Hindley	12
Pemberton	44
Total	280

- 3.5 The surveys were all carried out Monday to Wednesday between the hours of 9.00am and 4.00pm. The timing of the survey work is likely to have excluded some key groups, particularly individuals who work Monday to Friday or those who use the town centres in the evening or at the weekend.
- 3.6 The in-street surveys undertaken can provide a broad understanding of retail and leisure patterns but should be treated with caution and given limited weight in plan making and the determination of planning applications due to the constraints of the survey. A greater number of surveys undertaken at weekends, evenings in addition to during the week would give a better understanding of shopping and leisure trends would provide a more representative sample for analysis.
- 3.7 Section 4.0 summarises the main findings of the in-street surveys.

4.0

In Street Surveys

Wigan

4.1

In total there were 64 surveys completed in Wigan town centre with 40 of these people stating that Wigan was the closest town centre to where they live. The greatest proportion of people surveyed in Wigan had arrived by car (27) although a large number had travelled by bus (22) and most others arrived by foot (10). Just two people used the train.

4.2

Those who drove used a variety of car parks and as such there was no car park which stood out as the main parking destination for people visiting Wigan.

4.3

A large number of people surveyed had travelled fewer than 20 minutes (70.3%) to get to Wigan town centre. Although the remainder (29.7%) had travelled over 20 minutes which is more than any of the other centres in Wigan Borough.

4.4

The most common reasons cited for visiting Wigan are for food and grocery shopping (12) and clothes/shoe shopping (12). This was closely followed by work/school/college (11) which might be over represented due to the timing of the surveys. Nobody surveyed stated that their main purpose for visiting Wigan was for bulky goods shopping, or to visit the market.

4.5

Of those surveyed 60.9% planned to stay for fewer than two hours with 10.9% intending to stay all day. Although this does not specify whether they are staying all day for shopping, leisure or work.

4.6

Interestingly 54.7% of people surveyed said that they visit the town centre much more frequently than they did five years ago. There were 19 people (29.7%) who visit about the same. Therefore just 15.6% of people visit less frequently or stated they didn't visit five years ago. This would indicate that Wigan has become a town centre visited with a greater frequency now than was the case five years ago. This mirrors a general trend of a return to shopping activity being undertaken with a greater frequency.

4.7

There were a significant number of people who said that they did not seek out sport/fitness activities (73.8%). However, of those who did 69% visited Wigan at least once a week with 19% identified destinations elsewhere as providing for their nightlife activities.

4.8

In terms of entertainment 36 (62.1%) of people surveyed did not participate in this activity. Of the 22 people who did there were 11 who visited Wigan less than fortnightly and four who visited elsewhere.

4.9

There were 11 people who visited Wigan town centre for nightlife. There was no dominant frequency of visits to the town centre for this purpose and just two people visited elsewhere.

- 4.10 It is of note that those who stated they visited elsewhere may well be visiting another centre within Wigan Borough, although this level of detail is not captured by the surveys.
- 4.11 People who stated that they visited elsewhere were asked why. Many didn't know but the main reason across all activities was that there were better alternatives elsewhere. No one suggested that Wigan town centre was unattractive for sport, entertainment or nightlife. Only three said fear of crime made them go elsewhere.
- 4.12 Very few people stated that they visited Wigan town centre in the evening at all. 88.9% of people surveyed said they didn't visit Wigan in the evening for sport or fitness. Of those who did visit for sport, entertainment or nightlife, the frequency of visits is low. Of those who did visit the town centre in the evening just 14.5% stayed for over four hours.
- 4.13 When compared to other centres Wigan fairs quite well on most criteria. However a small number of people did state that Wigan is worse or much worse than other centres across all categories. Entertainment, evening and night time safety as well as car parking prices were most commonly identified as poor.
- 4.14 When asked what improvements they would make to Wigan town centre respondents' top suggestions were free car parking (24), more places to eat (21) and more high quality retailers (15). Only one person suggested improved accessibility for pedestrians.

Leigh

- 4.15 There were 36 surveys undertaken in Leigh. Leigh was noted as the nearest town centre to the greatest proportion of respondents' homes. The majority of people travelled to the town by bus (13), with 12 arriving by car and seven by foot.
- 4.16 Spinning Gate Shopping Centre was identified by the greatest proportion of shoppers using a car park, with 46.7% of all people visiting the town centre by car parking there. Of those surveyed, 19.4% travelled over 20 minutes and the rest took less time to get to Leigh.
- 4.17 The main reason for visiting the centre was for food and grocery shopping (18) with very few visits for other purposes. The majority of people in Leigh town centre planned to spend fewer than two hours there (86.1%) with no-one intending to spend the full day. Only 2.9% of all respondents said they typically spent over four hours in the town centre.
- 4.18 Only one person stated that they visit the town centre less frequently than 5 years ago with everyone else visiting the same amount or more frequently.
- 4.19 Very few people visit Leigh town centre during the day for sport (2), entertainment (7) and nightlife (2). Most people said they did not do these activities at all with only one person saying that they go elsewhere for nightlife.

- 4.20 During the evening only one person visited Leigh town centre for sport, two people visited for entertainment and two for nightlife. Of all the people surveyed, 33 people didn't do any of the activities.
- 4.21 15 people said that the choice of shops was worse than in other centres and 12 thought the quality of shops was worse. Other factors fared better with the range of services and accessibility by public transport performing well.
- 4.22 The respondents suggested a range of improvements that they wanted to see in Leigh. More specialist shops and free car parking were the most frequently offered although just nine people suggested each of these improvements.

Ashton-in-Makerfield

- 4.23 There were 51 people surveyed in Ashton-in-Makerfield with the majority of visitors living nearest to Ashton-in-Makerfield than any other centre. The most common mode of transport to access Ashton-in-Makerfield was car (17) with 13 travelling by foot and 10 coming as a passenger in a car. Of those who drove the majority parked in the Gerrard Centre/Co-op car park (15).
- 4.24 Very few people travelled over 20 minutes to get to Ashton-in-Makerfield (3.9%) with everyone else travelling for no longer than twenty minutes and the majority of people (66.7%) travelling fewer than 15 minutes.
- 4.25 The most frequently occurring reason for visiting Ashton-in-Makerfield was for food and grocery shopping (20) followed by a large number of people visiting the market (18). Other common reasons include clothes and shoe shopping, using the bank or post office as well as visiting the library. No one surveyed was in Ashton-in-Makerfield for work, school or college.
- 4.26 Very few people said they visit Ashton-in-Makerfield for sport, entertainment or nightlife. There were 10 respondents who stated that they visited elsewhere for sport, entertainment and nightlife. The main reason for this was that there were better alternatives in other centres. It is not specified whether these other centres are within Wigan Borough.
- 4.27 There were five respondents that said they typically spend more than four hours in Ashton-in-Makerfield centre in the evening but the greatest proportion (25) did not visit in the evening at all.
- 4.28 Ashton-in-Makerfield was described as worse or much worse than other centres on a large number of criteria. The main weaknesses were identified as the choice and quality of shops, the range and choice of pubs and restaurants and the shopping environment. Car parking provision and prices both performed well. The most commonly made suggestions for improvement were more specialist shops and more places to eat.

Atherton

- 4.29 There were 20 people that completed the survey in Atherton and 86.7% said Atherton was their nearest centre to home. The majority walked (11) and six travelled by car to get to Atherton. No one cycled.
- 4.30 Everyone interviewed travelled for fewer than 15 minutes to get to Atherton with only two people taking more than 10 minutes.
- 4.31 The main reasons for visiting the town centre were food and grocery shopping or visiting the bank or post office. No one said that they visited the centre for any form of comparison retail goods shopping or any social or leisure activities. The majority of people (70%) spent less than an hour in the centre.
- 4.32 There were three people who said they visited the centre less frequently than was the case five years ago, whilst the remainder visited the centre the same or more frequently.
- 4.33 No one said they visited the centre for entertainment during the day, one person visited for sport and two people came for nightlife. Respondents who said they went elsewhere said it was because there were not enough facilities in Atherton. This trend was the same in the evening with people citing that there were not enough facilities as the main reason they didn't visit Atherton.
- 4.34 Respondents ranked Atherton as broadly comparable with other centres. In terms of improvement, the most commonly offered suggestions were higher quality retailers, more specialist shops and more leisure activities.

Tyldesley

- 4.35 21 people in Tyldesley completed the survey with the majority stating Tyldesley to be nearer to home than any other centre. The most frequently used modes of travel were car and by foot with two people arriving by bike.
- 4.36 The majority of people travelled for fewer than 10 minutes (61.9%) with no one travelling over 15 minutes. Most people were visiting the centre for food and grocery shopping with a lesser number intending to use a bank or post office or visit a chemist.
- 4.37 No one intended to stay for more than two hours with 47.6% people staying for fewer than 30 minutes.
- 4.38 There were six (28.6%) people who visited less frequently than five years ago.
- 4.39 Most people either didn't participate in sport, entertainment or nightlife activities or chose alternate centres. The main reason cited for visiting elsewhere was that other centres had better facilities; although five people did say they visit Tyldesley at least fortnightly. This trend was similar in the evening with people visiting elsewhere due to better facilities.
- 4.40 Tyldesley was considered to be about the same as other centres across the criteria queried, although eight people considered the quality and choice and

shops to be worse than other centres. At least one respondent considered the centre to be worse or much worse than other centres on all criteria. The most frequently cited improvement suggested was more specialist shops although there was encouragement for a broad range of other improvements.

Standish

- 4.41 There were 32 people surveyed in Standish with the majority identifying Standish as the nearest town centre to their home. Most of the respondents travelled by foot (18), with 12 travelling by car and one using a bike. The Co-operative car park was cited by the greatest number of interviewees as the favoured place to park.
- 4.42 Most people travelled for fewer than 20 minutes although 12.5% of respondents had travelled over 20 minutes. The main reason for visiting the centre was for food and grocery shopping as well as using the bank. No one was visiting for comparison retail goods shopping and just one person cited social or leisure activities.
- 4.43 One person said they were visiting for the day and two said half a day. The majority were planning to spend fewer than 30 minutes (23).
- 4.44 Interestingly no one said they visited Standish less frequently than five years ago.
- 4.45 There were nine respondents who visited Standish in the day for social activity, seven who visited for entertainment and one who visited for sport. Many didn't participate in these activities at all. There were slightly more people visiting Standish in the evening than in the day for sport, entertainment and nightlife. Most people who visit in the evening spend fewer than two hours in the centre.
- 4.46 The responses to the quality of Standish compared with other centres was finely balanced between those that considered it to be worse and those that considered it to be better. There were 12 respondents that said car parking provision and leisure facilities were worse than other centres. Day time safety and car parking prices were considered to be better. The most commonly identified potential improvement was reducing traffic congestion (17).

Hindley

- 4.47 There were 12 people surveyed in Hindley and all of these lived nearer to Hindley than any other centre. The majority of people travelled by foot (8). Of those who drove the most commonly cited car park used was Tesco. No one travelled over 20 minutes and most people travelled for fewer than five minutes.
- 4.48 The sole reason for visiting the centre was for food and grocery shopping with no other reasons cited other than one respondent visiting a bank/post office. No one intended to spend more than two hours with 50% of people spending fewer than 30 minutes.

- 4.49 A third of people said they visit less frequently than they did five years ago. Only one person visited the centre during the day for entertainment. People who visited elsewhere did so given the availability of alternative destinations.
- 4.50 Five people considered evening and night time safety to be worse than in other centres. Hindley was otherwise considered about the same as other centres. More quality retailers was the most commonly mentioned improvement suggested by respondents.

Pemberton

- 4.51 There were 44 people surveyed in Pemberton and the majority lived nearest to Pemberton. There were 19 people who travelled by car and 17 who came on foot. The most commonly cited car park was Church Street (8) with a greater proportion of people parking on street (14). Most respondents (84.1%) spent fewer than 10 minutes travelling to the centre.
- 4.52 The main reasons for travelling to the centre were for food and grocery shopping as well as visiting a bank/post office. The greatest proportion of people were spending up to two hours in the centre although three people intended to spend all day. Just five people visited the centre less frequently than they did five years ago.
- 4.53 Most respondents visited elsewhere for sport, entertainment and nightlife due to the level and quality of provision in Pemberton. There were seven people who visited the centre in the day for entertainment and six who visited for this purpose in the evening. It was most common to spend fewer than two hours in the centre for these activities.
- 4.54 Pemberton was identified as being worse or much worse than other centres for entertainment and leisure facilities. There were 18 people who said the centre was much worse than other centres for leisure facilities. The main improvements suggested were more shops and more leisure activities.

Summary

- 4.55 Overall those surveyed in each centre were there because they lived closest to that centre than any other. The most commonly identified form of transport was car although a significant number of people travelled on foot or by bus. There were very few people who had travelled by bike or train.
- 4.56 Outside of Wigan and Leigh very few people travelled to the centre for purposes other than food and grocery shopping. The majority of people travelled for fewer than 15 minutes (73.6%) and intended to stay in the centre for fewer than two hours (84.7%).
- 4.57 Most people said they visited the centre they were in at least as frequently or more frequently than five years ago (73.4%).
- 4.58 A significant proportion of people visit elsewhere for sports, entertainment or nightlife activities and the main reason for this is the quality and lack of facilities

in the centres themselves. Of all respondents 56.4% don't visit centres in the evening at all.

4.59

The choice and quality of shops across the centres were cited the most as worse than other centres. In contrast, range of services, cleanliness and accessibility by public transport were considered better. The most commonly cited potential improvements identified were more specialist shops, more quality retailers and reducing traffic congestion.

5.0 **Shopping Hierarchy and Retail Performance**

The Borough and sub-Region

- 5.1 Wigan Borough is located within Greater Manchester and borders the administrative areas of Bolton, Salford, St Helens, Warrington, West Lancashire and Chorley.
- 5.2 Wigan is the largest town in Wigan Borough and is one of the major sub-regional town centres within Greater Manchester. Wigan is designated in the Core Strategy as a Principal Town Centre. Wigan provides a wide range of shopping, service, leisure, business and public administration facilities that meet the day-to-day needs of borough residents. The town has a good mix of convenience and comparison retailers albeit the comparison retail offer is impacted by proximity to the sub-regional centres of Liverpool and Manchester and the Trafford Centre. Robin Park located outside of Wigan town centre also attracts a significant proportion of comparison retail shopping from residents of the borough.
- 5.3 Leigh is the second largest town in the borough and has a generous and varied retail convenience offer alongside a more limited range of comparison retailers and service uses. The Core Strategy designates Leigh as a Main Town Centre. The principal role of the town centre is to serve residents of Leigh area and the wider south-eastern part of the borough.
- 5.4 The other designated Main Town Centre in the borough is Ashton-in-Makerfield. Whilst Ashton in Makerfield does not have as comprehensive an offer as the larger centres of Wigan and Leigh, it does have a range of independent retailers alongside businesses meeting essential everyday shopping needs and providing access to services.
- 5.5 There are six smaller town centres in Wigan Borough and a number of local centres, designated in the Core Strategy. The six town centres are Atherton, Golborne, Hindley, Pemberton, Standish and Tyldesley. The smaller town centres offer every-day retail goods and services and are geared towards meeting day-to-day convenience retail goods needs.
- 5.6 The network of local centres perform a primarily top up shopping role alongside food and drink offers spanning Class A3 to A5.
- 5.7 Management Horizon Europe's (MHE) UK Shopping Index 2008 ranks retail centres across the country. The MHE index rank for town centres in Wigan Borough and competing centres in other administrative areas is shown in Table 5.1 below.

Wigan Retail and Leisure Study

Table 5.1 MHE Retail Ranking

Centre	Rank (2008)	Rank (2003/04)	Change	Classification
Manchester	4	2	-2	Major City
Liverpool	10	14	4	Major City
Southport	53	62	9	Major Regional
Wigan	60	111	51	Regional
Warrington	99	83	-16	Regional
Bolton	110	166	56	Regional
Bury	183	143	-40	Sub-regional
Leigh	314	307	-7	Major District
Atherton	1018	863	-155	Minor District
Ashton-in-Makerfield	1247	1120	-127	Local

Source: Management Horizons Europe Shopping Index (2008)

- 5.8 The MHE score does not necessarily reflect the overall size of the town centre or the number of shops, but the presence of national multiples and the relative draw and importance that stores have. Each centre is given a weighted score which takes account of its provision of multiple retailers and anchor store strengths. For example, anchor department stores such as John Lewis or Debenhams receive a higher score (10) than other multiple operators such as H&M (3) in order to reflect their major influence on non-food shopping patterns.
- 5.9 A location which has stronger retailers who attract more visitors to the centre and have a greater influence on shopping patterns will receive a higher score than those that do not. Towns with a greater number of independent shops may have a low MHE score in relation to their overall size because of the weight that is given to national multiple retailers and their influence on shopping patterns.
- 5.10 MHE ranks Wigan as the main centre in Wigan Borough and 60th of all centres in the UK. Wigan is below Manchester, Liverpool and Southport but above Warrington, Bolton and Bury. Wigan has climbed the rankings over the period since 2003/04 and the opening of The Grand Arcade in 2007 will most likely have elevated Wigan still further above its 2008 position; The Rock opening in Bury is likely to have had the same effect. Leigh is identified as a Major District centre and is ranked 314th nationally with other centres in the borough ranking much lower; Atherton (1018th) and Ashton-in-Makerfield (1247th). This reflects the hierarchy of the centres in Wigan and the relative importance of Wigan as the principal town centre in the borough.

Household Shopping Patterns

- 5.11 A plan of the study area adopted is included at Appendix 2. The study area is postcode sector based and as such does not follow administrative boundaries precisely. The study area is split into 15 sub-zones with 12 that approximate well to the boundary of Wigan Borough. Zones 14 and 15 are in West Lancashire and the boundary between West Lancashire and Wigan divides Zone 3 into two parts.

- 5.12 It is typical for convenience retail habits to result in shoppers utilising a number of destinations for such purposes. The household surveys reflect this by asking residents their primary main food and primary top-up convenience retail shopping destinations. The NLP analysis of the household survey assumes that 70% of available consumer expenditure is directed to main food shopping and 30% is directed towards top up shopping. This split is informed by Experian demographic information and local retail characteristics.
- 5.13 There is not a set formula for splitting convenience retail expenditure by main and top-up food shopping but the NLP approach is robust and reflective of standard practice in the completion of retail and town centre studies. The analysis of the household telephone surveys excludes 'internet'/'mail-order' responses and 'don't know'/'don't buy' answers except where, in the primary main-food sector, internet spending on food goods is apportioned to stores based upon proximity to home address and the fascia identified by those interviewed.
- 5.14 The comparison retail spending power of the study area is split amongst six categories of goods. The division of comparison retail goods spending power is:
- Clothing and Footwear – 25%
 - Electrical Appliances – 16%
 - Furniture – 12%
 - DIY – 11%
 - Health and Beauty – 11%; and
 - Recreation (Books, CDs and Toys) – 25%
- 5.15 In common with the convenience retail goods assessment, there is not a set formula for splitting expenditure amongst different categories of comparison retail goods. NLP considers that its approach is robust and consistent with standard practice, as the proportion of expenditure directed to different categories of goods is informed by Experian demographic information.
- 5.16 The analysis below is based upon interviewees' responses to detailed questioning about: main food and top up food shopping; and comparison shopping across the six categories of comparison retail goods.
- 5.17 The economic tables at **Appendix 4** combine the main-food and top-up shopping patterns, to arrive at overall convenience shopping patterns in the study area. The same approach is adopted for the comparison retail sector, where shopping patterns across the six categories of goods are combined to provide an overall picture of comparison shopping patterns.

Borough Shopping Patterns

- 5.18 Zones 14 and 15 are outside of the administrative boundary of Wigan Borough and Zone 3 is part within and part outside of the borough. The more populated part of Zone 3 is within Wigan Borough and it is reasonably included within an

assessment of borough-wide performance. The retail shopping patterns below exclude the findings for Zone 14 and 15 to record retention within the borough. Later analysis of performance across retail destinations in the borough includes all zones within the study area.

Convenience Retail Shopping Patterns

5.19 Table 5.2 sets out market shares in the convenience retail sector at 2014.

Table 5.2 Convenience Retail Market Share in Wigan Borough (2014)

Centre	Market Share (%)
Ashton in Makerfield	2.8
Atherton	3.5
Golborne	0.4
Hindley	4.2
Leigh	5.1
Outside Leigh Defined Town Centre	16.6
Pemberton	0.9
Standish	1.0
Tyldesley	2.6
Wigan	5.9
Outside Wigan Defined Town Centre	6.2
Other Destinations in Wigan Borough	41.7
Wigan Borough Total	91.0
Leakage	9.0

Source: RMG Clarity Household Survey March 2013 / NEMs Household Survey March 2014

5.20 The 91% retention of convenience retail expenditure within Wigan Borough is very strong.

5.21 Destinations in and around the defined Leigh Town Centre⁶ are visited by the greatest proportion of borough residents for convenience retail shopping (21.7%). This includes destinations in the defined Town Centre⁶, Lidl and Tesco stores at the edge of this defined area (at Spinning Jenny Way) and out-of-centre destinations at Atherleigh Way.

5.22 Destinations in and around the defined Wigan Town Centre⁶ attract a significant proportion of convenience retail shopping trips in the borough (12.1%)⁷.

5.23 Asda Robin Park attracts 11.9% of convenience retail expenditure generated in the borough⁸.

5.24 The market shares of Golborne (0.4%), Pemberton (0.9%) and Standish (1.0%) are very low. The level of expenditure retention broadly reflects size of centre with the exception of expenditure retained at destinations within and outside of the defined Leigh Town Centre⁶ which is particularly pronounced

⁶ 2006 UDP defined Town Centre

⁷ Destinations in an around Wigan town centre includes Tesco at Central Park Way

⁸ Asda Robin Park is included in Table 5.2 under 'Other Destinations in Wigan Borough'

(21.7%). This is due to the abundance of foodstores in this area which include Aldi, Asda, Lidl, Marks and Spencer, Morrisons, Sainsbury's and Tesco.

- 5.25 Convenience retail expenditure retention in Wigan Borough (main food and top-up) is highest in Zone 1 Wigan (99.6%) and Zone 11 Leigh (99.2%). The majority of expenditure generated by residents of Wigan Borough (55.0%) is directed to free-standing stores outside of defined town centres⁹ including those at Central Park Way, Robin Park and Marus Bridge in Wigan, Makerfield Way in Ince and Atherleigh Way/Spinning Jenny Way in Leigh.
- 5.26 The proportion of convenience retail expenditure retained across sub-zones that make up Wigan Borough is consistently high, indicating its residents are well provided for in the food retail sector. The patterns recorded in those zones that are outside of the borough suggest that convenience retail stores in the borough draw limited convenience retail expenditure from beyond the administrative boundary.

Comparison Retail Shopping Patterns

- 5.27 Table 5.3 details market shares in the comparison retail sector at 2014.

Table 5.3 Comparison Retail Market Share in Wigan Borough (2014)

Centre	Market Share (%)
Ashton in Makerfield	1.5
Atherton	1.3
Golborne	0.4
Hindley	1.0
Leigh	10.7
Leigh (outside of the centre)	0.8
Parsonage Retail Park	3.9
Pemberton	0.4
Standish	0.6
Tyldesley	0.6
Wigan	22.7
Wigan (outside of the centre)	5.7
Robin Park	13.1
Local Centres Wigan	2.1
Other Destinations in Wigan Borough	1.6
Wigan Borough Total	66.5
Leakage	33.5

Source: RMG Clarity Household Survey March 2013 / NEMs Household Survey March 2014

- 5.28 Two thirds (66.5%) of the comparison retail expenditure generated by residents of Wigan Borough is retained within it. The defined Wigan Town Centre⁹ attracts the greatest market share (22.7%) followed by Robin Park (13.1%) and Leigh (10.7%). Golborne, Hindley, Pemberton, Standish and Tyldesley all have a less than 1% market share of borough comparison retail goods spending. Bolton (4.5%), Middlebrook Retail Park (4.7%) and the Trafford Centre (4.1%) draw the greatest proportion of comparison retail expenditure generated in the borough to destinations outside of it. To a lesser extent there is leakage to

⁹ 2006 UDP defined Town Centre

Manchester, Warrington (including Gemini Retail Park), Liverpool and Southport.

- 5.29 The proximity of Bolton and Middlebrook Retail Park to the eastern part of Wigan Borough and the offer of these destinations are the likely contributing factors to expenditure leaking from the borough. Middlebrook attracts a significant proportion of expenditure from residents in the Atherton and Leigh sub-zones which is some 10 to 15 kilometres travelling distance and less distance for some residents than a journey to Wigan town centre. A significant proportion of expenditure from the Tyldesley area is attracted to the Trafford Centre. Whilst there is a significant leakage of expenditure to destinations outside of the borough, the outflows of expenditure are not necessarily demonstrative of unsustainable patterns of shopping.
- 5.30 The greatest retention of comparison retail expenditure is in the Wigan (82.8%), Ince (72.9%) and Shevington (72.3%) areas. The lowest proportion of comparison retail expenditure retained by the borough is from the Golborne area (49.9%). Warrington accounts for the majority of the leakage from the Golborne area, which is again relatively accessible compared with higher-order destinations within Wigan Borough.

6.0 **Assessment of Retail Needs**

Methodology

Population and Expenditure Data

- 6.1 The market shares recorded by the RMG clarity and NEMS household surveys are applied to the most up-to-date population and expenditure data to assess current trading patterns and retail capacity at 2014¹⁰ and project forward capacity for additional retail floorspace to 2019, 2024 and 2026.
- 6.2 The 2011 Census is used to derive base population data and is consistent with typical approaches adopted in the writing of retail studies and previous iterations of the retail study. Population for the period 2011-2021 is projected forward having regard to the 2011-based Sub-National Population projections [SNPP] for Wigan (sub-zones 1, 2 and 4-13), West Lancashire (sub-zones 14 and 15) and a combination of both administrative areas for zone 3 with a 75% weighting in favour of Wigan. Post 2021, an annual growth rate is applied having regard to 2010-based sub-national population projections.

Commitments

- 6.3 The assessment of retail need in this section of the study does not take account existing commitments. Commitments that come forward will reduce the overall capacity for new floorspace.
- 6.4 The Council has granted planning permission recently for two foodstore schemes at Standish. A scheme at Preston Road, Standish is for a foodstore of 2,984 sq. m (gross convenience retail floorspace). The other retail scheme granted planning permission recently relates to a site at High Street, Standish and a foodstore of 2,340 sq. m (gross).
- 6.5 At June 2014, under consideration were proposals for a reduction in floorspace at the Leigh Tesco store and the sub-division of a B&Q Warehouse store at Frith Street, Newtown, to allow for part of the floorspace to be occupied by a Morrisons foodstore.

Constant Market Share Approach

- 6.6 A constant market share approach is adopted with two exceptions. From 2015 onwards, allowance is made for the Sainsbury's store at Atherleigh Way trading at 65% of company average levels. Sainsbury's opened its extended store in December 2012, and it is reasonable to assume that it will take two years for a settled pattern of trading to be established. Such adjustment of shopping patterns will often set a new/reconfigured store at a company average trading levels from two years into its operation. In this instance a more

¹⁰ Capacity at 2014 in the convenience retail sector only and comparison retail floorspace taken to be trading at equilibrium at 2014

realistic expected level of performance is adopted given the level of competition in the Leigh convenience retail market.

- 6.7 In December 2013, Marks and Spencer opened a Simply Food fascia store adjacent to the extended Sainsbury's. The retail capacity assessment makes allowance for this store trading at company average performance from 2015 onwards. The different approach adopted is justified by the different (top-up) shopping market that the store competes in, in contrast with Sainsbury's competing for main-food sales with large-format Asda, Morrisons and Tesco stores.

Capacity Attributable to Out-of-Centre Floorspace

- 6.8 Adopting a constant market share approach means that a significant proportion of capacity is calculated as attributable to out-of-centre floorspace. The NPPF and Planning Practice Guidance advocate a town centre first approach to accommodating new retail floorspace and, to be consistent with this, this study transfers to the nearest appropriately sized town centre any capacity generated that is attributable to out-of-centre retail floorspace.

Expenditure Leakage

- 6.9 Leakage of expenditure from a locality, and the potential for new floorspace to enact a claw-back of this, can be indicative of additional capacity. This has potential relevance to Wigan Borough in the comparison retail sector; retention of convenience retail goods expenditure is very high and unlikely to be elevated further. It is not for a borough-wide retail study to give consideration to claw-back and the implications of this on capacity. A retail assessment submitted with any planning application proposing new retail floorspace outside of the borough town centres¹¹ would be expected to consider the potential for a claw back of expenditure and the implications this has on trade diversion and the likely impact of a proposed development.

Floorspace Efficiencies

- 6.10 An allowance is made for the turnover of existing comparison retail floorspace increasing its performance by 1.8% per annum, as a result of the more efficient use of floorspace. 1.8% is a more modest rate of floorspace efficiency than was adopted commonly prior to the beginning of the economic downturn in 2008 and the reserved approach is a reflection of continued economic uncertainty in the retail sector. This continued uncertainty over future improvements in trading performance is also the reasoning behind the adoption in the convenience retail capacity assessment of zero growth in floorspace efficiencies over the period to 2026.

¹¹ Where the level of floorspace proposed justifies the LPA requiring that a retail assessment is submitted

Quantifying Capacity

- 6.11 Set out below is a summary of the convenience and comparison retail capacity assessments included at Appendix 4. The capacity assessments are by town, for the Principal Town Centre Wigan, the Main Town Centres of Leigh and Ashton-in-Makerfield and the smaller town centres of Atherton, Golborne, Hindley, Pemberton, Standish and Tyldesley.
- 6.12 Capacity is calculated for each centre by dividing the expenditure capacity generated by a typical sales density. The full schedule of capacity calculations is at Table 12 and Table 19 of Appendix 4. The sales densities adopted reflect the varying scales and format of retailing that is likely to be attracted to each centre. In the convenience retail sector, £10,000/sq. m is adopted for Wigan and Leigh, with £8,000/sq. m adopted for the other defined centres considered. In the comparison retail sector, £5,000/sq. m is adopted for Wigan and Leigh, with £3,500/sq. m adopted for the other defined centres considered.
- 6.13 Capacity is presented as a net sales area, as it is this figure that is relevant to retail impact assessments required by the NPPF. The gross floorspace of retail developments will always be greater than the net trading area, but the ratio between net and gross floorspace varies greatly. The net sales area in a corner shop might be up to 90% of the gross, whereas the equivalent figure for a large format foodstore might be as little as 60%. For these reasons, it is robust for a retail assessment to present floorspace capacity as a net figure.
- 6.14 There are references in the following section to convenience retail floorspace trading at above or below expected levels. The convenience retail assessment which follows compares the survey derived turnover of main foodstore destinations with expected (benchmark) turnover levels. The expected turnover of a convenience retail destination is the turnover that it would achieve were it to trade at company average (for named foodstores) or typical (for other floorspace) sales densities. Comparing survey derived turnover with benchmark turnover for convenience retail floorspace gives an indication as to whether destinations are trading above or below what might be expected. Floorspace data to inform this benchmark assessment is derived from a number of sources including previous retail studies, Experian GOAD and planning application data.
- 6.15 In the comparison retail sector, it is assumed that the 2014 survey-derived performance of floorspace in the borough is its benchmark position. The comparison retail capacity assessment at Table 19 of Appendix 4 adopts an approach whereby existing floorspace within the borough will increase its benchmark turnover in real terms from 2014 to 2026 at a growth rate of 1.8% per annum. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and the ability of retailers to absorb real increases in their costs by increasing their turnover to floorspace ratio.

Borough Quantitative Capacity

Convenience Retail Goods

- 6.16 Growth in the convenience retail goods spending power of the adopted study area is £34.5m to 2019, £79.0m to 2024 and £98.2 to 2026 (Table 3a at Appendix 4).
- 6.17 The NLP capacity assessment follows an accepted methodology of applying available retail expenditure pro-rata to the market shares of destinations¹². It is also appropriate to take into account the performance of existing retail floorspace, compared with expected levels of performance. In circumstances where existing floorspace is assessed to be underperforming, it is appropriate for organic growth in spending to be first absorbed by this underperforming floorspace. Conversely, where existing floorspace is assessed to be performing above expected levels, this can add to the identified capacity for new retail floorspace.

Comparison Retail Goods

- 6.18 Growth in comparison retail goods spending power of the adopted study area is £138.1m to 2019, £336.3m to 2024 and £429.2m to 2026 (Table 3b at Appendix 4).
- 6.19 The approach that NLP adopts in the calculation of comparison retail capacity is consistent with the approach adopted in the convenience retail sector, with the exception of the assumption that comparison retail floorspace at 2014 is trading at a level that is consistent with what might be expected. It is not feasible to 'benchmark' the expected turnover of comparison retail floorspace in town centres given the number of trading fascias and particularly when there is a high proportion of independent retailers.

¹² Save for the adjustments made in respect of the Sainsbury's and Marks and Spencer stores in Leigh

Principal Town Centre - Wigan

6.20 Table 6.21 sets out the current convenience retail capacity in Wigan and the capacity for additional convenience and comparison retail floorspace over the periods to 2019, 2024 and 2026.

Table 6.1 Quantitative capacity for additional convenience and comparison retail floorspace - Wigan

Year	Convenience*		Comparison**	
	£(m)	sq. m (net)	£(m)^	sq.m (net)^
At 2014*	24.7	2,471	-	-
By 2019	32.4	3,235	17.8	3,260
By 2024	42.1	4,208	56.2	9,397
By 2026	46.3	4,630	75.9	12,257

*Convenience sales density of £10,000 sq. m (based upon Asda, Morrisons, Sainsbury's and Tesco average with allowances made for other retailers). No growth in floorspace efficiency over the period to 2026.

**Comparison sales density of £5,000 per sq. m at 2014 increased by floorspace efficiencies to 2026 of 1.8% per annum.

^2019, 2024 and 2026 comparison retail capacity assumes Wigan Borough retains a constant market share.

Convenience Retail Goods

6.21 Table 6.2 indicates that convenience retail trading performance of the Marks and Spencer foodhall in Wigan is consistent with company average levels. Tesco at Central Park Way is shown to be underperforming, whilst the Morrisons in The Galleries and Asda at Robin Park are both trading at significantly above benchmark levels. The recorded convenience retail turnover of Asda is 46% above benchmark levels.

Table 6.2 Survey derived turnover of main foodstores compared with expected trading levels

Store	Benchmark Turnover (£m)	Survey Derived Turnover (£m)	Difference (£m)
Defined Town Centre			
Morrisons, The Galleries, Wigan	18.7	22.5	3.8
Marks & Spencer, Standishgate, Wigan	5.6	5.5	-0.1
Outside Defined Town Centre			
Tesco Extra, Central Park Way, Wigan	42.1	38.1	-4.0
Asda, Robin Park	53.7	78.6	24.9

Source: RMG Clarity Household Survey March 2013 / NEMs Household Survey March 2014

6.22 The recorded convenience retail surplus in the town generates immediate capacity for significant additional convenience retail floorspace. Net convenience retail floorspace of 2,471 sq. m translates into capacity for a foodstore with a gross floorspace of 5,000 sq. m to 6,000 sq. m. By way of comparison, the Morrisons store at Leigh has a net floorspace of 2,419 sq. m and a gross internal area of approximately 5,800 sq. m.

6.23 Capacity over the period to 2026 increases to 4,630 sq. m net. The level of capacity identified is sufficient to support immediately a large format foodstore

(superstore format) capable of performing a bulk food shopping role. On the basis of such a foodstore development coming forward, the residual floorspace capacity identified in the longer term would be sufficient to support a medium-sized foodstore with a net sales area of 1,000 to 1,500 sq. m. Again, to provide context, the size of such a foodstore would likely come from a spectrum encompassing Aldi/Lidl format foodstores up to a store with a sales area equivalent to the Wigan town centre Morrisons store.

Comparison Retail Goods

- 6.24 Table 14 at Appendix 4 summarises the current comparison retail performance of destinations in Wigan Borough. As it is assumed that destinations in Wigan are trading at expected levels at 2014, it is year-on-year growth in comparison retail spending that accounts for capacity over the period to 2026.
- 6.25 Capacity for 3,260 sq. m (net) of additional comparison retail goods floorspace is identified by 2019, increasing to 9,397 sq. m by 2024. The additional capacity identified in the long term to 2026 (12,257 sq. m) is significant and would enable a sizeable extension to the comparison retail offer of the town centre.
- 6.26 High street retailers are seeking increasingly larger units and NLP advises that the Council considers encouraging the development of a small number of larger units to accommodate the requirements of key national multiples and ensure that the town centre continues to be competitive in the sub-region and against retail park floorspace. Redevelopment and reconfiguration of The Galleries shopping centre provides an opportunity to deliver larger units to meet retailer demands, although uplift in floorspace is unlikely to reach the capacity identified beyond 2019.

Main town centre - Leigh

- 6.27 Table 6.3 sets out the current convenience retail capacity in Leigh and the capacity for additional convenience and comparison retail floorspace over the periods to 2019, 2024 and 2026.

Table 6.3 Quantitative capacity for additional convenience and comparison retail floorspace - Leigh

Year	Convenience*		Comparison**	
	£(m)	sq. m (net)	£(m)^	sq.m (net)^
At 2014*	-	-	-	-
By 2019	-	-	6.5	5,466
By 2024	-	-	20.5	5,977
By 2026	-	-	27.7	6,194

*Convenience sales density of £10,000 sq. m (based upon Asda, Morrisons, Sainsbury's and Tesco foodstore average reduced to reflect presence of Lidl and Aldi with allowances made for other retailers). No growth in floorspace efficiency over the period to 2026.

**Comparison sales density of £5,000 per sq. m at 2014 increased by floorspace efficiencies to 2026 of 1.8% per annum.

^2019, 2024 and 2026 comparison retail capacity assumes Wigan Borough retains a constant market share.

Convenience Retail Goods

6.28 Table 6.4 indicates that in Leigh existing convenience retail floorspace is trading at significantly below expected levels. This provides clear evidence that Leigh is already over-provided for in terms of convenience retail floorspace and as the table above illustrates, there is not any capacity for additional convenience retail floorspace over the period covered by the Core Strategy.

Table 6.4 Survey derived turnover of main foodstores compared with expected trading levels - Leigh

Store	Benchmark Turnover (£m)	Survey Derived Turnover (£m)	Difference (£m)
Defined Town Centre			
Aldi, King Street, Leigh (c.200m from PSA)	9.1	13.1	4.0
Asda, Windermere Road, Leigh (c.300m from PSA)	7.5	5.7	-1.8
Iceland, Bradshawgate, Leigh	4.5	3.5	-2.0
Outside Defined Town Centre			
Asda, Atherleigh Way, Leigh	46.0	50.6	4.6
Morrisons, Atherleigh Way, Leigh, Greater Manchester	30.6	18.2	-11.8
Sainsbury's, Atherleigh Way, Leigh	54.0	14.4	-39.6
Marks & Spencer, Atherleigh Way, Leigh	8.2	-	-
Tesco Extra, Spinning Jenny Way, Leigh, Manchester	46.1	19.7	-26.4
Lidl, Spinning Jenny Way, Leigh	1.8	2.8	1.0

Source: RMG Clarity Household Survey March 2013 / NEMs Household Survey March 2014

6.29 Existing convenience retail stores in the town have the capacity to absorb pro-rata growth in convenience expenditure over the period to 2026 without the need for additional floorspace. The extent of the existing convenience offer (Leigh has Aldi, Asda (x2), Lidl, Morrisons, Sainsbury's and Tesco stores), is more than is required to satisfy the convenience retail shopping needs of residents living in the east of the borough. The fact that in early 2014 Tesco submitted an application to seek alternative use for part of the floorspace within its store is indicative that this part of the borough is over provided for.

Comparison Retail Goods

6.30 Capacity for additional comparison retail floorspace in Leigh in the short term to 2019 is 1,192 sq. m. Over the long term this capacity increases to 4,470 sq.m.

6.31 The capacity identified is of a scale sufficient to support the development of significant additional comparison retail floorspace. Consistent with the advice for Wigan town centre, NLP recommends that the Council seeks to encourage the development of modern large-format retail units within the central area. The objective should be to encourage new fascias to the town centre, with the aim of increasing the performance of Leigh in the local retail hierarchy and allowing it to compete more effectively with out-of-centre retail destinations.

Main town centre - Ashton-in-Makerfield

6.32

Table 6.5 sets out the current convenience retail capacity in Ashton-in-Makerfield and the capacity for additional convenience and comparison retail floorspace over the periods to 2019, 2024 and 2026.

Table 6.5 Quantitative capacity for additional convenience and comparison retail floorspace - Ashton-in-Makerfield

Year	Convenience*		Comparison**	
	£(m)	sq. m (net)	£(m)^	sq.m (net)^
At 2014*	6.5	810	-	-
By 2019	7.4	920	0.6	165
By 2024	8.5	1,062	2.0	475
By 2026	9.0	1,122	2.7	619

*Convenience sales density of £8,000 sq. m (based upon Asda, Morrisons, Sainsbury's and Tesco foodstore average reduced to reflect presence of Lidl and Aldi with allowances made for other retailers). No growth in floorspace efficiency over the period to 2026.

**Comparison sales density of £3,500 per sq. m at 2014 increased by floorspace efficiencies to 2026 of 1.8% per annum.

^2019, 2024 and 2026 comparison retail capacity assumes Wigan Borough retains a constant market share.

Convenience Retail Goods

6.33

Aldi, which is the only large convenience store in the town, is trading at considerably above expected levels (£11.8m recorded by the household surveys compared with a benchmark turnover of £5.3m). The extent to which the store is recorded as trading at above expected levels generates immediate capacity for additional convenience retail floorspace.

Table 6.6 Survey derived turnover of main foodstores compared with expected trading levels – Ashton-in-Makerfield

Store	Benchmark Turnover (£m)	Survey Derived Turnover (£m)	Difference (£m)
Defined Town Centre			
Aldi, Princess Road, Ashton-in-Makerfield	5.3	11.8	6.5

Source: RMG Clarity Household Survey March 2013 / NEMs Household Survey March 2014

6.34

At 2014, there is capacity for up to 810 sq. m of additional convenience retail floorspace, which increases to 1,122 sq. m by 2026. The capacity identified is more than sufficient to accommodate a store of comparable size to the Aldi. The Council should consider any proposals for new convenience retail floorspace in the town in the context of there being immediate capacity for additional provision and clear evidence that there is a qualitative deficiency in the current offer of the town.

Comparison Retail Goods

6.35 There is limited capacity for additional comparison floorspace in the short term. Capacity is projected to increase to 619 sq. m over the period to 2026, which would allow for limited expansion of the retail offer in the town. Expansion in the comparison retail offer of Ashton-in-Makerfield is important if the town is to consolidate its position as the second main town centre in the borough in a tier below principal town centre Wigan.

Smaller town centres

6.36 Table 6.7 compares the (expected) benchmark and survey derived convenience retail turnover of stores within the six smaller town centres in the borough in order to identify which destinations are trading at, below or above expected levels.

Table 6.7 Survey derived turnover of main foodstores compared with expected trading levels - smaller town centres

Centre	Store	Benchmark Turnover (£m)	Survey Derived Turnover (£m)	Difference (£m)
Defined Town Centre				
Atherton	Tesco, Crab Tree Lane	15.3	18.6	3.3
Golborne	Lidl, High Street	1.9	2.8	0.9
Hindley	Tesco Extra, Cross Street	22.8	25.2	2.4
Pemberton	Tesco Express, Ormskirk Road	2.3	3.3	1.0
Standish	Co-op, Pole Street	6.9	4.9	-2.0
Tyldesley	Aldi, Castle Street	4.6	15.2	10.6
Outside Defined Town Centre				
Atherton	Asda, Bolton Road	10.1	3.1	-7.0
Golborne	Asda, Edge Green Lane	22.3	30.4	7.9
Hindley	Asda, Ladies Lane	7.0	6.6	-0.4
Standish	Lidl, Preston Road/Avondale Road	3.2	4.7	1.5
Tyldesley	Morrisons, Shuttle Street	18.3	12.7	-5.6
All Stores*				
Atherton		25.4	21.7	-3.7
Golborne		25.2	33.2	8.0
Hindley		29.8	31.8	2.1
Pemberton		2.3	3.3	1.0
Standish		10.1	9.6	-0.5
Tyldesley		22.9	27.9	5.1

Source: RMG Clarity Household Survey March 2013 / NEMs Household Survey March 2014

*All stores includes other destinations not listed in the schedule of specific stores

Atherton

6.37 Table 6.8 sets out the current convenience retail capacity in Atherton and the capacity for additional convenience and comparison retail floorspace over the periods to 2019, 2024 and 2026.

Table 6.8 Quantitative capacity for additional convenience and comparison retail floorspace - Atherton

Year	Convenience*		Comparison**	
	£(m)	sq. m (net)	£(m)^	sq.m (net)^
At 2014*	-	-	-	-
By 2019	-	-	0.6	148
By 2024	-	-	1.8	426
By 2026	-	-	2.4	555

*Convenience sales density of £8,000 sq. m (based upon Asda, Morrisons, Sainsbury's and Tesco average with allowances made for other retailers). No growth in floorspace efficiency over the period to 2026.

**Comparison sales density of £3,500 per sq. m at 2014 increased by floorspace efficiencies to 2026 of 1.8% per annum.

^2019, 2024 and 2026 comparison retail capacity assumes Wigan Borough retains a constant market share.

Convenience Retail Goods

6.38 Asda and Tesco operate stores in Atherton. Whilst the household survey identifies the Tesco store to be trading at above expected levels, the turnover recorded for the Asda store is significantly below company average performance level. The combined performance of these two stores results in a position where there is not any capacity for additional convenience retail floorspace in Atherton over the plan period. Based upon the findings of the household survey, the Asda store at Bolton Road has the capacity to absorb pro-rata growth in convenience retail expenditure. That said, the scope for Asda to accommodate growth in expenditure should not stymie the development of convenience retail floorspace in the centre of Atherton. It does however provide clear guidance that there is not any capacity for additional retail floorspace outside of the central area.

Comparison Retail Goods

6.39 There is limited quantitative capacity for additional comparison retail goods floorspace in Atherton town centre, with growth in spending generating scope for 555 sq. m net of additional floorspace over the long term to 2026. Satisfying the capacity identified for additional retail floorspace provides an opportunity for improvement in the town centre offer and the Atherton commercial property stock. This may be best addressed by an extension to existing floorspace or uplift in floorspace as part of a reinvigoration of existing buildings.

Golborne

6.40 Table 6.9 sets out the current convenience retail capacity in Golborne and the capacity for additional convenience and comparison retail floorspace over the periods to 2019, 2024 and 2026.

Table 6.9 Quantitative capacity for additional convenience and comparison retail floorspace - Golborne

Year	Convenience*		Comparison**	
	£(m)	sq. m (net)	£(m)^	sq.m (net)^
At 2014*	8.0	995	-	-
By 2019	9.6	1,197	0.2	42
By 2024	11.7	1,457	0.5	120
By 2026	12.5	1,569	0.7	156

*Convenience sales density of £8,000 sq. m based upon Asda, Morrisons, Sainsbury's and Tesco foodstore average reduced to reflect presence of Lidl and Aldi with allowances made for other retailers). No growth in floorspace efficiency over the period to 2026.

**Comparison sales density of £3,500 per sq. m at 2014 increased by floorspace efficiencies to 2026 of 1.8% per annum.

^2019, 2024 and 2026 comparison retail capacity assumes Wigan Borough retains a constant market share.

Convenience Retail Goods

6.41 Convenience retail needs in Golborne are met by a Lidl on High Street and an Asda at Edge Green Lane. A significant proportion of local convenience retail expenditure is directed to free-standing stores in Leigh. There is capacity identified for a medium sized store in the long term (1,569 sq. m net capacity over the period to 2026), primarily as a result of the two existing foodstores trading at significantly above expected levels.

Comparison Retail Goods

6.42 The household surveys record the comparison retail market share of Golborne as the least of the defined town centres in the borough. The market share recorded translates to a turnover of £3.5m at 2014 and growth over the period to 2026 of £0.9m, once floorspace efficiencies across existing destinations is accounted for. This itself translates into limited quantitative capacity for additional comparison retail floorspace. Scope for uplift is assessed to be 156 sq. m net of additional comparison retail floorspace over the period covered by the Core Strategy. The scale of capacity for additional retail floorspace identified most likely provides for an extension to existing premises or uplift in floorspace brought about through town centre improvements.

Hindley

6.43 Table 6.10 sets out the current convenience retail capacity in Hindley and the capacity for additional convenience and comparison retail floorspace over the periods to 2019, 2024 and 2026.

Table 6.10 Quantitative capacity for additional convenience and comparison retail floorspace - Hindley

Year	Convenience*		Comparison**	
	£(m)	sq. m (net)	£(m)^	sq.m (net)^
At 2014*	2.1	257	-	-
By 2019	3.7	462	0.4	108
By 2024	5.8	726	1.3	312
By 2026	6.7	839	1.8	405

*Convenience sales density of £8,000 sq. m based upon Asda, Morrisons, Sainsbury's and Tesco foodstore average reduced to reflect presence of Lidl and Aldi with allowances made for other retailers). No growth in floorspace efficiency over the period to 2026.

**Comparison sales density of £3,500 per sq. m at 2014 increased by floorspace efficiencies to 2026 of 1.8% per annum.

^2019, 2024 and 2026 comparison retail capacity assumes Wigan Borough retains a constant market share.

Convenience Retail Goods

6.44

Convenience retail provision in Hindley comprises a Tesco Extra at Cross Street and a small Asda store (former Netto) at Ladies Lane. The great majority of convenience retail expenditure from the Hindley area is directed to the Tesco. The household survey suggests that the Tesco stores trades at marginally above expected levels, and that the Asda store underperforms slightly against a benchmark position. The result is limited capacity for additional convenience retail floorspace in Hindley over the period to 2026. The retail capacity assessment at Appendix 4 details that, over the course of the period covered by the Core Strategy, there is scope for 839 sq. m of additional convenience retail floorspace. This is sufficient capacity in the longer term for a small-scale standalone supermarket, but could also be absorbed by extension of floorspace at existing retail destinations.

Comparison Retail Goods

6.45

The retail capacity indicates that the current comparison retail turnover of Golborne is some £9.2m. Amongst the smaller town centres in the borough, this places Golborne second behind Ashton-in-Makerfield in terms of comparison retail expenditure attracted from the study area. Despite this, the anticipated limited growth in comparison retail expenditure over the course of the period covered by the Core Strategy (pro-rata to existing market share) means that there is limited quantitative capacity for additional comparison retail floorspace in Hindley town centre. The retail capacity assessment charts that growth in retail expenditure directed to Hindley will result in capacity for 405 sq. m net of additional floorspace over the period to 2026. This quantum of capacity will provide for a series of high-street format units or an extension to existing units.

Pemberton

6.46 Table 6.11 sets out the current convenience retail capacity in Pemberton and the capacity for additional convenience and comparison retail floorspace over the periods to 2019, 2024 and 2026.

Table 6.11 Quantitative capacity for additional convenience and comparison retail floorspace - Pemberton

Year	Convenience*		Comparison**	
	£(m)	sq. m (net)	£(m)^	sq.m (net)^
At 2014*	1.0	122	-	-
By 2019	1.3	158	0.2	43
By 2024	1.6	205	0.5	124
By 2026	1.8	225	0.7	162

*Convenience sales density of £8,000 sq. m based upon Asda, Morrisons, Sainsbury's and Tesco foodstore average reduced to reflect presence of Lidl and Aldi with allowances made for other retailers). No growth in floorspace efficiency over the period to 2026.

**Comparison sales density of £3,500 per sq. m at 2014 increased by floorspace efficiencies to 2026 of 1.8% per annum.

^2019, 2024 and 2026 comparison retail capacity assumes Wigan Borough retains a constant market share.

Convenience Retail Goods

6.47 There is a limited convenience retail offer in Pemberton, which includes a Tesco Express store on Ormskirk Road. The survey derived turnover of the Tesco Express store (£3.3m) is in excess of benchmark performance. A Co-operative store at Church Street, Orrell attracts £4.9m of locally generated convenience retail expenditure, but over 50% is attracting to free standing stores in the Wigan area with the Robin Park Asda attracting over a third of all spending from the Billinge, Orrell, Pemberton and Winstanley areas. The fact that the Tesco Express is trading beyond expected levels means that there is demonstrable capacity for additional convenience retail floorspace, which is set to grow over the period to 2026 to 225 sq. m. Capacity of this magnitude is sufficient to support an additional local needs foodstore. Proximity to Asda at Robin Park and a lack of sites for large format foodstore development means that it is very unlikely that Pemberton will increase its market share materially in the convenience retail sector.

Comparison Retail Goods

6.48 At £3.7m, the recorded comparison retail turnover of Pemberton is the second lowest of the smaller town centres; above only Golborne which is recorded as having a comparison retail turnover of £3.5m. The household survey findings suggest that defined Wigan Town Centre and Robin Park attract over 50% of the comparison retail expenditure generated in the Billinge, Orrell, Pemberton and Winstanley area. The current performance of Pemberton in the comparison retail sector means that there is limited quantitative capacity for additional retail floorspace over the period to 2026, with potential pegged at fewer than 200 sq. m in the long term. The capacity identified does not provide scope for significant expansion of the retail offer in Pemberton, but this must be

set in context with proximity to other destinations with greater commercial attraction and the likely impact that this has on commercial interest in additional floorspace provision in the centre.

Standish

6.49 Table 6.12 sets out the current convenience retail capacity in Standish and the capacity for additional convenience and comparison retail floorspace over the periods to 2019, 2024 and 2026.

Table 6.12 Quantitative capacity for additional convenience and comparison retail floorspace - Standish

Year	Convenience*		Comparison**	
	£(m)	sq. m (net)	£(m)^	sq.m (net)^
At 2014*	-	-	-	-
By 2019	0.1	12	0.2	65
By 2024	0.8	100	0.8	186
By 2026	1.1	138	1.1	242

*Convenience sales density of £8,000 sq. m (based upon Asda, Morrisons, Sainsbury's and Tesco foodstore average reduced to reflect presence of Lidl and Aldi with allowances made for other retailers). No growth in floorspace efficiency over the period to 2026.

**Comparison sales density of £3,500 per sq. m at 2014 increased by floorspace efficiencies to 2026 of 1.8% per annum.

^2019, 2024 and 2026 comparison retail capacity assumes Wigan Borough retains a constant market share.

Convenience Retail Goods

6.50 There is a Co-operative foodstore at the heart of Standish centre, and a Lidl store to the north of the centre on Preston Road. About a fifth of local convenience retail expenditure is retained in the town centre, and the Lidl store increases the retention of local expenditure to a third. The majority of convenience retail expenditure generated locally is directed to destinations in Wigan and the free-standing Asda and Tesco stores in the main. Analysis of the retail capacity assessment suggests that the Lidl store is trading at above expected levels whereas the Co-operative store is under performing when compared with expected benchmark performance.

6.51 The trading performance of existing stores means that there is not any immediate capacity for new convenience retail floorspace in Standish. Table 12 at Appendix 4 shows a small amount of capacity at 2019, which increases to 138 sq. m by 2026. The level of capacity identified only really provides scope for an extension to existing provision or a small scale 'top-up' store in Standish. Should either of the commitments for new foodstores in Standish come forward, this will absorb the capacity identified and dependent upon the nature and scale of any floorspace developed could arrest the outflow of expenditure to Wigan.

Comparison Retail Goods

6.52 The comparison retail turnover of Standish town centre (£5.5m) gives it a performance comparable with that of Tyldesley in the south-east of the borough. It is at the lower end of the comparison retail turnover spectrum of the smaller centres in the borough. The limited existing comparison retail turnover of Standish and anticipated slow growth in shopper spending power means that there is limited quantitative capacity for additional comparison retail floorspace in the town. The assessed capacity of 242 sq. m net additional floorspace over the long term to 2026 might be met by extensions to existing units or taken up by comparison retail floorspace within any foodstore scheme that comes forward.

Tyldesley

6.53 Table 6.13 sets out the current convenience retail capacity in Tyldesley and the capacity for additional convenience and comparison retail floorspace over the periods to 2019, 2024 and 2026.

Table 6.13 Quantitative capacity for additional convenience and comparison retail floorspace - Tyldesley

Year	Convenience*		Comparison**	
	£(m)	sq. m (net)	£(m)^	sq.m (net)^
At 2014*	5.1	636	-	-
By 2019	6.5	815	0.3	67
By 2024	8.4	1,047	0.8	193
By 2026	9.2	1,145	1.1	252

*Convenience sales density of £8,000 sq. m (based upon Asda, Morrisons, Sainsbury's and Tesco foodstore average reduced to reflect presence of Lidl and Aldi with allowances made for other retailers)). No growth in floorspace efficiency over the period to 2026.

**Comparison sales density of £3,500 per sq. m at 2014 increased by floorspace efficiencies to 2026 of 1.8% per annum.

^2019, 2024 and 2026 comparison retail capacity assumes Wigan Borough retains a constant market share.

Convenience Retail Goods

6.54 Morrisons operates a foodstore at Shuttle Street, Tyldesley and there is an Aldi at Castle Street. These stores attract nearly 50% of the convenience retail expenditure generated locally. 30% of locally generated convenience retail expenditure is directed to foodstores in Leigh and primarily the Asda and Tesco stores. The results of the household surveys suggest that the Morrisons store trades at below expected levels whereas the Aldi trades at over three times what would be achieved at benchmark performance. Whilst it probable that the household surveys have over-estimated the performance of the Aldi store, the margin of error is such that it must be trading at significantly above expected levels. The result of this is that, notwithstanding the slight under-performance of the Morrisons foodstore, there is significant capacity immediately for additional convenience retail floorspace in the town. The convenience retail capacity identified (636 sq. m immediately increasing to

1,145 sq. m by 2026) is sufficient to support a third medium sized foodstore in the town.

Comparison Retail Goods

6.55

Tyldesley is at the lower end of the spectrum of comparison retail turnover, amongst the smaller town centres across the borough. Tyldesley attracts 6% of comparison retail expenditure generated locally, whilst over 50% is directed to Leigh or out of the borough to Bolton and the Trafford Centre. The performance of Tyldesley in the comparison retail sector means that, in adopting a constant market share approach, there is limited quantitative capacity for additional comparison retail floorspace in the town centre. Growth in spending power without any increase in market share will generate capacity for 252 sq. m net of additional floorspace over the Core Strategy period to 2026. This level of capacity is sufficient to support additional high-street shop units in the town centre, but not any substantial floorspace addition to the current stock.

7.0 **Change in Shopping Patterns: 2007 to 2014**

Drawing Comparisons between different Research

- 7.1 Caution needs to be exercised in drawing comparisons between the findings of the 2007 empirical research and the 2014 study, given that there is always a margin of error in the undertaking of household shopper surveys and in this instance there are methodological differences including in questions asked as part of the empirical research. Conclusions over broad patterns can be drawn, including which centres are shown to be stronger or weaker in the convenience and comparison retail sectors now when compared with seven years ago.

Borough-wide Shopping Patterns

- 7.2 The current retention rate of convenience retail expenditure generated in the borough (91%) is very strong and is demonstrative of strong representation from most of the leading national supermarket chains. The 2007 household study recorded a retention rate of 90%¹³, which suggests that the attraction of destinations within the borough relative to destinations outside of its boundary has remained constant. The market share of Wigan town centre has increased marginally but remains below 6%. Free-standing foodstores continue to dominate, albeit borough-wide market share at the Robin Park Asda has reduced from 14% to 12%. Free-standing foodstores in Leigh continue to account for 16%-17% of convenience retail expenditure generated in the borough, despite the significantly greater floorspace now developed.
- 7.3 The two-thirds retention of comparison retail expenditure within the borough, as recorded by this study is also healthy, and compares favourably with the 59% retention rate recorded by the 2007 study. The new empirical research suggests that it is the smaller centres in the borough that have contributed to the upturn in comparison retail market share. Whilst there is not any conclusive evidence from the new household surveys of why, the delivery of new foodstores in the borough (Tesco, Hindley for example) with associated comparison retail will increase the attractiveness of smaller centres for comparison retail shopping as will expansion amongst discount comparison retail fascias (Quality Save, Ashton-in-Makerfield, for example).
- 7.4 Grand Arcade Wigan opened in 2007 and the market share of Wigan town centre has remained at a level comparable with the 24% recorded in 2007.
- 7.5 Whilst some caution needs to be exercised in drawing direct comparisons between the two datasets, the broad indication is that the opening of Grand Arcade has resulted in Wigan town centre maintaining its market share during a period of heightened competition for retail expenditure. Grand Arcade has raised the profile of Wigan town centre, and increases its ability to compete with other principal centres in the sub-regional centre (such as Bolton), the

¹³ NLP has excluded Zone 14 and Zone 15 from its analysis of the 2007, to achieve consistency with the 2014 analysis

regional centres of Liverpool and Manchester and the out-of-town Trafford Centre.

- 7.6 Following its former owners entering administration, new owners of The Galleries shopping centre are looking to reconfigure it, and the Marketgate area of the shopping centre, as a retail and leisure destination. The reinvigoration of The Galleries to provide commercial floorspace in the configuration required by retail and leisure operators has the potential to increase the retail market share of Wigan town centre as its wider attraction provides further reason for shoppers to choose it as a destination above other options available within the borough and the wider sub-region.
- 7.7 The new empirical research shows that the borough-wide comparison retail market share of Leigh town centre has reduced marginally from around 12% to less than 11%.
- 7.8 The overall picture is that growth in retention of comparison retail expenditure in the borough is driven by a general upturn in the market share of the smaller town centres. Whilst, again, this must be treated with a degree of caution, it does suggest that a greater proportion of Wigan Borough residents are choosing to shop locally for comparison retail purchases.

Borough-wide Capacity 2014 – 2026

- 7.9 Considering convenience retail capacity borough-wide would suggest that there is not any theoretical need for additional floorspace at 2014, and not until beyond 2024. Over-supply of retail floorspace in Leigh negates any capacity identified elsewhere in the borough, until towards the end of the Core Strategy period. This position is only theoretical as the convenience retail market in the borough does not function as a single entity, and over-supply in Leigh should not prohibit need elsewhere in the borough being met through the delivery of new floorspace. Convenience retail capacity across the borough is greatest in the Ashton-in-Makerfield, Golborne, Tyldesley and Wigan areas.
- 7.10 Caution needs to be exercised in drawing comparisons between capacity in 2007 and capacity now, given methodological differences and the fact that a different price base is used. That said, general commentary on relative capacity positions can be made.
- 7.11 The convenience retail expenditure surplus identified in Wigan (£24.7m at 2014) is broadly consistent with the £23.2m identified at 2009, in the 2009 update. This implies a sustained trading at above expected levels in the Wigan area, and at Asda Robin Park in the main. A divergence between the 2009 and 2014 capacity assessments occurs once expenditure capacity is projected forward, and this is a direct result of the approach adopted by NLP in its assessment of future needs; an approach which aligns with the recent economic climate and the expected economic conditions moving forward. The NLP assessment identifies surplus convenience retail expenditure in Wigan of £46.3m by 2026 whereas the surplus in the 2009 update reaches £87.8m by 2027. NLP considers that its more cautious approach is justified given the

economic downturn over the period from 2008 and a continued lack of confidence in the food retail industry.

- 7.12 The more cautious findings for Wigan are reflected across the borough, in terms of long term capacity. A key difference is the immediate capacity shown for additional convenience retail floorspace in the Ashton-in-Makerfield and Tyldesley areas, which contrasts with zero capacity shown in the 2009 update.
- 7.13 The more cautious approach adopted by NLP is evident again in the comparison retail sector. The Wigan area surplus at 2019 (£17.8m) is significantly less the £34.3m shown in the 2009 update for the five-year time frame to 2014. The long term surplus the Wigan area (£75.9m in 2026) is significantly less than the long term surplus (to 2027) of £349.6m identified in the 2009 update. Again, the NLP approach is considered to be more robust given economic trading conditions in the retail sector in the period since 2008. The approach adopted by NLP is consistent across the borough and hence the capacity identified for all town centres is significantly less than that set out in the 2009 Capacity Assessment Update.

Wigan

- 7.14 A comparison of the retail evidence base from 2001 and 2007 shows that the comparison retail market share of Wigan town centre declined considerably over this period. The latest empirical research suggests that the market share of Wigan town centre has plateaued over the period since 2007. The development of Grand Arcade (23,063 sq. m net of commercial floorspace) is the obvious reason for the decline in market share having been arrested, meaning that Wigan town centre has maintained its market share during a period of heightened competition brought about by economic down turn and recession. Redevelopment of the Galleries/Marketgate area of the shopping centre provides further opportunity to build upon the attractiveness of Wigan to borough residents as a comparison retail shopping destination.
- 7.15 The town centre continues to play a limited role in meeting convenience retail shopping needs, being subordinate to free-standing foodstores on the outskirts of town and further afield.
- 7.16 A recalibration of growth rates adopted in the convenience and comparison retail sectors means that, as a general rule, capacity is much reduced from that set out in the 2007 study and its 2009 update. The 2014 empirical research suggests a current under-supply of convenience retail floorspace in the Wigan area and scope for significant additional convenience retail floorspace. The position at 2014 is consistent with the position on immediate requirements for Wigan detailed in the 2009 update. In the longer term, convenience retail capacity grows at a much steadier rate.
- 7.17 Capacity in the comparison retail sector (12,257 sq. m over the period to 2026) is more now than is recorded by the 2009 update figures. This suggests that new floorspace in the principal centre within the borough, over the Core Strategy period, will not be on the same scale as Grand Arcade and ought to

be focussed upon reinvigoration and extension of existing stock rather than major intervention to deliver significant new floorspace.

Leigh

- 7.18 Leigh has maintained second place in the hierarchy of borough retail centres, The latest empirical research suggests that the comparison retail market share of the town centre has declined marginally, and the arrival of new convenience retail floorspace out-of-centre (Morrisons foodstore and replacement Sainsbury's store) has assisted in maintaining the convenience retail market share of the wider town.
- 7.19 In 2009, convenience retail floorspace in Leigh was reported to be trading at above expected levels. This study has identified that stores in Leigh are trading at significantly below expected levels and this most likely results directly from a significant increase in local competition since the undertaking of the previous household survey in 2007. This means that there is not any capacity for additional convenience retail floorspace over the Core Strategy period to 2026. The capacity identified at 2009 is met and exceeded. If anything, Leigh is likely to witness a consolidation in its convenience retail floorspace, and this is most likely to be consolidation amongst floorspace in out-of-centre locations.
- 7.20 In the comparison retail sector, capacity of 4,470 sq. m over the Core Strategy period is significantly less than the 20,000 sq. m plus capacity identified in the previous study for the period to 2027. There is scope for growth in the comparison retail sector of Leigh, and whilst this will not be on the scale for which capacity was identified in 2009, it is important that measured growth in the town centre retail stock is planned for. Growth is necessary if the town is to maintain its position in the local hierarchy and compete more effectively with higher order destinations in the sub-region.

Ashton-in- Makerfield

- 7.21 In 2007 Ashton-in-Makerfield was perceived to be a poor quality retail destination. The 2009 update found existing convenience retail floorspace to be trading at significantly below expected levels, and hence did not identify any capacity for additional convenience retail floorspace. The trend in the convenience retail sector is reversed, market share is up and this study has identified capacity for new convenience retail floorspace in the town. The borough-wide market share of the town in the comparison retail sector has increased significantly, and whilst capacity is reduced, as a result of the more cautious approach adopted in this assessment, there remains capacity for over 5,000 sq. m net of additional comparison retail floorspace during the Core Strategy period.

Atherton

- 7.22 The 2009 update found retail floorspace in Atherton, and most notably Tesco at Crabtree Lane, to be trading at significantly above expected levels. Whilst

the Tesco continues to trade at above expected levels, this is now less pronounced and the switch in fascia from Netto to Asda at Bolton Road suggests that this floorspace is now trading at significantly below expected levels. The net result is that the capacity assessment informing this study does not identify any scope for additional convenience retail floorspace over the period covered by the Core Strategy.

- 7.23 There is capacity for limited additional comparison retail floorspace in Atherton in the short term, increasing slightly in the longer term. The capacity identified is less than the capacity identified at 2009, consistent with the more cautious approach adopted by NLP in completing the capacity assessment which informs this study.

Golborne

- 7.24 The Asda and Lidl stores in Golborne trade at significantly above expected levels, leading to surplus capacity for new floorspace. Had Sainsbury's built-out the commitment at the Millingford Industrial Estate, this capacity would most likely have been absorbed. The fact that this floorspace has not come forward results in immediate capacity for 995 sq. m additional convenience retail floorspace rising to 1,569 sq. m by 2026. The level of capacity identified is less than that included in the 2009 update and would be accounted for by the Millingford Industrial Estate scheme coming forward, If it does not come forward, then the Council should look favourably on other proposals that come forward for additional convenience retail floorspace in the town.
- 7.25 The 2009 update identified limited capacity for additional comparison retail floorspace; in the region of 1,000 sq. m in the longer term. The retail capacity assessment underpinning this study suggests that the comparison retail market share of Golborne has reduced over the seven years to 2014, which combined with a more measured consideration of expected growth means that capacity is much reduced.

Hindley

- 7.26 The 2009 update did not identify any convenience retail capacity in Hindley until 2019, due to stores trading at below expected levels. The empirical research informing this study suggests a better performance amongst existing convenience retail floorspace in the town, and immediate capacity some 250 sq.m. This is shown to increase steadily and reach in the medium term a level which is comparable with the capacity identified in the 2009 update.
- 7.27 The market share of Hindley in the comparison retail sector remains at about 1.0% and the 405 sq. m capacity identified over the period to 2026 is significantly less than that identified in 2009.

Pemberton

- 7.28 The 2014 capacity assessment identified very limited capacity for additional convenience retail floorspace in Pemberton. This is consistent with the

conclusion in 2009 that convenience retail floorspace in Pemberton traded at slightly in excess of expected levels.

- 7.29 The borough-wide market share of Pemberton in the comparison retail sector is shown to have reduced over the period since 2007. This, combined with the more realistic rates of expenditure growth adopted in this study, means that the capacity identified currently (up to 162 sq. m) is significantly less than the 2009 update assessed.
- 7.30 In both the convenience and comparison retail sectors, there is limited scope for growth in the offer of Pemberton without the town centre realising an increase in its market share within the borough.

Standish

- 7.31 The 2009 update identifies very limited capacity for additional comparison retail floorspace over the period to 2027 and capacity in the convenience retail sector only after 2019 due to under-performance of existing convenience retail floorspace. In the comparison retail sector, 2019 assessed capacity is comparable with the 2014 position from the 2009 update. Despite adoption of a lower growth rate for retail expenditure, the 2014 study records an improved performance for Standish in the comparison retail sector and this in-turn generates capacity for floorspace uplift. In the convenience retail sector, existing floorspace is still shown to be trading at below expected levels, which means that there is not capacity until 2019 and thereafter the scope for new retail floorspace is limited.
- 7.32 There are two commitments for additional convenience retail floorspace in Standish. Whilst the convenience retail floorspace of the commitments exceeds the convenience retail capacity identified, these schemes have the potential to add to the quality of the offer in Standish and increase the market share of the town. This retail capacity exercise is undertaken on a constant market share basis. Significant additional retail floorspace has the potential to enact an increase in market share. Whilst it is for those proposing new retail floorspace to put forward any case for increase in market share, there is clear potential for such an increase to occur in Standish if one or other of the foodstore commitments comes forward.

Tyldesley

- 7.33 The market share of Tyldesley in the comparison retail sector is shown to have increased over the seven years to 2014. The borough-wide market share remains less than 1.0% though, which means capacity going forward when adopting a constant market share approach is only some 250 sq. m over the period to 2026. This is significantly less than the capacity identified in the 2009 update, as a result of the lower projected growth in retail spending. This study has identified some capacity for additional convenience retail floorspace in Tyldesley, sufficient to support a small to medium sized convenience retail store in the long term, which contrasts with the findings of the 2009 update. The 2009 updated assessed existing convenience retail floorspace in

Wigan Retail and Leisure Study

Tyldesley to be trading at below expected levels, to an extent where it modelled no additional capacity over the period to 2027.

8.0

Conclusions

8.1

Wigan Metropolitan Borough Council commissioned Nathaniel Lichfield & Partners (NLP) to prepare a borough-wide retail and leisure study. The study is required to assess the current convenience and comparison retail and leisure offer and to quantify the need for new floorspace. The study updates the development plan evidence base replacing the 2007 study and subsequent 2009 update. This study is written to inform policy development and application across the borough.

8.2

The study is informed by two telephone surveys of 1,400 residents total in a survey area covering Wigan Borough and extending west into neighbouring West Lancashire. The empirical research is supplemented by desk-based research and analysis carried out by NLP.

8.3

The study considers the quantitative need for additional retail floorspace, informed by the results of the household telephone surveys, and compares the results to previous findings in the 2007 study and 2009 update.

Shopping Patterns 2014

8.4

The retention of convenience retail shopping expenditure in the borough is very healthy at 91%, which is consistent with the position recorded by the 2007 study. Leigh attracts the greatest proportion of convenience retail expenditure generated in the borough (21.7%) albeit the majority of this expenditure (16.6%) is directed to larger format foodstores outside the main shopping area. The market share of stores within and at the edge of Wigan town centre (12.1%) is comparable with the market share of Asda Robin Park (11.9%). Hindley (with a market share of 4.2%) provides a subordinate convenience retail role at the centre of the borough.

8.5

Destinations across Wigan Borough retain 66% of the comparison retail expenditure generated within it, which is an increase on the 59% recorded by the empirical research informing the 2007 study. Whilst Wigan continues to attract the greatest proportion of borough-wide comparison retail spending (22.7%), this does not show any material change on the position in 2007. The market shares of Robin Park (13.1%) and Leigh (10.7%) represent a regression when compared with their market shares in 2007. The overall conclusion is that it is the smaller centres which have contributed to an increase in the proportion of comparison retail expenditure retained within the borough, and particularly Ashton-in-Makerfield for which is recorded an increase in market share from just over 1.0% to 4.5%. The introduction of new larger foodstores (with comparison retail sales) and growth in the discount comparison retail sector may be part of the explanation of why the comparison retail market share of the smaller town centres has increased.

- 8.6 Bolton, Middlebrook Retail Park, Trafford Centre and Manchester are the principal recipient destinations to which comparison retail expenditure from the borough is leaked; collectively accounting for a market share of over 20%.

Retail Capacity Assessment

- 8.7 The retail capacity assessment assumes a constant market share, projecting forward shopping patterns recorded by the 2013 RMG Clarity household survey and the 2014 NEMS household survey. The quantitative assessment of the potential capacity for new retail floorspace suggests that there is scope for new convenience and comparison retail floorspace in most parts of Wigan borough.
- 8.8 Table 8.1 and Table 8.2 summarise the capacity for additional convenience and comparison retail floorspace for the defined town centres in Wigan Borough. Capacity beyond 2019 should be viewed with caution as there is little certainty over long term economic performance and prosperity.

Table 8.1 Convenience Capacity by Centre

Centre	Convenience Capacity			
	At 2014	At 2019	At 2024	At 2028
Wigan	2,471	3,235	4,208	4,630
Leigh	-	-	-	-
Ashton-in-Makerfield	810	920	1,062	1,122
Atherton	-	-	-	-
Golborne	995	1,197	1,457	1,569
Hindley	257	462	726	839
Pemberton	122	158	205	225
Standish	-	12	100	138
Tyldesley	636	815	1,047	1,145

Table 8.2 Comparison Capacity by Centre

Centre	Comparison Capacity			
	At 2014	At 2019	At 2024	At 2028
Wigan	-	3,260	9,397	12,257
Leigh	-	1,192	3,436	4,470
Ashton-in-Makerfield	-	165	475	619
Atherton	-	148	426	555
Golborne	-	42	120	156
Hindley	-	108	312	405
Pemberton	-	43	124	162
Standish	-	65	186	242
Tyldesley	-	67	193	252

Meeting Shopping/Leisure Needs in Wigan Borough

- 8.9 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail development over their

development plan period. When planning for growth in their town centres, LPAs should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

- 8.10 The adopted Core Strategy promotes retail development where a proposal promotes the prosperity of the borough. It directs retail development to existing town centres.
- 8.11 As set out above, the retail capacity assessment assumes that the market share and role of Wigan, Leigh, Ashton-in-Makerfield and the smaller town centres will remain unchanged in the future. Whilst this study is primarily a quantitative capacity update and does not address the vitality and viability of town centres, it is important to make reference to benefits derived from qualitative improvements in retail and leisure provision. If a proposal for retail or leisure development comes forward and that proposal exceeds the capacity projections set out in Table 8.1 and Table 8.2, this does not necessarily mean the proposal should be refused planning permission. Retail capacity is an important consideration in the context of retail trade diversion and retail impact, but it is also important to place this in context with whether a proposed development is consistent with the role, character and catchment area of the town or area it is intended to serve. It is important that such a qualitative consideration sits alongside a consideration of whether a proposal is justified in terms of the NPPF sequential approach and impact tests.
- 8.12 It is unlikely that the proportion of convenience retail expenditure generated and retained in the borough will increase, but additional retail floorspace in town centres across Wigan Borough could claw-back comparison retail expenditure that is currently directed to locations outside of the borough.
- 8.13 The implications of major retail development in centres surrounding the borough should also be monitored, with consideration given to the effect that such proposals may have on the demand for additional retail floorspace in Wigan.

Leisure Assessment Conclusions

- 8.14 This update of the evidence base focusses upon quantitative retail capacity, but includes a qualitative assessment of commercial leisure provision. The population of the borough (c. 317,800) provides a sizeable catchment population for commercial leisure provision, and the draw of facilities within the borough extends beyond the administrative boundary. Leisure attractions elsewhere in Greater Manchester (and notably Middlebrook – which is 10 minutes' drive from Aspull – and the Trafford Centre – which is 20 minutes' drive from Leigh) will divert spending of Wigan Borough residents.
- 8.15 The NLP CIneSCOPE analysis of cinema provision concludes that there is not any capacity for additional cinema provision in Wigan Borough. Empire at Robin Park and Cineworld in Leigh are sufficient to meeting the needs of

cinemagoing residents of Wigan Borough. That said, there is the potential for a new cinema in Wigan town centre to meet latent demand for a centrally located facility that is accessible as a walk-in destination and by public transport. The CINeSCOPE analysis also identifies potential capacity for additional provision in the Chorley area, and it is possible that this market would be served by additional provision in Wigan. The development plan does not need to make specific provision for new cinema facilities, but proposals that come forward in central areas and particularly to the north of the borough (in Wigan) could assist in meeting unmet demand.

- 8.16 The health and fitness sector in Wigan has shown sustained growth, although mirroring national trends this has tended to be in the budget/no contract market rather than in the previously successful contract market. In common with planning for cinema development, there is not any need for the development plan to make specific provision for growth in this sector. The ten-pin bowling market has witnessed decline, and a rise in 'boutique bowling' destinations is so far restricted to higher order centres including Liverpool and Manchester.
- 8.17 The Bingo market has stagnated, and may well be the result of sustained pressure from growth in on-line gambling and the continued effects on a ban on smoking in buildings. There is not any requirement for the development plan to include specific provision for new bingo halls within the borough.
- 8.18 This report includes commentary on indoor play centres, which is a growth sector in the leisure industry and increasingly coming forward as part of mixed-use developments. In common with other sectors of the commercial leisure market, the development plan need not make specific provision for indoor play centres but the local planning authority should be minded of the potential for such uses to come forward.

Retail Assessment Conclusions

Wigan

- 8.19 Wigan is the largest settlement in Wigan Borough and is the principal town centre as well as the main retail destination. It is one of the major sub-regional town centres within Greater Manchester. Wigan provides a wide range of shopping, service, leisure, business and public administration facilities that meet the day-to-day needs of residents. The town has a good mix of convenience and comparison goods retailers but the comparison retail goods offer is impacted upon by proximity to the higher order centres of Liverpool and Manchester and the offer of the Trafford Centre. Robin Park located outside of Wigan town centre is also a big draw to residents of the borough.
- 8.20 There is capacity identified for both convenience and comparison retail floorspace in Wigan. The Council should consider encouraging additional comparison retail floorspace to be provided in units with larger modern formats to meet contemporary requirements of high street retail operators, whilst remaining appropriate to the scale of the town.

Leigh

- 8.21 Leigh is the second largest town in the borough and is a main town centre subordinate only to Wigan. Leigh has a generous and varied convenience offer for its size and a smaller number of comparison retailers and service uses that serve residents of Leigh and areas in the south east of the borough.
- 8.22 Leigh has sufficient existing convenience retail floorspace to absorb growth in convenience retail expenditure as it increases over the Core Strategy period. There is scope for additional comparison retail floorspace in Leigh, and its delivery will be important to ensure that the town maintains its role in the local retail hierarchy and competes more effectively with higher order centres in the sub-region. In the longer-term, capacity identified could give rise to a sizeable extension to Leigh town centre.

Ashton-in-Makerfield

- 8.23 The third largest and another main town in the borough is Ashton-in-Makerfield. Although it does not have as comprehensive an offer as the larger centres of Wigan and Leigh, Ashton-in-Makerfield is an important retail centre meeting the shopping needs and services of residents living in the south of the borough.
- 8.24 There is capacity identified for both additional convenience and comparison floorspace in Ashton-in-Makerfield which would assist with cementing its position as one of three main town centres in the borough.

Smaller town centres

- 8.25 There are six other smaller town centres in Wigan Borough, and a series of local centres. The six defined smaller town centres offer every-day goods and services and offer a well-established network of convenience retail provision.
- 8.26 Based upon the constant market share approach, there is limited capacity for additional comparison floorspace within these towns, albeit there is scope for satisfying an under provision of convenience retail floorspace in Golborne and Tyldesley. The 2014 study serves to demonstrate once again the dominance of the larger centres in the borough and the attraction to residents of Wigan Borough of nearby higher order centres and destinations.