



# Cheshire Retail Study

Cheshire East Council

Final Report

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## 1.0 Introduction

### Instruction

- 1.01 WYG Planning (hereafter referred to as 'WYG') was commissioned by Cheshire East Council ('the Council') in June 2015 to undertake a Retail Study covering Cheshire East (CE). The Retail Study provides an update to the Cheshire Retail Study (2011).
- 1.02 The Study responds to the Cheshire Retail Study Update - Guidance Document prepared jointly by Cheshire East and Cheshire West and Chester (CWAC) Councils which acted as a brief for the Study. The brief set out required project outputs from the Study in relation to the following areas:
- Executive Summary;
  - Current and Emerging Retail and Leisure Trends;
  - Market Research;
  - Current and Past Shopping Patterns;
  - Population and Expenditure;
  - Retail and Leisure Capacity;
  - Assessment of Vitality and Viability of Centres;
  - Retail Planning Policy Recommendations; and
  - Summary and Conclusions.
- 1.03 A key purpose of this Study is to provide an assessment of retail and leisure needs and capacity in the CE Local Plan period to 2030, through the identification of existing shopping and leisure patterns and a review of the current performance of the defined centres in the administrative area. The Study provides recommendations in respect to the Council's future strategy for the two Principal Towns (Crewe and Macclesfield), nine Key Service Centres and 13 Local Service Centres in CE, to help safeguard their future vitality and viability, and it will assist in bringing forward the redevelopment of key town centre sites.
- 1.04 The Study will act as the evidence base to assist in the formulation of future development plan policy, in particular the CE Local Plan Site Allocations and Development Policies Document. The Study also



provides baseline information to assist in the determination of planning applications for retail and leisure development.

- 1.05 The Study draws upon new empirical research, with NEMS Market Research Limited (NEMS) undertaking telephone surveys of 2,100 households within the defined Study Area in September 2015 and January 2016. The Study Area for the household survey comprises 15 zones which are based on postcode sectors grouped to reflect areas which are likely to exhibit similar patterns of shopping behaviour. The Study draws upon the most recent Experian Micromarketer G3 population and expenditure data (published October 2015) in order to establish the up-to-date position with regard to both convenience and comparison goods capacity.
- 1.06 The Study provides an assessment of retail and leisure patterns and trends, and any changes which have taken place to these patterns since the previous household survey was undertaken in 2010. The Study considers the role of the each of the defined centres within CE and the influence of out of centre development and other Centres outside the administrative area.
- 1.07 Further to the assessment of shopping and leisure patterns, the vitality and viability of centres, population and expenditure, and retail and leisure capacity, the Study advises on an appropriate future retail and leisure strategy for CE.

## Structure of Report

- 1.08 Our report is structured as follows:
  - Section 2 provides a context for the Retail Study by providing an analysis of key retail trends;
  - Section 3 considers the up-to-date position in respect of relevant national retail and town centre planning policy;
  - Section 4 sets out a review of the survey research and considers changes in shopping behaviour that have occurred since the undertaking of the previous Cheshire Retail Study (2011);
  - Section 5 sets out an overview of the vitality and viability of two Principal Towns (Crewe and Macclesfield), nine Key Service Centres and 13 Local Service Centres in CE;
  - Section 6 identifies current and future population and expenditure levels within the Study Area;
  - Section 7 provides our assessment of the quantitative and qualitative need for further convenience and comparison goods retail floorspace over the assessment period;
  - Section 8 considers the need for additional commercial leisure development; and
  - Section 9 sets out our recommendations in respect of CE’s future retail and leisure strategy.



## 2.0 Current and Emerging Retail Trends

### Introduction

- 2.01 A recent report by Colliers<sup>1</sup> provides information regarding recent trends, together with forecasts for the future of retailing in the UK. The findings confirm that the retail sector has been significantly affected by the wider economic climate and that there is considerable uncertainty about the strength and durability of future growth. However, Colliers reports that the recent improved economic outlook is beginning to result in increased consumer confidence and pockets of retailer expansion which are resulting in a reduction in vacant retail space. Furthermore, it is evident that the UK unemployment rate is currently falling (recorded as being 5.1% between October and December 2015, compared to 5.7% between October and December 2014)<sup>2</sup> and that average pay for employees in Great Britain increased 1.9% between October to December 2015 compared to the same period 12 months earlier<sup>3</sup>.
- 2.02 Notwithstanding these very recent encouraging signs, the economic conditions of the past few years have had a significant impact on the public's ability and willingness to spend their earnings on retail goods. Since 2010 there have also been increases in taxation (for example in VAT, national insurance contributions and capital gains tax) which also impact upon households' spending. Furthermore, prior to late 2014 the UK experienced a number of years of inflation consistently being at a level beyond average earnings growth, although more recently this has improved, with total average earnings growing by 1.8% in real terms between October and December 2015. A delay in reviewing business rates has also been identified by both the Portas<sup>4</sup> and Grimsey<sup>5</sup> Reviews as a key factor affecting the success of many operators.
- 2.03 Recent economic conditions have resulted in significant structural changes to the high street, whereby the pressure on retailers to remain solvent has meant that many are showing increased signs of caution in their investment decisions. In particular, retailers are rationalising their physical store portfolios by reducing their number of stores, abandoning their representation in weaker centres and concentrating on acquiring sites in city centres and major regional shopping centres. The Grimsey Review identified that the national vacancy rate at 2013 equated to over 22,000 empty shops across

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<sup>1</sup> 'National Retail Barometer: Summer 2014', Colliers, September 2014

<sup>2</sup> 'Labour Market Statistics, February 2016 Release', ONS, February 2016

<sup>3</sup> 'Labour Market Statistics, February 2016 Release', ONS, February 2016

<sup>4</sup> 'The Portas Review', December 2009

<sup>5</sup> 'The Grimsey Review – An Alternative Future for the High Street', September 2013



the top 650 town centres. The Centre for Retail Research<sup>6</sup> estimates that overall store numbers will fall by 61,930 between 2012 and 2018, with the main impact being upon non-food stores. The report also estimates that 316,000 people will become unemployed, permanently or temporarily, as a result of these store closures.

- 2.04 To address this, many retailers have sought to re-negotiate their lease terms with landlords in order to enable them to switch from quarterly rents to monthly agreements, with several high street firms (including Monsoon and New Look) trying to ease the cash flow burden of paying rent three months in advance. Furthermore, some retailers are finding it increasingly difficult to justify being represented in every town in the UK and in less profitable markets. As a consequence, demand has reduced considerably for 'poorer quality premises' in secondary locations and in many smaller towns with a commensurate drop in value (and often rent). Large cities and towns are likely to suffer less compared to smaller centres, given that they provide an enhanced choice for customers and offer the greater retail and leisure 'experience' that consumers increasingly desire.
- 2.05 In summary, there has been a marked polarisation and divergence in retailer spending, characterised by diminishing demand for secondary premises in smaller peripheral centres and increasing interest for well located and appropriately configured floorspace in key centres. It is evident that whilst Central London, regional city centres and regional shopping malls are relatively stable, a significant number of small and medium sized towns which serve a localised catchment may need to implement innovative ideas in order to compete for expenditure and reduce trade leakage.
- 2.06 In terms of retail rental values, Colliers<sup>7</sup> notes that national rates are expected to rise by 1.4% in 2015, and the retail market has stabilised or is now experiencing modest rental growth in most places. Colliers also report consumer purchasing power is expected to be buoyed by low inflation and rising real wages, which in turn will assist in providing a boost to the occupier market. The number of new retail developments being brought forward is highlighted as a further indication that confidence is returning for investors.
- 2.07 Given current spending patterns and the wider uncertain economic climate, it is unsurprising that Experian, which monitors and forecasts retail consumer expenditure in the UK, has in recent years identified significant changes when reviewing its forecast growth rates for both convenience and comparison goods expenditure over the short term. Experian's<sup>8</sup> forecast annual per capita

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<sup>6</sup> 'Retail Futures 2018', Centre for Retail Research, May 2013  
<sup>7</sup> 'Midsummer Retail Report 2015: New Frontiers', Colliers, July 2015  
<sup>8</sup> Experian Retail Planner Briefing Note 13 (Figure 1a), October 2015



convenience goods growth rate is -0.2% for 2015, +0.1% for 2016 and +0.3% for 2017. By way of contrast, Experian<sup>9</sup> forecast in 2010 that per capita convenience goods growth would equate to +0.8% per annum across these same three reporting years.

2.08 However, Experian's forecast annual per capita comparison goods growth rates are significantly more positive in recent years and are similar to those recorded prior to the recession. Experian identifies per capita growth of +5.3% for 2015, +3.2% for 2016 and +2.9% for 2017.

2.09 Despite difficulties in recent years across the comparison goods sector, certain types of retail have continued to perform well. The market for recreational goods has, on the whole, performed strongly in recent years, with healthy growth attributed to supermarket sales together with the growing popularity of online shopping, which continues to see an increase in sales year-on-year. However, the manner in which such purchases are made has changed considerably, with the increasing popularity of the internet to purchase books and music having a notable impact on the composition of town centres, with such stores all but disappearing from the high street. Other businesses have experienced growth, with the Grimsey Review<sup>10</sup> reporting a 12% increase (equating to an additional 1,100 stores) in 'value-related retailing' outlets, including second-hand, discount and charity shops. The Grimsey Review also makes reference to the expansion of pawnbrokers, pay-day lenders and betting shops which have collectively experienced a 17% growth in the number of such outlets since 2009.

## Trends in Comparison Goods Retailing

2.10 Whilst it is not anticipated that growth in retail spending over the next ten years will mirror that achieved after the turn of the millennium, there is expected to be some growth in comparison goods expenditure in coming years. Consequently, there is an increasing focus from retailers on achieving more efficient use of their floorspace, particularly given the recent poor performance of certain national multiples, many of which have been affected by the significant increase in e-tailing and increases in rental levels secured before 2008. As a result of the current economic climate, retailers are more reluctant to commit to new development than they have been in previous decades. Instead, they are more selective and are holding out for accommodation that is appropriate both in terms of location and the type of premises provided. Indeed, retailers are seeking to occupy larger units in order to achieve more efficient use of floorspace and attract shoppers from a wider area. These

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<sup>9</sup> Experian Retail Planner Briefing Note 8.1 (Figure 1), August 2010

<sup>10</sup> 'The Grimsey Review – An Alternative Future for the High Street', September 2013





larger floor plates enable operators to provide a greater range of goods; for example, in 2009, when the retail market was generally stagnant, Primark opened one million sq.ft of new retail space.

2.11 International market conditions and price deflation in some key sectors have also meant that many high street names are becoming increasingly vulnerable to takeover. This is being pursued through disposals, company voluntary administrations (CVAs), informal arrangements with landlords, lease expiries and break options. More generally, whilst there is likely to be continued demand for larger, modern retail units in the future, increased sensitivity over future viability will mean a cautious approach to new investment for many key national retailers. Marginal locations within centres will increasingly be rejected. Many national retailers, who would have previously considered smaller/lower order centres in order to increase their market share, are now assessing their future strategies given the downturn experienced in the economy. Consequently, many investment decisions will be influenced by the scale of commitment from other retailers; developers will increasingly need to promote large town centre redevelopment schemes with anchor tenants if they are to attract other high quality retailers.

## Trends in Food Retailing

2.12 In the aftermath of the growth in the number of edge and out of centre large format supermarkets during the 1990s, development of such facilities is now more limited due to stricter planning laws (following the publication of PPS4 and, subsequently, the NPPF) and a lack of suitable sites. As a result, the national multiples in the food retailing sector are finding a range of other measures to improve their market share. These include:

- Offering a wider product range, such as financial and insurance products, petrol and non-food goods;
- Developing a wide range of retail models, for example small-format convenience stores in town centres (e.g. Sainsbury's Local, Tesco Express), smaller supermarkets mostly in town centres (e.g. Tesco Metro), superstores (e.g. Tesco) and hypermarkets (e.g. Tesco Extra, Asda Supercentres);
- Extended opening hours;
- Offering cheap products and no-frills service;
- Providing an attractive and powerful brand image; and
- Offering a home delivery service.



- 2.13 Mintel<sup>11</sup> identifies that the recession – allied with a period of higher inflation – has had an impact on consumer behaviour and the wider dynamics of grocery retailing. Price, or specifically value, is now identified as the key issue for consumers, and more shoppers are assessing whether purchases represent value for money. Shoppers have realised that they are able to ‘trade down’ and switch to own-label ranges or to discount retailer to save money without sacrificing on quality. Indeed, customers are mixing value and premium in the same basket.
- 2.14 As consumers alter their shopping habits, it is predicted that growth will be limited and the battle for market share will intensify further. With consumer confidence recovering post recession, Mintel predict slow growth on food spending in the coming years. However, winning a share of consumer spend will require more than low prices, with shoppers increasingly seeking to source high-quality, good value food.
- 2.15 The changing UK demographics are also having a major impact on the food and grocery sector. For example, there has been a rise in single occupancy young professional households who are ‘time poor’ and relatively ‘cash rich’. Though their baskets might be small, they tend to buy higher value items, therefore providing an opportunity to boost volume and value growth. Elsewhere, an ageing population profile is leading to a rise in time rich consumers who are likely to make more frequent small trips rather than do large weekly shops. The contrasting requirements of these markets means that retailers are seeking to open a variety of stores with a particular current focus on discount and small convenience stores and a trend away from new superstores.
- 2.16 Verdict<sup>12</sup> estimates that the food and grocery sector was worth an £139.5 billion in 2014, equating to an annual growth of 2.8%. The four key supermarket chains in the UK have respective market shares of 27.2% (Tesco), 16.3% (Asda), 15.3% (Sainsbury’s) and 9.4% (Morrisons). National multiple retailers, which also include operators such as Co-operative Food (5.1%), Aldi (4.2%) and Waitrose (4.0%), represent a total grocery market share of 89.1%.
- 2.17 Discount retailers are growing fastest in the market, a trend which looks set to continue. Both Aldi and Lidl have experienced significant increases to their market share in recent years. Research by Mintel<sup>13</sup> indicates that between 2011 and 2013 the number of consumers indicating that they visit Aldi or Lidl stores as their main destination for in-store grocery shopping almost doubled, rising from a combined figure of 6% to 11%.

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<sup>11</sup> ‘Food & Drink Retailing’, Mintel, March 2014

<sup>12</sup> ‘UK Food & Grocery – Verdict Sector Report’, Verdict, October 2014

<sup>13</sup> ‘Food & Drink Retailing’, Mintel, March 2014



- 2.18 There has been a recent slowdown in the growth plans of the majority of the principal supermarket operators. Tesco, for example, indicated in April 2013 that it had scrapped plans for major store developments on more than 100 sites and would instead focus on developing medium size units. It then subsequently announced in January 2015 its intention to pull out of a further 49 store development and to close 43 existing stores. Tesco subsequently announced in January 2016 its intention to scale back the number of its stores which trade 24 hours, with the opening hours of 76 stores to be reduced.
- 2.19 Asda is the second largest supermarket retailer in the UK, with more than 550 stores nationwide. In contrast to Tesco's plans, it announced in February 2015 its intention to invest £600m opening 17 new supermarkets and revamping 62 more as well as plans to open a further number of petrol filling stations. Asda's focus for additional openings is believed to be London and the south of England.
- 2.20 Morrisons also intends to open few larger stores once its current pipeline of development is completed. Its focus in recent years has been on developing the small-scale M Local convenience format store. However, the retailer posted disappointing results for the year to 1 February 2015 and announced the agreed sell-off of 140 M Local stores in September 2015 for a £30 million loss. The retailer also confirmed in September 2015 the closure of 11 of its supermarkets.
- 2.21 Sainsbury's announced in October 2014 its intention to further develop the Sainsbury's Local format and to improve its online offering. However, its most significant move is to enter the discount market under the Netto fascia, with Sainsbury's owning a half share in Netto's UK operation. Netto announced the trialling of 15 stores in November 2014 clustered around the M62 corridor between Liverpool and Hull in order to 'test the water'. The first two new build openings were announced in March 2015 in Lymm and Hull, which appears to suggest confidence in the venture.
- 2.22 Emboldened by changing convenience goods shopping patterns and significant increases in their market share, Aldi and Lidl have both announced ambitious store opening targets that, if met, will further increase pressure on the 'main four' operators (these being Asda, Morrisons, Sainsbury's and Tesco). Aldi have identified major expansion plans on top of significant store openings in recent years, reflective of its position as the UK's fastest growing food retailer. The retailer announced in August 2015 plans to invest £600m in to its UK business with a target for 130 new stores over a two year investment period. Aldi also revealed plans to start trading online from 2016, initially limited to the sale of wine and non-food goods. Lidl similarly revealed plans in November 2015 to open 40-50 stores a year over the forthcoming three year period, revising upwards previous plans for 30-40 store openings a year. The retailer opened 20 new stores in 2014.



2.23 More generally, the role of supermarkets has continued to develop in recent years, with the large operators now offering a greater diversity of goods and services, via a larger number of formats and locations. Food and non-food sales are also increasingly being driven by large supermarket growth, with half of town centres competing with five or more supermarkets within a two mile radius<sup>14</sup>. Whilst the exact impacts which will arise from the opening of a new supermarket are dependent on local circumstances, BCSC notes that there has been a significant decline in the number of independent food retailers in recent times, including a reduction of 45% between 1996 and 2007 in the number of greengrocers. Over the same time period the market share of total retail sales secured by supermarkets increased from 38% to 42%. Mintel<sup>15</sup> predict that the long term decline in the number of specialist food and drink retailers can be expected to bottom out in the coming years, helped by the shift being experienced toward convenience stores.

## Leisure Sector

2.24 The daytime and evening leisure sector has undergone a major shift in the last five years. During the economic downturn reductions in the income levels of consumers impacted on their ability to spend on these types of discretionary activities and items. After a period of weak growth during the economic recession, Mintel<sup>16</sup> calculate that the value of the UK leisure market has increased by 15.3% between 2010 and 2015, to a total value of £80 billion, with the market showing strong resilience. Despite this growth the benefits of increased revenues for leisure operators have been largely consumed by higher wage and utility costs.

2.25 A review of the leisure activity participation and frequency levels indicates that eating and drinking out of the home still remain the most popular activities which people do on a monthly basis, with the cinema the next most popular of the non-food and drink-led activities. Other activities, including going to a theatre, tenpin bowling, attending live sporting events and visiting a zoo are, on average, undertaken less frequently and this is at least in part reflective of their greater average cost. It is expected that relatively difficult trading conditions for the leisure sector are set to continue in the immediate future as a result of a shortfall in the amount of money that consumers have available to spend and increased operating cost.

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<sup>14</sup> 'What Does the Future Hold for Town centres?', BCSC, September 2009

<sup>15</sup> 'Food and Drink Retailing', Mintel, March 2014

<sup>16</sup> 'Leisure Review', Mintel, October 2015



- 2.26 The number of leisure centres and swimming pools has increased in the past few years, although with reductions to their sport and leisure funding budgets local authorities are increasingly being required to adopt more commercial approaches. Mintel<sup>17</sup> notes that 33% of adults use a health centre or swimming pool, a reduction from 40% in 2013, although operator data suggests that admissions have remained resilient overall pointing to losses being concentrated around more casual users.
- 2.27 Research by the Leisure Database Company<sup>18</sup> indicates that the private health and fitness sector had a market value of approximately £3.9 billion in March 2012, an increase of 1.5% over the previous twelve month period. Mintel also notes that, whilst only 12% of adults currently use a private health and fitness club, the potential for a further expansion of the market remains strong.
- 2.28 The composition of the private health and fitness sector has experienced great change in recent years with the rise of budget gym operators presenting a challenge to the more long established key players. Mintel<sup>19</sup> indicate that the market has expanded significantly with a shift towards budget operators bringing possibilities for more convenient access and affordability for the customers. Budget operator Pure Gym has expanded to become the market leader both in terms of number of members (520,000) and clubs (99), more than doubling the size of its estate between 2012 and 2013. At the same time Pure Gym's main competitor The Gym has also greatly increased its membership (350,000) and number of clubs (63). David Lloyd Leisure and Virgin Active Group remain the largest 'full service' health club chains with 440,000 and 400,000 members respectively. Mintel have predicted 6% growth for the private sector health and fitness market up to 2018, to reach a value of £2.8 billion by 2020.
- 2.29 In terms of other leisure activities, the cinema sector has struggled over the last five years with falling admissions. Admissions of 158 million in 2014 represented a decline of 8% from that of 2011<sup>20</sup>. With returning consumer confidence and a series of high profile releases scheduled for the coming years, it is expected that the sector will return to growth in 2015. Admissions for 2015 are estimated to be 173 million, forecast to rise to 175 million in 2020.<sup>21</sup> Mintel<sup>22</sup> identifies that the eating out market has grown by around 9% between 2013 and 2015, to an estimated £34 billion. The sector is recognised as exhibiting resilient performance during the economic downturn as a key area for discretionary spending.

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<sup>17</sup> 'Leisure Centres and Swimming Pools', Mintel, September 2015

<sup>18</sup> 'State of the UK Fitness Industry', The Leisure Database Company, June 2013

<sup>19</sup> 'Health and Fitness Clubs', Mintel, July 2013

<sup>20</sup> 'Cinemas', Mintel, November 2014

<sup>21</sup> 'Cinemas', Mintel, November 2015

<sup>22</sup> 'Eating Out Review', Mintel, June 2015



## Office, Residential and Community Use Sector

- 2.30 The Town and Country Planning (General Permitted Development) (England) Order 2015 has resulted in the relaxation of permitted development rights related to the change of use of buildings and land. Amongst other rights, the 2015 Order permits the change of uses of a building and any land within its curtilage from office use to residential use subject to a number of criteria. It is the Government's intention that through the relaxation of permitted development rights in this regard that vacant, underused or failing employment premises will be put back to viable use for residential purposes. Notwithstanding the positive benefits of this change, some concerns have been raised that the changes may result in a downturn in office stock.
- 2.31 As a result of the trends in retailing, with many retailers choosing to rationalise their physical store portfolios by reducing their number of stores and abandoning their representations in weaker centres, there are opportunities for a wider mix of uses to be developed in town centres in order to contribute towards their vitality and viability. Through the introduction of additional residential and office uses in town centres, there is the opportunity to increase a town centre's walk-in catchment by both residents and workers, thus providing more consumers and more vibrancy to the town centre.
- 2.32 There is a growing need for local planning authorities to think 'beyond retail' when planning for town centres in order to maintain healthy centres within the current retail climate. Such a focus reflects the recommendations provided by the 'Beyond Retail: Redefining the shape and purpose of town centres' report prepared by the Distressed Town Centre Property Task Force, published in November 2013. The report provided a series of recommendations aimed at improving the vibrancy of town centres by providing a focus beyond retail. It has been recognised furthermore in recent years that in order for town centres to remain vital and viable, it is important to increase dwell time and create town centres that are viewed as meeting places for communities. This trend sits alongside the growing cafe culture, with food and drink uses attracting customers to centres as well as physical purchases. An improved mix and variety of uses in the town centre can also assist in creating a more vibrant night time economy.

## Markets

- 2.33 In recent years there has been an increased focus on the importance of markets in contributing to the health of town centres. The Portas Review (2011) recommended the support for markets as a key element of the High Street, including recommendations for a 'National Market Day' and reducing regulations relating to market trading. The Government's Response 'High Streets at the Heart of our



Communities’ (March 2012) accepted the recommendations made by Portas in relation to the importance of markets. At the same time, the NPPF specifically refers to markets as part of ensuring the vitality of town centres and states that local planning authorities should retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive. Subsequently in July 2013, the Government published ‘The Future of High Streets’ which provided details on progress since the Portas Review, which advised that the key to success and securing the long term future of the High Street is for communities to strike the right balance between traditional retail and other uses for high street property including markets, pop up shops, housing, community and social uses, and entertainment and cultural activities. The Government backed and helped to fund the Love Your Local Market campaign, run by the National Association of British Market Authorities with a view to:

- Encouraging people to take the first step on the entrepreneurial ladder;
- Support local growth by increasing footfall to local markets and town centres; and
- Encourage the local community to make the most of their local market and town centre.

2.34 As a result of the increased focus on the role of markets in contributing to the strength of town centres, there has been a trend towards local authorities considering the role that the markets within their local authority area play and consideration of the means to improve and capitalise on the contribution markets can make towards the health of centres. There has been a trend towards greater diversification of markets, along with traditional markets, specialist markets are developing, for example, craft or food markets, in addition to temporary markets, such as farmers’ markets.

### Out of Centre Development

2.35 Despite the ‘town centre first’ planning policies which have been adopted by recent Governments, research undertaken by Verdict<sup>23</sup> indicates that between 2007 and 2012, the amount of out of centre floorspace increased by 23%. In more recent years, Colliers<sup>24</sup> note that there has been a continually changing demand in the out of town retail sector. High profile administrations including MFI (November 2008), Comet (November 2012) and JJB Sports (September 2014), alongside the failure of other retailers with a significant out-of-town presence, created significant voids in the landscape of

<sup>23</sup> ‘UK Out of Town Retailing’, Verdict Datamonitor, April 2012

<sup>24</sup> ‘Midsummer Retail Report: New Frontiers’, Colliers, October 2015



retail parks. The Local Data Company reported the national average vacancy rate in out of centre retail warehouses in 2015 to be 6.6%, a decrease of around 1.4% from 2014. The flooding of the market with un-let space acted to reduce rents although the vacancies created by recent administrations have now largely been absorbed by new interest from discount retailers such as B&M, Home Bargains and Dunelm alongside familiar high street retailer such as Mothercare, Next Home and TK Maxx<sup>25</sup> with vacancy rates improving to 6.6% reflecting this.<sup>26</sup> The changing retailer mix at out of town destinations, buoyed by wider planning permissions, has provided a more diverse offering within the sector.

2.36 Looking forward, Colliers<sup>26</sup> indicates that future out of centre development will fall into two main categories. The first relates to the adaptation and refurbishment of existing stock. Colliers states that between 80% and 90% of the retail warehousing stock that the UK requires to service demand has already been built. Accordingly, most development activity will see landlords seeking to improve the suitability of their property for the latest retailers and also make improvements to improve dwell time on retail parks (for example, by seeking to introduce coffee shops and restaurants). Older schemes may be remodelled or redeveloped to meet current needs. According to Colliers, the other main strand of out of centre retail development relates to opportunities in areas where there has not been a great deal of retail warehousing in the past.

## Shopping Centre Development

2.37 Shopping centre retail development has been at a virtual standstill in recent years, but there are a few signs that a corner may about to be turned. Cushman & Wakefield<sup>27</sup> reports that development activity was restrained in 2014, with an estimated 124,300 sq.m of shopping centre space added over the course of the year, which is less than half the total added in 2013. Cushman & Wakefield indicated that the shopping centre development pipeline for 2015 totalled 154,618 sq.m, including the 51,100 sq.m Westfield Bradford and the 27,870 sq.m Friars Walk in Newport, both of which opened in the second half of 2015. It is anticipated that 2016 will see the delivery of several shopping extensions, including Birmingham's Grand Central centre, which when complete, will nearly double its size to 53,000 sq.m. Cushman & Wakefield forecasts that the shopping centre pipeline will pick up significantly from 2017 as the economic recovery and the greater availability of finance help to bring forward new schemes and extensions that already have planning permission.

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<sup>25</sup> 'Midsummer Retail Report 2015: New Frontiers', Colliers, July 2015

<sup>26</sup> 'Vacancy Report Summary H1 2015', Local Data Company, September 2015

<sup>27</sup> 'Marketbeat Shopping Centre Development Report', Cushman & Wakefield, September 2014





- 2.38 Notwithstanding this, the viability of shopping centre retail development remains, for the moment, challenging no matter how well designed or well located a scheme is. There are three types of scheme which have a better chance of success in the current economic climate. The first of these will be where a town has a large, affluent catchment and an acknowledged undersupply of retail floorspace in both town centre and out-of-town locations. The second scenario relates to schemes which were very close to happening before the recession took hold, which may be revised to better meet the current needs of the market. Barnsley, Macclesfield, Bradford and Lichfield are examples of such schemes. We note that the Macclesfield Silk Street scheme is no longer progressing and the Council instead are moving forward to secure a new leisure-led scheme to spearhead the regeneration of Macclesfield town centre on part of the same site. Ask Real Estate having been selected by the Council to deliver a leisure-led scheme on the Churchill Way car park. The third opportunity relates to development where the key anchor is a foodstore and, as a result, demand has remained strong. However, due to changes in the food retail sector and the trading model of the 'main four' operators, opportunities in this latter category are more difficult to come by.
- 2.39 In addition to retail, food and drink is becoming an integral part of many shopping centres. In particular, consumers are increasingly travelling to larger centres to use the leisure facilities and experience more of a complete 'day out'. In the past, it was relatively typical for non-retail uses to occupy less than 10% of shopping centre floorspace, but this has increased in recent schemes, including Westfield in Stratford where catering and leisure units occupy over 20% of the space.

### Growth in E-tailing ('E-commerce')

- 2.40 Many consumers who previously shopped in town centres and at retail parks are now increasingly using the internet to make purchases. Experian<sup>28</sup> identifies that internet sales' share of total retail sales stood at 11.6% in mid-2015 compared to just 4.7% at June 2008. The value of internet sales in 2015 is estimated at £42.1 billion.
- 2.41 The rise in recent years of e-commerce has had a major impact upon retailers, developers and investors alike, with the top 10 e-retailers in 2012 including Amazon UK (16%), Shop Direct (5%) and Next (4%)<sup>29</sup>. As access to the internet/online shopping continues to grow through digital televisions, tablets and mobile phones, proportionally less money is anticipated to be spent on the high street or at retail parks.

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<sup>28</sup> Experian Retail Planner Briefing Note 13', October 2015

<sup>29</sup> Ibid



- 2.42 The growth in internet as a sales medium has been enabled by the increase in access to the internet by households, which the Office for National Statistics<sup>30</sup> reports increased from 57% at 2006 to 86% in 2015. A total of 22.5 million households in Great Britain now have internet access. The proportion of households with access to the internet is expected to increase further over the coming years, alongside the growth in mobile phone and tablets with access via the new 4G spectrum. The ONS states that access to the internet using a mobile phone increased by nearly a third between 2011 and 2015, from 36% to 66%. This has supported the strong growth recorded, together with improved consumer confidence in the security of online payment, deliveries and heavy demand for expensive electrical products available online. The option of using the internet to 'click and collect' in-store at a dedicated counter is also increasing in popularity (particularly within stores with large sales areas), with the service now accounting for over 50% of John Lewis internet orders<sup>31</sup>.
- 2.43 As a consequence of such changes, the Office for National Statistics<sup>32</sup> indicates that the number of people using the internet to purchase goods continues to rise, with 74% of the UK population purchasing products over the internet in 2013, compared to 53% in 2008. The most popular online purchases were clothes/sports goods, with 49% of all adults in the UK purchasing some items via the internet. In addition, 42% of the population bought household goods online and 23% bought food or groceries.
- 2.44 Online spending continues to be the key growth opportunity for national and independent retailers, accounting for increasing proportions of total sales. For example, online sales at Next in 2009 accounted for 44% of operating profit and 32% of group sales. With regard to foodstore operators, food accounts for approximately 20.5% of all internet sales<sup>33</sup>, and by 2019 online sales will account for 8.3% of all sales through grocery retailers<sup>34</sup>. Verdict's research identifies that major retailers have seen their business grow as online shopping has increased and, as a result, the likes of Asda and Sainsbury's have improved their geographical coverage and capacity. In particular, online sales at Tesco currently exceed £2 billion, with Mintel noting that the operator has a reported 39.1% online grocery market share, which is double that of the next leading competitor of Sainsbury's who have a 17.5% market share.
- 2.45 It is evident that internet shopping as a whole is having an impact upon traditional high streets, in light of increased competition and lower prices. Consequently, there is a possibility that online

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<sup>30</sup> 'Statistical Bulletin: Internet Access Households and Individuals', Office for National Statistics, August 2015

<sup>31</sup> 'Click and Collect', Mintel, September 2014

<sup>32</sup> Ibid

<sup>33</sup> 'Shop Expansion and the Internet', CBRE, May 2012

<sup>34</sup> 'Online Grocery Retailing', Mintel, March 2015



retailing will continue to put pressure on retail rental growth over the next five to ten years. In particular, it appears likely that smaller town centres (which may be less able to offer a complete 'shopping experience') are likely to be the subject of greater ongoing impacts from online retailing.

2.46 Despite some variance in the estimated future growth of online shopping, it is clear that e-tailing cannot entirely replace the 'shopping experience' as shopping is a social activity. In this regard, retailers are already adopting innovative approaches to encourage people to visit their store through 'try before you buy' concepts. For example, Ellis Brigham has installed Vertical Chill indoor ice climbing walls at five stores for customers to try equipment and to interact with products. For successful retailers, online selling provides an additional route to the market. Online retailers benefit from demand generated through physical channels whilst high street outlets can benefit from reaching a wider customer base through the internet. Those retailers who are likely to have a healthy future are those who are able to combine a strong high street presence with an interesting and closely related e-tail offer.

## Summary

2.47 In summary, it is evident that the retail market has undergone significant changes in recent years. Wider economic conditions facing the UK have led to a marked decline in some previously healthy town centres, as well as other traditional retail formats. This has principally been caused by a decline in available expenditure, due to suppressed disposable incomes and an increase in the proportion of expenditure committed online.

2.48 However, 2015 has seen an increase in consumer confidence, mainly driven by an improved economic outlook as a result of falling unemployment and the availability of credit. As a consequence, it is anticipated that expenditure growth rates will increase moving forward. Whilst such forecasts remain below those achieved before the recession, they are significantly higher than those recorded over the last three or four years. The growth in online sales has also impinged on the need for new tangible floorspace. However, increased expenditure growth allied with the retail industry embracement of innovative multi-channelling retail strategies, provides an opportunity for town centres to widen their audience in the future and retain ground. To deliver on this, it will be critical that town centres are flexible enough to both embrace and complement digital solutions, whilst also providing appropriate and well managed retail floorspace that can showcase products and services. The ability for centres to 'move with the times' and utilise modern technology, whilst providing a materially different experience to online shopping, (partly through the inclusion of leisure and food and drink offers), will help ensure their ongoing vitality and viability.



## 3.0 Planning Policy Context

### Introduction

3.01 Given that this Study seeks to provide important evidence to assist in the production of future retail planning policy, it is important to review existing national planning policy of pertinence to retail and town centre matters to explore the context for the Study and how it may impact upon the production of the Local Plan. We also summarise Cheshire East’s planning policy, insofar as it is relevant to retail and leisure matters, in order to consider the Council’s strategy in respect of its centres.

### National Planning Policy Framework

3.02 The National Planning Policy Framework was published in March 2012. The NPPF replaces all former Planning Policy Statements, Planning Policy Guidance Notes and some Circulars in a single consolidated document.

3.03 The main theme of the NPPF is that there should be ‘a presumption in favour of sustainable development’. In terms of plan-making, it is stated that local planning authorities should positively seek opportunities to meet the development needs of their area, with an emphasis on Local Plans having sufficient flexibility to adapt to rapid change.

3.04 In terms of economic development, it is set out within the NPPF’s core principles that planning should proactively drive and support economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made to objectively identify and then meet the business and other development needs of an area, with positive responses made to wider opportunities for growth.

3.05 The NPPF stresses the Government’s commitment to securing economic growth in order to create jobs and prosperity, with paragraph 17 stating that the planning system should do everything it can to support sustainable economic growth.

3.06 Paragraph 19 indicates that planning should operate to encourage and not to act as an impediment to sustainable growth, and that significant weight should be placed on the need to support economic growth through the planning system. The NPPF seeks to ensure that local planning authorities plan



proactively to meet the development needs of business and support an economy fit for the 21<sup>st</sup> century.

3.07 The NPPF still recognises the need to promote the vitality and viability of towns and cities through the promotion of competition and growth management during the Plan period. Paragraph 23 of the NPPF provides guidance for local planning authorities in drawing up Local Plans, it indicates that they should:

- recognise town centres as the heart of their communities and pursue policies to support their vitality and viability;
- define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centre. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;
- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to town centre;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

3.08 Paragraph 23 also indicates that needs for retail, leisure, office and other main town centre uses should be met in full and should not be compromised by limited site availability.



- 3.09 Paragraph 24 requires local planning authorities to adopt a sequential approach to the consideration of planning applications for main town centre uses that are not in an existing centre or in accordance with an up-to-date Local Plan. The following paragraph 25 indicates that that the sequential approach should not apply to applications for small scale rural offices or other small scale development.
- 3.10 Paragraph 26 indicates that local planning authorities should require an impact assessment for retail, leisure and office development outside of town centres which are not in accordance with an up-to-date Local Plan and if the development is over a proportionate, locally set threshold. Where there is no locally defined threshold, the default threshold will be 2,500 sq.m.
- 3.11 Paragraph 27 indicates that where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on the vitality and viability of a town centre or on existing, planned, committed investment in a Centre it should be refused.
- 3.12 The NPPF also recognises that retail activity should still, where possible, be focused in existing town centres. Retail and leisure proposals which cannot be accommodated in or adjacent to the town centre will have to satisfy a dual impact test and the sequential test.

### **Ensuring the Vitality of Town Centres Planning Practice Guidance**

- 3.13 Ensuring the Vitality of Town Centres National Planning Practice Guidance was published in March 2014 and replaces the previous Planning for Town Centres Practice Guidance. It provides a more concise summation of how retail and main town centre planning policy is to be applied in practice. However, the objectives of the Practice Guidance remain comparable with those of its predecessor, with there being a stated requirement for local planning authorities to plan positively and support town centres to generate local employment, promote competition within and between town centres, and create attractive and diverse places for users.
- 3.14 The Practice Guidance requires local planning authorities to fully assess and plan to meet needs for main town centre uses through the adoption of a 'Town Centre first' approach. Paragraphs 002 and 003 confirm that this should be delivered through a positive vision or strategy which is communicated through the development plan. The strategy should be facilitated through active engagement with the private sector and other interested organisations (including Portas Pilot organisations, Town Teams and so on). Any strategy should be based on evidence which clarifies the current state of town centres and opportunities to meet development needs and support Centres' vitality and viability.



3.15 Such strategies should seek to address the following matters:

- the appropriate and realistic role, function and hierarchy of town centres in the area over the Plan period, including an audit of the vitality and viability of existing town centres and their ability to accommodate new development;
- consideration of the vision for the future of each town centre and the most appropriate mix of uses;
- the assessment of the scale of development that a town centre can accommodate;
- the timeframe for new retail floorspace to be delivered;
- what other complementary strategies are necessary or appropriate to enhance the town centre to deliver the vision in the future; and
- the consideration of the enhancement of car parking provision including charging and enforcement mechanisms.

3.16 Paragraph 005 of the Practice Guidance identifies a series of key indicators which are of relevance in assessing the health of a Centre over time. Paragraph 005 goes on to state that not all successful town centre regeneration initiatives have been retail led or focused on substantial new development, but have instead involved improvements such as renewed public realm, parking, and accessibility and other partnership mechanisms. Paragraph 007 identifies the importance of planning for tourism as an important component of any overall vision and indicates that local planning authorities should consider specific tourism needs (including locational or operational requirements) and opportunities for tourism to support local services, vibrancy and the built environment.

3.17 Paragraph 009 reaffirms the town centre first policy in the form of the sequential test, which requires local planning authorities to undertake an assessment of candidate sites' availability, suitability and viability when preparing their Local Plan. Such an assessment should also consider the scale of future needs and the type of land needed to accommodate main town centre uses.

## **Housing and Economic Development Needs Assessment Planning Practice Guidance**

3.18 The Government has issued further Practice Guidance to provide specific instruction in respect of the undertaking of needs assessments (including those for main town centre uses). Paragraph 032 of the Practice Guidance states that plan makers should consider forecasts of quantitative and qualitative need based on a range of data which is current and robust. Local planning authorities will need to



take account of business cycles and make use of forecasts and surveys to assess employment land requirements.

## Relaxation of Permitted Development Rights

- 3.19 At a national level, recent changes to the Town and Country Planning (General Permitted Development) Order 1995 have sought to support the diversification and vitality of town centres. The changes follow the Portas Report recommendation to make it easier to change surplus space in order to provide for the effective re-use of buildings.
- 3.20 The Town and Country Planning (General Permitted Development) (Amendment) (England) Order 2013 came into force on 30 May 2013. It provides, for a period of three years, for the change of use of Use Class B1 offices to residential without the need for planning permission. The Order also provides for the temporary change of use (for up to two years) of uses falling within Use Classes A1, A2, A3, A4, A5, B1, D1 and D2 to uses falling within Classes A1, A2, A3 and B1, subject to the use relating to no more than 150 sq.m of floorspace and subject to the temporary provision not previously being relied upon.
- 3.21 From 6 April 2014, permitted development rights have been further extended to provide for certain additional changes of use without the need for planning permission. The changes come into force under the Town and Country Planning (General Permitted Development) (Amendment and Consequential Provisions) (England) Order 2014 and result in the introduction of two new classifications that affect commercial premises.
- 3.22 The first provides for the change of use of premises and land from Use Class A1 to use as a 'deposit taker' (effectively comprising banks, building societies, credit unions and friendly societies). The second provides for the change of use from Use Classes A1 and A2 to residential. There are certain restrictions as to where and when the rights can be exercised.
- 3.23 Subsequent to the above, the Town and Country Planning (General Permitted Development) (England) Order 2015 came into force on 15 April 2015. The Order acts, *inter alia*, to consolidate and replace the Town and Country Planning (General Permitted Development Order 1995) and to provide additional permitted development rights. It should be noted that conditions and restrictions apply, and that prior approval is generally required in order to implement development. The new rights include:





- a permitted change of use from amusement arcade/casino (sui generis use) to residential use (Class C3);
- a permitted change from retail (Class A1) to financial services (Class A2);
- a permitted change from retail/financial services (Class A1/A2) to food and drink (Class A3);
- a permitted change from retail/financial services (Class A1/A2), betting offices, pay day loan shops and casinos to assembly and leisure uses (Class D2);
- extension of the temporary permitted development rights introduced in May 2013 for extensions to shops, offices, industrial and warehouse buildings to support business expansion and the economy so they apply permanently;
- the erection of click and collect facilities within the curtilage of a retail shop; and
- modifications to the size of an existing retail shop loading bay.

3.24 The Town and Country Planning (General Permitted Development) (England) (Amendment) Order 2016 comes into force on 6 April 2016. The amendment makes permanent the temporary right to change a building used as an office into residential use.

3.25 The intended consequence of such measures is to secure the redevelopment and reuse of premises. However, it is considered that the relaxation in respect of changes of use to residential are more likely to encourage re-use of offices in larger metropolitan areas which may benefit from a greater supply of office buildings and where previously there may have been some reluctance to grant planning permission for residential uses. Notwithstanding this, the changes set out above are of relevance to Cheshire East and we return to them in the concluding section of this report.

## Development Plan

3.26 The adopted development plan for CE currently comprises the saved policies from the following Local Plans:

- Congleton Borough Local Plan First Review (adopted January 2005);
- Borough of Crewe and Nantwich Replacement Local Plan (adopted February 2005);
- Macclesfield Borough Local Plan (adopted January 2004);
- The Cheshire Replacement Minerals Local Plan (1999); and
- The Cheshire Replacement Waste Local Plan (2007).



3.27 The retail and town centre policies contained within the Congleton, Crewe and Nantwich and Macclesfield Local Plans were adopted at the time that PPG6 provided national guidance in relation to planning for town centres and retail developments. We do not set out in detail the retail and town Centre policies provided by the saved policies of the former Local Plans, however the weight to be given to relevant policies in existing plans will depend on their degree of consistency with this framework (the closer the policies in the plan to the policies in the Framework, the greater the weight that may be given). It follows that considerable weight should be given to the policies of the NPPF when planning for retail and town centre development in the CE area, as the adopted policies are out-of-date and largely immaterial.

## Emerging Development Plan

### Cheshire East Local Plan Strategy Submission Version

3.28 The Local Plan Strategy Submission Version was submitted to the Secretary of State for Communities and Local Government in May 2014. In July 2014, the Local Plan examination hearing sessions commenced, however, subsequently the examination was suspended in order to allow CE Council to prepare additional evidence to support the Local Plan. In October 2015, the Local Plan Strategy hearing sessions were resumed. Following the resumed hearing sessions, in December 2015, the Inspector issued Further Interim Views and proposed changes to the Local Plan Strategy are now being consulted upon. Once adopted, the CE Local Plan will set out the overall vision and planning strategy for development in the CE borough. It will also identify strategic site and strategic locations that will accommodate most of the Borough's housing and employment development needs.

3.29 Draft Policy EG5 of the Local Plan relates to town centre development. The policy sets out the hierarchy of Centres for retail purposes as follows:

- Principal Towns (Crewe and Macclesfield), which will be the main focus for high quality comparison retail, supported by a range of retail, service, leisure, tourism, office and other town centre-type uses, including residential.
- Key Service Centres (Alsager, Congleton, Handforth, Knutsford, Middlewich, Nantwich, Poynton, Sandbach and Wilmslow), where there will be a focus on the improvement of the convenience and comparison retail offer, with the potential to strengthen and enhance the retail offer, where suitable, as well as diversification to other uses such as offices, services, leisure, cultural and residential, as appropriate.



- Local Service Centres (Alderley Edge, Audlem, Bollington, Bunbury, Chelford, Disley, Goostrey, Haslington, Holmes Chapel, Mobberley, Prestbury, Shavington and Wrenbury), where there will be a focus on convenience and comparison retailing of an appropriate scale, plus opportunities for service uses and small-scale independent retailing of a function and character that meets the needs of the local community.
- Other settlements and rural areas, where there will be a focus on providing retail and services of appropriate scale and nature to meet the needs of the local community. In the interests of sustainable development and the maintenance of local services, growth and investment in the other settlements, this should be confined to proportionate development at a scale commensurate with the function and character of the settlement and confined to locations well related to the existing built up extent of the settlement. It may be appropriate for local needs to be met with larger settlements, dependent on location.

3.30 Draft Policy EG5 goes on to explain that town centres will be promoted as the primary location for main town centre uses, including retail, leisure, cultural and office development. It states that the use of upper floors in town and other centres for non-retail uses will be supported, where appropriate. The policy specifically refers to markets, the retention and enhancement of which will be encouraged. It is stated that small parades of shops will be protected where they are of importance to the day-to-day needs of local communities. The policy seeks to support proposals in the Principal Towns and Key Service Centres that help develop the evening and night-time economy provided any negative impacts have been addressed. In accordance with paragraph 24 of the NPPF, Draft Policy EG 5 also requires that proposals for main town centre uses should be located within the designated town centre or on other allocated sites, and that where there are no suitable sites available, edge-of-centre locations must be considered prior to out-of-centre locations. Draft Policy EG 5 also states that edge and out-of-centre proposals will be considered whether there is no significant adverse impact on the vitality and viability of the surrounding town centres; and it is demonstrated that the tests outlined in current Government guidance can be satisfied.

3.31 Draft Policy SC 1 of the Local Plan relates to leisure and recreation facilities. The policy states that the Council will support and promote the provision of better leisure, community and recreation facilities, where there is a need for such facilities, the proposed facilities are of a type and scale appropriate to the size of the settlement, are accessible and support the objectives of the Local Plan Strategy. The policy seeks to direct leisure facilities which will serve the Borough as a whole and facilities that attract large numbers of people, to be located, where possible, within or adjoining Crewe or Macclesfield town centres. The policy advises that leisure facilities that will serve Key Service Centres should be



located in or adjacent to their town centre or highly accessible locations and that where facilities are intended to service the everyday needs of a community or neighbourhood, they should be located in or adjacent to the Centres of Local Service Centres or other settlements.

3.32 Draft Strategic Locations Policy SL1 relates to Central Crewe. The policy seeks to support the regeneration and development of Central Crewe during the Local Plan period through, amongst other targets:

- provision of comparison retail and leisure, including at least 1 anchor store and a large scale leisure use with the Town Centre Boundary;
- support for 24 hour town centre uses including restaurants and cafes;
- support for multi-use facilities that drive footfall generation and introduce a diversity of uses within the town centre;
- appropriately sited, rationalised and improved car parking to support town centre uses and the local economy;
- a bus interchange with covered areas and public conveniences;
- promotion of the market with a unique theme;
- a focus on civic functions;
- up to 5,000 sq.m of retail on Mill Street and the creation of pedestrian and cycle links to the railway station and the town centre; and
- potential leisure development and expansion of the existing sports and leisure hub at Crewe Alexandra Football Club on Gresty Road.

3.33 Draft Strategic Locations Policy SL4 relates to Central Macclesfield. The policy seeks to support the regeneration and development of Central Macclesfield over the Local Plan period. The policy states that new and improved retail and leisure developments that are in-centre and improve the quality of the shopping experience will be supported. The policy also seeks to support an enhanced cultural offer, new restaurants and cafes to increase footfall throughout the evening and local markets. The policy specifically seeks to strengthen the retail and leisure sectors in Central Macclesfield.

3.34 The Local Plan Strategy also provides details on strategic housing allocations across the local authority area. For several of these sites, the Local Plan identifies that retail provision will be delivered to meet local needs. The full list of new local centres is still being finalised as part of the Local Plan process.



3.35 In addition, as part of Site CS8 – South Macclesfield Development Area, it is stated that a new Class A1 superstore with a net sales area of up to 5,000 sq.m, with the majority of floorspace to be dedicated for convenience goods.

## Other Relevant Documents

### Crewe Town Centre: Regeneration Delivery Framework for Growth (2015)

3.36 The Crewe Town Centre Regeneration Delivery Framework for Growth seeks to set out a framework to realise a transformational future for Crewe. The framework has three primary purposes, namely to:

- Determine an Action Plan to support the economic prosperity of Crewe town centre – defining specific actions for key partners;
- Establish a framework for the potential acquisition an invention of CE Council in respect of a number of priority sites; and
- Inform the emerging planning policy of Crewe town centre to feed into the Local Plan process.

3.37 The framework recognises that Crewe town centre has a number of constraints, including perceptions of the centre, dominance of car parking at key gateways, lack of connectivity within the centre, presence of vacant and under-used buildings and a challenging retail and leisure market. The framework seeks to establish a programme of actions to assist in overcoming these constraints. Four priority themes are identified within the framework in order to assist the regeneration of Crewe, namely, the consideration of a range of opportunity sites, improving modes of movement into and within the town centre, improvements to the public realm and increasing the vibrancy of the town centre.

3.38 Overall, the vision of the Framework is to make the most of development projects planned for Crewe town centre, including the Lifestyle Centre and the University Technical College, as well as the proposed HS2 North-West Gateway Hub Station. Also to recognise both the town’s growing population and heritage and to re-establish Crewe town centre as the vibrant and attractive “hub” for South Cheshire, offering a strong range of retail, leisure, employment and residential opportunities serving local businesses, shoppers, residents, students, visitors and rail passengers.



## 4.0 Original Market Research

### Introduction

- 4.01 The undertaking of original market research enables in-depth analysis at a local level and allows the evaluation of the trade draw of particular town centres. The use of specifically commissioned and tailored survey research is fundamental to identifying the likely capacity for future retail floorspace across the Study Area.
- 4.02 A key requirement of this Study is the detailed understanding of shopping patterns in terms of the use of the defined centres within the CE administrative area and surrounding retail Centres, and the identification of the catchment area of CE. WYG commissioned specialist market researchers NEMS to undertake a comprehensive household telephone survey to identify consumers' habits and preferences in the Study Area.
- 4.03 We set out the general methodological approach to the surveys and the key results below.

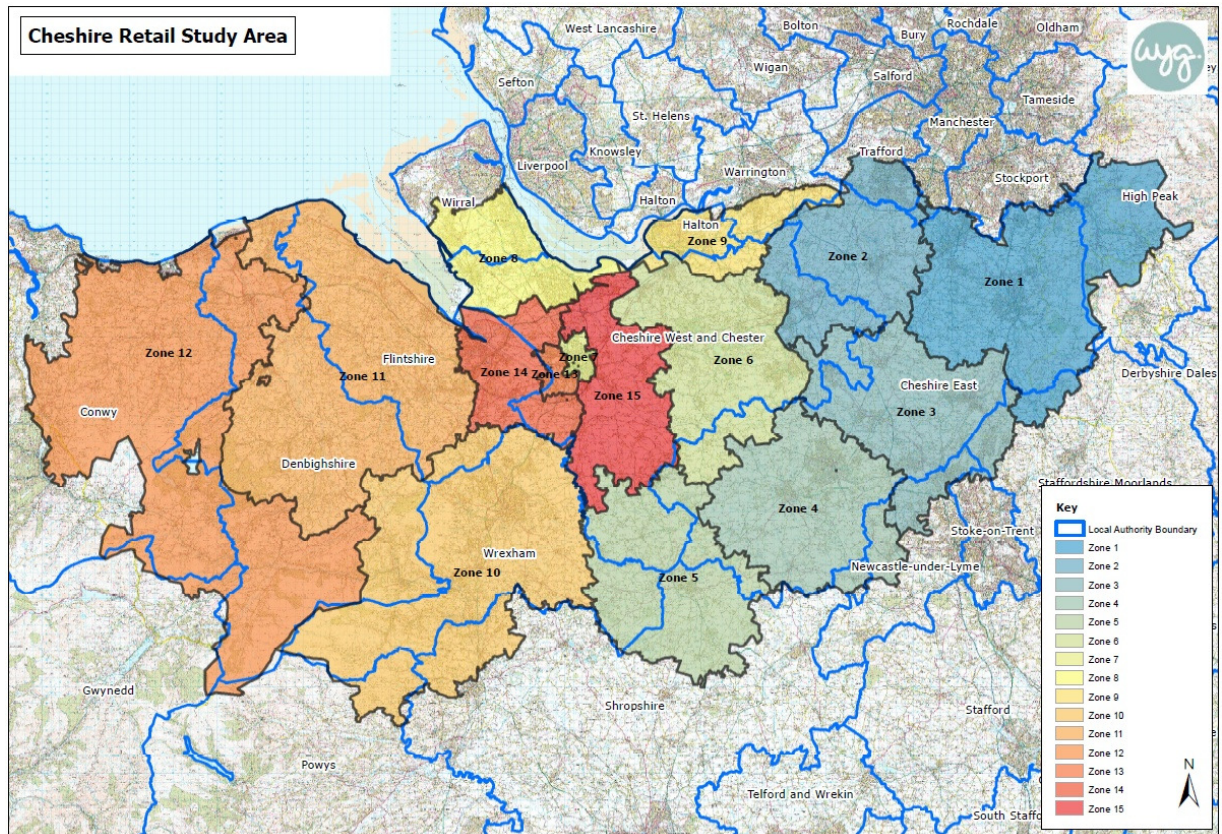
### Household Survey

- 4.04 Across September 2015 and February 2016, a survey of 2,100 households was undertaken across the defined Study Area which comprises 15 separate zones and stretches beyond the CE administrative boundaries to incorporate adjacent local authority areas, including in CWAC, Conwy, Denbighshire, Flintshire, Halton, High Peak, Newcastle-under-Lyme, Shropshire, Trafford, Wirral and Wrexham. Residents in these outlying areas also, to some extent, look to facilities within CE to meet some retail and leisure needs. Beyond these Zones, residents are less likely to look to facilities within CE for their convenience or comparison shopping requirements due to the existing alternative retail provision within those respective authority boundaries.
- 4.05 The CE administrative area broadly equates to Study Area Zones 1, 2, 3 and 4, as well as parts of Zones 5 and 6. Macclesfield town centre is located within Zone 1 and Crewe town centre is located within Zone 4. Zone 1 contains Handforth, Poynton and Wilmslow. Zone 2 contains Knutsford. Zone 3 contains Alsager, Congleton, Middlewich and Sandbach. Zone 4 contains Nantwich.



4.06 Figure 4.1 below and Appendix 1 illustrates the Study Area. Table 4.1 sets out the postcode sectors which comprise each zone with the Study Area. The questions and full tabulation of results from the household survey are provided at Appendix 2.

**Figure 4.1: Study Area**





**Table 4.1: Postcode Sectors by Survey Zone**

Survey Zone	Postcode Sectors
Zone 1	SK9 1, SK9 2, SK9 3, SK9 4, SK9 5, SK9 6, SK9 7, SK10 1, SK10 2, SK10 3, SK10 4, SK10 5, SK11 0, SK11 6, SK11 7, SK11 8, SK11 9, SK12 1, SK12 2, SK22 1, SK22 2, SK22 3, SK22 4, SK 23 0, SK23 6, SK23 7, SK 23 9
Zone 2	WA14 1, WA14 2, WA14 3, WA14 4, WA14 5, WA15 0, WA15 6, WA15 7, WA15 8, WA15 9, WA16 0, WA16 6, WA16 7, WA16 8, WA16 9, CW9 5, CW9 6, CW9 7, CW9 8
Zone 3	CW4 7, CW4 8, CW10 0, CW10 9, CW11 1, CW11 2, CW11 3, CW11 4, CW12 1, CW12 2, CW12 3, CW12 4, ST7 1, ST7 2, ST7 3, ST7 4, ST7 8, ST8 6, ST8 7, ST8 6, ST8 7
Zone 4	CW1 2, CW1 3, CW1 4, CW1 5, CW1 6, CW2 5, CW2 6, CW2 7, CW2 8, CW3 0, CW3 9, CW5 5, CW5 6, CW5 7, CW5 8
Zone 5	SY13 1, SY13 2, SY13 3, SY13 4, SY14 7, SY14 8
Zone 6	CW 6 0, CW6 9, CW 7 1, CW7 2, CW7 3, CW7 4, CW8 1, CW8 2, CW8 3, CW8 4, CW6 0, WA6 6, WA6 7, WA6 8, WA6 9
Zone 7	CH1 1, CH1 2, CH1 3, CH2 1, CH2 2, CH2 3, CH3 5
Zone 8	CH60 0, CH60 1, CH60 2, CH60 3, CH60 4, CH60 5, CH60 6, CH60 7, CH60 8, CH60 9, CH61 0, CH61 1, CH61 2, CH61 3, CH61 4, CH61 5, CH61 6, CH61 7, CH61 8, CH61 9, CH62 0, CH62 1, CH62 2, CH62 3, CH62 4, CH62 5, CH62 6, CH62 7, CH62 8, CH62 9, CH63 0, CH63 1, CH63 2, CH63 3, CH63 4, CH63 5, CH63 6, CH63 7, CH63 8, CH63 9, CH64 0, CH64 1, CH64 2, CH64 3, CH64 4, CH64 5, CH64 6, CH64 7, CH64 8, CH64 9, CH65 0, CH65 1, CH65 2, CH65 3, CH65 4, CH65 5, CH65 6, CH65 7, CH65 7, CH65 8, CH65 9, CH66 0, CH66 1, CH66 2, CH66 3, CH66 4, CH66 5, CH66 6, CH66 7, CH66 7, CH66 8, CH66 9, CH42 1, CH42 2, CH42 4
Zone 9	WA4 3, WA4 4, WA4 5, WA7 1, WA7 2, WA7 3, WA7 4, WA7 5, WA7 6, WA13 0
Zone 10	LL11 1, LL11 2, LL11 3, LL11 4, LL11 5, LL11 6, LL12 0, LL12 7, LL12 8, LL12 9, LL13 0, LL13 7, LL13 8, LL13 9, LL14 1, LL14 2, LL14 3, LL14 4, LL14 5, LL14 6, SY10 7, SY11 3, LL20 7, LL20 8
Zone 11	CH6 5, CH6 6, CH7 1, CH7 2, CH7 3, CH7 4, CH7 5, CH7 6, CH8 7, CH8 8, CH8 9, LL15 1, LL15 2, LL16 3, LL16 4, LL18 6, LL19 7, LL19 8, LL19 9
Zone 12	LL16 5, LL17 0, LL18 2, LL18 4, LL18 5, LL21 0, LL21 9, LL22 8, LL22 9, LL26 0, LL29 6, LL29 8
Zone 13	CH1 4, CH1 5, CH4 7, CH4 8
Zone 14	CH1 6, CH5 1, CH5 2, CH5 3, CH5 4, CH4 0, CH4 9
Zone 15	CH2 4, CH3 6, CH3 7, CH3 8, CH3 9

Shaded rows denote those Zones which lie within/partly within CE

- 4.07 The results of the household survey are utilised to calculate the expenditure claimed by each existing retail facility within the Study Area, a process which is considered in Section 7 of this report.
- 4.08 The household survey is also of assistance in identifying the market share claimed by specific retail destinations, the frequency of visit to purchase various types of goods, the incidence of linked trips, the most popular means of accessing town centre facilities, the use of other town centre facilities, and so on.
- 4.09 In considering the market share of trips secured by specific retail destinations, we have compared the market share of trips attracted to particular destinations in 2010, to the market share attracted by





these same facilities now in order to determine how market shares may have changed over time or responded to new development in or outside the Study Area.

- 4.10 In our view, the consideration of market share of trips (rather than market share of expenditure) is of particular interest as it accurately allows changes in customers' shopping habits to be monitored over time. Accordingly, we consider below the market share of trips to particular retail venues and defined centres to purchase both convenience goods and comparison goods. For convenience goods, respondents have been questioned in respect of where they last visited to undertake 'main' food shopping (which may take the form of a large 'trolley' shop and be undertaken on a weekly basis) and 'top up' food shopping (which will generally be undertaken on a more frequent basis and will involve the purchase of grocery staples, such as milk and bread, and occasional items). For comparison goods, respondents have been questioned in respect of where they last visited to purchase seven separate types of comparison goods.
- 4.11 Our market share analysis utilises the same NEMS household survey data that we rely on to assess quantitative need and our commentary relates to physical retail destinations only (in other words, expenditure which is committed through the internet and other special forms of trading does not form part of our market share analysis that follows).
- 4.12 However, it is possible to identify from 'unfiltered' household survey data<sup>35</sup> those respondents who indicated that their last convenience and comparison goods purchases were undertaken via the internet.
- 4.13 Table 4.2 below sets out the proportion of purchases made online from the survey results, which suggest that there is considerable variation in terms of the types of goods which are purchased online. As we would expect, a greater proportion of main food shopping is undertaken online, when compared to top-up shopping. This is reflective of the fact that online food shopping is more practical and convenient when a larger number of items are purchased.
- 4.14 There are five types of comparison goods where, across the Study Area as a whole, at least one in ten purchases are made online. These categories are: books, CDs and DVDs (for which 43.3% of respondents indicates they made their last purchase online); electrical goods (24.2%); toys, games, bicycles and recreation goods (18.8%); small household goods (10.8%); and clothing and footwear (12.6%). However, it should be noted that there is a reasonably significant degree of variation

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<sup>35</sup> This being the household survey results which have not had special forms of trading responses 'stripped out' from the dataset



between zones in terms of the proportion of purchases committed online. Accordingly, in assessing the future quantitative need for additional retail floorspace, we deduct an allowance for special forms of trading based on the national average figures for convenience and comparison goods identified by Experian in its Retail Planner Briefing Note 13, which was published in October 2015. Importantly, the Experian allowance also takes into consideration the proportion of online sales which are actually sourced from stores' shelves – expenditure which may be able to support additional floorspace in the future. We provide full details of our consideration of special forms of trading in assessing quantitative retail needs at Section 6 of this report.

4.15 Table 4.2 also sets out the proportion of convenience goods purchases which are made online within the Study Area in accordance with the household survey, by considering the mean figure for the proportion of main food and top-up shopping purchases made online. This mean figure of 2.2% is substantially lower than the projected online convenience goods market share estimated by Experian at 2015 of 9.2%. This indicates that a lesser proportion of residents within the Study Area undertake their convenience goods purchases online than would be expected. In terms of comparison goods shopping, we have again calculated the mean proportion of purchases made online across all of the comparison goods categories. The mean online comparison goods market share of 15.5% is also slightly lower than the projected online comparison goods market share estimated by Experian at 2015 of 15.6%. This indicates that the market share of online comparison goods purchases in the Study Area is lower than, although only by a small proportion, to that found nationally.

**Table 4.2a: Proportion of Purchases Made Online by Zone (%)**

Goods Type	1	2	3	4	5	6	7	8
<b>Convenience Goods</b>								
Main Food Shopping	4.4%	3.9%	9.0%	1.4%	2.1%	3.4%	2.0%	3.8%
Top-Up Food Shopping	0.6%	0.0%	0.0%	0.0%	2.5%	0.0%	1.2%	0.0%
<b>Comparison Goods</b>								
Clothing and footwear	20.0%	16.3%	17.5%	14.8%	13.7%	11.6%	5.4%	9.3%
Books, CDs and DVDs	44.2%	39.9%	41.3%	46.6%	38.5%	54.9%	44.7%	44.4%
Small household goods	12.0%	11.9%	13.1%	12.3%	17.1%	20.9%	4.6%	2.8%
Toys, games, bicycles and recreation goods	25.2%	19.1%	27.7%	20.5%	23.5%	26.9%	7.3%	15.4%
Chemist goods	3.6%	6.2%	6.2%	4.5%	1.8%	3.6%	0.8%	5.1%
Electrical goods	24.0%	26.1%	34.7%	20.1%	26.2%	30.3%	17.2%	17.0%
DIY	1.5%	7.7%	1.9%	2.8%	4.8%	7.3%	2.0%	3.7%
Furniture	10.6%	9.0%	11.3%	5.1%	14.1%	4.4%	7.4%	4.1%

Source: Household Survey, NEMS, Weighted (Not Filtered)  
 Experian average figure derived from Experian Retail Planner Briefing Note 13, Appendix 3



**Table 4.2b: Proportion of Purchases Made Online by Zone (%)**

Goods Type	9	10	11	12	13	14	15	Total	Mean	Zones 1 4 Mean	Experian
<b>Convenience Goods</b>											
Main Food Shopping	8.5%	4.9%	1.4%	6.7%	1.0%	2.2%	1.7%	4.2%	2.2%	2.4%	9.2%
Top-Up Food Shopping	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%	0.2%			
<b>Comparison Goods</b>											
Clothing and footwear	11.8%	10.3%	3.6%	19.6%	10.1%	8.3%	6.0%	12.6%	15.5%	17.4%	15.6%
Books, CDs and DVDs	40.8%	39.4%	40.4%	47.0%	34.9%	49.9%	38.5%	43.3%			
Small household goods	9.5%	6.4%	13.3%	13.1%	7.1%	7.5%	20.5%	10.8%			
Toys, games, bicycles and recreation goods	17.8%	16.4%	6.5%	23.3%	10.7%	14.7%	16.0%	18.8%			
Chemist goods	6.7%	1.5%	2.6%	8.1%	1.5%	3.9%	3.0%	4.2%			
Electrical goods	31.6%	25.3%	19.4%	31.5%	12.9%	13.4%	29.2%	24.2%			
DIY	3.6%	5.8%	0.8%	5.1%	2.6%	0.0%	2.9%	3.6%			
Furniture	12.1%	7.4%	1.7%	17.9%	2.9%	3.2%	7.1%	7.5%			

Source: Household Survey, NEMS, Weighted (Not Filtered)

Experian average figure derived from Experian Retail Planner Briefing Note 13, Appendix 3

- 4.16 As we have explained, the market share analysis which follows relates to shopping *trips* only. However, we give some consideration to the market share of *expenditure* at Section 7 of this report.
- 4.17 In terms of the justification for some of the changes in market share figures from 2010 to 2015, it is important to take note that 9,514 sq.m of the new retail developments which have taken place since the previous household survey was undertaken. In terms of within CE, these new schemes can be summarised as follows:

- Morrisons on West Park Drive in Macclesfield (542 sq.m gross);
- Waitrose on Park Lane in Poynton (2,335 sq.m gross);
- Sainsbury’s Local in The Square in Holmes Chapel (586 sq.m gross);
- Asda at West Heath Shopping Centre, Holmes Chapel Road (1,310 sq.m gross);
- M&S Simply Food, Barn Road, Congleton (1,127 sq.m gross);
- Aldi, Brook Street, Knutsford (1,420 sq.m gross);
- Little Waitrose, Princess Street, Knutsford (672 sq.m gross); and
- Aldi, Nantwich Road, Crewe (1,522 sq.m gross).

### Convenience Goods Shopping Patterns

- 4.18 The first section of the analysis of shopping patterns looks at the main and top-up convenience shopping patterns across CWAC and CE and then CE specifically for the purposes of this Retail Study.



## Main Food Shopping Patterns

4.19 Within the Study Area, existing convenience goods facilities in CE and CWAC combined attract approximately 50.9% of main food shopping trips from CE and CWAC residents, which has increased marginally since 2010, when CE & CWAC attracted 48.8% of main food shopping trips. The total level of market share to Greater Manchester from all zones is now at approximately 1.3%, which is a decrease from the figure of 4.6% in 2010 and the shopping trips to Wales is now 2.1%, again, a significant reduction from 28.7% in 2010.

**Table 4.3: Main Food Market Share Analysis for CWAC & CE: 2010-2015 (%)**

	2010	2015	Change 2010 2015
Zone	Main Food	Main Food	Main Food
<b>1</b>	76.3	74.0	-2.3
<b>2</b>	52.2	60.2	8.0
<b>3</b>	74.7	77.3	2.5
<b>4</b>	97.5	95.4	-2.1
<b>5</b>	10.6	18.2	7.6
<b>6</b>	92.5	92.7	0.2
<b>7</b>	94.8	93.0	-1.8
<b>8</b>	51.2	62.5	11.4
<b>9</b>	7.2	7.3	0.1
<b>10</b>	0.8	0.0	-0.8
<b>11</b>	3.0	0.3	-2.7
<b>12</b>	0.0	0.0	0.0
<b>13</b>	56.7	70.7	14.0
<b>14</b>	9.9	18.6	8.7
<b>15</b>	90.8	95.9	5.1
<b>Total</b>	<b>48.8</b>	<b>50.9</b>	<b>2.1</b>

Source: 2010 Cheshire Retail Study and Table 3 of Appendix 5

4.20 As Table 4.3 above illustrates, the highest market share achieved by convenience goods facilities within the boundaries of CWAC & CE are in the Zones focused on Zone 4 ('Crewe'), Zone 6 ('Vale Royal'), Zone 7 ('Inner East Chester') and Zone 15 ('Outer East Chester'). Within each of these four Zones at least 90% of main food shopping trips are undertaken at facilities within CWAC and CE.

4.21 The lower market shares for CWAC & CE facilities (Zones 9, 10, 11, and 12) are to be expected given that these Zones fall outside the administrative boundaries of both Councils. The Household Survey found that Zone 10 ('Wrexham'), Zone 11 ('Flintshire') and Zone 12 ('Denbighshire'), had limited main food shopping trips directed to facilities within CWAC and CE. Instead, these residents are



undertaking their main food shops primarily in Wrexham, Denbigh, Mold and other convenience destinations in North Wales.

4.22 In terms of foodstores within CWAC and CE Table 4.4 below provides a breakdown of the market share of the top stores both within and outside of the CWAC and CE boundaries. The Household Survey identifies the most popular store for main food shopping within CE is the Tesco in Macclesfield which has a total main food market share of 1.9%, which has decreased from 2.1% in 2010. The Sainsbury's in Macclesfield has a main food market share of 1.8%, which has also decreased from 2.0% but the Aldi in Macclesfield now has a total main food market share of 1.5%, which has increased from 0.4%.

**Table 4.4: Top Main Food Shopping Destinations by Total Market Share (%)**

	Total 2010	Total 2015
<b>Cheshire East</b>		
Sainsbury's, Middlewich Road, Nantwich	2.1	2.0
Tesco Superstore, Hibel Road, Macclesfield	2.1	1.9
Sainsbury's, Cumberland Street, Macclesfield	2.0	1.8
Aldi, Queen Victoria Street, Macclesfield	0.4	1.5
Tesco Extra, Vernon Way, Crewe	1.4	1.5
Morrisons, Dunwoody Way, Crewe	2.5	1.4
Morrisons, Bridestone Shopping Centre, Congleton	1.3	1.3
Booths, Stanley Road, Knutsford	0.6	1.2
Asda, Victoria Centre, Crewe	2.3	1.2
<b>Cheshire West</b>		
Asda, Wellington Road / Grange Road, Ellesmere Port	2.7	2.3
Sainsbury's, Venables Road, Northwich	2.7	1.9
Morrisons, Nat Lane, Winsford	2.5	1.7
Morrisons, Chester Road, Ellesmere Port	1.6	1.7
Sainsbury's, Caldley Valley Road, Chester	2.2	1.4

Source: 2010 Cheshire Retail Study and Table 3 of Appendix 5

4.23 Turning to the main food market share for facilities within CE specifically, **Table 4.5** below provides a breakdown of the zonal market share for main food shopping and compares these figures with those identified in 2010. Facilities within CE retain 25.6% of the main food market share, which has increased by 1.4 percentage points since 2010.



**Table 4.5: Main Food Market Share Analysis for Cheshire East: 2010-2015 (%)**

	2010	2015	Change 2010 2015
Zone	Main Food	Main Food	Main Food
1	76.3	72.8	-3.5
2	8.8	27.4	18.6
3	58.1	65.8	7.7
4	97.5	94.8	-2.7
5	4.5	10.8	6.3
6	5.8	7.1	1.3
7	0.9	0.7	-0.2
8	0.0	0.0	0.0
9	4.3	1.0	-3.3
10	0.0	0.0	0.0
11	0.3	0.0	-0.3
12	0.0	0.0	0.0
13	1.0	0.0	-1.0
14	0.7	0.6	-0.1
15	1.3	0.0	-1.3
<b>Total</b>	<b>24.2</b>	<b>25.6</b>	<b>1.4</b>

Source: 2010 Cheshire Retail Study and Table 3 of Appendix 5

- 4.24 Zones 1, 3 and 4 achieve the highest market share for CE, with the convenience facilities within Zone 4 achieving a market share of 94.8%. Other than these three zones, all but Zone 2 ('Knutsford' – 27.4%) and Zone 5 ('Whitchurch' – 10.8%) achieve a market share for facilities within CE of 1.0% or less.
- 4.25 Looking at the zones primarily within CE, Zones 1, 3 and 4, the CE facilities retain over 65% of the main food market share.
- 4.26 For respondents within Zone 1 ('Macclesfield') the most popular main food shopping facility is the Tesco on Hibel Road in Macclesfield town centre, attracting 16.8% of the shopping trips. This is followed by the Sainsbury's on Cumberland Street (15.6%) and the Aldi on Queen Victoria Street (13.5%). 4.8% of main food trips from Zone 1 are to the Waitrose on Church Street in Wilmslow. Turning to Zone 3 ('Congleton') 9.8% of main food trips from respondents in the Zone are to the Tesco on Barn Road and 7.2% to the Morrisons at Bridestone Shopping Centre. 6.8% of trips from Zone 3 are to the Waitrose on Flat Lane in Sandbach.
- 4.27 Of the main food shopping trips in Zone 4 ('Crewe'), the highest proportion of trips are to the out-of-centre Sainsbury's on Middlewich Road in Nantwich (17.6%), followed by the Morrisons on Dunwoody Way in Crewe (14.9%) and the Tesco Extra on Vernon Way (11.2%).



- 4.28 Zone 2 has a lower market share to facilities within CE, with 10.5% of trips from Zone 2 going to the Booths in Knutsford and 8.8% going to the Aldi in Knutsford. Instead, a high proportion of trips are going to Altrincham and in particular the Sainsbury's on Lloyd Street (10.9%) and the Tesco Extra on Manor Road (8.6%) and to facilities in Northwich, including the Sainsbury's on Venables Road (9.2%) Tesco on Manchester Road (6.2%) and the Aldi on Leicester Street (6.6%). These levels of shopping trips to the centres identified seem logical in light of Zone 2 covering all or part of all three of these centres.
- 4.29 In terms of the overall changes in market share within CE since 2010, the highest level of change has been in Zones 2 ('Knutsford') and 3 ('Congleton') which have increased their market share by 18.6 and 7.7 percentage points respectively. Looking at Zone 3 in particular, this increase in main food market share retention can be accounted for an increase in market share at the Morrisons in Congleton town centre and the Tesco on Barn Road, along with wider increases to the market shares at the Waitrose in Sandbach and the Tesco superstore and Morrisons in Middlewich.
- 4.30 Looking at Zones 1, 2, 3 and 4 in particular, the market share figures demonstrate that there is some leakage to areas outside of CE and CWAC. Looking at Zone 3 for example, 5.0% of residents' trips are to destinations in Stoke and 7.7% to destinations in Newcastle-Under-Lyme. In terms of residents in Zone 1, 5.7% of main food trips are to destinations in Stockport and 3.2% are to destinations in High Peak.
- 4.31 In terms of shopping patterns for the main towns within CE, [Table 4.6](#) below provides a breakdown of the town market shares and divides these into in/edge and out of centre locations.
- 4.32 Table 4.6 demonstrates that Macclesfield has increased its town market share from 5.1% to 5.6%, which can be attributed by the market share of the Tesco, Sainsbury's and the Aldi as described above. Crewe has the second highest market share in terms of towns within CE at 5.2%, but this has decreased by 1.5 percentage point since 2010, particularly attributed to the in/edge of centre stores. Of particular reference are the Asda in the Victoria Centre which has reduced in main food market share from 2.3% to 1.2% and the Morrisons on Dunwoody Way has reduced from 2.5% to 1.4%. In both of these cases, the biggest decrease has been from respondents in Zone 4 ('Crewe') who have primarily re-distributed their trips to other alternative facilities, including the Aldi on Grand Junction Way in Crewe (an increase from 2.2% to 8.0%) and to the new Aldi on Nantwich Road which opened in 2013 (now attracting 9.8% of trips from respondents in Zone 4).



4.33 Overall, the market share for in/edge of centre destinations within the main towns has increased by 1.4 percentage points and the market share for out of centre destinations has decreased by 1.6 percentage points.

**Table 4.6: Market Shares Achieved by Main Towns – Main Food Shopping (%)**

Cheshire East Council		2010	2015	Difference
Macclesfield	In / Edge of Centre	4.7	5.5	<b>0.8</b>
	Out of Centre	0.4	0.1	<b>-0.3</b>
	<b>Total</b>	<b>5.1</b>	<b>5.6</b>	<b>0.5</b>
Handforth	In / Edge of Centre	0.5	0.0	<b>-0.5</b>
	Out of Centre	0.7	0.4	<b>-0.3</b>
	<b>Total</b>	<b>1.2</b>	<b>0.4</b>	<b>-0.8</b>
Poynton	In / Edge of Centre	0.5	0.5	<b>0.0</b>
	Out of Centre	0.0	0.0	<b>0.0</b>
	<b>Total</b>	<b>0.5</b>	<b>0.5</b>	<b>0.0</b>
Wilmslow	In / Edge of Centre	1.6	0.8	<b>-0.8</b>
	Out of Centre	1.3	0.1	<b>-1.2</b>
	<b>Total</b>	<b>2.9</b>	<b>0.9</b>	<b>-2.0</b>
Knutsford	In / Edge of Centre	0.6	2.4	<b>1.8</b>
	Out of Centre	0.0	0.0	<b>0.0</b>
	<b>Total</b>	<b>0.6</b>	<b>2.4</b>	<b>1.8</b>
Alsager	In / Edge of Centre	0.1	0.3	<b>0.2</b>
	Out of Centre	0.0	0.0	<b>0.0</b>
	<b>Total</b>	<b>0.1</b>	<b>0.3</b>	<b>0.2</b>
Congleton	In / Edge of Centre	1.7	1.3	<b>-0.4</b>
	Out of Centre	1.5	1.1	<b>-0.4</b>
	<b>Total</b>	<b>3.2</b>	<b>2.4</b>	<b>-0.8</b>
Middlewich	In / Edge of Centre	0.4	1.4	<b>1.0</b>
	Out of Centre	0.0	0.0	<b>0.0</b>
	<b>Total</b>	<b>0.4</b>	<b>1.4</b>	<b>1.0</b>
Sandbach	In / Edge of Centre	1.0	1.4	<b>0.4</b>
	Out of Centre	0.2	0.0	<b>-0.2</b>
	<b>Total</b>	<b>1.2</b>	<b>1.4</b>	<b>0.2</b>
Crewe	In / Edge of Centre	6.7	5.2	<b>-1.5</b>
	Out of Centre	0.0	0.9	<b>0.9</b>
	<b>Total</b>	<b>6.7</b>	<b>6.1</b>	<b>-0.6</b>
Nantwich	In / Edge of Centre	1.2	1.6	<b>0.4</b>
	Out of Centre	2.1	2.0	<b>-0.1</b>
	<b>Total</b>	<b>3.3</b>	<b>3.6</b>	<b>0.3</b>
<b>Total In Centre</b>		<b>19.0</b>	<b>20.4</b>	<b>1.4</b>
<b>Total Out of Centre</b>		<b>6.2</b>	<b>4.6</b>	<b>-1.6</b>

Source: 2010 Cheshire Retail Study and Table 3 of Appendix 5

Notes: The 'Total' market share figures above do not equate to the total for CE in Table 4.5 above due to the omission of other destinations in smaller centres in CE





### Top Up Food Shopping Patterns

4.34 Within the Study Area, existing convenience goods facilities in CWAC and CE retain approximately 54.1% of top-up food shopping trips undertaken, which has decreased marginally since 2010, when the two local authorities retained 52.2% of top-up food shopping trips.

**Table 4.7: Top Up Food Market Share Analysis for CWAC & CE: 2010-2015 (%)**

Zone	2010 Top Up Food	2015 Top Up Food	Change 2010 2015 Top Up Food
1	79.7	82.3	2.6
2	53.3	59.2	5.9
3	79.0	77.2	-1.8
4	94.5	95.2	0.7
5	21.8	34.0	12.2
6	97.8	94.7	-3.1
7	83.8	92.2	8.4
8	60.6	66.9	6.3
9	5.1	10.6	5.5
10	0.8	3.9	3.1
11	2.7	2.7	0.0
12	0.9	4.4	3.5
13	67.5	69.0	1.5
14	18.3	17.5	-0.8
15	86.3	93.4	7.1
<b>Total</b>	<b>52.2</b>	<b>54.1</b>	<b>1.9</b>

Source: 2010 Cheshire Retail Study and Table 3 of Appendix 5

4.35 Looking at top-up food shopping patterns within the whole of the CWAC and CE, the market share retention for facilities in Zones 4 ('Crewe'), 6 ('Vale Royal') 7 ('Inner East Chester') and 15 ('Outer East Chester'), are all above 90%, with the highest being Zone 4 at 95.2%. The biggest change in market share from 2010 to 2015 is in Zone 5, which has increased its retention of top up shopping by 12.2 percentage points.

4.36 Again, turning to the top-up food market share for stores within CE specifically, **Table 4.8** below provides a breakdown of the zonal market share for top-up food shopping within the Borough.



**Table 4.8: Top up Food Market Share Analysis for Cheshire East: 2010-2015 (%)**

	2010	2015	Change 2010 2015
Zone	Main Food	Main Food	Main Food
<b>1</b>	79.7	80.9	1.2
<b>2</b>	16.9	31.2	14.3
<b>3</b>	75.4	73.9	-1.5
<b>4</b>	93.5	93.6	0.1
<b>5</b>	5.5	9.0	3.5
<b>6</b>	3.9	7.0	3.1
<b>7</b>	0.0	0.0	0.0
<b>8</b>	0.3	0.5	0.2
<b>9</b>	1.5	9.8	8.3
<b>10</b>	0.8	0.0	-0.8
<b>11</b>	0.5	0.5	0.0
<b>12</b>	0.0	4.4	4.4
<b>13</b>	0.0	0.0	0.0
<b>14</b>	2.9	0.0	-2.9
<b>15</b>	3.9	1.1	-2.8
<b>Total</b>	<b>27.1</b>	<b>29.8</b>	<b>2.7</b>

Source: 2010 Cheshire Retail Study and Table 3 of Appendix 5

- 4.37 Within CE, Zones 1 ('Macclesfield') and 4 ('Crewe') have the highest market share retention levels of 80.9% and 93.6% respectively. This is followed by Zone 3 ('Crewe') with a market share of 73.9% and then Zone 2 ('Knutsford') at 31.2%. Other than these four zones, all of the others have market shares of less than 10%, with five of the zones not recording any market share.
- 4.38 Zone 3 ('Congleton') has reduced its market share retention level to facilities within CE from 75.4% to 73.9% from 2010 to 2015 and Zone 2 ('Knutsford') has increased its market share from 16.9% to 31.2% (an increase in 14.3 percentage points). In terms of respondents in Zone 3, the proportion of top-up shopping trips to Congleton has increased from 19.2% to 21.8% which can be primarily linked to an overall increase in trips to all facilities but also the new M&S Simply Food on Congleton Retail Park which now attracts 2.3% of trips from Zone 3. Looking at top-up shopping trips from residents in Zone 3, Middlewich has increased its market share since 2010 to 21.3% but the proportion to facilities in Sandbach and Alsager has decreased.
- 4.39 Turning to Zone 2, the increase of trips is primarily due to the Sainsbury's Local in Knutsford which now has a market share of 3.9% from respondents in the Zone and the new Aldi on Brook Street now attracts 2.6% of trips from Zone 2. 11.1% of all top-up trips from Zone 2 are now to the Booths on Stanley Road.



4.40 Looking at the top-up food market shares achieved by the main towns in CE, Table 4.9 below provides a breakdown of the in and out of centre market shares across the Borough. Middlewich and Knutsford have seen the biggest increase in market share by 1.2 percentage points each. The biggest decrease has been to Wilmslow facilities. Macclesfield still has the highest top-up food shop market share at 5.0%, followed by Crewe at 4.8%. In terms of Wilmslow, the Waitrose top-up food market share has decreased from 0.5% to 0.3% and the Sainsbury's from 0.7% to 0.2%. In terms of residents in Zone 1, the highest proportion undertake their top-up shop in Macclesfield town centre (7.7%), followed by the Co-op on Ivy Road (6.6%). In addition, 5.2% undertake their top-up shop at the Co-op in Bollington. Looking at residents in Zone 3, 7.6% undertake their top-up shop at the Tesco Express in Middlewich and 5.6% at the Tesco on Barn Road in Congleton.



**Table 4.9: Market Shares Achieved by Main Towns – Top-up Shopping (%)**

Cheshire East Council		2010	2015	Difference
Macclesfield	In / Edge of Centre	3.6	3.2	-0.4
	Out of Centre	1.7	1.8	0.1
	<b>Total</b>	<b>5.2</b>	<b>5.0</b>	<b>-0.2</b>
Handforth	In / Edge of Centre	0.8	0.2	-0.6
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.8</b>	<b>0.2</b>	<b>-0.6</b>
Poynton	In / Edge of Centre	1.1	0.8	-0.3
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>1.1</b>	<b>0.8</b>	<b>-0.3</b>
Wilmslow	In / Edge of Centre	1.5	0.7	-0.8
	Out of Centre	0.7	0.3	-0.4
	<b>Total</b>	<b>2.2</b>	<b>1.1</b>	<b>-1.2</b>
Knutsford	In / Edge of Centre	1.3	2.3	1.0
	Out of Centre	0.0	0.2	0.2
	<b>Total</b>	<b>1.3</b>	<b>2.5</b>	<b>1.2</b>
Alsager	In / Edge of Centre	1.2	0.6	-0.6
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>1.2</b>	<b>0.6</b>	<b>-0.6</b>
Congleton	In / Edge of Centre	1.4	1.2	-0.2
	Out of Centre	0.8	1.4	0.4
	<b>Total</b>	<b>2.2</b>	<b>2.6</b>	<b>0.4</b>
Middlewich	In / Edge of Centre	1.5	2.0	0.5
	Out of Centre	0.3	0.9	0.6
	<b>Total</b>	<b>1.7</b>	<b>2.9</b>	<b>1.2</b>
Sandbach	In / Edge of Centre	1.6	1.5	-0.1
	Out of Centre	0.5	0.6	0.1
	<b>Total</b>	<b>2.1</b>	<b>2.1</b>	<b>0.0</b>
Crewe	In / Edge of Centre	3.6	3.0	-0.6
	Out of Centre	2.3	1.8	-0.5
	<b>Total</b>	<b>5.9</b>	<b>4.8</b>	<b>-1.1</b>
Nantwich	In / Edge of Centre	1.2	1.5	0.3
	Out of Centre	1.2	1.0	-0.2
	<b>Total</b>	<b>2.4</b>	<b>2.5</b>	<b>0.1</b>
<b>Total In Centre</b>		<b>18.3</b>	<b>17.0</b>	<b>-1.3</b>
<b>Total Out of Centre</b>		<b>8.0</b>	<b>8.0</b>	<b>0.0</b>

Source: 2010 Cheshire Retail Study and Table 3 of Appendix 5

Notes: The 'Total' market share figures above do not equate to the total for CE in Table 4.8 above due to the omission of other destinations in smaller centres in CE

## Non-Bulky Comparison Goods

### Comparison Goods Shopping Patterns: Clothing and Footwear

- 4.41 Looking at clothing and footwear comparison shopping within CE and CWAC, the facilities within these two Boroughs attract 51.0% of shopping trips. Table 4.10 below provides a breakdown of the market share for each Zone for the two Boroughs together and then for CE separately.



**Table 4.10: CE & CWAC - Clothing and Footwear Market Share by Zones (2010-2015) (%)**

Zone	2010	2015	2010 2015 Difference	2010	2015	Change 2010 2015
	CWAC & CE	CWAC & CE	CWAC & CE	CE	CE	CE
<b>1</b>	55.4	52.2	-3.2	54.2	47.0	-7.2
<b>2</b>	42.6	45.5	2.9	8.4	12.1	3.7
<b>3</b>	49.7	45.7	-4.0	37.1	34.9	-2.2
<b>4</b>	74.0	70.8	-3.2	58.6	61.6	3.0
<b>5</b>	41.3	41.7	0.4	6.3	1.7	-4.6
<b>6</b>	74.6	72.3	-2.3	4.0	3.5	-0.5
<b>7</b>	89.7	84.1	-5.6	0.0	0.0	0.0
<b>8</b>	61.0	66.9	5.9	0.0	0.0	0.0
<b>9</b>	14.0	13.3	-0.7	2.0	1.5	-0.5
<b>10</b>	25.3	29.5	4.2	0.3	0.0	-0.3
<b>11</b>	33.2	39.2	6.0	0.0	0.0	0.0
<b>12</b>	13.4	17.1	3.7	0.6	0.0	-0.6
<b>13</b>	78.7	87.9	9.2	1.1	0.0	-1.1
<b>14</b>	52.3	58.7	6.4	0.0	0.6	0.6
<b>15</b>	77.5	83.3	5.8	0.0	1.7	1.7
<b>Total</b>	<b>49.7</b>	<b>51.0</b>	<b>1.3</b>	<b>15.6</b>	<b>14.5</b>	<b>-1.1</b>

Source: 2010 Cheshire Retail Study and Table 8 of Appendix 5

- 4.42 As Table 4.10 demonstrates, overall, the market share for clothing and footwear goods has increased since 2010 within the two Boroughs combined by 1.3 percentage points. Within CE & CWAC, the Zones with the highest clothing and footwear market shares are Zone 7 ('Inner East Chester') at 84.1%, Zone 13 ('Inner West Chester') at 87.9% and Zone 15 ('Outer East Chester') at 83.3%.
- 4.43 Looking at market shares for facilities within CE only, the Zones with the highest market shares are Zones 1 (47.0%) and 4 (61.6%), which is logical in light of the locations of the Zones in context to the CE boundary. For respondents in Zone 1, the most popular destinations are Macclesfield, Handforth and Wilmslow and for Zone 4, the most popular destinations are Crewe town centre and Grand Junction Retail Park, and Nantwich town centre.
- 4.44 Zones 2 and 3, which also fall within or partly within the CE boundary, have a smaller market share of 12.1% and 34.9% respectively. This is due to the draw to facilities outside of CE for respondents in these Zones, particularly to Northwich, Altrincham, The Trafford Centre and Manchester City Centre for respondents in Zone 2 and to Freeport, Manchester City Centre, Stoke City Centre and the Trafford Centre for respondents in Zone 3.
- 4.45 Looking at the leakage of clothing and footwear market share for residents in Zones 1, 2, 3 and 4, we can see that 45.9%, 31.2%, 44.6% and 25.3% of each of the zones' market shares are leaking to facilities outside of CE and CWAC respectively. In terms of Zone 1, 10.3% of this is to facilities in



Trafford, 19.9% to facilities in Stockport and 5.5% to facilities in High Peak. For Zone 3, 7.7% is to facilities in Trafford, 7.6% to facilities in Manchester, 16.0% to facilities in Stoke and 6.5% to facilities in Newcastle-Under-Lyme. These figures demonstrate the pull of these facilities located outside of the Study Area.

- 4.46 Turning to market shares for the key towns within CE, there have been marginal changes to the majority of the market shares for clothing and footwear goods. Overall, Crewe has the highest market share for such goods at 6.0%, followed by Macclesfield at 3.0% and Nantwich at 1.2%. All of the other towns within CE have a market share of less than 1%.
- 4.47 Looking at Crewe in particular, the town centre draws 4.0% of clothing and footwear shopping trips and Grand Junction Retail Park draws 2.0%. Comparing these figures to 2010, Crewe town centre previously had a market share of 5.3% and Grand Junction Retail Park of 0.4%. These figures demonstrate that whilst the overall market share for the two facilities combined has remained broadly consistent, Grand Junction Retail Park now attracts more trips for clothing and footwear goods and has therefore diverted a significant amount of trips away from the town centre.
- 4.48 Looking at Table 4.11 below, we are able to see that Macclesfield has seen an overall reduction from 3.9% to 2.2% in 2015, which is primarily down to the in and edge of centre shopping facilities which have decreased by 1.7 percentage points. The out of centre market share has increased by 0.8 percentage points which is solely due to the Next at Lyme Green Retail Park to the south of Macclesfield. Overall, the market share for the in and edge of centre destinations within the towns has decreased since 2010 by 4.1 percentage points and the out of centre destinations have increased by 0.5 percentage points.



**Table 4.11: Market Shares Achieved by Main Towns – Clothing and Footwear (%)**

		2010	2015	Difference
Macclesfield	In / Edge of Centre	3.9	2.2	-1.7
	Out of Centre	0.0	0.8	0.8
	<b>Total</b>	<b>3.9</b>	<b>3.0</b>	<b>-0.9</b>
Handforth	In / Edge of Centre	0.0	0.0	0.0
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>
Poynton	In / Edge of Centre	0.0	0.1	0.1
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.0</b>	<b>0.1</b>	<b>0.1</b>
Wilmslow	In / Edge of Centre	0.7	0.5	-0.2
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.7</b>	<b>0.5</b>	<b>-0.2</b>
Knutsford	In / Edge of Centre	0.0	0.4	0.4
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.2</b>	<b>0.4</b>	<b>0.2</b>
Alsager	In / Edge of Centre	0.1	0.0	-0.1
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.1</b>	<b>0.0</b>	<b>-0.1</b>
Congleton	In / Edge of Centre	0.7	0.4	-0.3
	Out of Centre	0.0	0.1	0.1
	<b>Total</b>	<b>0.7</b>	<b>0.5</b>	<b>-0.2</b>
Middlewich	In / Edge of Centre	0.0	0.1	0.1
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.0</b>	<b>0.1</b>	<b>0.1</b>
Sandbach	In / Edge of Centre	0.2	0.3	0.1
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.2</b>	<b>0.3</b>	<b>0.1</b>
Crewe	In / Edge of Centre	5.2	6.0	0.8
	Out of Centre	0.4	0.0	-0.4
	<b>Total</b>	<b>5.6</b>	<b>6.0</b>	<b>0.4</b>
Nantwich	In / Edge of Centre	1.1	1.2	0.1
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>1.1</b>	<b>1.2</b>	<b>0.1</b>
<b>Total In Centre</b>		<b>15.0</b>	<b>10.9</b>	<b>-4.1</b>
<b>Total Out of Centre</b>		<b>0.4</b>	<b>0.9</b>	<b>0.5</b>

Source: 2010 Cheshire Retail Study and Table 8 of Appendix 5

Notes: The 'Total' market share figures above do not equate to the total for CE in Table 4.10 above due to the omission of other destinations in smaller centres in CE

Comparison Goods Shopping Patterns: Books, CDs and DVDs

4.49 Table 4.12 below provides a breakdown of market share for books, CD's and DVD's by Zone for CWAC & CE facilities combined and then looking at CWAC facilities separately. Overall the CWAC & CE facilities market share for books, DVDs and CDs has decreased by just 0.7% across the 15 zones. The zones with the highest market shares are Zones 4, 6, 7, 13 and 15 which each attract over 80% of the



CWAC & CE shopping trips for books, CDs and DVDs. The zones with the lowest CWAC & CE facilities market shares are Zones 10, 11 and 12 which each attract less than 10% of the trips.

4.50 The biggest differences in CWAC & CE facilities market shares from 2010 to 2015 are Zones 5, which has increased its market share by 23.7 percentage points to 47.4% at 2015 and Zone 9 which has increased its market share by 9.5 percentage points and then Zones 1 and 11 which have decreased in market share by 9.7 and 11.7 percentage points respectively. Looking at responses from Zone 5 in particular, we can see from the full market share analysis tables that there has been a significant increase in trips from residents in Zone 5 to Chester City Centre (an increase from 18.4% to 32.2%).

4.51 Turning to CE facilities, there has been an overall increase in market share within the CE Borough for books, CDs and DVDs by 2.7 percentage points from 21.1% in 2010 to 23.8% in 2015. The market share within Zones 7-15 is 0.0% in all cases and the highest market share for CE is within Zone 4 at 84.6%. Of this, 72.1% of trips within Zone 4 are to Crewe town centre and 15.7% are to Nantwich town centre.

**Table 4.12: CWAC & CE Books, CDs, DVDs Market Share by Zones (2010-2015) (%)**

	2010	2015	2010 2015 Difference	2010	2015	Change 2010 2015
Zone	CWAC & CE	CWAC & CE	CWAC & CE	CE	CE	CE
<b>1</b>	69.7	60.0	-9.7	69.7	58.4	-11.3
<b>2</b>	42.4	52.2	9.8	9.6	36.0	26.4
<b>3</b>	64.7	71.4	6.7	55.3	54.5	-0.8
<b>4</b>	88.4	84.6	-3.8	85.1	84.6	-0.5
<b>5</b>	23.7	47.4	23.7	5.3	15.2	9.9
<b>6</b>	82.0	87.0	5.0	7.8	11.1	3.3
<b>7</b>	93.2	97.1	3.9	0.0	0.0	0.0
<b>8</b>	58.4	59.4	1.0	0.0	0.0	0.0
<b>9</b>	8.5	18.0	9.5	0.0	0.0	0.0
<b>10</b>	10.6	4.4	-6.2	0.4	0.0	-0.4
<b>11</b>	19.4	7.7	-11.7	1.1	0.0	-1.1
<b>12</b>	8.8	6.4	-2.4	0.0	0.0	0.0
<b>13</b>	81.2	87.1	5.9	0.0	0.0	0.0
<b>14</b>	39.3	45.8	6.5	0.0	0.0	0.0
<b>15</b>	82.2	92.5	10.3	2.2	0.0	-2.2
<b>Total</b>	<b>50.2</b>	<b>50.9</b>	<b>0.7</b>	<b>21.1</b>	<b>23.8</b>	<b>2.7</b>

Source: 2010 Cheshire Retail Study and Table 10 of Appendix 5

4.52 In terms of Zones 1-4, Zones 1, 3 and 4 each have a market share for CE facilities that is above 50%, with the Zone with the highest retention rate being Zone 4 at 84.6%, which has decreased by 0.5 percentage points since 2010. For respondents in Zone 4, the most popular destinations to purchase books, CDs and DVDs are Crewe town centre (57.3%) and Nantwich town centre (20.5%). Looking at





Zone 2, a higher proportion of respondents are travelling to destinations outside of CE to purchase such goods such as Altrincham town centre, which has a high market share from those in Zone 2 (35.4%).

4.53 Looking at the main towns in CE, the towns with the highest books, CDs and DVDs market share are Macclesfield and Crewe, at 5.4% and 6.3% respectively. Macclesfield town centre's market share has decreased by 0.2 percentage points from 2010 to 2015 and Nantwich town centre's market share has also decreased by 1.3 percentage points from 2010 to 2015. The out of centre facilities in the main towns other than Congleton and Nantwich, did not attract any market share for books, CDs and DVDs in 2015. Overall, the facilities within and on the edge of the centres within the main towns in CE have increased their market share by 1.8 percentage points.



**Table 4.13: Books, CDs and DVDs Market Share by Town (2010-2015) (%)**

Cheshire East Council		2010	2015	Difference
Macclesfield	In / Edge of Centre	5.6	5.4	-0.2
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>5.6</b>	<b>5.4</b>	<b>-0.2</b>
Handforth	In / Edge of Centre	0.0	0.2	0.2
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.0</b>	<b>0.2</b>	<b>0.2</b>
Poynton	In / Edge of Centre	0.0	0.0	0.0
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>
Wilmslow	In / Edge of Centre	1.8	1.7	-0.1
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>1.8</b>	<b>1.7</b>	<b>-0.1</b>
Knutsford	In / Edge of Centre	1.0	3.3	2.3
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>1.0</b>	<b>3.3</b>	<b>2.3</b>
Alsager	In / Edge of Centre	0.1	0.2	0.1
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.1</b>	<b>0.2</b>	<b>0.1</b>
Congleton	In / Edge of Centre	1.7	1.8	0.1
	Out of Centre	0.0	0.1	0.1
	<b>Total</b>	<b>1.7</b>	<b>1.9</b>	<b>0.2</b>
Middlewich	In / Edge of Centre	0.2	0.4	0.2
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.2</b>	<b>0.4</b>	<b>0.2</b>
Sandbach	In / Edge of Centre	0.4	0.7	0.3
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.4</b>	<b>0.7</b>	<b>0.3</b>
Crewe	In / Edge of Centre	7.6	6.3	-1.3
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>7.6</b>	<b>6.3</b>	<b>-1.3</b>
Nantwich	In / Edge of Centre	2.0	3.2	1.2
	Out of Centre	0.0	0.1	0.1
	<b>Total</b>	<b>2.0</b>	<b>3.3</b>	<b>1.3</b>
<b>Total In Centre</b>		<b>20.7</b>	<b>22.5</b>	<b>1.8</b>
<b>Total Out of Centre</b>		<b>0.0</b>	<b>0.2</b>	<b>0.2</b>

Source: 2010 Cheshire Retail Study and Table 10 of Appendix 5

Notes: The 'Total' market share figures above do not equate to the total for CE in Table 4.12 above due to the omission of other destinations in smaller centres in CE

Comparison Goods Shopping Patterns: Small Household Goods

4.54 Table 4.14 below provides a breakdown of the market share of small household goods across all 15 zones for both the facilities within CWAC & CE and then for facilities within CWAC alone. For facilities within CWAC & CE, the total market share for small household goods is 47.0% across all 15 zones, which has decreased by 0.9 percentage points since 2010. The zones with the highest market share are Zones 4 ('Crewe'), 7 ('Inner East Chester'), 13 ('Inner West Chester') and 15 ('Outer East Chester')



which each retain over 80% of the market share. Zones 1, 2, 3 and 11 have all decreased in market share by over 5 percentage points and Zone 15 has increased in market share by 22.5 percentage points.

- 4.55 Looking at the market share for facilities within CE specifically, Zone 4 ('Crewe') has the highest market share at 82.4%, followed by Zone 1 at 42.9%. All other zones are below 40% with Zones 7, 8 and 10-15 all at 0.0%. Zone 4 has also seen the highest increase in market share retention for CE, rising from 70.5% in 2010 to 82.4% in 2015. This can be attributed to an increase in market share to the Grand Junction Retail Park for Zone 4 respondents, from 7.2% to 11.8% and Nantwich town centre which has increased in Zone 4 from 5.3% in 2010 to 21.5% in 2015.
  
- 4.56 Turning to Zones 1-3, these relatively low levels of market share retention to facilities within CE can be primarily attributed to high levels of trips to facilities outside of both CE and CWAC. In particular, residents in Zone 1 are travelling to Cheadle Royal (13.6%), Stockport town centre (8.3%) and Stanley Green Retail Park (10.3%) to purchase such goods and residents in Zone 2 are travelling to Warrington town centre (11.0%) and The Trafford Centre (11.4%) and residents in Zone 3 are travelling to Stoke city centre (7.8%), Gemini Retail Park in Warrington (7.1%) and Newcastle-Under-Lyme (4.6%). These shopping trips demonstrate relatively unsustainable shopping patterns for small household goods.



**Table 4.14: CWAC & CE Small Household Goods Market Share by Zones (2010-2015) (%)**

Zone	2010	2015	2010 2015 Difference	2010	2015	Change 2010 2015
	CWAC & CE	CWAC & CE	CWAC & CE	CE	CE	CE
<b>1</b>	52.4	44.5	-7.9	52.4	42.9	-9.5
<b>2</b>	36.8	31.1	-5.7	12.9	14.2	1.3
<b>3</b>	51.9	44.9	-7.0	42.7	38.1	-4.6
<b>4</b>	79.2	86.0	6.8	70.5	82.4	11.9
<b>5</b>	39.0	38.6	-0.4	4.9	12.5	7.6
<b>6</b>	72.5	78.7	6.2	9.4	7.6	-1.8
<b>7</b>	84.5	83.6	-0.9	0.0	0.0	0.0
<b>8</b>	57.0	57.8	0.8	0.3	0.0	-0.3
<b>9</b>	6.2	5.1	-1.1	2.8	1.4	-1.4
<b>10</b>	15.4	14.1	-1.3	0.0	0.0	0.0
<b>11</b>	36.0	27.1	-8.9	0.5	0.0	-0.5
<b>12</b>	17.2	16.0	-1.2	0.0	0.0	0.0
<b>13</b>	80.3	82.2	1.9	0.0	0.0	0.0
<b>14</b>	59.6	61.8	2.2	0.0	0.0	0.0
<b>15</b>	66.0	88.5	22.5	0.0	0.0	0.0
<b>Total</b>	<b>47.9</b>	<b>47.0</b>	<b>-0.9</b>	<b>18.0</b>	<b>18.6</b>	<b>0.6</b>

Source: 2010 Cheshire Retail Study and Table 12 of Appendix 5

- 4.57 Looking at the most popular destinations for small household goods shopping within CE, Crewe town centre attracts the highest number of trips at 7.9% of all responses. This level of market share has increased from 7.6% in 2010.
- 4.58 Table 4.15 below provides the breakdown of market share for small household goods within each of the main towns within CE. Again, Macclesfield and Crewe attract the highest numbers of trips, with 8.0% to Crewe and 5.1% to Macclesfield. Both of these market shares have increased slightly since 2010. The overall level of market share for in and edge of centre facilities within the main towns has decreased by 1.7 percentage points since 2010 and the market share of out of centre facilities within these towns has increased by 0.5 percentage points.



**Table 4.15: Small Household Goods Market Share by CE Towns (2010-2015) (%)**

Cheshire East Council		2010	2015	Difference
Macclesfield	In / Edge of Centre	4.3	4.6	0.3
	Out of Centre	0.2	0.5	0.3
	<b>Total</b>	<b>4.5</b>	<b>5.1</b>	<b>0.6</b>
Handforth	In / Edge of Centre	0.0	0.0	0.0
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>
Poynton	In / Edge of Centre	0.0	0.0	0.0
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>
Wilmslow	In / Edge of Centre	0.6	0.3	-0.3
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.6</b>	<b>0.3</b>	<b>-0.3</b>
Knutsford	In / Edge of Centre	0.2	0.7	0.5
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.2</b>	<b>0.7</b>	<b>0.5</b>
Alsager	In / Edge of Centre	0.0	0.0	0.0
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>
Congleton	In / Edge of Centre	0.7	0.3	-0.4
	Out of Centre	0.1	0.1	0.0
	<b>Total</b>	<b>0.8</b>	<b>0.4</b>	<b>-0.4</b>
Middlewich	In / Edge of Centre	0.0	0.1	0.1
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.0</b>	<b>0.1</b>	<b>0.1</b>
Sandbach	In / Edge of Centre	0.2	1.0	-1.0
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.2</b>	<b>1.0</b>	<b>-1.0</b>
Crewe	In / Edge of Centre	7.6	7.9	0.3
	Out of Centre	0.0	0.1	0.1
	<b>Total</b>	<b>7.6</b>	<b>8.0</b>	<b>0.4</b>
Nantwich	In / Edge of Centre	0.7	2.0	1.3
	Out of Centre	0.0	0.1	0.1
	<b>Total</b>	<b>0.7</b>	<b>2.1</b>	<b>1.4</b>
<b>Total In Centre</b>		<b>17.6</b>	<b>15.9</b>	<b>-1.7</b>
<b>Total Out of Centre</b>		<b>0.3</b>	<b>0.8</b>	<b>0.5</b>

Source: 2010 Cheshire Retail Study and Table 12 of Appendix 5

Notes: The 'Total' market share figures above do not equate to the total for CE in Table 4.14 above due to the omission of other destinations in smaller centres in CE

#### Comparison Goods Shopping Patterns: Toys, Games, Bicycles and Recreation Goods

4.59 Looking at shopping patterns for toys, games, bicycles and recreation goods, Table 4.16 below provides a breakdown by zone for market share retention levels for facilities within CWAC & CE and then for facilities within CWAC separately. For facilities within CWAC & CE, Zones 7 ('Inner East Chester'), 13 ('Inner West Chester') and 15 ('Outer East Chester') each retain over 90% of the market



share for recreation and toys goods. Zones 9 ('Warrington'), 11 ('Flintshire Area') and 12 (Denibighshire Area') retain the lowest levels of market share, with each achieving less than 15%.

4.60 Since 2010, there have been some considerable changes in terms of market share for each zone for CWAC & CE. In particular, the market share for Zone 6 has decreased from 2010 by 19.3 percentage points, Zone 11 has decreased by 34.0 percentage points

4.61 In terms of retention rates to CE facilities specifically, Zone 4 has the highest retention of market share of 77.6%, followed by Zone 1 at 41.5% and Zone 3 at 23.8%. In terms of respondents in Zone 4, the most popular destination for purchasing such goods is Crewe town centre (41.9%) and Nantwich town centre (17.0%). In terms of respondents in Zone 1, the most popular destination is Stockport town centre (19.8%) followed by Macclesfield town centre (17.2%).

**Table 4.16: CE & CWAC Recreation Goods Market Share by Zones (2010-2015) (%)**

Zone	2010	2015	2010 2015 Difference	2010	2015	Change 2010 2015
	CWAC & CE	CWAC & CE	CWAC & CE	CE	CE	CE
<b>1</b>	51.1	41.5	-9.6	51.1	41.5	-9.6
<b>2</b>	41.2	32.7	-8.5	6.8	7.3	0.5
<b>3</b>	44.5	44.0	-0.5	32.9	23.8	-9.1
<b>4</b>	67.1	80.9	13.8	62.3	77.6	15.3
<b>5</b>	28.1	31.2	3.1	6.3	3.0	-3.3
<b>6</b>	80.6	61.3	-19.3	5.4	0.0	-5.4
<b>7</b>	93.1	94.7	1.6	0.0	0.0	0.0
<b>8</b>	56.8	52.0	-4.8	0.0	0.0	0.0
<b>9</b>	5.1	7.2	2.1	0.0	0.0	0.0
<b>10</b>	25.3	39.0	13.7	0.0	1.3	1.3
<b>11</b>	46.9	12.9	-34.0	0.0	0.0	0.0
<b>12</b>	16.9	12.0	-4.9	0.0	0.0	0.0
<b>13</b>	86.7	96.5	9.8	0.0	0.0	0.0
<b>14</b>	61.8	73.9	12.1	0.0	0.0	0.0
<b>15</b>	87.5	95.0	7.5	0.0	0.0	0.0
<b>Total</b>	<b>49.4</b>	<b>46.5</b>	<b>-2.9</b>	<b>14.8</b>	<b>12.7</b>	<b>-2.1</b>

Source: 2010 Cheshire Retail Study and Table 14 of Appendix 5

4.62 Table 4.17 below provides a breakdown of market shares for the main towns within CE. As stated above, Macclesfield is still one of the most popular towns for recreational goods at 2.3% but has decreased since 2010 by 1.8 percentage points. The biggest decrease can be seen from respondents in Zone 1, where the proportion has decreased from 38.6% in 2010 to 17.2% in 2015. Instead, as stated above, a higher proportion of respondents from Zone 1 are travelling to facilities in Stockport to purchase such goods.



4.63 Crewe has the highest market share out of the CE towns, which attracts 5.1% of all shopping trips for recreational goods but has also seen a decrease in market share since 2010 when it attracted 5.4% of all trips. Nantwich has also seen an increase in overall market share by 1.1 percentage points. This is as a result of an increase in trips to Nantwich town centre primarily from respondents in Zone 4.

**Table 4.17: Recreational Goods Market Share by Town (2010-2015) (%)**

Cheshire East Council		2010	2015	Difference
Macclesfield	In / Edge of Centre	4.1	2.2	-1.9
	Out of Centre	0.0	0.1	0.1
	<b>Total</b>	<b>4.1</b>	<b>2.3</b>	<b>-1.8</b>
Handforth	In / Edge of Centre	0.0	0.1	0.1
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.0</b>	<b>0.1</b>	<b>0.1</b>
Poynton	In / Edge of Centre	0.0	0.0	0.0
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>
Wilmslow	In / Edge of Centre	0.5	0.4	-0.1
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.5</b>	<b>0.4</b>	<b>-0.1</b>
Knutsford	In / Edge of Centre	0.3	0.3	0.0
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.3</b>	<b>0.3</b>	<b>0.0</b>
Alsager	In / Edge of Centre	0.0	0.1	0.1
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.0</b>	<b>0.1</b>	<b>0.1</b>
Congleton	In / Edge of Centre	1.4	0.8	-0.6
	Out of Centre	0.1	0.3	0.2
	<b>Total</b>	<b>1.5</b>	<b>1.1</b>	<b>-0.4</b>
Middlewich	In / Edge of Centre	0.2	0.0	-0.2
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.2</b>	<b>0.0</b>	<b>-0.2</b>
Sandbach	In / Edge of Centre	0.1	0.2	0.1
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.1</b>	<b>0.2</b>	<b>0.1</b>
Crewe	In / Edge of Centre	5.4	5.1	-0.3
	Out of Centre	0.6	0.0	-0.6
	<b>Total</b>	<b>6.0</b>	<b>5.1</b>	<b>-0.9</b>
Nantwich	In / Edge of Centre	0.4	1.6	1.2
	Out of Centre	0.1	0.0	-0.1
	<b>Total</b>	<b>0.5</b>	<b>1.6</b>	<b>1.1</b>
<b>Total In Centre</b>		<b>12.4</b>	<b>10.6</b>	<b>-1.8</b>
<b>Total Out of Centre</b>		<b>0.8</b>	<b>0.4</b>	<b>-0.4</b>

Source: 2010 Cheshire Retail Study and Table 14 of Appendix 5

Notes: The 'Total' market share figures above do not equate to the total for CE in Table 4.16 above due to the omission of other destinations in smaller centres in CE



Comparison Goods Shopping Patterns: Chemist Goods

4.64 Looking at chemist goods shopping patterns, Table 4.18 below demonstrates that facilities within CWAC & CE retain 52.7% of the market share which has decreased by 1.8 percentage points since 2010.

4.65 Looking at facilities within CE specifically, the highest retention level of market share are Zones 1, 3 and 4, which each retain over 60% of trips. Zone 4 has the highest retention level of 91.1%, with the highest proportion of trips from respondents going to Crewe town centre (38.4%) and Nantwich town centre (24.9%). Looking at respondents in Zone 2, the most popular destination is Northwich town centre (27.0%) followed by Knutsford town centre (23.8%) and Altrincham town centre (16.9%).

**Table 4.18: CWAC & CE Chemist Goods Market Share by Zones (2010-2015)**

Zone	2010	2015	2010 2015 Difference	2010	2015	Change 2010 2015
	CWAC & CE	CWAC & CE	CWAC & CE	CE	CE	CE
<b>1</b>	71.0	73.9	2.9	70.8	73.5	2.7
<b>2</b>	51.9	61.0	9.1	12.7	29.5	16.8
<b>3</b>	73.4	74.7	1.3	65.7	64.4	-1.3
<b>4</b>	94.1	93.1	-1.0	92.7	91.1	-1.6
<b>5</b>	13.8	18.8	5.0	1.5	1.4	-0.1
<b>6</b>	96.8	93.2	-3.6	3.2	3.2	0.0
<b>7</b>	95.3	92.4	-2.9	0.9	1.5	0.6
<b>8</b>	61.5	66.0	4.5	0.5	0.0	-0.5
<b>9</b>	3.3	5.8	2.5	0.5	0.9	0.4
<b>10</b>	4.6	4.4	-0.2	0.0	0.0	0.0
<b>11</b>	5.2	5.3	0.1	0.0	0.0	0.0
<b>12</b>	3.6	2.2	-1.4	1.2	0.0	-1.2
<b>13</b>	76.5	81.6	5.1	0.0	0.0	0.0
<b>14</b>	27.6	32.1	4.5	0.0	0.0	0.0
<b>15</b>	85.7	96.4	10.7	0.0	0.0	0.0
<b>Total</b>	<b>50.9</b>	<b>52.7</b>	<b>1.8</b>	<b>23.7</b>	<b>25.2</b>	<b>1.5</b>

Source: 2010 Cheshire Retail Study and Table 16 of Appendix 5

4.66 Table 4.19 below again demonstrates that Macclesfield and Crewe have the highest overall market shares for chemist goods, followed by Nantwich, Congleton and Knutsford. The market shares for Macclesfield and Crewe have both decreased since 2010 but the market share for Congleton has increased since 2010.



**Table 4.19: Chemist Goods Market Share by CE Town (2010-2015)**

Cheshire East Council		2010	2015	Difference
Macclesfield	In / Edge of Centre	4.9	4.7	-0.2
	Out of Centre	0.2	0.0	-0.2
	<b>Total</b>	<b>5.1</b>	<b>4.7</b>	<b>-0.4</b>
Handforth	In / Edge of Centre	0.0	0.1	0.1
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.6</b>	<b>0.1</b>	<b>-0.5</b>
Poynton	In / Edge of Centre	0.0	0.9	0.9
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.0</b>	<b>0.9</b>	<b>0.9</b>
Wilmslow	In / Edge of Centre	1.9	1.1	-0.8
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>1.9</b>	<b>1.1</b>	<b>-0.8</b>
Knutsford	In / Edge of Centre	1.1	2.2	1.1
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>1.1</b>	<b>2.2</b>	<b>1.1</b>
Alsager	In / Edge of Centre	0.6	0.6	0.0
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.6</b>	<b>0.6</b>	<b>0.0</b>
Congleton	In / Edge of Centre	2.6	2.2	-0.4
	Out of Centre	0.0	0.3	0.3
	<b>Total</b>	<b>2.6</b>	<b>2.5</b>	<b>-0.1</b>
Middlewich	In / Edge of Centre	0.8	1.2	0.4
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.8</b>	<b>1.2</b>	<b>0.4</b>
Sandbach	In / Edge of Centre	1.4	1.4	0.0
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>1.4</b>	<b>1.4</b>	<b>0.0</b>
Crewe	In / Edge of Centre	5.7	5.0	-0.7
	Out of Centre	0.1	0.0	-0.1
	<b>Total</b>	<b>5.8</b>	<b>5.0</b>	<b>-0.8</b>
Nantwich	In / Edge of Centre	2.4	2.3	-0.1
	Out of Centre	0.1	0.3	0.2
	<b>Total</b>	<b>2.5</b>	<b>2.6</b>	<b>0.1</b>
<b>Total In Centre</b>		<b>22.0</b>	<b>20.3</b>	<b>-1.7</b>
<b>Total Out of Centre</b>		<b>0.4</b>	<b>0.6</b>	<b>0.2</b>

Source: 2010 Cheshire Retail Study and Table 16 of Appendix 5

Notes: The 'Total' market share figures above do not equate to the total for CE in Table 4.18 above due to the omission of other destinations in smaller centres in CE

## Bulky Comparison Goods

- 4.67 In addition to assessing shopping patterns for convenience goods and non-bulky comparison goods, it is also possible from the household survey to assess the shopping patterns for 'bulky goods' within the three broad categories of 'electrical', 'furniture' and 'DIY Goods'.



Comparison Goods Shopping Patterns: Electrical Goods

- 4.68 Turning to electrical products, Table 4.20 below demonstrates that existing facilities within CE & CWAC retain 49.6% of the trips and facilities within CE retain approximately 19.9% of the trips. Looking at facilities within CE, the highest retention level is within Zone 4 at 89.9%, which can be attributed by the high levels of shopping trips for electrical goods to Crewe town centre (28.6%) and Grand Junction Retail Park (53.6%). Whilst the market share from Zone 4 to Crewe town centre has decreased since 2010 from 42.3%, the Zone 4 market share to Grand Junction Retail Park has increased from 44.8%.
- 4.69 Zone 3 has seen a decrease in the retention rate to CE facilities by 18.6 percentage points since 2010. The biggest decrease in trips from respondents in Zone 3 is to Crewe town centre, which has decreased from 17.7% in 2010 to 6.6% in 2015, although trips to Grand Junction Retail Park have increased from 7.6% to 17.1%. Instead, a higher proportion of respondents from Zone 3 are now travelling to Festival Retail Park in Hanley, which has increased from 13.0% to 20.1%.

**Table 4.20: CWAC & CE Electrical Goods Market Share by Zones (2010-2015) (%)**

	2010	2015	2010 2015 Difference	2010	2015	Change 2010 2015
Zone	CWAC & CE	CWAC & CE	CWAC & CE	CE	CE	CE
1	52.8	53.7	0.9	52.5	53.7	1.2
2	45.3	44.6	-0.7	5.3	4.8	-0.5
3	61.4	56.1	-5.3	50.2	43.7	-6.5
4	92.3	92.0	-0.3	91.9	89.9	-2.0
5	19.3	25.9	6.6	1.8	0.0	-1.8
6	90.7	82.4	-8.3	8.2	0.9	-7.3
7	94.4	95.5	1.1	0.0	1.4	1.4
8	51.1	45.3	-5.8	0.0	0.0	0.0
9	4.3	2.6	-1.7	1.9	0.0	-1.9
10	6.8	9.0	2.2	0.0	0.0	0.0
11	33.3	27.1	-6.2	0.0	0.0	0.0
12	2.8	3.6	0.8	0.0	0.0	0.0
13	86.8	91.3	4.5	0.0	0.0	0.0
14	64.1	76.1	12.0	0.0	0.0	0.0
15	80.8	85.2	4.4	0.0	0.0	0.0
<b>Total</b>	<b>49.5</b>	<b>49.6</b>	<b>0.1</b>	<b>19.7</b>	<b>19.9</b>	<b>0.2</b>

Source: 2010 Cheshire Retail Study and Table 18 of Appendix 5

- 4.70 The most popular retail destination overall for electrical goods shopping is Greyhound Retail Park, with a market share of 10.4% across the whole Study Area. In terms of CE retail destinations, the most popular is Grand Junction Retail Park in Crewe with a 6.8% market share.



4.71 Table 4.21 below demonstrates the town of Crewe has the highest market share within CE for electrical goods of 10.4%, followed by Macclesfield which has a market share of 6.3%. In both of these towns, the most popular destinations are the Lyme Green Retail Park in Macclesfield and Grand Junction Retail Park in Crewe. Both of these retail destinations have large format electrical goods retailers. The decrease in trips to Macclesfield town centre for electrical goods is likely to be in light of an increase in preference to purchase goods from retail park destinations, due to the associated benefits of being able to transport larger goods via private modes of transport (car etc).



**Table 4.21: Electrical Goods Market Share by Town (2010-2015) (%)**

Cheshire East Council		2010	2015	Difference
Macclesfield	In / Edge of Centre	4.4	1.8	-2.6
	Out of Centre	0.7	4.5	3.8
	<b>Total</b>	<b>5.1</b>	<b>6.3</b>	<b>1.2</b>
Handforth	In / Edge of Centre	0.0	0.5	0.5
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.0</b>	<b>0.5</b>	<b>0.5</b>
Poynton	In / Edge of Centre	0.0	0.1	0.1
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.0</b>	<b>0.1</b>	<b>0.1</b>
Wilmslow	In / Edge of Centre	0.6	0.1	-0.5
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.6</b>	<b>0.1</b>	<b>-0.5</b>
Knutsford	In / Edge of Centre	0.0	0.1	0.1
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.0</b>	<b>0.1</b>	<b>0.1</b>
Alsager	In / Edge of Centre	0.4	0.2	-0.2
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.4</b>	<b>0.2</b>	<b>-0.2</b>
Congleton	In / Edge of Centre	0.7	0.2	-0.5
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.7</b>	<b>0.2</b>	<b>-0.5</b>
Middlewich	In / Edge of Centre	0.2	0.1	-0.1
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.2</b>	<b>0.1</b>	<b>-0.1</b>
Sandbach	In / Edge of Centre	0.3	0.7	0.4
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.3</b>	<b>0.7</b>	<b>0.4</b>
Crewe	In / Edge of Centre	10.6	10.3	-0.3
	Out of Centre	0.0	0.1	0.1
	<b>Total</b>	<b>10.6</b>	<b>10.4</b>	<b>-0.2</b>
Nantwich	In / Edge of Centre	0.4	0.7	0.3
	Out of Centre	0.0	0.1	0.1
	<b>Total</b>	<b>0.4</b>	<b>0.8</b>	<b>0.4</b>
<b>Total In Centre</b>		<b>18.7</b>	<b>14.1</b>	<b>-4.6</b>
<b>Total Out of Centre</b>		<b>0.7</b>	<b>4.7</b>	<b>4.0</b>

Source: 2010 Cheshire Retail Study and Table 18 of Appendix 5

Notes: The 'Total' market share figures above do not equate to the total for CE in Table 4.20 above due to the omission of other destinations in smaller centres in CE

Comparison Goods Shopping Patterns: DIY

4.72 Turning to DIY shopping, Table 4.22 below demonstrates that the facilities within CE & CWAC retain 53.3% of the shopping patterns within the Study Area. This has decreased slightly since 2010 when the level of retention was 54.0%.



- 4.73 Looking at facilities within CE in particular, these retain approximately 23.5% of the market share for DIY shopping, which has reduced slightly since 2010 when the retention level was 23.3%.
- 4.74 Looking at facilities within CE specifically, the Zones with the highest market shares are Zones 1, 3 and 4. Within Zone 1, the most popular destination is the B&Q in Macclesfield and in Zones 3 and 4, the most popular destination is the B&Q in Crewe. Zone 4 has seen an overall reduction in market share to CE facilities from 97.7% to 90.0% and Zone 3 has reduced from 68.3% to 63.9%.
- 4.75 Looking at respondents in Zone 4, the total proportion of trips to facilities within Crewe has decreased from 87.5% to 78.1%. In 2010, a high proportion of respondents in Zone 4 were undertaking DIY shopping trips in Crewe town centre (58.7%) and Grand Junction Retail Park (10.8%). Now, 69.3% of DIY shopping trips from Zone 4 are being undertaken in the B&Q Warehouse on Weston Road, which attracted just 11.2% of trips in 2010. This is likely to be in light of the refurbishment of the B&Q store back in 2010/2011. Shoppers from Zone 2 are undertaking their DIY shop at Northwich Retail Park (38.5%), Albion Road Retail Park (8.0%) and then beyond CWAC, 29.4% shop at Altrincham Retail Park for DIY goods.

**Table 4.22: CWAC & CE DIY Goods Market Share by Zones (2010-2015) (%)**

Zone	2010	2015	2010 2015 Difference	2010	2015	Change 2010 2015
	CWAC & CE	CWAC & CE	CWAC & CE	CE	CE	CE
1	64.2	63.7	-0.5	63.9	63.1	-0.8
2	54.8	55.4	0.6	1.9	5.8	3.9
3	79.7	74.0	-5.7	68.3	63.9	-4.4
4	97.7	90.0	-7.7	97.7	90.0	-7.7
5	14.8	15.1	0.3	5.6	9.6	4.0
6	96.0	96.4	0.4	9.0	6.8	-2.2
7	96.9	100.0	3.1	0.0	0.0	0.0
8	62.2	67.8	5.6	0.0	0.0	0.0
9	3.7	5.4	1.7	0.0	3.9	3.9
10	3.2	5.9	2.7	0.0	0.0	0.0
11	23.4	9.8	-13.6	0.0	0.0	0.0
12	0.7	0.0	-0.7	0.0	0.0	0.0
13	95.3	100.0	4.7	0.0	0.0	0.0
14	40.0	52.8	12.8	0.0	0.0	0.0
15	82.8	97.9	15.1	0.0	0.0	0.0
<b>Total</b>	<b>54.0</b>	<b>53.3</b>	<b>-0.7</b>	<b>23.3</b>	<b>23.5</b>	<b>0.2</b>

Source: 2010 Cheshire Retail Study and Table 20 of Appendix 5

- 4.76 Table 4.23 below demonstrates that of the main towns within CE, Crewe has the highest market share of 9.9%, of which the out-of-centre B&Q attracts 9.0% of all trips. Macclesfield is second highest with a market share of 7.5%, again of which 4.7% is to the B&Q on Stratham Street. Both of these stores



have significantly improved their market shares overall, although this has been at the supposed detriment of town centre DIY market shares.

4.77 Of particular note is Crewe town centre (not including Grand Junction) which has decreased from 7.5% to 0.9% and Macclesfield town centre from 5.4% to 1.1%. Please note that the figures in Table 4.23 below also include the edge of centre facilities in the market share calculations.



**Table 4.23: DIY Goods Market Share by Town (2010-2015) (%)**

Cheshire East Council		2010	2015	Difference
Macclesfield	In / Edge of Centre	5.4	5.9	0.5
	Out of Centre	0.6	1.6	1.0
	<b>Total</b>	<b>6.0</b>	<b>7.5</b>	<b>1.5</b>
Handforth	In / Edge of Centre	0.0	0.0	0.0
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>
Poynton	In / Edge of Centre	0.0	0.3	0.3
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.0</b>	<b>0.3</b>	<b>0.3</b>
Wilmslow	In / Edge of Centre	0.5	0.1	-0.4
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.5</b>	<b>0.1</b>	<b>-0.4</b>
Knutsford	In / Edge of Centre	0.1	0.5	0.4
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.1</b>	<b>0.5</b>	<b>0.4</b>
Alsager	In / Edge of Centre	0.2	0.2	0.0
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.2</b>	<b>0.2</b>	<b>0.0</b>
Congleton	In / Edge of Centre	2.1	0.7	-1.4
	Out of Centre	0.3	0.0	-0.3
	<b>Total</b>	<b>2.4</b>	<b>0.7</b>	<b>-1.7</b>
Middlewich	In / Edge of Centre	0.3	0.4	0.1
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.3</b>	<b>0.4</b>	<b>0.1</b>
Sandbach	In / Edge of Centre	1.2	2.0	0.8
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>1.2</b>	<b>2.0</b>	<b>0.8</b>
Crewe	In / Edge of Centre	8.9	0.9	-8.0
	Out of Centre	1.2	9.0	7.8
	<b>Total</b>	<b>10.1</b>	<b>9.9</b>	<b>-0.2</b>
Nantwich	In / Edge of Centre	1.4	0.7	-0.7
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>1.4</b>	<b>0.7</b>	<b>-0.7</b>
<b>Total In Centre</b>		<b>20.8</b>	<b>9.7</b>	<b>-11.1</b>
<b>Total Out of Centre</b>		<b>2.1</b>	<b>10.6</b>	<b>8.5</b>

Source: 2010 Cheshire Retail Study and Table 20 of Appendix 5

Notes: The 'Total' market share figures above do not equate to the total for CE in Table 4.5 above due to the omission of other destinations in smaller centres in CE

#### Comparison Goods Shopping Patterns: Furniture Goods

4.78 The final bulky comparison goods category is furniture goods. Table 4.24 below demonstrates that the facilities within CE & CWAC retain 52.4% of the furniture goods market share, which has reduced by 1.7 percentage points since 2010. The facilities within CE specifically retain 21.3% of the total market share, which has reduced by 1.1 percentage points since 2010. Looking at the market share to



facilities within CE, Zone 4 has the highest market share at 86.2%, followed by Zone 1 at 58.7% and Zone 3 at 56.0%. Again, Zone 3 has seen the most significant decrease in market share to CE facilities from 62.2% to 56.0%, a decrease in 6.2 percentage points and Zone 2 has seen the biggest increase in market share from 11.2% to 17.6%.

**Table 4.24: CWAC & CE Furniture Goods Market Share by Zones (2010-2015) (%)**

Zone	2010	2015	2010 2015	2010	2015	Change
	CWAC & CE	CWAC & CE	Difference	CE	CE	2010 2015
<b>1</b>	60.3	59.3	-1.0	60.3	58.7	-1.6
<b>2</b>	48.5	35.3	-13.2	11.2	17.6	6.4
<b>3</b>	72.0	64.4	-7.6	62.2	56.0	-6.2
<b>4</b>	89.2	78.6	-10.6	86.1	86.2	0.1
<b>5</b>	21.4	27.8	6.4	7.1	0.0	-7.1
<b>6</b>	84.1	69.0	-15.1	8.0	6.9	-1.1
<b>7</b>	89.5	86.7	-2.8	0.0	0.0	0.0
<b>8</b>	57.1	71.6	14.5	0.3	0.0	-0.3
<b>9</b>	8.8	10.8	2.0	2.5	2.2	-0.3
<b>10</b>	16.0	24.4	8.4	0.4	0.0	-0.4
<b>11</b>	38.0	29.5	-8.5	0.5	0.0	-0.5
<b>12</b>	14.7	17.7	3.0	0.0	1.4	1.4
<b>13</b>	82.4	88.6	6.2	0.0	0.0	0.0
<b>14</b>	68.5	60.2	-8.3	0.0	1.2	1.2
<b>15</b>	78.7	87.8	9.1	2.1	0.0	-2.1
<b>Total</b>	<b>54.1</b>	<b>52.4</b>	<b>-1.7</b>	<b>22.4</b>	<b>21.3</b>	<b>-1.1</b>

Source: 2010 Cheshire Retail Study and Table 22 of Appendix 5

4.79 Looking at the overall market shares to the main towns in CE, Macclesfield and Crewe achieve the highest market shares at 6.9% and 7.6% respectively, although both of these towns have also seen a decrease in market shares since 2010 by 0.3 and 1.6 percentage points respectively. Overall, the towns have seen a decrease in market shares for both the in/edge of centre retail facilities and the out of centre facilities.





**Table 4.25: Furniture Goods Market Share by Town (2010-2015) (%)**

Cheshire East Council		2010	2015	Difference
Macclesfield	In / Edge of Centre	6.6	5.9	-0.7
	Out of Centre	0.6	1.0	0.4
	<b>Total</b>	<b>7.2</b>	<b>6.9</b>	<b>-0.3</b>
Handforth	In / Edge of Centre	0.0	0.4	0.4
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.0</b>	<b>0.4</b>	<b>0.4</b>
Poynton	In / Edge of Centre	0.0	0.3	0.3
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.0</b>	<b>0.3</b>	<b>0.3</b>
Wilmslow	In / Edge of Centre	0.5	0.1	-0.4
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.5</b>	<b>0.1</b>	<b>-0.4</b>
Knutsford	In / Edge of Centre	0.3	0.7	0.4
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.3</b>	<b>0.7</b>	<b>0.4</b>
Alsager	In / Edge of Centre	0.2	0.1	-0.1
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.2</b>	<b>0.1</b>	<b>-0.1</b>
Congleton	In / Edge of Centre	1.6	1.3	-0.3
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>1.6</b>	<b>1.3</b>	<b>-0.3</b>
Middlewich	In / Edge of Centre	0.3	0.2	-0.1
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.3</b>	<b>0.2</b>	<b>-0.1</b>
Sandbach	In / Edge of Centre	0.4	0.6	0.2
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>0.4</b>	<b>0.6</b>	<b>0.2</b>
Crewe	In / Edge of Centre	7.1	6.9	-0.2
	Out of Centre	2.1	0.7	-1.4
	<b>Total</b>	<b>9.2</b>	<b>7.6</b>	<b>-1.6</b>
Nantwich	In / Edge of Centre	1.5	1.5	0.0
	Out of Centre	0.0	0.0	0.0
	<b>Total</b>	<b>1.5</b>	<b>1.5</b>	<b>0.0</b>
<b>Total In Centre</b>		<b>19.5</b>	<b>17.4</b>	<b>-2.1</b>
<b>Total Out of Centre</b>		<b>2.7</b>	<b>1.7</b>	<b>-1.0</b>

Source: 2010 Cheshire Retail Study and Table 22 of Appendix 5

Notes: The 'Total' market share figures above do not equate to the total for CE in Table 4.24 above due to the omission of other destinations in smaller centres in CE

### Changes in Market Share Since 2010

4.80 The analysis above has also provided a breakdown of the overall changes in shopping patterns within CE since the previous household survey was undertaken in 2010. Table 4.26 below provides a summary of the market share to facilities within CE for each of the category of goods. Overall there



has been some change since 2010, albeit the changes for the majority of the products has been marginal.

- 4.81 For convenience retailing, the overall main food market share to facilities within CE has increased by 1.4 percentage points and for top up food has increased by 2.7 percentage points. Turning to comparison shopping patterns, the market share to CE facilities for books, CDs and DVDs has increased by 2.7 percentage points. The market share retention for recreation and furniture goods has decreased by 2.1 and 1.1 percentage points respectively.

**Table 4.26: Changes in Market Share Since 2010**

	Cheshire East Market Share (%)		
	2010	2015	Change
<b>Convenience</b>			
Main Food	24.2	25.6	+1.4
Top-up	27.1	29.8	+2.7
<b>Comparison</b>			
Clothing and Footwear	15.6	14.5	-1.1
Books, CDs and DVDs	21.1	23.8	+2.7
Small Household Goods	18.0	18.6	+0.6
Recreation Goods	14.8	12.7	-2.1
Chemist Goods	23.7	25.2	+1.5
Electrical Goods	19.4	19.9	+0.5
DIY Goods	23.3	23.5	+0.2
Furniture Goods	22.4	21.3	-1.1

Source: Tables 3, 8, 10, 12, 14, 16, 18, 20, 22 and 24 of Appendix

Conclusions in Respect of Comparison Goods Shopping Patterns

- 4.82 In terms of the total comparison goods market share, we are able to calculate the market share based on the overall study area expenditure for each destination. Looking at facilities and Centres within CE specifically, the top destinations in terms of total comparison goods spend are set out in Table 4.27 below.
- 4.83 We are able to see from calculating the total comparison goods market share based on expenditure, that the top destination for comparison goods retailing in CE is Crewe town centre which has a total comparison goods turnover of £190.2m at 2015, which equates to a market share of 4.0%. This market share has reduced since 2010, when the town centre had a total survey derived turnover of £249.2m, equating to a market share of 11.5%. The second highest within CE is Macclesfield town centre with a total turnover of £166.9m, equating to a market share of 3.7%. This level of total market share has also reduced from 2010.



**Table 4.27: Top Destinations for Total Comparison Market Share and Expenditure**

Destination	Total Comparison Market Share 2010	Total Comparison Expenditure 2010	Total Comparison Market Share 2015	Total Comparison Expenditure 2015
<b>CE</b>				
Crewe Town centre	11.5%	£249.2m	4.0%	£190.2m
Macclesfield Town centre	11.4%	£247.1m	3.7%	£166.9m
Grand Junction Retail Park, Crewe	2.2%	£46.6m	2.2%	£106.9m
Nantwich Town centre	2.1%	£46.3m	1.5%	£71.0m
Lyme Green Retail Park, Macclesfield	0.4%	£9.3m	1.1%	£51.8m
Congleton Town centre	2.8%	£60.3m	0.9%	£43.4m
<b>CWAC</b>				
Chester City Centre	24.2%	£522.5m	9.5%	£451.3m
Greyhound Retail Park, Sealand, Chester	7.7%	£167.3m	4.4%	£207.9m
Cheshire Oaks	3.9%	£83.8m	4.5%	£216.6m
Northwich Town Centre	9.3%	£200.6m	3.0%	£144.3m
Ellesmere Port Town centre	5.0%	£107.6m	2.3%	£108.8m
<b>Outside of CWAC &amp; CE</b>				
Wrexham Town centre	-	-	5.3%	£252.0m
Trafford Centre	-	-	2.2%	£102.7m
Warrington Town centre	-	-	1.9%	£91.5m
Cheadle Royal Shopping Centre	-	-	1.7%	£79.3m
Liverpool City Centre	-	-	1.7%	£78.9m
Altrincham Town centre	-	-	1.5%	£71.6m

4.84 Looking at Zones 1, 2, 3 and 4 in particular, we can see that there are relatively high proportions of expenditure leaking outside of the Study Area to facilities in neighbouring authorities. In particular, £149.2m or 24.3% of all comparison goods expenditure from residents in Zone 1 is being spent at facilities in Stockport, with a further £27.2m or 4.4% at facilities in Trafford. In 2010, the total quantum of comparison expenditure from Zone 1 being spent at destinations in Greater Manchester was £160.5m, which is £34.8m less than the £195.3m figure recorded now.

4.85 Looking at Zone 3, £91.3m or 18.1% of the total comparison expenditure from these residents is being spent at destinations in Stoke city, £23.4m or 4.6% at destinations in Newcastle-Under-Lyme and £19.6m or 3.9% at destinations in Trafford.

4.86 Table 4.28 below looks at the top destinations within CE at which the highest proportion of expenditure is spent. Overall, we can see that a total of £938.9m of available comparison expenditure within the Study Area is directed towards destinations in CE. This has increased by £61.3m since 2010.



4.87 The Table demonstrates that of the total expenditure spent at facilities within CE, £190.2m or 20.3% of this is spent in Crewe town centre, which has decreased by £59.0m or 8.1 percentage points since 2010. A further £166.9m or 17.5% is spent in Macclesfield town centre and £106.9m or 11.4% at Grand Junction Retail Park.

**Table 4.28: Proportion of Market Share Directed to CE**

	Expenditure (£m)			Proportion of CE Expenditure (%)		
	2010	2015	Change	2010	2015	Change
Total CE Expenditure	£877.6m	£938.9m	<b>£61.3m</b>	-	-	-
Crewe Town centre	£249.2m	£190.2m	<b>-£59.0m</b>	28.4%	20.3%	-8.1%
Macclesfield Town centre	£247.3m	£166.9m	<b>-£80.9m</b>	28.2%	17.8%	-10.4%
Grand Junction Retail Park	£46.6m	£106.9m	<b>£60.3m</b>	5.3%	11.4%	+6.1%
Nantwich Town centre	£46.3m	£71.0m	<b>£24.7m</b>	5.3%	7.6%	2.3%
Lyme Green Retail Park	£9.3m	£51.8m	<b>£42.5m</b>	1.1%	5.5%	+4.4%
Congleton Town centre	£60.3m	£43.4m	<b>-£16.9m</b>	6.9%	4.6%	-2.3%
Knutsford Town centre	£17.6m	£43.2m	<b>£25.6m</b>	1.7%	4.6%	+2.9%

Source: Table 24 of Appendix 5

### Customer Behaviour

4.88 The results of the household survey are useful in understanding customer behaviour in terms of how people undertake their convenience and comparison goods shopping.

4.89 When respondents to the household survey were asked the main reason they choose to do their main food shopping at a particular store, most respondents (32.2%) explained that their chosen store was near to home. 17.7% of respondents stated that the reason was for lower prices, 7.7% stated habit, 6.9% stated the choice of food goods available and 5.3% did not have a reason.

4.90 The majority of respondents (63.4%) to the household survey do their main food shopping at least once a week. 13.0% do their main food shopping at least once a fortnight and 12.6% at least two times per week. The most popular time to undertake main food shopping was on weekdays during the day (40.1%), 12.4% undertake their main food shopping on weekdays during the evening and 15.0% on Saturday.



4.91 In terms of linked trips, the NEMS household survey results were accumulated and calculated to draw out the percentage of people that link their main food shopping trips to town centre stores, with other activities within those Centres. Table 4.28 below breaks down the percentage of linked trips for those respondents which said that their main food shop was to a town centre store in each of the respective towns. The Table demonstrates that those who shop in Alsager for their main food shop, 55.2% also undertake another activity. Of these, 29.9% are travelling to/from school or university.

4.92 There are also high proportions of linked trips within Nantwich (50.9%) of which 21.5% link their trips with non-food shopping. There were no respondents in Handforth who state that they linked their trips with other activities. This is logical in light of the limited offer of the Centre.

**Table 4.29a: Proportion of Town Centre Main Food Shopping Trips Linked with Other Activities**

	Macclesfield	Handforth	Poynton	Wilmslow	Knutsford
Yes non food shopping	6.41%	0.0%	13.61%	12.82%	8.78%
Yes other food shopping	5.10%	0.0%	6.81%	0.00%	3.21%
Yes visiting services such as banks and other financial institutions	2.48%	0.0%	0.00%	3.73%	2.86%
Yes leisure activity	7.02%	0.0%	0.00%	3.51%	5.09%
Yes travelling to / from work	3.20%	0.0%	0.00%	4.99%	11.54%
Yes travelling to / from school / college / university	0.72%	0.0%	0.00%	4.40%	0.00%
Yes getting petrol	3.89%	0.0%	0.00%	0.00%	0.00%
Yes visiting café / pub / restaurant	0.88%	0.0%	0.00%	10.76%	4.57%
Yes visiting family / friends	2.21%	0.0%	0.00%	0.00%	2.79%
Yes visiting health service such as doctor, dentist, hospital	0.61%	0.0%	6.81%	0.00%	1.55%
Yes visiting other service such as laundrette, hairdresser, recycling	0.72%	0.0%	0.00%	0.00%	2.01%
Yes other activity	0.00%	0.0%	0.00%	0.00%	0.00%
	<b>33.3%</b>	<b>0.0%</b>	<b>27.2%</b>	<b>40.2%</b>	<b>42.4%</b>



**Table 4.29b: Proportion of Town Centre Main Food Shopping Trips Linked with Other Activities**

	Alsager	Congleton	Middlewich	Sandbach	Crewe	Nantwich	Total (Towns in Cheshire East)
Yes non food shopping	10.35%	8.95%	0.00%	9.45%	19.60%	21.54%	9.07%
Yes other food shopping	0.00%	5.59%	5.84%	6.85%	2.65%	10.34%	5.17%
Yes visiting services such as banks and other financial institutions	14.93%	3.23%	2.02%	3.79%	4.42%	2.94%	2.27%
Yes leisure activity	0.00%	0.00%	0.00%	13.70%	0.94%	6.62%	3.43%
Yes travelling to / from work	0.00%	3.23%	16.28%	0.00%	3.42%	2.94%	5.23%
Yes travelling to / from school / college / university	29.90%	0.00%	2.38%	0.00%	0.00%	2.40%	1.11%
Yes getting petrol	0.00%	2.24%	0.00%	0.00%	1.42%	0.00%	1.46%
Yes visiting café / pub / restaurant	0.00%	5.47%	5.84%	3.77%	3.83%	3.21%	2.71%
Yes visiting family / friends	0.00%	0.00%	0.00%	2.61%	4.31%	0.92%	2.34%
Yes visiting health service such as doctor, dentist, hospital	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.34%
Yes visiting other service such as laundrette, hairdresser, recycling	0.00%	0.00%	2.92%	2.61%	0.00%	0.00%	0.79%
Yes other activity	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
<b>Total</b>	<b>55.2%</b>	<b>28.7%</b>	<b>35.3%</b>	<b>42.8%</b>	<b>40.6%</b>	<b>50.9%</b>	<b>33.9%</b>

Source: NEMS Household Survey

- 4.93 Respondents were also asked if they ever visit the town centres within CWAC and CE. Of the Centres within CE, 19.1% stated that they visit Crewe town centre and 17.8% stated that they visit Macclesfield town centre. Of those visiting Crewe, 40.2% visit the Centre at least once a fortnight and 71.8% travel there by car. The main reason these respondents visit the Centre is because it is close to home (35.7%) and because of the choice and range of shops (32.7%). Of these respondents, when they were asked if there were any measures to encourage them to visit more often, 27.3% gave their first answer that an increased choice and range of shops would help.
- 4.94 Turning to Macclesfield, of the respondents that said they do visit Macclesfield, 33.7% stated that they visit at least once a week and 71.7% stated that they travel to Macclesfield via car. Of those that visit Macclesfield, 50.5% stated that they visit primarily because it is close to home and 18.1% state that the range of shops is the main reason. When asked if there were any measures that would encourage



the respondents to visit Macclesfield more, the most popular first mention at 27.0% was an increased choice and range of shops.

4.95 Tables 4.30 and 4.31 set out the main reasons respondents visited each of the Centres in CE and the main measures which would encourage them to visit each Centre more often.

**Table 4.30 – Main reasons for visiting each Centre**

	1 <sup>st</sup>	2 <sup>nd</sup>	3 <sup>rd</sup>	4 <sup>th</sup>
<b>Alsager</b>	Choice and range of shops (26.0%)	Close to home (25.2%)	Close to work (10.7%)	Environmental quality (8.6%)
<b>Congleton</b>	Close to home (45.2%)	Choice and range of shops (14.0%)	Choice of leisure facilities (restaurants, pubs etc) (13.2%)	Close to work (9.3%)
<b>Crewe</b>	Close to home (35.7%)	Choice and range of shops (32.7%)	Close to work (5.9%)	Choice of services (hairdressers etc) (5.8%)
<b>Handforth</b>	Choice and range of shops (41.3%)	Close to home (22.2%)	For the Marks and Spencers Store (9.6%)	Choice of leisure facilities (restaurants, pubs etc) (6.3%)
<b>Knutsford</b>	Close to home (31.5%)	Choice and range of shops (28.8%)	Environmental quality (15.2%)	Choice of leisure facilities (restaurants, pubs etc) (6.2%)
<b>Macclesfield</b>	Close to home (50.5%)	Choice and range of shops (18.1%)	Choice of services (hairdressers etc) (5.7%)	Nice atmosphere/friendly people (3.3%)
<b>Middlewich</b>	Close to home (55.1%)	Choice of services (hairdressers etc) (22.0%)	Choice and range of shops (7.8%)	Like to support local shops (7.8%)
<b>Nantwich</b>	Close to home (30.2%)	Choice and range of shops (18.9%)	Environmental quality (16.2%)	Choice of leisure facilities (5.0%)
<b>Poynton</b>	Close to home (65.8%)	Close to family/friends (9.7%)	Choice and range of shops (9.7%)	Environmental quality (6.3%)
<b>Sandbach</b>	Close to home (48.5%)	Choice and range of shops (16.1%)	Environmental quality (6.7%)	Close to work (6.3%)
<b>Wilmslow</b>	Close to home (54.8%)	Choice and range of shops (34.5%)	Choice of services (5.4%)	Convenient car parking (3.2%)



**Table 4.31 – Measures which would encourage more visits**

	1 <sup>st</sup>	2 <sup>nd</sup>	3 <sup>rd</sup>	4 <sup>th</sup>
<b>Alsager</b>	Nothing (51.8%)	More food shops (15.8%)	Increased choice and range of shops (15.8%)	More independent shops (8.5%)
<b>Congleton</b>	Nothing (37.0%)	Increased choice and range of shops (14.0%)	Improved non-food shops (12.7%)	Increased public transport (7.9%)
<b>Crewe</b>	Nothing (33.7%)	Increased choice and range of shops (27.3%)	Improved quality of shops (7.0%)	Improved non-food shops (6.4%)
<b>Handforth</b>	Nothing (79.1%)	Increased choice and range of shops (5.6%)	More parking (3.7%)	Increased public transport, better environment and more places to eat (each at 3.0%)
<b>Knutsford</b>	Nothing (46.6%)	More parking (16.9%)	Increased choice and range of shops (15.0%)	Better pavements (5.3%)
<b>Macclesfield</b>	Nothing (32.3%)	Increased choice and range of shops (27.0%)	Cheaper parking (5.9%)	Less empty shops (4.4%)
<b>Middlewich</b>	Increased choice and range of shops (38.4%)	Nothing (28.6%)	Improved non-food shops (11.6%)	Less empty shops (7.8%)
<b>Nantwich</b>	Nothing (64.9%)	More parking (10.9%)	Increased choice and range of shops (10.4%)	Cheaper parking (2.5%)
<b>Poynton</b>	Nothing (33.2%)	Less traffic (27.3%)	Increased choice and range of shops (17.3%)	More parking (8.6%)
<b>Sandbach</b>	Nothing (56.8%)	More parking (19.7%)	Increased choice and range of shops (16.4%)	Increased public transport (2.2%)
<b>Wilmslow</b>	Nothing (31.1%)	Increased choice and range of shops (30.0%)	More parking (20.6%)	Cinema (14.5%)

Source: NEMS Household Survey

4.96 Respondents were asked whether they undertake shopping via electronic means i.e. home, mobile or TV shopping. The majority of respondents (65.8%) stated that they shop via home internet, 25.4% shop via portable internet devices (mobile phone, tablets etc) and 2.2% shop via the TV. When asked which goods their household purchases via electronic shopping, the highest response was for books at 48.9% followed by clothes at 48.0% and CDs, DVDs and music at 40.5%.

## Conclusions

4.97 Overall, the market share directed to facilities within CE has increased since 2010, with only clothing and footwear, recreation goods and furniture goods reducing in market share. Both the main food and top-up food market share to destinations in CE have increased, demonstrating that few residents from CE are now travelling to facilities outside of the Borough to undertake their convenience shops.





However, the main food market share is just 25.6%, which although has increased by 1.4 percentage points since 2010, is still relatively low at only approximately a quarter of the CE population undertaking their main food shop at CE destinations.

- 4.98 Both Crewe and Macclesfield town centres have seen a decrease in total comparison goods turnover and a decrease in total comparison goods market share based on available expenditure. Instead, there has been a considerable increase in turnover at Lyme Green Retail Park in Macclesfield and an increase in turnover of Nantwich town centre, which is a particularly positive sign for CE.
- 4.99 Looking at clothing and footwear goods in particular, the in and edge of centre facilities within the main towns of CE have seen a reduction in market share but facilities within and on the edge of Crewe town centre still attracts the highest market share of all of the main towns.
- 4.100 The levels of market share leaking outside of the Study Area is still relatively high, particularly for residents from Zones 1, 2 and 3, who are travelling to destinations in Trafford, Manchester, Stoke and Newcastle-Under-Lyme to undertake their comparison shop.



## 5.0 Health Check Assessments

- 5.01 The NPPF identifies a number of factors which are of relevance in delivering sustainable development, with one such factor being the need to ensure the vitality of town centres. Paragraph 23 of the NPPF states that local authorities should promote competitive town centre environments and set out policies for the management and growth of centres over the Plan period. Paragraph 23 also requires local planning authorities to recognise that town centres are at the heart of their communities and to pursue policies that support their viability and vitality. It is also noted that competitive town centre environments should be promoted in order to enhance customer choice, provide a diverse retail offer and in order to reflect the individuality of town centres.
- 5.02 Whilst the NPPF does not provide a list of indicators to be used to assess the health of a centre, such criteria have been published in the Government's Planning Practice Guidance: Ensuring the Vitality of Town Centres. Indicators which should be monitored on a regular basis in order to judge the health of a centre and its performance over time include the following:
- **Diversity of uses** – Data on the diversity of uses in the two Principal Towns of Crewe and Macclesfield, the nine Key Service Centres and the 13 Local Service Centres was collated during our survey of each of the defined Centres in August and September 2015.
  - **Proportion of vacant street level property** – Vacant properties were also identified during the undertaking of the survey.
  - **Retailer representation and intentions to change representation** – Information on the current strength of the defined Centres, retailer representation and retailer requirements has been derived from Venuescore's UK Shopping Venue Rankings and from other published sources.
  - **Commercial rents** – research into commercial rents has been undertaken by WYG through liaison with local property agents and the rental valuations of retail units currently on the market.
  - **Pedestrian flows** – General footfall and pedestrian flows were also observed during the undertaken during WYG's survey of the Town Centre, with detailed footfall survey data used where available.
  - **Accessibility** – Consideration of access to and around the Centres is informed by WYG's surveys.
  - **Perceptions of safety and occurrence of crime** – Consideration of recorded crime levels and initiatives to deter crime is informed by data available via [www.ukcrimestats.com](http://www.ukcrimestats.com) and our observations of initiatives present in each Centre.



- **State of Town Centre environmental quality** – Consideration of the quality of the buildings and public realm in the town centre has also been informed by WYG’s ‘on the ground’ observations.

5.03 We have also had particular regard to the proliferation of vacant land and premises and the opportunities that may exist for future growth in each Centre. The commentary below provides an analysis the two Principal Towns (Crewe and Macclesfield) and the nine Key Service Centres in respect of each of the above indicators. Full health checks for each Principal Town and Key Service Centre are provided at Appendix 3. We review the health and function of the Local Service Centres in CE later in this Section, with full reviews of the Local Services Centres contained at Appendix 4. A plan showing the spatial distribution of the centres in CE is contained at Appendix 5.

5.04 We commence our assessment by considering the role of the centres in the Borough and in the sub-regional shopping hierarchy.

### Sub-Regional Retail Hierarchy

5.05 Table 5.1 illustrates the position of the sub-region’s principal centres based on the Venuescore UK Shopping Venue Rankings 2014-15. Venuescore’s index ranks over 3,000 retail venues within the UK (including town centres, stand-alone malls, retail warehouse parks and factory outlet centres) based on the strength of their current retail provision. Towns and major shopping centres are rated using a scoring system that takes account of the presence in each location of multiple retailers – including anchor stores, fashion operators and non-fashion multiples.

5.06 Venuescore allocates each centre within a tier, reflecting its level of retail provision. The eight tiers comprise (highest to lowest): ‘Major City’, ‘Major Regional’, ‘Regional’, ‘Sub-Regional’, ‘Major District’, ‘District’, ‘Minor District’ and ‘Local’. The rankings in the table represent the position of the Centres at the time of the most recent 2014 Rankings, as well as competing surrounding destinations. The market position index and classification, as set out in the below table, provides an indication as to whether a retail venue’s focus is upmarket (luxury goods) or more downmarket (discount stores).

5.07 Crewe, Macclesfield and Wilmslow are all classed as Sub-Regional Centres by Venuescore. Crewe achieves the highest Venuescore ranking of 185<sup>th</sup>, followed by Macclesfield (225<sup>th</sup>) and Wilmslow (285<sup>th</sup>). The ranking of each of these centres has declined slightly since 2010, with Crewe’s ranking decreasing by three places during this period, while Macclesfield and Wilmslow’s rankings have decreased by two places. As would be expected, these centres are ranked lower than the competing



nearby higher order centres of Manchester (ranked 2<sup>nd</sup>) and Liverpool (5<sup>th</sup>). In addition, the rankings of these centres are also lower than the rankings achieved by Chester (37<sup>th</sup>) and Cheshire Oaks (113<sup>th</sup>). It is therefore evident that Crewe, Macclesfield and Wilmslow face competition from the nearby higher order centres.

5.08 In considering the position of the nine Key Service Centres in CE, as set out above, Wilmslow (285<sup>th</sup>) is the highest ranking Centre, followed by Nantwich (468<sup>th</sup>), Congleton (616<sup>th</sup>), Knutsford (746<sup>th</sup>), Sandbach (746<sup>th</sup>), Handforth (858<sup>th</sup>), Middlewich (1,313<sup>th</sup>), Poynton (1,792<sup>nd</sup>), and Alsager (2,557<sup>th</sup>). Since 2010, the rankings of Alsager (+736), Middlewich (+249), Handforth (+119), Sandbach (+54) Nantwich (+44), Congleton (+37) and Knutsford (+15) have all improved since 2010, albeit to different extents. The only Key Service Centres whose ranking has decreased since 2010 are Poynton (- 34 places) and Wilmslow (-2 places). Alderley Edge, which is a Local Service Centre, is also included in the Venuescore rankings and achieves a ranking of 1,895<sup>th</sup>. The centre’s ranking has improved by 783 places since 2010.

5.09 It is notable that there are out-of-centre retail destinations in CE which achieve a higher Venuescore ranking than the defined Key Service Centres. Grand Junction Retail Park in Crewe has a Venuescore ranking of 727<sup>th</sup>, which is higher than the rankings achieved by the majority of Key Service Centres. Notwithstanding this, the retail park’s ranking has decreased by 105 places since 2010. Congleton Retail Park and Lyme Green Retail Park achieve rankings of 1,167<sup>th</sup> and 1,524<sup>th</sup> respectively. The Centres located within the CWAC administrative area are also included within Table 5.1. Chester is classed as a ‘Major Regional’ Centre and achieves a higher ranking than all of the defined centres in CE.

**Table 5.1: Venuescore’s Sub-Regional Shopping Hierarchy**

VENUE	SCORE (2014/15)	Location Grade (2014/15)	2014/15 Rank	2013/14 Rank	2010/11 Rank	Change in Rank 2010 2014/15
Manchester	756	Major City	2	2	2	0
Liverpool	569	Major City	5	5	4	-1
Chester	295	Major Regional	37	35	32	-5
Cheshire Oaks	182	Regional	113	150	126	+13
Crewe	135	Sub-Regional	185	197	188	+3
Macclesfield	114	Sub-Regional	225	236	223	-2
Wilmslow	94	Sub-Regional	285	275	283	-2



Sealand Road/Greyhound Retail Park, Chester	85	Sub-Regional	329	335	344	+15
Ellesmere Port	73	Major District	388	374	362	-26
Northwich	73	Major District	388	353	317	-71
Nantwich	62	Major District	468	495	512	+44
Congleton	49	District	616	636	653	+37
Winsford	47	District	646	-	-	-
Grand Junction Retail Park, Crewe	41	District	727	655	622	-105
Knutsford	40	District	746	697	761	+15
Sandbach	40	District	746	805	800	+54
Handforth	36	District	858	781	977	+119
Congleton Retail Park	26	Minor District	1,167	1,024	1,119	-48
Northwich Retail Park, Northwich	24	Minor District	1,257	-	-	-
Nantwich Road, Crewe	23	Minor District	1,313	1,383	1,414	+101
Middlewich	23	Minor District	1,313	1,155	1,562	+249
Albion Road Retail Park, Northwich	20	Minor District	1,468	-	-	-
Neston	19	Local	1,531	-	-	-
Lyme Green Retail Park, Macclesfield	17	Local	1,680	1,524	1,877	+197
Poynton	16	Local	1,792	1,684	1,758	-34
Wharton Retail Park, Winsford	15	Local	1,895	-	-	-
Alderley Edge	15	Local	1,895	1,684	2,678	+783
Great Broughton	14	Local	2,010	-	-	-
Hoole	14	Local	2,010	-	-	-
Frodsham	11	Local	2,557	-	-	-
Alsager	11	Local	2,557	2,428	3,293	+736

Source: Venuescore UK Shopping Venue Rankings 2014-15



## Diversity of Uses

- 5.10 Table 5.2 and 5.3 shows a summary of the diversity of uses present within the two Principal Town Centres of Crewe and Macclesfield, as well as the nine Key Service Centres in CE. A full diversity of use analysis, including maps showing the uses across each centre and a comparison with previous years in which the centres have been surveyed is included at Appendix 3. The analysis has been undertaken to help identify how the different retail and service sectors are performing and how the composition of these centres has changed over time. This helps to demonstrate the effects of interventions that have occurred and the impact of external influences, such as the recent recession.
- 5.11 To ensure the current health check was compiled using the most up-to-date diversity of use information, surveys of each of the centres were undertaken by WYG in August and September 2015. For consistency, the Centre boundaries which have been used for the diversity of use analysis are comparable to the boundaries used as part of the Cheshire Retail Study Update (2009), which were largely based on the Experian Goad boundaries for each centre.

**Table 5.2: Diversity of Uses - Units**

Centre	Total Units	Proportion of Convenience Goods Units(%)	Proportion of Comparison Goods Units (%)	Proportion of Retail Service Units (%)	Proportion of Leisure Service Units (%)	Proportion of Financial and Business Units (%)	Proportion of Vacant Units (%)
Macclesfield	514	7.2	36.1	14.7	18.4	11.0	13.6
Crewe	238	8.0	31.9	11.8	14.7	9.7	23.9
Nantwich	277	6.5	33.9	23.1	21.7	9.0	5.8
Wilmslow	228	4.4	36.4	18.4	17.1	13.2	10.5
Congleton	225	7.1	29.8	16.9	19.1	8.4	18.7
Knutsford	201	4.5	37.3	19.9	21.4	10.9	6.0
Sandbach	145	10.3	27.6	17.2	26.9	11.0	6.9
Poynton	110	7.3	35.5	22.7	20.0	9.1	5.5
Alsager	104	13.5	27.9	20.2	20.2	8.7	9.6
Middlewich	86	11.6	18.6	26.7	23.3	9.3	10.5
Handforth	66	12.1	19.7	15.2	24.2	6.1	22.7
Cheshire Average	-	8.5	30.5	17.7	19.0	10.9	13.4
UK Average	-	8.5	32.4	14.2	22.5	10.8	11.4

Source: WYG site survey, based on Experian Goad Centre boundary  
 UK average from Experian Goad Category Report (July 2015)  
 Cheshire Average relates to average across CEC and CWAC



**Table 5.3: Diversity of Uses - Floorspace**

Centre	Total Floorspace (sq.m)	Proportion of Convenience Goods Floorspace (%)	Proportion of Comparison Goods Floorspace (%)	Proportion of Retail Service Floorspace (%)	Proportion of Leisure Service Floorspace (%)	Proportion of Financial and Business Floorspace (%)	Proportion of Vacant Floorspace (%)
Macclesfield	98,950	6.1	42.3	7.3	18.2	10.4	15.4
Crewe	77,380	24.2	38.8	3.4	13.9	5.4	14.2
Nantwich	42,122	19.8	32.2	14.2	21.6	8.2	4.0
Wilmslow	40,976	21.8	33.4	11.5	15.4	10.2	7.7
Congleton	32,179	15.7	29.9	11.1	21.9	6.8	14.5
Sandbach	26,564	27.7	28.5	6.4	23.1	9.1	5.2
Knutsford	26,264	8.2	33.1	12.3	31.4	9.4	5.7
Poynton	13,923	27.6	27.4	12.3	21.5	6.3	5.0
Middlewich	13,374	29.5	12.8	15.0	23.1	10.0	9.7
Alsager	13,305	28.0	24.0	13.2	20.2	8.0	6.6
Handforth	7,697	19.8	23.2	8.5	24.6	2.9	21.0
Cheshire Average	-	23.3	30.0	9.2	19.3	8.3	9.8
UK Average	-	15.1	36.1	7.5	23.3	8.2	9.2

Source: WYG site survey, based on Experian Goad Centre boundary  
 UK average from Experian Goad Category Report (July 2015)  
 Cheshire Average relates to average across CEC and CWAC

5.12 Table 5.2 and 5.3 show that Macclesfield town centre is the largest retail centre in the Borough, with 514 units present in the centre, providing 98,950 sq.m floorspace. The second largest retail centre in terms of floorspace is Crewe, which comprises 77,380 sq.m floorspace. Notwithstanding this, given the number of large scale units present in Crewe, when compared to Nantwich which comprises a number of small scale units, Crewe (238 units) has fewer units than Nantwich (277 units). Nantwich and Wilmslow provide a similar level of retail and service floorspace, at 42,122 sq.m and 40,976 sq.m respectively, Congleton provides the next greatest floorspace (32,179 sq.m), followed by Sandbach (26,564 sq.m) and Knutsford (26,264 sq.m), which provide a similar level of floorspace. The remaining Key Service Centres are much smaller in scale, with Poynton (13,923 sq.m), Middlewich (13,374 sq.m) and Alsager (13,305 sq.m) all providing a similar level of floorspace. Handforth provides the smallest amount of floorspace (7,697 sq.m) of the Key Service Centres.

5.13 Our analysis of the proportion of convenience goods units and floorspace present in each centre shows that Alsager is extremely well represented in terms of the proportion of convenience goods units (13.5%) and floorspace (28.0%), when compared to the respective national average figures (8.5% and 15.1%). This is largely as the result of the development of the Asda supermarket on Lawton Road. Indeed, the amount of convenience floorspace in Alsager has nearly doubled since 2010. However, the proportion of convenience goods units (4.5%) and floorspace (8.2%) in Knutsford is substantially less than the respective national average figures. This is as a result of the Booths and Aldi supermarkets not being located within the Goad town centre boundary. Indeed, if these units are taken into account, it is considered that Knutsford provides a strong convenience goods offer.



- 5.14 Our analysis has found that Macclesfield provides a high proportion of comparison goods units (36.1%) and floorspace (42.3%) when compared to the national average (32.4% and 36.1% respectively), which is to be expected given Macclesfield is the largest centre in CE and, alongside Crewe, is a Principal Town in the Borough which provides a main focus for such provision. Although Crewe is also a Principal Town, the proportion of comparison goods units (31.9%) and floorspace (38.8%) in Crewe lower than Macclesfield. The centre in CE which has the lowest proportion of comparison goods units (18.6%) and floorspace (12.8%) is Middlewich. This is reflective of the role and scale of the centre, which is largely convenience and service focussed, as well as the proximity of Middlewich to larger centres such as Sandbach and Crewe which provide a stronger comparison goods offer.
- 5.15 When considering the service function provided by each of centres within the Borough, Middlewich provides the greatest proportion of retail service units (26.7%) and floorspace (15.0%) of the Centres in CE. This is largely as a result of a substantial number of health and beauty uses present in the centre. Sandbach provides the greatest proportion of leisure serve units (26.9%), while Knutsford provides the greatest proportion of leisure service floorspace (31.4%). This is the largest as a result of the strong food and drink offer present in both centres, including public houses, restaurants and cafes. Wilmslow provides the highest level of financial and business units in the Borough (13.2%), while the highest proportion of financial and business floorspace is provided by Macclesfield (10.4%). The financial and business representation in both of these centres has remained strong since 2009.
- 5.16 The proportion of vacant floorspace is greater than the national average (9.2%) in Handforth (21.0%), followed by Macclesfield (15.4%), Crewe (14.2%), Congleton (14.5%), Middlewich (9.7%). It is considered that the high proportion of vacant units and floorspace in Handforth is as a result of the centre being physically larger than required for its role and function, particularly given the competition provided by Handforth Dean Retail Park and Wilmslow. The number of vacant units in Handforth may be less if the centre was more concentrated. The majority of vacant units in Handforth are located in the Paddock which would benefit from intervention. The vacancy rates in the two Principal Towns of Macclesfield and Crewe are greater than the national average. In Crewe, there is a concentration of vacant units along High Street, which is considered to be as a result of the peripheral nature of this street and its limited connectivity with the remainder of the Centre. In addition, there are also vacancies along Queensway as a result of the Council's aspirations to redevelop the Royal Arcade, although the Council is actively seeking short term tenancies for these units in the meantime. Similarly, in Macclesfield, there is a concentration of vacant units at the entrance to the Grosvenor Centre, however, this area has planning permission for its redevelopment. Therefore, it is considered





that there is potential for the vacancy rate in Crewe and Macclesfield to improve if planned redevelopment proposals are pursued.

## Vacancies

- 5.17 Table 5.4 shows how the vacancy rates within the two Principal Towns of Crewe and Macclesfield, as well as the nine Key Service Centres in CE, have changed since 2009/10. The number of vacant units in Crewe town centre has increased by 10.2 percentage points to its current level of 23.9% of all units, which is the greatest increase in the proportion of vacant units of any centre in the CE administrative area. Crewe has also seen a 7.7 percentage point increase to its proportion of vacant floorspace. The number of vacant units in Macclesfield town centre has remained at around 13% since 2009/10. However, Macclesfield's vacant floorspace has increased by 6.6 percentage points over the same timeframe. Poynton town centre has also seen a substantial increase in both the number of vacant units (+5.9 percentage points) and vacant floorspace (+10.6 percentage points).
- 5.18 The centres with the best vacancy rate improvements since 2009/10 are Middlewich, where the number of vacant units has decreased by 4.7 percentage points, and Alsager, where the proportion of vacant floorspace has decreased by 2.7 percentage points. However, at 5.8% and 4.0%, Nantwich town centre achieves the lowest respective proportion of vacant units and floorspace of any centre in CE. Overall, five of the 11 centres have seen increases to the proportion of vacant units, whilst eight of the centres have experienced an increase to their proportions of vacant floorspace. It should be noted, however, that vacancy information for Handforth was not available for 2009/10 preventing a comparison from being made. In addition, the national vacancy trends should also be taken into consideration, as the national average for the proportion of vacant units (+0.9 percentage points) and floorspace (+0.7 percentage points) have both increased since 2009/10. Therefore, the centres where the vacancy rate has reduced since 2009/10 can be considered to be performing very well, given that nationally vacancy rates have increased during this period.



**Table 5.4 – Changes in Vacancies between 2009/10 and 2015**

Centre	Units (%)			Floorspace (%)		
	2009/10	2015	Change	2009/10	2015	Change
Crewe	13.7	23.9	+10.2	6.5	14.2	+7.7
Macclesfield	13.9	13.6	-0.3	8.8	15.4	+6.6
Alsager	9.8	9.6	-0.2	9.3	6.6	-2.7
Congleton	19.8	18.7	-1.1	15.6	14.5	-1.1
Handforth	-	22.7	-	-	21.0	-
Knutsford	6.8	6.0	-0.8	4.4	5.7	+1.3
Middlewich	15.2	10.5	-4.7	8.4	9.7	+1.3
Nantwich	3.5	5.8	+2.3	2.6	4.0	+1.4
Poynton	5.5	11.4	+5.9	5.0	15.6	+10.6
Sandbach	4.7	6.9	+2.2	5.1	5.2	+0.1
Wilmslow	11.5	10.5	+1.0	7.5	7.7	+0.2
Cheshire Average	11.9	13.8	+1.9	7.8	10.4	+2.6
UK Average	10.4	11.3	+0.9	8.5	9.2	+0.7

2009/10 UK average (Experian Goad Category Report April 2009)

2015 UK average (Experian Goad Category Report July 2015)

Cheshire Average relates to average across CEC and CWAC

### National Multiples

5.19 Multiple retailers such as Boots, Marks and Spencer's and Primark, can act as anchor tenants in a centre and can add to its appeal and create additional footfall. Experian Goad produces a list of the top comparison retailers, which acts as a measure of the vitality and viability of a centre. Table 5.5 below shows the number of the top 27 retailers located within each of the centre boundaries.

**Table 5.5: Experian Goad list of Major Comparison Retailers**

Retailer	Crewe	Macclesfield	Alsager	Congleton	Handforth	Knutsford	Middlewich	Nantwich	Poynton	Sandbach	Wilmslow
Argos	✓	-	-	✓	-	-	-	-	-	✓	-
BHS	✓	-	-	-	-	-	-	-	-	-	-
Boots the Chemist	✓	✓	-	✓	-	✓	-	✓	✓	✓	✓
Burton	✓	✓	-	-	-	-	-	-	-	-	-
Carphone Warehouse	-	✓	-	-	-	✓	-	-	-	-	-
Clarks	✓	✓	-	-	-	-	-	✓	-	-	✓
Clintons	✓	✓	-	✓	-	-	-	-	-	-	✓
Debenhams	-	-	-	-	-	-	-	-	-	-	-
Dorothy Perkins	✓	✓	-	✓	-	-	-	-	-	-	-
H&M	-	-	-	-	-	-	-	-	-	-	-
HMV	-	-	-	-	-	-	-	-	-	-	-
House of Fraser	-	-	-	-	-	-	-	-	-	-	-
John Lewis	-	-	-	-	-	-	-	-	-	-	-
Marks & Spencer	✓	✓	-	-	-	-	-	-	-	-	-
New Look	✓	✓	-	-	-	-	-	-	-	-	-
Next	-	-	-	-	-	-	-	-	-	-	-
O2	✓	✓	-	-	-	-	-	-	-	-	✓
Primark	-	-	-	-	-	-	-	-	-	-	-
River Island	✓	✓	-	-	-	-	-	-	-	-	-
Superdrug	✓	✓	-	✓	-	-	-	✓	-	-	✓
TK Maxx	-	-	-	-	-	-	-	-	-	-	-
Topman	✓	-	-	-	-	-	-	-	-	-	-
Topshop	✓	-	-	-	-	-	-	-	-	-	-
Vodafone	✓	✓	-	-	-	-	-	-	-	-	✓
Waterstones	✓	✓	-	-	-	✓	-	-	-	-	✓
WHSmith	✓	✓	-	✓	-	✓	-	✓	-	✓	✓
Wilkinsons	✓	-	-	-	-	-	-	-	-	-	-
<b>TOTAL</b>	<b>18</b>	<b>14</b>	<b>0</b>	<b>6</b>	<b>0</b>	<b>4</b>	<b>0</b>	<b>4</b>	<b>1</b>	<b>3</b>	<b>8</b>

5.20 Crewe town centre accommodates the highest number of top comparison retailers, as identified by Experian Goad, with 17 of the top 27 retailers located within the town centre. Macclesfield accommodates the second greatest number of top comparison retailers, with 14 of the top comparison retailers located in the town centre. This demonstrates that both Crewe and Macclesfield are seen as reasonable attractive locations for national operators to invest and that these town centres accommodate a range of comparison goods retailers which should act to attract consumers due to the critical mass of well known high street brands. Notwithstanding this, it is evident that there are several of the top comparison retailers who are not represented in CE. This is likely a result of the higher order centres which are located in close proximity to the Borough, such as Manchester, Liverpool, Chester and Stoke-on-Trent, which given their scale, are appealing to operators such as Debenhams or House of Fraser. The Key Service Centre which accommodates the greatest number of top



comparison goods retailers is Wilmslow, which accommodates eight such retailers. The Centre is considered to provide a strong provision in terms of comparison goods operators for a Centre of its scale. Three of the Key Service Centres in CE accommodate none of the top comparison goods retailers, namely Alsager, Handforth and Middlewich. This corresponds with these being the smallest (in terms of the total number of units) Key Service Centres within the Borough. In cases where Key Service Centres do not support a high proportion of national multiple operators, this is not necessarily a weakness. Centres such as Knutsford and Nantwich provide a wide range and variety of independent operators, which creates a unique and diverse shopping offer and are also the towns with the lowest vacancy rates.

5.21 A comprehensive review of each of the Principal Towns and Key Service Centres is contained at Appendix 3. A summary of the health of each centre is provided below, which should be considered in conjunction with the key indicators set out above.

### Rental Levels

5.22 EGi has been used to gain information on the advertised rental levels of units within each of the defined centres in CE. At the time of our search, Wilmslow had the highest average rental level of £302/sq.m, followed by Knutsford (£256/sq.m) and Nantwich (£235/sq.m). The centre which had the greatest variance in advertised rental levels was Crewe, with rental levels ranging from £39/sq.m to £667/sq.m. The lowest average rental levels were found in Middlewich (£101/sq.m) and Alsager (£105/sq.m).

**Table 5.6 – Rental Levels**

Centre	Lowest Advertised Rental Level £ per sq.m	Highest Advertised Rental Level £ per sq.m	Average Advertised Rental Level £ per sq.m
Macclesfield	52	583	169
Crewe	39	667	213
Alsager	83	127	105
Congleton	61	350	160
Handforth	134	172	142
Knutsford	170	404	256
Middlewich	47	143	101
Nantwich	128	446	235
Poynton	-	-	-
Sandbach	97	240	167
Wilmslow	165	549	302

Source: EGi Available Property Information 2015  
 Historic data used for Alsager as no properties available via EGi  
 No available data for Poynton



## Parking

- 5.23 Table 5.7 provides details in relation to the Council owned car parks which are present in each centre, including the total number of spaces provided in each centre and the price of parking. As may be expected, given they are the Principal Towns in the Borough, Macclesfield (2,268 spaces) and Crewe (1,749 spaces) provide the greatest number of Council owed car parking spaces of the centres in CE. When considering the Key Service Centres in CE, Wilmslow (1,134 spaces) has the highest number of parking spaces, followed by Knutsford (635 spaces). The Key Service Centres which provide the lowest amount of Council owned car parking provision are Middlewich (133 spaces) and Handforth (108 spaces). While car parking charges apply in Macclesfield, Crewe, Wilmslow, Knutsford, Nantwich and Congleton, parking is free of charge in Sandbach, Alsager, Poynton, Middlewich and Handforth.
- 5.24 It should be noted that Table 5.7 only provides details in relation to Council owned parking spaces and that in all of the centres private car parks are also present.

**Table 5.7: Council Owned Car Parks**

Centre	Number of Car Parks	Total Number of Space	Price
Macclesfield	18	2,268	Free (specific locations) Free after 3 (Whalley Hayes CP) £0.30-£0.70 – under 1 hour £1.00-£1.10 – 1 to 2 hours £1.00-£2.30 – 2 to 3 hours £1.00-£3.40 – 3 to 4 hours £3.10-£4.30 – 4 to 6 hours £3.30-£5.50 – 6 to 10 hours
Crewe	13	1,749	Free (specific locations) Free after 3 (Oak Street) £0.70 – under 1 hour £1.10 – 1 to 2 hours £2.10 – 2 to 4 hours £2.60-£2.90 – 4 to 10 hours
Wilmslow	6	1,134	Free after 3 (Spring Street CP) £0.60 – under 1 hour £1.00 – 1 to 2 hours £1.70-£3.40 – 2 to 3 hours £2.50-£3.40 – 3 to 4 hours £3.10-£4.30 – 4 to 6 hours £3.30-£4.30 – 6 to 10 hours
Knutsford	6	635	Free after 3 (Princess Street CP) £0.40-£0.60 – under 1 hour £0.80-£1.00 – 1 to 2 hours £1.70-£2.10 – 2 to 3 hours £2.50-£3.10 – 3 to 4 hours £3.10-£3.90 – 4 to 6 hours £3.30-£4.30 – 6 to 10 hours
Sandbach	8	546	Free
Nantwich	9	507	£0.60-£0.70 – under 1 hour £1.00-£1.10 – 1 to 2 hours £2.10 – 2 to 4 hours £2.60-£2.90 – 4 to 10 hours
Alsager	3	366	Free
Congleton	8	296	£0.60 – under 1 hour £1.70 – 1 to 3 hours £2.60 – 3 to 10 hours
Poynton	1	204	Free
Middlewich	3	133	Free
Handforth	2	108	Free

## Markets

5.25 Markets can add considerable diversity to the everyday retail offer and can draw additional visitor trips into a town centre. The extra visitors often also shop elsewhere in the centre and markets can therefore play an important role in boosting a centre's vitality and viability. We consider CE to have a good coverage of markets, with eight of the eleven centres having a market that operates once a week or more often. Crewe and Macclesfield have indoor markets that operate six days a week, whilst Knutsford's indoor market operates four times a week and Nantwich markets operate three times a week. Several of the town centres have both indoor and outdoor markets and ten of the eleven centres also offer a farmers or artisan markets, which often sell locally produced or sourced goods. Handforth, Poynton and Wilmslow are the only centres that don't operate a weekly market, but



Wilmslow in particular has a large and popular artisan market (120 stalls) that operates once a month and is a key attraction to the centre.

**Table 5.8: Markets within CE Centres**

Centre	Type	Number of Stalls	Days
Macclesfield	Indoor	50	6 days (Mon-Sat)
	Outdoor	25	3 days (Tues, Fri and Sat)
	Treacle Market (Artisan)	100	Last Sun of the month
Crewe	Indoor	Not known	6 days (Mon-Sat)
	Outdoor	47	3 days (Mon, Fri and Sat)
	Friday market	15	4 <sup>th</sup> Fri of the month
Nantwich	Indoor	20 (units)	3 days (Tues, Thurs and Sat)
		20 (stalls)	
	Outdoor	20	
	Farmers	25	
Wilmslow	Artisan	120	3 <sup>rd</sup> Sat of the month
Congleton	Covered	11 (indoor) 84 (outdoor)	2 days (Tues and Sat)
	Farmers	10	1 <sup>st</sup> and 3 <sup>rd</sup> Tues of the month
	Artisan and Vintage	Not known	2 <sup>nd</sup> Sun of the month
Sandbach	Indoor	80	2 days (Thurs and Sat)
	Farmers	30	2 <sup>nd</sup> Sat of the month
Knutsford	Indoor	14 (8 occupiers)	4 days (Tues, Thurs, Fri and Sat)
	Outdoor	1	Every Friday
	Farmers	18	1 <sup>st</sup> Sun of the month
Poynton	Farmers	15	1 <sup>st</sup> Sun of the month
Middlewich	Outdoor	15	1 day (Tues)
	Farmers	15-20	1 <sup>st</sup> Sat of every month
Alsager	Outdoor	25	1 day a week (Wed)
	Farmers	Not known	3 <sup>rd</sup> Sat of the month
Handforth	-	-	-

## Community Facilities

5.26 Commercial centres are the focus of retail and service uses, which often enables visitors to meet different retail and service needs within a single linked trip. In the same respect, if a Centre lacks a particular retail facility or service, a trip further afield may be required. Table 5.9 identifies twelve key services that are regularly used by visitors in town centres. WYG consider the general coverage of retail facilities and services within the two Principal Towns and the nine Key Service Centres in CE to be reasonably good. Macclesfield and Congleton are the only centres to contain each category of retail and service facilities. However, Knutsford, Middlewich, Nantwich, Sandbach and Wilmslow each only lack one type of service or facility. Alsager and Handforth are the centres that are missing the most facilities, which is unsurprising given that they are the two smallest Key Service Centres in the Borough. However, each centre contains at least one supermarket, bank, Post Office, restaurant or cafe chemist, dentist and a library.

**Table 5.9 – Community Facilities in CE Centres**

	Supermarket or Superstore	Pharmacy	Post Office	Bank	Building Society	Public House	Restaurant/ cafe	Library	Leisure Use (Leisure Centre, Cinema, Bowling etc)	Surgery/ Health Centre	Dentist	Community Centre
Macclesfield	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Crewe	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗	✓	✗
Nantwich	✓	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓	✓
Wilmslow	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗
Congleton	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Sandbach	✓	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓	✓
Knutsford	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✗
Poynton	✓	✓	✓	✓	✗	✓	✓	✓	✗	✓	✓	✓
Middlewich	✓	✓	✓	✓	✓	✓	✓	✓	✗	✓	✓	✓
Alsager	✓	✓	✓	✓	✗	✓	✓	✓	✗	✗	✓	✓
Handforth	✓	✓	✓	✓	✗	✗	✓	✓	✗	✓	✓	✗

\*Leisure centre at Congleton does not feature in Goad floorspace figures, although this facility is within the Town Centre Boundary.

### Digital High Street

5.27 Digital facilities can promote a centre to potential visitors whilst also broaden its offer to different types of shopping and a wider range of people. In so doing, a Centre’s digital offer can have a significant bearing on its vitality and viability. Table 5.10 demonstrates the extent of the several digital mediums across the CE authority area. With the exception of Handforth, each Centre within the Borough has a website. Six of the eleven Centres offer one or more Collect Plus facilities. The centres with the best Wi-Fi coverage are Macclesfield, Crewe, Nantwich, Wilmslow and Knutsford. However, Alsager and Handforth do not have particularly good Wi-Fi coverage.





**Table 5.10 – Digital Facilities in CE Centres**

	BT Wi Fi Hotspots	Cloud Wi Fi Hotspots	Collect Plus Points	Website
Macclesfield	1	10	1	Yes (good)
Crewe	5	4	1	Yes (good)
Nantwich	1	8	1	Yes (good)
Wilmslow	3	8	1	Yes (limited)
Congleton	1	4	1	Yes (good)
Sandbach	0	4	1	Yes (limited)
Knutsford	1	6	0	Yes (good)
Poynton	0	2	0	Yes (good)
Middlewich	1	1	0	Yes (limited)
Alsager	0	0	0	Yes (limited)
Handforth	0	0	0	No

Sources: www.btwifi.co.uk, www.thecloud.net, www.collectplus.co.uk

## Principal Towns

- 5.28 A summary of the health of Crewe and Macclesfield town centre is provided below. The full health checks for these Centres are provided at Appendix 3.

### Crewe

- 5.29 Crewe town centre provides an important resource, particularly for residents in the southern part of the Borough, in catering for their convenience and comparison goods needs, as well as providing a key location to access a range of services. The centre has a strong representation from national multiple operators; however, such operators are largely focussed on the value end of the market, with the town lacking in terms of more upmarket national operators. Although Grand Junction Retail Park, which is located approximately 300m to the south east of the town centre, acts to enhance the wider appeal of Crewe as a shopping and leisure destination, the Retail Park also provides a competing destination to the town centre. The Retail Park provides a range of large retail units which accommodate national multiple comparison retailers including Halfords, Harveys, Home Bargains, Next and TK Maxx and an Aldi foodstore. Alongside the Class A1 retailers are also a Costa, KFC, Bella Italia and Frankie and Benny's
- 5.30 The centre is well represented in terms of convenience goods floorspace, when compared to the national average, with a Tesco Extra superstore located to the south east of the centre and an Asda supermarket located in the north east of the centre. The proportion of comparison goods provision, although comparable to the national average, has declined by 3,311 sq.m since 2009. Crewe's leisure service provision has declined by nine units and 2,795 sq.m floorspace since 2005. Although Phoenix Leisure Park is located within the town centre, connections from the core of the town centre to the Leisure Park are of poor quality and could be improved. A new Lifestyle Centre is currently under-



construction in the town centre, which will provide a leisure facility and community hub, and will improve Crewe's leisure provision once opened in April 2016.

- 5.31 Crewe was busy at the time of our survey demonstrating that the town provides an important resource for the area. The environmental quality of Crewe is mixed and it is considered that connectivity could be improved between different areas of the centre. Indeed, the high vacancy rate in the centre detracts from the environmental quality, with the proportion of vacant units in the centre being nearly double the national average. However, it is clear that plans are in place to assist the regeneration of the centre via the Crewe Town Centre Regeneration Framework for Growth, with specific plans in the pipeline including the Council's proposal to redevelop part of the Royal Arcade site.
- 5.32 In summary, it is considered that the health of Crewe town centre has declined in recent years and therefore intervention is required to ensure that the health of the town does not reduce further.

### Macclesfield

- 5.33 Macclesfield is well represented in terms of comparison goods units, which is to be expected given the higher order status of Macclesfield within the Borough. The town centre's retail service offer is also strong, with the proportion of such units greater than the national average. The proportion of convenience goods floorspace in the centre is below the national average, which is largely a result of the lack of a large scale supermarket operator present in the centre. Macclesfield's leisure service offer is also weak, with the proportion of such floorspace substantially below the national average.
- 5.34 Macclesfield benefits from an attractive public realm as a result of both the distinct historic environment and previous programmes of investment which have taken place in the centre. Notwithstanding this, the vacancy rate in the centre is above the national average, with these empty units detracting from the environmental quality of the centre. However, plans are being developed to regenerate areas of the town centre which would benefit from improvements, including the planned leisure-led redevelopment scheme being progressed by Ask Real Estate on the Churchill Way car park.
- 5.35 Overall, Macclesfield is showing some positive vitality and viability indicators particularly in relation to the comparison and service sector but there are also a number of indicators which demonstrate that the centre has struggled over the past five years. As such, it is recommended that further interventions take place in the centre to address the centre's weaknesses including vacant units and a lack of modern retail units, to assist the centre in being vital and viable over the Plan period.



## Key Service Centres

5.36 A summary of the health of the Key Service Centres in CE is provided below. The full health checks for these centres are provided at Appendix 3.

### Alsager

5.37 Alsager is considered to play an important role in catering for the day to day convenience and service needs of the surrounding communities. The centre offers a good range of products and services for a centre of its scale. Alsager has a strong convenience goods and retail service offer when compared to the national average. Indeed, the amount of convenience goods floorspace in the centre has nearly doubled since 2010, as a result of the completion of the Asda supermarket, which provides the anchor convenience goods unit in the centre. However, the comparison goods offer of the centre has declined in recent years, with six of the comparison goods units in the centre comprising charity shops. The centre is characterised by a high proportion of independent retailers. Alsager also provides an important community function, containing a library, civic centre and medical services.

5.38 Although overall the environmental quality of the town centre is good, the eastern part of the town centre is considered to be considerably more vibrant than the western portion of the centre due to the higher levels of footfall. The vehicular traffic passing through the centre does detract from the amenity value of the shop frontages, however, a shared surface scheme is proposed within the Alsager Town Strategy, which would assist in addressing this issue. The vacancy rate in the centre is below the national average, which is a positive sign of health; however, it appears there are some issues in terms of attracting new investment to the centre, as evidenced by the lack of occupancy of the new retail units adjacent to the Asda supermarket.

5.39 It is considered that Alsager is a vital and viable centre. It provides an important resource for the local communities in catering for their convenience and service needs and offers a reasonable range of goods for a Centre of its size.

### Congleton

5.40 In summary, it has been concluded that the vitality and viability of Congleton town centre is varied. The town centre has a range of strengths including strong levels of footfall and favourable environmental quality in the pedestrianised areas of the town centre. Congleton is covered by two Conservation Areas and there is a range of historic buildings present in the centre which create an



attractive built environment. There is a reasonable number of national multiple retailers present in the centre, however, the majority of the retail and service offer is provided by independent retailers. Although there are two supermarkets present in the centre, namely Aldi and Morrisons, the wider range of convenience goods units is limited.

- 5.41 In terms of the centre’s weaknesses, the vacancy rate is substantially greater than the national average, and the comparison goods and financial and business service offer has declined since 2009. The vacancy rate has improved slightly since 2009, which is a positive indicator. However, it is considered that areas of the town centre are vulnerable and would benefit from intervention.
- 5.42 Notwithstanding this, plans are being progressed to improve the town centre. Public realm improvements are planned along Bridge Street, Duke Street, High Street and Little Street and plans are being progressed for the refurbishment or rebuild of the leisure centre at its existing location at Worrall Street.

### Handforth

- 5.43 Handforth is the smallest of the Key Service Centres in CE, and given the limited range of retail and service units present, the centre caters for local needs. Indeed, the catchment of the centre is constrained by both Wilmslow and Handforth Dean Retail Park, which are located in close proximity to the centre and provide a much wider offer.
- 5.44 The centre is well represented in terms of the proportion of convenience goods when compared to the national average, with the Tesco Express and Spar stores providing the main convenience offer. There is also a buoyant leisure service sector when compared to the national average, with a good range of food and drink units present. Handforth is highly accessible, with the presence of free parking and regular bus and train services.
- 5.45 Handforth does face a number of key challenges. Handforth has a high vacancy rate, with a high proportion of vacant units present at the Paddock, the purpose built parade. In addition, the spatial form of Handforth does not assist the vibrancy of the centre, as there is a small strip of units located in an isolated position in the southern part of the centre. It is considered that some consolidation of the centre may be beneficial in order to develop a more condensed and healthy core, in order to maintain a viable centre in the future.



## Knutsford

- 5.46 Knutsford is considered to be a vibrant and thriving centre. As well as providing an important retail and service destination for local residents, as a result of the varied retail offer and evening economy, the centre also attracts customers from further afield.
- 5.47 The vacancy rate in the centre is low, demonstrating that operators are keen to have a presence. The range of independent retailers assists in creating a unique and interesting offer; with the presence of national operators also creating a strong retail mix. The town is considered a destination to purchase higher order goods. Knutsford's convenience shopping offer has improved in recent years via the opening of a new Aldi supermarket and small format Waitrose store. The centre has a strong leisure service offering, with a range of food and drink facilities present. There has been an increase in eight leisure service units since the previous survey in 2009.
- 5.48 The Knutsford Conservation Area covers the majority of the town centre, which is indicative of the centre's attractive environmental quality. The town's attraction is further improved by its links to the nearby recreational amenities at Tatton Park, The Moor and The Heath. Although the centre is highly accessible by car due to its close proximity to the M6 and M56 motorways, some conflicts do occur being vehicular and pedestrian traffic in the centre due to the presence of narrow pavements and passing traffic.

## Middlewich

- 5.49 Middlewich provides for the convenience and service needs of a local catchment. Indeed, it has a strong convenience goods function when compared to the national average, with the centre anchored by the Tesco and Lidl<sup>36</sup> supermarkets. The proportion of retail service units present in the centre is substantially greater than the national average; the majority of such units comprise health and beauty units. Although the proportion of comparison goods units in the centre is lower than the national average, this is to be expected given the scale of the Centre and the proximity of Middlewich to higher order centres such as Crewe, which provide a wider comparison goods offer.
- 5.50 The centre can be easily accessed by car due to the presence of the A54 directly to the north of the town centre, which leads to the M6. Although there is currently no railway station in the centre, the

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<sup>36</sup> The Lidl store is included within the Experian Goad Town centre Boundary for Middlewich, but is located 'edge of centre' in accordance with the Congleton Borough Local Plan.



Council is exploring the potential to provide a new station to serve the centre. The traditional linear form and presence of historic buildings in Middlewich contribute towards the environmental quality. However, Middlewich would benefit from additional pedestrian activity in order to create a more vibrant centre.

- 5.51 Although at present the health of Middlewich is considered to be reasonable, it is considered that interventions would benefit it to ensure its vitality and viability does not deteriorate in the future, particularly given the competition provided by nearby higher order centres.

### Nantwich

- 5.52 Nantwich provides a role in catering for the day-to-day retail and service needs of those residents in the south western part of the Borough. The centre provides a good range of speciality and independent shops, which creates a unique shopping environment and caters for visitors, as well as local residents.
- 5.53 There is a good range and choice of convenience goods present in the centre. The Morrisons and Aldi provide anchor stores and the offer of the wider centre has improved recently via the opening of an M&S Simply Food at the edge of the centre. Nantwich is also well provided for in terms of retail services, with strong representation from the health and beauty sector. Although there is considered to be a reasonable range of comparison goods available in Nantwich for a Centre of its size, the proportion of such goods has reduced since 2009. The vacancy rate in the centre is low. Although the number of vacant units has increased by six since 2009, there does not appear to be any issues with long term vacancies. The environmental quality of the centre is positive and it is located within the Nantwich Conservation Area and contains the largest concentration of historic buildings in the Borough.
- 5.54 Overall, Nantwich is considered to be a vital and viable centre. Even though Nantwich is located a short distance from the higher order centre of Crewe, its specialist offer means it is able to complement and offer something different to the offer of Crewe town centre and Grand Junction Retail Park.



## Poynton

- 5.55 Poynton is considered to be a healthy centre. Indeed, its' vitality and viability has improved considerably since 2010. The centre performs a role in meeting the convenience shopping and day-to-day service needs of the local resident population.
- 5.56 The convenience goods offer in Poynton has improved in recent years, with a new Asda and Waitrose opening. In addition, planning permission has been granted for the delivery of an Aldi store on the former Poynton cinema site; however, development of the store has not yet commenced. The centre is also well represented in terms of retail service floorspace, with a high proportion of health and beauty outlets. The centre is slightly under-represented in comparison to the national average in terms of leisure and retail service floorspace and therefore may benefit from improvements in this regard.
- 5.57 There have been significant improvements to the environmental quality of Poynton since 2010 as a result of the installation of shared surfaces and public realm improvements. These improvements have created more activity and vibrancy within the centre by allowing for additional outdoor seating within the centre. The vacancy rate in the centre is very low, with the amount of vacant units and floorspace having halved since 2010, which is another sign of the centre's improvement.

## Sandbach

- 5.58 Sandbach provides an important resource in catering for the retail and service needs of the local population. Although the majority of units are occupied by independent retailers, there are several national multiple retailers present in the centre, which act to provide a good mix. In addition, the provision of an indoor, outdoor and farmers market present in the centre, albeit not on a permanent basis, brings further interest to the town's retail mix.
- 5.59 The centre has a low vacancy rate and there are no long term vacancies in the centre, which indicates that it is a popular location for retail and service operators to locate. The environmental quality of the centre is good. A Conservation Area covers the town centre and there are a range of historic buildings present. There are also attractive meeting places present, such as the Market Square. As many of the units within the centre are located on the roads which run through the centre and given the historic road alignment, there are some conflicts between vehicular and pedestrian traffic, although there are a limited number of designated crossing points.
- 5.60 Overall, Sandbach is considered to be a healthy Key Service Centre.



## Wilmslow

- 5.61 Wilmslow is viewed as a reasonably healthy centre. The centre is well represented in terms of the independent sector; however, there are also a good range of national multiple retailers present for a centre of Wilmslow’s scale. Since 2010, the comparison goods sector in Wilmslow has reduced, while the centre’s retail service offer has increased, which reflects national trends. Wilmslow is well represented in terms of retail service and financial and business services when compared to the national average, but it is lacking in terms of its leisure service offer and would likely benefit from a wide range and choice of such uses.
- 5.62 The environmental quality of the centre is reasonable. However, it is not particularly attractive or distinctive. Therefore, the vibrancy of the centre could be increased via improvements to the public realm.
- 5.63 The centre is located in close proximity to the out-of-centre retail outlets at Handforth Dean and Cheadle Royal, which provide competition to the town centre. Currently the centre appears to be withstanding the competition provided by these destinations. However, the centre may benefit from a stronger identity to ensure it responds to such pressure in the future.

## Local Service Centres

- 5.64 Draft Policy PG2 of the emerging CE Local Plan Strategy identifies the following settlements as Local Service Centres within the settlement hierarchy: Alderley Edge; Audlem; Bollington; Bunbury; Chelford; Disley; Goostrey; Haslington; Holmes Chapel; Mobberley; Prestbury; Shavington; and Wrenbury. Draft Policy EG5 sets out the retail hierarchy for CE, with Local Service Centres forming the third tier of the hierarchy. The policy states that in the Local Service Centres there will be a focus on convenience and comparison retailing of an appropriate scale, plus opportunities for service uses and small-scale independent retailing of a function and character that meets the needs of the local community.
- 5.65 A review of the health and function of the centres identified as Local Service Centres within the emerging Local Plan has been undertaken. The full assessments are included at Appendix 4. As part of our assessment we have also reviewed the status of each centre within the retail hierarchy. Table 5.11 provides a summary of the level of provision within each centre. We have also set out the population located within a 800m walk time catchment of each centre, which equates to a walk time of approximately 10 minutes, and the population within a 5 minute drive time.





- 5.66 A definition of Local Centres is not provided in the NPPF or PPG but was previously included in the now superseded Planning Policy Statement 4 (2009). The definition within the withdrawn PPS 4 stated that: **'local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre'**. Therefore, Local Centres have a role of catering for the day to day shopping needs of the local communities which they serve. Local Centres typically serve a smaller catchment than Town or District Centres, and are unlikely to cater for the same level of passing trade. They are primarily intended to serve the needs of the population within walking distance.
- 5.67 As set out at Table 5.11 below, Audlem, Bollington, Disley and Prestbury all accommodate more than 20 retail and service units. Given each of these centres contains a range of shops of a local nature, including convenience goods, comparison goods and retail service uses, it is considered that these Centres serve the role of a Local Centre for retail purposes. Chelford, Goostrey, Haslington and Mobberley all provide a lesser level of provision, however, there is a clear concentration of units within each of these centres, which provide a focus for local residents to access retail and service provision.
- 5.68 Bunbury, Shavington and Wrenbury accommodate a concentration of between three and five units each. Accordingly, given the limited level of provision within each of these centres, we do not consider that they currently perform the role of Local Centres for retail purposes. Our conclusions in relation to the retail hierarchy do not have an impact on the overall conclusions which have been made by CE in relation to the settlement hierarchy, as our comments relate solely to retail uses. It is recognised that each of these centres provides a limited number of convenience and service uses, which assist in catering for the day to day needs of the local population and that the presence of these units assists in the creation of sustainable shopping patterns. However, the centres do not currently provide a sufficient concentration of retail and service uses to meet the role of a Local Centre for retail purposes. In terms of Bunbury and Wrenbury, the immediate population which is served by the retail and service units in these villages is limited, with a population of 1,218 located within a 800m walking catchment of Bunbury and a population of 653 located within a walking catchment of Wrenbury. Shavington has a much greater walk-in catchment of 3,388 people, given its position in a more built-up area. Although currently the level of provision in Shavington (5 units) is less than would be expected of a Local Centre for retail purposes, we are aware that additional residential development is planned to the south of Shavington, with areas allocated in the emerging CE Local Plan Strategy and therefore the retail and



service provision in Shavington may need to be expanded to serve the increased residential population.

**Table 5.11 – Local Service Centre Review**

	Total No of Units	No of Convenience Goods Units	No of Comparison Goods Units	No of Service Units	No of Vacant Units	Population with 800m walking catchment	Population with 5 minute drive time	Recommended Designation for Retail Purposes
Audlem	26	6	8	12	0	1,532	3,003	Local Service Centre
Bollington	24	5	2	17	0	4,301	7,556	Local Service Centre
Bunbury	5	2	0	3	0	1,218	2,213	None
Chelford	8	3	1	3	1	1,108	2,883	Local Service Centre
Disley	36	7	7	21	1	3,119	8,029	Local Service Centre
Goostrey	8	1	1	5	1	1,186	3,060	Local Service Centre
Haslington	12	2	1	9	0	4,711	11,256	Local Service Centre
Mobberley	7	2	2	3	0	1,442	5,747	Local Service Centre
Prestbury	30	2	5	19	4	1,937	8,181	Local Service Centre
Shavington	5	2	0	3	0	3,388	8,755	None
Wrenbury	3	1	0	1	1	653	1,521	None

WYG Site Visits 2015

Population figures derived from Experian (ONS based population 2013)

5.69 In summary, we consider that Audlem, Bollington, Chelford, Disley, Goostrey, Haslington, Mobberley and Prestbury accord with the role of a Local Centre by catering for the day to day shopping needs of the local communities which they serve. Each of these centres provides a range of small shops of a local nature, with uses including, for example, small supermarkets/convenience stores, newsagents, post offices and pharmacies, along with other facilities such as a hot food takeaways and laundrette. Currently, given the limited level of concentrated retail and service provision in Bunbury, Shavington and Wrenbury, we do not consider these locations meet the role of a Local Centre for retail purposes at present. Notwithstanding this, given the position of these centres within the settlement hierarchy, there may be merit in encouraging the development of further retail provision in these centres to serve the surrounding population and to encourage more sustainable development patterns in these areas. As we have set out above, our recommendations in relation to the centre hierarchy for retail purposes does not have an impact on the overall conclusions which have been made by CE in relation to the settlement hierarchy, as our comments relate solely to retail.



## Retail Parks

- 5.70 There are seven retail parks located within or close to the Principal Towns and Key Service Centres in the CE administrative area. The retail parks are all in edge-of-centre or out-of-centre locations and they also all benefit from free customer car parking facilities.
- 5.71 Macclesfield has three retail parks, which are Statham Street Retail Park, Silk Retail Park and Lyme Green Retail Park. Silk Retail Park and Lyme Green Retail Parks sell comparison goods with some leisure service uses, whilst Stratham Street has comparison goods uses only. Statham Street Retail Park is located adjacent to the south-west of Macclesfield's Town Centre Boundary. The retail park has five units, the largest of which being a B&Q store and Halfords. Silk Retail Park is located 1.2km to the north of the town centre and contains three retail units, which mainly sell bulky goods. The retail park is anchored by Wickes and Oak Furniture Land, but also contains a McDonald's restaurant. Lyme Green Retail Park is Macclesfield's largest retail park with nine units including Homebase, Next, Matalan and Currys PC World. Macclesfield's retail parks collectively provide 16 additional retail units with a combined floorspace comprising 22,775sq.m<sup>37</sup>, which equates to 23.0% of Macclesfield town centre's total floorspace (as defined by Goad).
- 5.72 Grand Junction Retail Park is Crewe's only retail park. However, it contains 28 retail units, which is the largest number of retail units of any retail park in CE. The retail park also contains the second largest total floorspace of 18,172sq.m, which equates to 23.5% of Crewe town centre's total floorspace and 37.2% of Crewe town centre's retail floorspace (as defined by Goad). However, it also is the only retail park in CE to contain a vacant retail unit, although this is only a single unit. Grand Junction Retail Park relates closely to Crewe town centre, as it sits approximately 300m to the east of the primary shopping area. Existing occupiers include M&S Simply Food, Aldi, Next, Sports Direct, Halfords, Currys/PC World, TK Maxx and a number of restaurants.
- 5.73 Handforth has two retail parks, which are Handforth Dean and Stanley Green Retail Park. Stanley Green Retail Park is actually located in Stockport Borough, although in practice it is connected to Handforth. Both retail parks are located adjacent to the A34, which connects Manchester to Wilmslow and Macclesfield. However, the retail parks are poorly connected to Handforth's Primary Shopping Area and they instead act as standalone retail destinations that primarily face onto the A34. Stanley

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<sup>37</sup> Source: Completely Retail, except Handforth Dean, which has been measured using OS mapping provided by Cheshire East Council.



Green Retail Park comprises a linear terrace of six retail units, which are anchored by a large B&Q and also include Next, TK Maxx, Halfords, Homesense and Costa Coffee. Handforth Dean Retail Park contains seven units, which are anchored by Marks & Spencer, which sells both comparison and convenience goods, a Tesco superstore, Outfit and BHS.

5.74 Congleton Retail Park is located approximately 600m to the north-west of Congleton’s town centre boundary. The retail park contains 10 units and is anchored by an M&S Simply Food with the remaining units all selling predominantly comparison goods. The retail park has a total floorspace of 6,043sq.m, which is 18.8% of the total floorspace within Congleton town centre and 47.5% of the town centre’s retail floorspace (as defined by Goad).

5.75 In summary, we consider the retail parks in the CE administrative area to play a role in providing goods and services that may not otherwise be provided within existing town centre locations. The retail parks generally appear to be vital and viable and help to support the town centres in providing for the retail and leisure needs of the surrounding population. Notwithstanding this, the retail parks provide a substantial amount of floorspace and in some cases provide competition to the defined centres in CE. Accordingly, it is advised that any applications for new floorspace at the retail parks in CE are carefully assessed and considered in accordance with the sequential and impact tests where required.

**Table 5.12a: Retail Parks in CE**

Retail Park	Town	Zone	Type	Units						Total Floorspace (sq.m)	Car Parking Spaces
				Convenience	Comparison	Leisure Service	Retail Service	Vacant	Total		
Silk RP	Macclesfield	1	Bulky	0	2	1	0	0	3	3,893	Circa. 160 (free)
Lyme Green RP	Macclesfield	1	Open A1 (non-food) + leisure	0	8	1	0	0	8	12,286	595 (free)
Statham Street RP	Macclesfield	1	Open A1 (non-food)	0	5	0	0	0	5	6,596	Not known
Handforth Dean	Handforth	1	Open A1 (non-food)	3	3	1	0	0	7	Circa. 25,000	Circa. 1,500 (free)
Congleton RP	Congleton	3	Open A1	1	9	0	0	0	10	6,043	226 (free)
Grand Junction RP	Crewe	4	Open A1	2	19	6	0	1	28	18,172	791 (free)



**Table 5.12b: Adjacent Retail Parks in CE Stockport Borough**

Stanley Green Retail Park, Handforth	Handforth	Outside Study Area	Open A1 (non-food)	0	5	1	0	0	6	8,500	434 (free)
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Source: All floorspace figures taken from Completely Retail, except Handforth Dean, which has been measured using OS mapping provided by CE Council.

### Conclusion

- 5.76 In this section we have assessed the health of the two Principal Towns (Crewe and Macclesfield) and the nine Key Service Centres in CE. We have also considered the role and function of the Local Service Centres within the Borough and how the retail parks in CE and the surrounding area impact on the defined centres. Full assessments of the health of each of the Principal Towns and Key Service Centres are provided at Appendix 3 and reviews of each of the Local Service Centres are provided at Appendix 4.
- 5.77 In terms of the Principal Towns of Crewe and Macclesfield, we recommend intervention in the town centres in order to improve their vitality and viability. It is recognised that positive steps are already being taken by the Council in Crewe through the production of the Crewe Town Centre Regeneration Delivery Framework for Growth and the Council’s acquisition of the Royal Arcade site with the intention of delivering a leisure-led, mixed use development on the site. Similarly, we support the Council’s intentions to improve Macclesfield town centre’s offer, including via the redevelopment of the Churchill Way Car Park area for leisure-led development.
- 5.78 The health of the Key Service Centres in CE is varied. Alsager, Knutsford, Nantwich, Poynton, Sandbach and Wilmslow are all considered to be vital and viable centres. Although Congleton has a range of strengths, it is considered that the centre would benefit from intervention to improve its health. Accordingly, we support the plans to improve the town centre’s public realm and to refurbish/rebuild the leisure centre. It is considered that Handforth faces several challenges to its health, including a high vacancy rate. In response, the consolidation of Handforth is recommended to create a more condensed and vibrant core. Although the health of Middlewich is considered to be reasonable, it is recommended that investment in the centre is maintained to ensure that the competition provided by nearby higher order centres does not result in the deterioration of Middlewich’s health.



5.79 It is concluded that the retail parks in CE assist in providing for the retail and service needs of the CE population and in many cases provide goods and services that may not otherwise be provided within existing town centre locations. Notwithstanding this, the retail parks provide a substantial amount of floorspace and in some cases compete with the defined centres in CE. Accordingly, it is advised that any applications for new floorspace at the retail parks in CE are carefully assessed and considered in accordance with the sequential and impact tests where required.



## 6.0 Population and Expenditure

6.01 This section of the report assesses the current population and available expenditure (for both convenience and comparison goods) within the Study Area.

### Study Area Population

6.02 For those parts of the Study Area within CE (Zones 1-4, and parts of Zones 5-6) and CWAC (Zones 6, 7, 13 and 15, and parts of Zones 2-3, 5, 8-9 and 14), the 2011 population data from the 2011 census was sourced from Experian Micromarketer G3 for each study zone. A plan and detailed description of the Study Area and study zones is provided at the beginning of Section 4, which shows how the administrative areas of CE and CWAC corresponds to the study zones.

6.03 CE and CWAC Councils provided population estimates and forecasts for their respective local authority areas for each year within the period 2010 to 2030<sup>38</sup>, from which we calculated the forecast population growth from 2011 (date of the last census) to 2015 and each of the forecast years (2020, 2025 and 2030). Population forecasts for CE were produced by consultants ORS for the June 2015 Housing Development Study and used to inform the Local Plan housing provision and for CWAC, the forecasts were produced for the CWAC Local Plan and published in CWAC's July 2013 Strategy and Housing Background Paper (Publication Draft).

6.04 The total population growth forecasts for CE and CWAC were distributed across the study zones based on the distribution of completed and planned housing development within each local authority area as provided by the respective Council.

6.05 CE provided data on the planned housing growth between 2010 and 2030 within each of the Principal Towns and Key Service Centres in the Borough<sup>39</sup>, and an overall figure for the Local Service Centres<sup>40</sup> and the other rural areas. The total population growth forecast for CE between 2011 and each forecast year was distributed across each of the study zones that fall within the administration area of CE based on the planned housing growth distribution across the Borough, which has been informed by the recommended Option 6 of Aecom's Spatial Distribution Update Report (July 2015). The total

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<sup>38</sup> CE population forecasts produced by consultants ORS for the June 2015 Housing Development Study (CE Local Plan Examination Library document PS E033).

<sup>39</sup> Crewe, Macclesfield, Congleton, Alsager, Sandbach, Middlewich, Nantwich, Handforth, Wilmslow, Knutsford and Poynton

<sup>40</sup> Alderley Edge, Audlem, Bollington, Bunbury, Chelford, Disley, Goostrey, Haslington, Holmes Chapel, Mobberley, Prestbury, Shavington and Wrenbury



population growth for the Local Service Centres and the other rural areas was distributed across the study zones based on the existing number of households within the Local Service Centres, and the area within each study zone across other rural areas. It is acknowledged that factors such as the age structure of the population, and the type of dwellings being built, will vary from one settlement to another and will mean that a settlement that is due to receive a certain proportion of the Borough's housing provision will not necessarily receive the same share of the Borough's future population growth. Hence the results should be treated with some caution.

- 6.06 CWAC Council's adopted Local Plan aims to provide 22,000 homes over the Plan period (2010-2030) and sets out the planned housing growth for each of the defined Centres and the remaining rural area. As at 31 March 2015, circa 4,700 additional homes have been completed within CWAC since 2010. The total population growth forecast for CWAC between 2011 and 2015 was distributed across each of the study zones which fall within the administration area of CWAC based on the distribution of housing completions. We then deducted the housing completions within each study zone from the overall 22,000 homes planned across CWAC to provide the planned housing growth distribution from 2015 to each of the forecast years, which was used as the basis for the distribution of population growth with CWAC across the study zones between 2015 and each of the forecast years.
- 6.07 We then added the CE and CWAC population growth forecasts for each study zone to the 2011 census population data.
- 6.08 The population forecasts for CE and CWAC upon which this study is based are thereby consistent with the scale and distribution of housing growth set out in CE Council's Local Plan Strategy – Proposed Changes Version (March 2016) as well as the CWAC Local Plan (Part One) Strategic Policies (adopted 29 January 2015), and therefore represents an appropriate basis for the purposes of modelling future retail needs.
- 6.09 Outside of CE and CWAC (Zones 10-12 and parts of Zones 1-5, 8-9 and 13-14), the population within each study zone at the 2015 base year and in each of the forecast years was sourced from Experian Micromarketer G3 data (which was issued in October 2015). Experian's baseline population data estimates (ONS mid-year 2013 estimate) take into consideration the findings of the 2011 Census release, which is then projected forward by Experian using a 'demographic component model', which takes into consideration the birth rate, aging, net migration and death rate. Further information on Experian's methodology is available in their Population and Household Projections Data Profile (UK 2015 Data Release) and their UK 2015 Local Area Data Release Notes (UK 2015 Data Release).





- 6.10 Outside of the CWAC and CE authority areas, we assumed that Experian’s future population projections represent the most appropriate data source for the purposes of modelling future retail needs. The Experian data is reflective of growth rates that take into account Office for National Statistics (ONS) population projections, and current age, gender and socio-economic estimates. Again, in light of the amalgamation of population data and forecasts from three different sources, WYG notes that the forecasts should be treated with caution, particularly over the longer term.
- 6.11 Table 6.1 below sets out our estimate of the population across the Study Area in the 2015 base year, and then at five-year intervals to 2030 in accordance with the NPPF (i.e. 2020, 2025 and 2030). Table 6.1 shows that the Study Area population is forecast to increase from 1,503,300 persons at 2015 to 1,545,500 persons at 2020, equating to an increase in population over the first 5 year forecast period of approximately 42,200 persons, or 2.8%. At 2030, the population of the Study Area is forecast to be 1,616,603 persons, equating to an increase in population over the 15 year study period from 2015 to 2030 of approximately 113,300 persons, or 7.5%. Within CE the forecast population increases from 381,600 at 2015 to 397,900 at 2020 and to 427,100 at 2030. This equates to an estimated population increase within CE of 16,300 persons, or 4.3%, between 2015 and 2020, and an increase of 45,500 persons, or 11.9%, over the overall 15 year study period.
- 6.12 The Study Area population estimate for the 2015 base year is significantly higher than that identified in the 2011 CRSU, when the population of the Study Area was forecast to be 1,481,000 in 2015, some 22,300 less than the current estimate. The 2011 CRSU identified that the population of the Study Area would rise by approximately 65,000 persons between 2015 and 2026, to 1,546,000. This rate of population growth, which equates to an average of approximately 5,900 persons per annum between 2015 and 2026, is substantially below the current rate of population growth forecast for the study area, which equates to an average of approximately 7,600 persons per annum over the period 2015 to 2030.



**Table 6.1: Study Area Population by Survey Zone (2015 to 2030)**

Zone	2015	2020	2025	2030
1	166,300	171,600	176,800	181,300
2	131,900	136,500	140,600	144,200
3	153,800	159,900	165,700	170,900
4	125,600	130,900	135,900	140,400
5	25,800	26,400	27,000	27,500
6	99,300	103,400	106,300	109,500
7	46,300	47,000	48,100	49,200
8	179,000	182,500	185,400	188,200
9	84,900	86,300	87,500	88,400
10	157,800	164,300	170,200	175,500
11	134,700	136,500	137,600	138,000
12	68,300	69,300	70,100	70,300
13	39,500	40,000	40,600	41,300
14	62,100	62,600	62,900	62,800
15	28,300	28,400	28,700	29,100
<b>Study Area Total</b>	<b>1,503,300</b>	<b>1,545,500</b>	<b>1,583,400</b>	<b>1,616,600</b>

Source: Experian Micromarketer G3 (2014 data), CWAC and CE Councils' data.

Notes: Rounded to the nearest 100.

## Retail Expenditure

- 6.13 In order to calculate per capita convenience and comparison goods expenditure, we have utilised Experian Micromarketer G3 data which provides detailed information on local consumer expenditure taking account of the socio-economic characteristics of the local population. Experian is a widely accepted source of expenditure data and is regularly used by WYG in calculating retail capacity.
- 6.14 The base year for the Experian expenditure data is 2013. Per capita growth forecasts were sourced from Experian Retail Planner Briefing Note 13, which was published in October 2015. Appendix 3 of the Retail Planner Briefing Note identifies the annual growth forecasts for convenience and comparison goods which inform our assessment as set out in Table 6.2 below.



**Table 6.2: Expenditure Growth Forecasts**

Year	Convenience (%)	Comparison (%)
2015	-0.1	5.3
2016	0.1	3.2
2017	0.3	2.9
2018	0.2	2.7
2019	0.2	2.8
2020	0.1	3.0
2021	0.1	3.2
2022	-0.1	3.1
2023	0.1	3.3
2024	0.2	3.3
2025	0.1	3.1
2026	0.1	3.1
2027	0.1	3.2
2028	0.1	3.1
2029	0.1	3.2
2030	0.1	3.3

Source: Appendix 3, Retail Planner Briefing Note 13 (October 2015)

- 6.15 The latest growth forecasts suggest that the recovery from the downturn in the economy is well underway, albeit growth in convenience goods expenditure will improve over the medium and long term when compared to the current position. For convenience goods, Experian forecasts -0.1% annual growth at 2015. Whilst there is some deviation in the rate forecast thereafter, the rate of annual convenience goods growth forecast to 2030 broadly follows +0.1%.
- 6.16 By contrast, Experian identifies an immediate and relatively strong annual comparison growth rate of +5.3% at 2015. A drop in the rate of growth to +3.2% is anticipated at 2016, with annual growth rates thereafter to 2030 forecast to be extremely stable, within the range +2.7% to +3.3%. The latest data shows that there is very limited growth in convenience goods expenditure in the short to long term and this compares to higher annualised comparison goods expenditure growth.
- 6.17 Growth in expenditure forecast in the longer term (beyond the next ten years) should be treated with caution given the inherent uncertainties in predicting the economy's performance over time. Assessments of this nature should therefore be reviewed on a regular basis in order to ensure that forecasts over the medium and long term are reflective of any changes to relevant available data.
- 6.18 Experian Retail Planner Briefing Note 13 also provides a forecast as to the proportion of expenditure which will be committed through special forms of trading (comprising 'non-store retailing', such as internet sales, TV shopping and so on) over the reporting period. We have excluded any expenditure



which survey respondents indicated was committed via special forms of trading and instead have made an allowance derived from Experian’s recommendation.

6.19 In considering special forms of trading, it should be noted that many products which are ordered online are still actually sourced from a physical store’s shelves or stockroom (particularly in the case of convenience goods). Accordingly, expenditure committed in this manner acts to support stores and should be considered ‘available’ to tangible retail destinations. In order not to overstate the influence of expenditure committed via special forms of trading, our approach is based on Experian’s ‘adjusted’ figure (provided at Appendix 3 of its Retail Planner Briefing Note 13) which makes an allowance for internet sales sourced from stores. The proportion of expenditure committed through special forms of trading cited below at Table 6.3 is excluded from the identified expenditure as it is not available to stores within the Study Area.

**Table 6.3: Special Forms of Trading Forecasts**

Year	Convenience	Comparison
2015	2.8%	11.7%
2020	4.0%	14.9%
2025	5.0%	15.0%
2030	5.7%	14.7%

Source: Appendix 3, Experian Retail Planner Briefing Note 13 (October 2015)

6.20 Based on the above growth rates and special forms of trading allowances, it is possible to produce expenditure estimates for each survey zone at 2015, 2020, 2025 and 2030. In doing so, our assessment takes into account both per capita retail expenditure growth and population change.

### Convenience Goods Expenditure

6.21 Taking into consideration the above increases in population and per capita expenditure, it is estimated that, at 2015, the resident population of the Study Area generates some £3,131.3m of convenience goods expenditure<sup>41</sup>. Available convenience goods expenditure is then forecast to increase to £3,203.5m at 2020, which represents an increase of £72.2m (or 2.3%) between 2015 and 2020. At 2030, the available convenience goods expenditure is forecast to rise to £3,316.5m, which represents an increase of £185.2m (or 5.9%) between 2015 and 2030.

<sup>41</sup> Expressed in 2013 prices, as is every subsequent monetary value



6.22 We note that the forecast growth in convenience goods spending is substantially lower than estimated in the 2011 CRSU. In the CRSU the level of expenditure growth between 2015 and 2026 was estimated at £501.3m<sup>42</sup>, equating to a 12.7% increase over an 11 year period the compared to the current estimated growth rate over the 15 year period between 2015 and 2030 of 6.0%. This decrease in forecast convenience goods expenditure growth primarily reflects the substantial decreases in the forecast per capita convenience goods expenditure growth over the study period since 2011.

**Table 6.4: Total Available Study Area Expenditure – Convenience Goods (£m)**

2015 (£m)	2020 (£m)	2025 (£m)	2030 (£m)	Growth 2015 2020 (£m)	Growth 2015 2025 (£m)	Growth 2015 2030 (£m)
3,131.3	3,203.5	3,259.5	3,316.5	72.2	128.2	185.2

Source: Table 2a, Appendix 6  
In 2013 prices

### Main Food and 'Top-Up' Shopping

6.23 The proportion of convenience goods expenditure that is committed through main food shopping trips and through 'top-up' shopping trips has been estimated with reference to respondents' answers to Questions 2, 7, 18 and 19 of the household survey. Questions 2 and 19 ask respondents to estimate how much they spent on their last main and top-up food shopping trips, and Questions 7 and 18 ask how often they make such main and top-up food shopping trips, respectively. We analysed responses to these questions to derive an estimate of the split between main and top-up expenditure on a zonal basis.

6.24 Across the whole of the Study Area, we calculate (by adding together our estimates of the monetary split between main and top up shopping expenditure within each zone) that the proportion of convenience goods expenditure directed to respondents' main food shopping destination equates to 76.9% of their overall convenience shopping expenditure. The remaining 23.1% of expenditure (which will typically be spent on regular purchases such as milk, bread and so on) is therefore attributed to the respondents' top-up convenience shopping destination. Our estimate of the split between these two types of expenditure on a zonal basis is provided below at Table 6.5.

<sup>42</sup> Converted from £361.5 in 2007 prices



**Table 6.5: Assumed Split of Convenience Goods Expenditure between Main and Top-Up Shopping**

Zone	Main Food	Top Up
1	75.5%	24.5%
2	78.9%	21.1%
3	77.0%	23.0%
4	82.6%	17.4%
5	82.0%	18.0%
6	73.9%	26.1%
7	74.4%	25.6%
8	77.8%	22.2%
9	72.5%	27.5%
10	76.5%	23.5%
11	76.8%	23.2%
12	75.3%	24.7%
13	78.3%	21.7%
14	73.2%	26.8%
15	79.0%	21.0%

Source: Derived from Table 2b, Appendix 6

- 6.25 By applying these estimates to the identified resident population of the Study Area, convenience goods expenditure at 2015 committed through 'main food' shopping trips is estimated to be £2,408.1m and through 'top up' shopping trips is estimated to be £723.2m.

### Comparison Goods Expenditure

- 6.26 For comparison goods, Table 6.6 sets out our estimation that the resident population of the Study Area will generate some £4,771.7m of comparison goods expenditure at 2015. Available comparison goods expenditure is then forecast to increase to £5,464.5m at 2020, which represents an increase of £692.8m (or 14.5%) between 2015 and 2020. At 2030, the available comparison goods expenditure is forecast to be £7,853.1m, which represents an increase of £3,081.4m (or 64.6%) between 2015 and 2030.
- 6.27 We note that the forecast growth in comparison goods spending over the study period to 2030 is substantially lower than estimated in the 2011 CRSU. Growth between 2015 and 2030 is estimated at £2,914.7m, whereas in the 2011 CRSU the level of expenditure growth between 2015 and 2026 was estimated at £3,515.1m<sup>43</sup>, equating to a rise of 69.5% over this 11 year period. The decrease in

<sup>43</sup> Converted from £3,620.3m in 2007 prices



comparison goods expenditure growth reflects the slower economy recovery from the 2008 recession and more modest future outlook compared to that anticipated in 2011.

**Table 6.6: Total Available Study Area Expenditure– Comparison Goods (£m)**

2015 (£m)	2020 (£m)	2025 (£m)	2030 (£m)	Growth 2015 2020 (£m)	Growth 2015 2025 (£m)	Growth 2015 2030 (£m)
4,771.7	5,464.5	6,548.3	7,853.1	692.8	1,776.6	3,081.4

Source: Table 9, Appendix 6  
In 2013 prices

- 6.28 For the purposes of this Study, comparison goods expenditure has been divided into eight sub-categories: 'Clothing & Footwear', 'CDs, DVDs and Books', 'Small Household Goods', 'Toys, Games, Bicycles and Recreational Goods' and 'Health and Beauty/Chemist Goods' (collectively referred to as non-bulky goods) and 'Electrical', 'DIY and Gardening' and 'Furniture' (these three categories collectively being referred to as bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zonal basis.
- 6.29 In considering the above, it should be noted that if an excess of expenditure manifests itself within the Study Area, this does not necessarily translate directly into a requirement for additional floorspace. In assessing quantitative need, it is also necessary to take account of:
- Existing development proposals;
  - Expected changes in shopping patterns; and
  - The future efficiency of retail floorspace.

### Market Shares

- 6.30 Having calculated the likely levels of expenditure that are generated by the resident population within the defined Study Area it is also important to understand what proportion of this expenditure is currently retained by retail facilities within CE (i.e. these market shares may differ slightly to those outlined in Section 4 as they are based on retail expenditure rather than shopping trips).
- 6.31 As previously highlighted, this Study has involved the completion of 2,100 household telephone interviews within CE, CWAC and the wider area. By analysing the results from the survey it has been possible to understand the likely levels of overall convenience goods expenditure that are captured by facilities in CE. The market shares for the various expenditure categories are highlighted in Tables 6.7 and 6.8.



**Table 6.7: CE's Current Market Share (2015) – Convenience**

Zone	Main Food	Cheshire East Total		Market Share <sup>1</sup>
		Top Up Food	Total Convenience £m	
1	202.8	72.9	<b>275.7</b>	<b>74.8%</b>
2	63.9	19.5	<b>83.4</b>	<b>28.2%</b>
3	164.4	54.9	<b>219.3</b>	<b>67.7%</b>
4	200.1	41.7	<b>241.8</b>	<b>94.6%</b>
5	5.1	0.9	<b>6.1</b>	<b>10.5%</b>
6	11.2	3.9	<b>15.1</b>	<b>7.1%</b>
7	0.5	0.0	<b>0.5</b>	<b>0.5%</b>
8	0.0	0.4	<b>0.4</b>	<b>0.1%</b>
9	1.2	4.7	<b>5.9</b>	<b>3.4%</b>
10	0.0	0.0	<b>0.0</b>	<b>0.0%</b>
11	0.0	0.3	<b>0.3</b>	<b>0.1%</b>
12	0.0	1.5	<b>1.5</b>	<b>1.1%</b>
13	0.0	0.0	<b>0.0</b>	<b>0.0%</b>
14	0.5	0.0	<b>0.5</b>	<b>0.4%</b>
15	0.0	0.2	<b>0.2</b>	<b>0.3%</b>
<b>Study Area Total</b>	<b>649.7</b>	<b>200.8</b>	<b>850.5</b>	<b>27.2%</b>

Notes: Derived from Tables 2 and 4 at Appendix 6.

<sup>1</sup> Market share of total study area expenditure on main and top-up food shopping.

- 6.32 Table 6.7 indicates that existing facilities within CE attract £649.7m of main food convenience goods expenditure and £200.8m of 'top-up' convenience goods expenditure generated by residents of the Study Area. Accordingly, facilities within CE retain a total of £850.5m, or 27.2%, of the total convenience goods expenditure generated by residents within the Study Area.
- 6.33 Zones 1, 3 and 4 comprise the primary convenience goods catchment for CE's facilities. Each of these zones retains between 67.7% and 94.6% of the convenience goods expenditure of residents within the respective zone. Zones 2 and 5 form the secondary catchment for CE, where 28.2% and 7.1% of residents spending, respectively, is retained by facilities in CE. The results show that there was no or limited (below 3.4%) convenience expenditure drawn to facilities in CE from Zones 6 to 15.
- 6.34 In terms of individual stores within CE, the out-of-centre Sainsbury's in Nantwich followed by the edge-of-centre Tesco superstore on Hibel Road in Macclesfield are identified to be the most popular followed by the edge-of-centre Sainsbury's store in Macclesfield, which achieve total convenience goods turnovers of £53.2m, £51.6m and £50.4m from the resident population within the Study Area respectively. Other popular stores include the Aldi in Macclesfield (£40.5m), the Booths in Knutsford town centre (£38.4m) and the Tesco on the Clayton By Pass in Congleton (£28.6m).





6.35 Looking at popular convenience facilities for residents in Zones 1-3 which are located outside of CE, we can see that the Morrisons, Tesco and Aldi in Chapel-en-le-Frith draw a total of £47.3m of convenience expenditure from residents in Zone 1 and for residents in Zone 2, the Sainsbury's, Tesco Extra, Aldi and Waitrose in Altrincham draw a total of £70.5m of convenience expenditure. Turning to Zone 3, a total of £28.2m of the resident's convenience expenditure is being spent in the Tesco and Aldi in Stoke and the Sainsbury's in Biddulph. The level of expenditure being spent at destinations outside of CE from residents in Zone 4 is significantly lower.

**Table 6.8: CE's Current Market Share (2015) – Comparison Goods**

Zone	Cheshire East Total									Total Comparison £m	Market Share <sup>1</sup> %
	Non Bulky					Bulky					
	Clothing & Footwear £m	Books/CDs/ DVDs £m	Small Household £m	Recreation £m	Chemist £m	Electrical £m	DIY & Gardening £m	Furniture £m			
1	80.2	0.5	1.0	2.0	9.4	2.5	22.6	0.4	325.3	53.0%	
2	17.1	4.3	8.4	26.5	20.1	14.6	1.6	11.0	72.1	14.5%	
3	49.3	4.4	3.1	3.6	8.2	3.5	18.6	5.2	221.0	43.9%	
4	66.4	0.0	1.3	0.0	0.8	0.3	19.3	1.1	297.7	77.7%	
5	0.4	1.6	2.0	5.0	8.9	7.2	0.6	3.0	3.2	3.7%	
6	3.4	13.4	23.1	2.1	0.0	1.4	1.4	26.9	13.9	4.1%	
7	0.0	7.6	12.4	0.7	1.4	0.6	0.0	15.4	0.6	0.4%	
8	0.0	16.8	28.5	28.7	16.8	34.0	0.0	51.8	0.0	0.0%	
9	1.1	2.3	0.9	12.0	21.0	12.8	0.5	2.7	2.9	1.1%	
10	0.0	1.1	4.1	33.7	44.0	48.3	0.0	10.0	0.8	0.2%	
11	0.0	1.8	7.3	32.1	43.2	36.5	0.0	11.1	0.0	0.0%	
12	0.0	0.7	2.1	15.7	18.7	19.2	0.0	3.0	0.2	0.1%	
13	0.0	5.3	8.0	0.6	2.6	1.2	0.0	12.3	0.0	0.0%	
14	0.4	4.9	8.5	6.9	15.4	5.5	0.0	10.9	0.6	0.3%	
15	0.5	5.5	9.9	0.8	0.4	1.8	0.0	13.2	0.5	0.4%	
<b>Total</b>	<b>218.8</b>	<b>70.0</b>	<b>120.4</b>	<b>170.2</b>	<b>210.8</b>	<b>189.3</b>	<b>64.6</b>	<b>176.8</b>	<b>938.9</b>	<b>19.7%</b>	

Notes: Sourced from Tables 9, 11, 13, 15, 17, 19, 21 and 23 to 25 at Appendix 6.

<sup>1</sup> Market share of total study area expenditure across all categories on comparison goods.

6.36 Table 6.8 above sets out for each of the Study Zone, the comparison goods expenditure of residents retained within CE for each of the Study Zones across the eight categories of comparison goods spending. Retained comparison goods spending in CE varies across the different categories of comparison goods, from £64.6m for electrical goods to £218.8m for spending on clothing and



footwear. Overall, existing facilities within CE attract £938.9m of the total comparison goods expenditure generated by residents of the Study Area, equating to an overall market share of 19.7%.

- 6.37 Zones 1, 3 and 4 comprise the primary comparison goods catchment for CE's facilities, which respectively retain 53.0%, 43.9% and 77.7% of the comparison goods expenditure of residents within each of these zones. Zone 2 forms the secondary comparison goods catchment for CE, with 14.5% of residents' spending retained by facilities in CE. The results show that there was no or limited (below 4.1%) comparison goods expenditure drawn to facilities in CE from Zones 5 to 15.
- 6.38 The most popular destination for spending on comparison goods in CE is Crewe town centre, which attracts £190.2m of Study Area residents spending (equating to a market share based on available expenditure of 4.0%). The edge of centre Grand Junction Retail Park and other edge-of-centre destinations in Crewe attract a further £108.3m of comparison goods expenditure, and out-of-centre facilities – in particular the B&Q Warehouse on Weston Road – attract £29.2m of comparison goods expenditure. Overall, in, edge and out-of-centre facilities in Crewe achieve a comparison goods turnover of £327.7m, equating to a market share across the whole Study Area of 7.0%.
- 6.39 Macclesfield town centre is the next most popular comparison shopping destination in CE, attracting £166.9m, of Study Area residents spending, equating to a market share of 3.5%, despite being the largest centre for comparison goods within CE. Edge-of-centre facilities in Macclesfield further attract £25.5m of comparison goods expenditure, and out-of-centre facilities – most notably the out-of-centre Lyme Green Retail Park – attract £51.8m of comparison goods expenditure. In, edge and out-of-centre facilities in Macclesfield collectively achieve a comparison goods turnover of £249.3m, equating to a market share of 5.2%.
- 6.40 Other popular destinations include Nantwich town centre (£71.0m) and Congleton town centre (£43.4m).
- 6.41 Looking at popular comparison destinations for residents in Zones 1-4 which are located outside of CE, we can see that Stockport attracts a total of £149.2m of the total available comparison expenditure from residents in Zone 1, or 24.3% of the available expenditure. £128.3m of the total available comparison expenditure in Zone 2 is being spent at destinations in Altrincham (or 25.8%). For Zone 3, £130.6m (or 26.0%) of the resident's available comparison expenditure is being spent in Stoke and Biddulph, and in particular, £42.7m (8.5%) is being spent at Festival Retail Park in Stoke and £31.5m (6.3%) is being spent in Hanley centre. Again, a significantly lower level of expenditure is being spent



outside of CE & CWAC from residents in Zone 4, with £15.2m (4.0%) of the total available comparison expenditure being spent in Hanley and £8.0m (2.1%) in Stoke.

## Conclusions

- 6.42 Overall, existing facilities within CE attract £649.7m of main food convenience goods expenditure and £200.8m of 'top-up' convenience goods expenditure generated by residents of the Study Area. Accordingly, facilities within CE retain a total of £850.5m, or 27.2%, of the total convenience goods expenditure generated by residents within the Study Area. Relatively high levels of convenience expenditure from residents in Zones 1-3 is being spent at destinations outside of CE. In terms of individual stores within CE, the out-of-centre Sainsbury's in Nantwich followed by the edge-of-centre Tesco superstore on Hibel Road in Macclesfield are identified to be the most popular followed by the edge-of-centre Sainsbury's store in Macclesfield.
- 6.43 Retained comparison goods spending in CE varies across the different categories of comparison goods, from £64.6m for electrical goods to £218.8m for spending on clothing and footwear. Overall, existing facilities within CE attract £938.9m of the total comparison goods expenditure generated by residents of the Study Area, equating to an overall market share of 19.7%.
- 6.44 The most popular destination for spending on comparison goods in CE is Crewe town centre, which attracts £190.2m of Study Area residents spending (equating to a market share based on available expenditure of 4.0%).



## 7.0 Retail Capacity in Cheshire East

- 7.01 We have examined the need for new convenience and comparison goods floorspace over the five year reporting periods to 2030 (i.e. at 2015, 2020, 2025 and 2030). At the outset, it is important to note that an assessment in the long term should be viewed with caution, due to the obvious difficulties inherent in predicting the performance of the economy and shopping habits over time. This need for caution is demonstrated by the fluidity of the market seen between the 2011 CRSU and the current Study. In any event, any identified capacity should not necessarily be viewed as justification of new retail floorspace outside of centres as this could prejudice the implementation of any emerging Town Centre redevelopment strategies and the development of more central sites which may be currently available or which could become available over time.
- 7.02 A complete series of quantitative capacity tables are provided at Appendix 6 to provide further detail in terms of the step-by-step application of our quantitative assessment methodology.

### Capacity Formula

- 7.03 For all types of capacity assessment, the conceptual approach is identical, although the data sources and assumptions may differ. The key relationship is Expenditure (£m) (allowing for population change and retail growth) *less* Turnover (£m) (allowing for improved 'productivity') *equals* Surplus or Deficit (£m).
- 7.04 **Expenditure (£m)** – The expenditure element of the above equation is calculated by taking the population within the defined catchment and then multiplying this figure by the average annual expenditure levels for various forms of retail spending per annum. The expenditure is estimated with reference to a number of factors, namely:
- Growth in population;
  - Growth in expenditure per person per annum; and
  - Special Forms of Trading (e.g. the internet, catalogue shopping and so on).
- 7.05 **Turnover (£m)** – The turnover figure relates to the annual turnover generated by existing retail facilities within the Study Area. The turnover of existing facilities is calculated using Mintel Retail Rankings and Verdict UK Grocery Retailers reports – independent analysis which lists the sales densities for all major multiple retailers.



- 7.06 **Surplus / Deficit (£m)** – This represents the difference between the expenditure and turnover figures outlined above. A surplus figure represents an effective under provision of retail facilities within the Study Area (which, all things being equal, would suggest that additional floorspace could be supported), whereas a deficit would suggest a quantitative overprovision of retail facilities.
- 7.07 Although a surplus figure is presented in monetary terms, it is possible to convert this figure to provide an indication of the quantum of floorspace which may be required. The level of floorspace will vary dependent on the type of retailer proposed and the type of goods traded. For example, in the case of comparison goods, non-bulky goods retailers tend to achieve higher sales densities than bulky goods retailers. However, within the bulky goods sector itself there is significant variation, with electrical retailers tending to have a much higher sales density than those selling DIY or furniture goods.

## Capacity for Future Convenience Goods Floorspace

### Trading Performance of Existing Convenience Provision

- 7.08 In order to ascertain the likely need for additional convenience goods floorspace in CE, it is first necessary to consider the performance of the current provision. Table 7.1 below assesses the individual performance of each of the main convenience goods facilities in CE by comparing the survey-derived turnover of each food retail destination to its 'benchmark' turnover. The 'benchmark' turnover indicates the level of turnover that the store would generally be expected to attract, based on company average trading levels. A judgement can then be made on the trading performance of existing facilities based on comparing the survey-derived turnover with the expected 'benchmark' turnover (based on nationally published trading information from Mintel and Verdict) of existing provision.
- 7.09 The 'benchmark' turnover differs for each operator based on its average turnover per square metre throughout the country. Although robust up-to-date information is available in terms of the convenience goods floorspace provided by large foodstores, it can be more difficult to quantify the extent of local convenience provision as there is no single comprehensive database to rely upon. Where we have been unable to verify the exact quantum of floorspace provided by existing smaller-scale convenience destinations, we have assumed that stores are trading 'at equilibrium' (i.e. the survey-derived turnover equates to the expected level of turnover).



**Table 7.1: Trading Performance of Main Foodstores in Cheshire East at 2015**

Store	Net Conv F'space (sq. m)	T'over per sq. m (£)	Benchmark Turnover (£m)	Survey Derived Turnover (£m)
<b>Macclesfield</b>				
Aldi, Queen Victoria Street, Macclesfield	565	10,008	5.65	40.48
Marks & Spencer Foodhall, Mill Street, Macclesfield	810	11,578	9.37	2.92
Tesco Metro, Exchange Street, Macclesfield	1,153	12,099	13.95	8.92
Tesco Superstore, Hibel Road, Macclesfield	2,320	12,099	28.07	51.62
Sainsbury's, Cumberland Street, Macclesfield	2,889	12,684	36.65	50.43
Other, Macclesfield	2,470	-	10.0	9.0
<i>Out-of-Centre</i>				
Other, Out-of Centre	1,575	-	13.7	16.2
<i>Subtotal Macclesfield</i>	<b>11,782</b>	-	<b>117.9</b>	<b>180.0</b>
<b>Poynton</b>				
Morrisons, Queensway, Poynton	649	13,388	8.69	9.07
Waitrose, Park Lane, Poynton	1,049	13,080	13.72	7.25
Other, Poynton	652	-	5.0	4.0
<i>Subtotal Poynton</i>	<b>2,350</b>	-	<b>27.6</b>	<b>19.9</b>
<b>Wilmslow</b>				
Waitrose, Church Street, Wilmslow	1,781	13,080	23.30	18.91
Sainsbury's, Alderley Road, Wilmslow	1,701	12,684	21.58	4.23
Other, Wilmslow	1,110	-	8.1	2.5
<i>Out-of-Centre</i>				
Lidl, Dean Row Road, Wilmslow	743	3,522	2.62	5.24
<i>Other, Out-of-Centre</i>	134	12,099	1.62	1.04
<i>Subtotal Wilmslow</i>	<b>5,470</b>	-	<b>57.3</b>	<b>31.9</b>
<b>Alderley Edge</b>				
<i>Subtotal Alderley Edge</i>	<b>1,046</b>	-	<b>4.8</b>	<b>2.9</b>
<b>Knutsford</b>				
Booths, Stanley Road, Knutsford	1,876	10,602	19.89	38.39
Aldi, Brook Street, Knutsford	622	10,008	6.22	26.76
Other, Knutsford	1,259	-	10.5	14.7
<i>Out-of-Centre</i>				
<i>Other, Out-of-Centre</i>	121	-	0.99	1.29
<i>Subtotal Knutsford</i>	<b>3,878</b>	-	<b>37.6</b>	<b>81.1</b>
<b>Alsager</b>				
Asda, Lawton Road, Alsager	405	13,901	5.63	8.79
Other, Alsager	879	-	4.4	1.8



Store	Net Conv F space (sq. m)	T'over per sq. m (£)	Benchmark Turnover (£m)	Survey Derived Turnover (£m)
<i>Out-of-Centre</i>				
Other, Out-of-Centre			0.8	0.8
<b>Subtotal Alsager</b>	<b>1,284</b>	<b>-</b>	<b>10.9</b>	<b>11.5</b>
<b>Congleton</b>				
Morrisons, Bridestone Shopping Centre, Congleton	1,482	13,388	19.84	22.65
Other, Congleton	1,316	-	8.6	18.4
<i>Out-of-Centre</i>				
Tesco Superstore, Clayton By Pass, Congleton	1,260	12,099	15.24	28.58
Other, Out-of-Centre	2,126	-	20.9	9.6
<b>Subtotal Congleton</b>	<b>6,183</b>	<b>-</b>	<b>64.6</b>	<b>79.2</b>
<b>Middlewich</b>				
Tesco Superstore, Southway, Middlewich	624	12,099	7.55	13.68
Morrisons, Newton Bank, Middlewich	1,258	13,388	16.84	15.77
Lidl, Chester Road, Middlewich	743	3,522	2.62	15.33
Other, Middlewich	429	-	2.8	3.3
<i>Out-of-Centre</i>				
Other, Out-of-Centre	180		2.2	5.6
<b>Subtotal Middlewich</b>	<b>3,234</b>	<b>-</b>	<b>32.0</b>	<b>53.8</b>
<b>Sandbach</b>				
Waitrose, Flat Lane / Brookhouse Road, Sandbach	1,747	13,080	22.85	21.46
Aldi, Middlewich Road, Sandbach	823	10,008	8.24	20.26
Other, Sandbach	1,291	-	5.2	2.8
<i>Out-of-Centre</i>				
Other, Out-of-Centre	769		6.3	4.8
<b>Subtotal Sandbach</b>	<b>3,539</b>	<b>-</b>	<b>40.2</b>	<b>40.3</b>
<b>Crewe</b>				
Asda, Victoria Centre, Crewe	3,438	13,901	47.80	34.00
Tesco Extra, Vernon Way, Crewe	3,300	12,099	39.93	40.85
Morrisons, Dunwoody Way, Crewe	2,961	13,388	39.64	36.40
Aldi, Grand Junction Way, Crewe	603	10,008	6.04	21.15
Other, Crewe	2,294	-	16.3	14.0
<i>Out-of-Centre</i>				
Aldi, Nantwich Road, Crewe	667	10,008	6.67	22.86
Other, Out-of-Centre	1,386	-	16.3	8.7
<b>Subtotal Crewe</b>	<b>14,650</b>	<b>-</b>	<b>172.7</b>	<b>177.9</b>
<b>Nantwich</b>				



Store	Net Conv F space (sq. m)	T'over per sq. m (£)	Benchmark Turnover (£m)	Survey Derived Turnover (£m)
Morrisons, Station Road, Nantwich	1,675	13,388	22.43	24.07
Aldi, Station Road, Nantwich	745	10,008	7.45	18.84
Other, Nantwich	2,064	-	11.9	4.8
<i>Out-of-Centre</i>				
Sainsbury's, Middlewich Road, Nantwich	3,716	12,684	47.13	53.19
Other, Out-of Centre	382	8,146	3.11	0.57
<i>Subtotal Nantwich</i>	<b>8,581</b>	<b>-</b>	<b>92.1</b>	<b>101.5</b>
Other, Out-of Centre				
Tesco Extra, Kiln Croft Lane, Handforth	4,319	12,099	52.25	22.26
Marks & Spencer Foodhall, Coppice Way, Handforth	929	11,578	10.76	4.23
<b>SUBTOTAL CHESHIRE EAST</b>	<b>71,453</b>		<b>760.4</b>	<b>850.5</b>

Source: Table 5 at Appendix 6

7.10 For each convenience goods retail destination, consideration has been given as to whether any of its turnover is likely to be derived as 'inflow' from outside the Study Area. However, given the extent of the Study Area and the urban nature of the Greater Manchester, Merseyside and Stoke-on-Trent areas immediately north of the Study Area, we consider it unlikely that residents of areas further afield will travel to the Study Area in very significant numbers to undertake food shopping. We note that there are some facilities at the periphery of the Study Area that could benefit from a significant level of inflow, most notably the large foodstores at Handforth Dean, which are located in close proximity to residents just outside of the Study Area in Stockport and Manchester. In calculating the survey derived turnover for the Tesco Extra store and the Marks & Spencer foodhall at Handforth Dean Retail Park, we have therefore made an allowance for an additional 80% of the stores' turnover to be derived from expenditure inflow from outside of the Study Area. We set out all our assumptions in this regard within Table 4 of Appendix 6.

7.11 Our assessment is based upon a 'goods based' approach, which disaggregates expenditure by category type, and it is important to recognise that major foodstore operators generally sell an element of non-food goods such as books, compact discs, clothing and household goods. To account for this, the typical ratio between convenience/comparison goods provision for each operator<sup>44</sup> has

<sup>44</sup> Derived from Verdict UK Food & Grocery 2014 Company Briefing Reports. Where Verdict data is not available or is considered not to appropriately reflect how a store trades in practice, we have applied professional judgement in the manner set out in the notes to Table 5 of Appendix 6





been applied to the estimated net floorspace of each foodstore<sup>45</sup>. This provides an indication of the likely sales area dedicated to the sale of convenience goods at each store.

- 7.12 Whilst survey results are commonly accepted as a means by which to identify existing shopping patterns, their findings should be treated with a 'note of caution' as they can have a bias towards national multiple retailers and, as a consequence, may understate the role of smaller stores and independent retailers. However, in order to minimise any bias, WYG's methodology asks respondents where they 'last' undertook their main food or top-up shopping, rather than where they 'usually' undertake such purchases.
- 7.13 We note that there is a substantial level of convenience goods floorspace identified at the local parade level across CE that is not identified through the survey when establishing either main or top up food shopping patterns. However, from review of the floorspace it is often found that these facilities are very localised, with a high level of small scale CTN, off licences, bakers or butchers. Such provision does not serve either a main food or top-up food shop function and therefore it is considered that such facilities cater for micro level needs that are very difficult to identify and quantify and should not be materially considered within this strategic spatial capacity exercise.
- 7.14 Our assessment identifies that taking into account all convenience goods retail facilities in CE, the identified survey-derived turnover of £850.5 per annum at 2015, is greater than the expected benchmark turnover of £760.4m. This suggests that, taken cumulatively, existing convenience goods facilities are 'over-trading' when compared to their expected turnover. Accordingly, it would appear that there is the potential for additional food retail provision to be supported within CE to meet the existing quantitative need and respond to the current over-trading of stores.
- 7.15 There are instances where specific facilities trade very strongly or relatively poorly. Across CE the Aldi and Lidl stores are performing extremely well when compared to the expected benchmark turnover. For example, the Aldi at Queen Victoria Street in Macclesfield has an estimated convenience goods benchmark turnover of £5.7m, but turns over an estimated £40.5m of convenience goods expenditure. Similarly, Aldi at Brook Street in Knutsford has a benchmark turnover of £6.2m, while the household survey found the store to have a convenience goods turnover of £26.8m. Conversely, the findings of the household survey indicate that several stores within CE have a turnover less than their expected benchmark. For example, the survey shows the Sainsbury's store at Alderley Road in

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<sup>45</sup> Net sales areas have been sourced from Storepoint database of food retailers or planning application information. Where such data is not available, we have applied professional judgement in the manner set out in the notes to Table 5 of Appendix 5



Wilmslow to have a survey-derived turnover of £4.2m, while the expected benchmark of the store is £21.6m. Similarly, the Asda store at the Victoria Centre in Crewe has an expected benchmark turnover of £47.8m, but the survey found the store to be trading at £13.8m below this benchmark at £34.0m.

- 7.16 Whilst we have no doubt that the Aldi and Lidl stores within CE are performing very strongly and that other foodstores within the local authority area are performing below benchmark level, it should be noted that the estimation of a store's turnover is subject to a number of assumptions. For example, in apportioning main and top up convenience goods expenditure using the household survey results, it is assumed that each person within a zone spends the zonal per capita average amount on such items. However, in reality, it is likely that the typical discount foodstore customer spends a lesser amount than the typical 'main four' (Tesco, Sainsbury's, Asda and Morrisons) foodstore shopper. Accordingly, there is the possibility that the turnover of certain discount foodstores may have been overestimated and that the turnover of certain 'main four' foodstores may have been underestimated. However, across the Study Area as a whole, the methodology acts to balance out any such discrepancies.

#### **Baseline Quantitative Need for Additional Convenience Goods Floorspace**

- 7.17 Table 7.2 appraises the future capacity for additional convenience goods retail floorspace in CE, taking account of the current convenience goods trading position compared against the 'benchmark' (or anticipated) turnover of existing convenience goods floorspace. Accordingly, Table 7.2 sets out the benchmark turnover of existing convenience retail facilities in CE in the 2015 base year and projects this forward to 2030 assuming that the benchmark turnover of existing floorspace will increase through improvements in floorspace efficiency at the rates set out in Experian Retail Planner Briefing Note 13.
- 7.18 The £850.5m of convenience goods expenditure generated by residents of the Study Area and claimed by destinations within CE at 2015 equates to a market share of 27.2%. Our assessment assumes that the current market share of facilities in CE of 27.2% is maintained over the forecast period. Rolling forward this market share and making an allowance for inflow of expenditure deriving from residents outside of the Study Area, of £49.5m (5.8%) in 2015, we estimate that the total available convenience goods expenditure in CE will be £850.5m in 2015, increasing to £870.1m at 2020 and £900.8m at 2030.



**Table 7.2: Estimated Baseline Capacity for Convenience Goods Facilities in CE**

Year	Benchmark Turnover of Existing Stores <sup>1</sup> £m	Market Share of Study Area Expenditure %	Available Expenditure <sup>2</sup> £m	Inflow £m	Surplus Expenditure £m
2015	760.4	27.2%	850.5	49.5	139.7
2020	754.3	27.2%	870.1	49.3	165.1
2025	752.8	27.2%	885.3	48.9	181.5
2030	752.8	27.2%	900.8	48.8	196.8

<sup>1</sup> Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 13 (Oct 2015)

<sup>2</sup> Assumes constant market share claimed by CE facilities of 27.2% from Study Area. Includes allowance for inflow of 80% for the Tesco store and M&S foodhall at Handforth Dean Retail Park.  
At 2013 prices

7.19 Table 7.2 indicates that there will be a convenience goods expenditure surplus of £139.7m at 2015, which corresponds to the current level of over-trading in CE. The convenience goods expenditure surplus in CE increases to £165.1m at 2020, £181.5m at 2025 and £196.8m at 2030 as a result of the estimated growth in convenience goods expenditure over this period.

### Commitments for New Convenience Goods Floorspace

7.20 There are a number of commitments in CE for new convenience goods floorspace that are further expected to draw on the available convenience goods expenditure. As summarised in Table 7.3, we estimate that the turnover requirements of the extant retail planning permissions<sup>46</sup> for new convenience goods floorspace in Congleton, Alsager, Crewe, Macclesfield and Poynton would be £36.3m, £25.1m, £15.0m, £12.6m and £8.9m in the 2015 base year, respectively. We expect that a further scheme, Cheshire FRESH, on the outskirts of Middlewich, but within CWAC, would achieve a convenience goods turnover of £6.5m, of which £3.5m would likely be drawn from CE. Overall, we estimate that commitments for new convenience goods floorspace in CE would have a combined turnover of £122.2m, if operational in the 2015 base year. Full details of the assumptions made in estimating the turnover of commitments are provided in the notes which accompany Table 26 of Appendix 6.

7.21 It should be noted that the commitment for the construction of a mezzanine floor within the Tesco store at Hibel Road in Macclesfield, although not fully implemented, will not expire in the future as

<sup>46</sup> As reported by CWAC Council to WYG at August 2015



Tesco has technically begun construction of the mezzanine. Planning permission for this development was most likely obtained by Tesco as a future-proofing exercise to enable Tesco to insert a mezzanine in the store as and when required. In the current economic climate and with Tesco carrying out wide ranging cost-cutting measures nationwide, we expect that this permission is likely to remain unimplemented for the foreseeable future. In practice, capacity for new convenience floorspace in CE is therefore likely to be slightly higher than that identified in our assessment.



**Table 7.3: Extant Convenience Commitments in CE**

Proposal	Planning Application Reference	Convenience Sales Area Floorspace	Estimated Turnover at 2015	Estimated Turnover from CE
		sq.m	£m	£m
<b>Macclesfield</b>				
New office block with ground floor retail use	14/3619M	121	0.6	0.6
Insertion of mezzanine floor	07/0200P	988	12.0	12.0
<b>Subtotal Macclesfield</b>		<b>2,757</b>	<b>20.8</b>	<b>20.8</b>
<b>Crewe</b>				
Extension of existing Aldi supermarket	14/3477N	405	4.1	4.1
Mixed use development comprising residential, employment and three A1 retail units	P07/0639	864	9.2	9.2
Change of use to form a retail unit with associated servicing and parking area	14/4109N	350	1.8	1.8
<b>Subtotal Crewe</b>		<b>1,619</b>	<b>15.0</b>	<b>15.0</b>
<b>Congleton</b>				
Extension to the Bridestone Shopping Centre for a new foodstore and speciality retail units	12/1211C	2,703	35.2	35.2
Replacement of vacant public house with a convenience store	12/2147C	213	1.1	1.1
<b>Subtotal Congleton</b>		<b>2,916</b>	<b>36.3</b>	<b>36.3</b>
<b>Alsager</b>				
Demolition of existing buildings and construction of a new foodstore	13/4121C	1,975	25.1	25.1
<b>Subtotal Alsager</b>		<b>1,975</b>	<b>25.1</b>	<b>25.1</b>
<b>Poynton</b>				
New foodstore and additional unit for Class A1-A5 use	14/1904M	884	8.9	8.9
<b>Subtotal Poynton</b>		<b>884</b>	<b>8.9</b>	<b>8.9</b>
<b>Other</b>				
Redevelopment for a new foodstore and petrol filling station	13/3294C	1,882	23.9	23.9
<b>TOTAL CHESHIRE EAST</b>		<b>12,087</b>	<b>130.5</b>	<b>130.5</b>
<b>OUTSIDE OF CHESHIRE EAST</b>				
<b>Other</b>				
Garden centre, auction centre and associated livestock accommodation, retail units and farm shop (Cheshire FRESH), Holmes Chapel Road, Middlewich (Zone 3)	13/03828/FUL	1,366	6.5	3.5
<b>TOTAL OUTSIDE OF CHESHIRE EAST</b>		<b>1,366</b>	<b>6.5</b>	<b>3.5</b>
<b>TOTAL</b>		<b>13,453</b>	<b>137.0</b>	<b>140.0</b>

Source: Tables 26 and 49 of Appendix 6  
2013 Prices



## Residual Quantitative Need for Additional Convenience Goods Floorspace Post Implementation of Commitments

- 7.22 Table 7.4 below sets out the residual convenience expenditure capacity in CE, taking into account the turnover requirements of extant planning commitments for new convenience retail floorspace, and converts this to a floorspace requirement. We have assumed that all of the estimated convenience turnover of the commitments within Crewe, Macclesfield, Alsager, Congleton and Poynton will be drawn from the available expenditure within CE. For the scheme on the outskirts of Middlewich, we have assumed that 54.5% of the convenience goods turnover of this scheme will be drawn from CE.
- 7.23 Although expenditure claimed by the commitments for new convenience retail floorspace in CE absorbs some of the surplus convenience retail expenditure identified in Table 7.2, a residual convenience goods expenditure of £139.7m is identified at 2015. This convenience goods expenditure surplus increases to £165.1m at 2020, £181.5m at 2025 and £196.8m at 2030. The identified surplus convenience goods expenditure could support between 3,100 sq.m and 8,100 sq.m net convenience goods floorspace at 2020, increasing to between 4,400 sq.m and 8,100 sq.m net floorspace at 2025 and 5,600 sq.m and 14,600 sq.m net floorspace at 2030. The minimum figure is based on the identified need being met through the delivery of a new foodstore by one of the leading supermarket operators (Tesco, Sainsbury's, Morrisons or Asda) and the maximum figure relates to need being met by independent or discount operators, which generally achieve lower sales densities. The long term estimates should be viewed with some caution, given the difficulties in predicting economic changes further into the future. Accordingly, we recommend that the requirement identified should be monitored and re-assessed during the Local Plan period.
- 7.24 We are aware that on the 21 October 2015, the CE Strategic Planning Board resolved to grant outline planning permission subject to the completion of a Section 111 Agreement for the first phase of the South Macclesfield Development Area. As the formal decision has not yet been issued, this scheme is not included as a commitment within the capacity assessment. However, the scheme is proposed to include the provision of a foodstore (up to 5,000 sq.m for convenience goods). Therefore, if the South Macclesfield Development Area foodstore is implemented, a large proportion of the capacity identified in the short to medium term in CE will be absorbed.



**Table 7.4: Residual Quantitative Need for Additional Convenience Goods Floorspace in CE Post Implementation of Commitments**

Year	Convenience Goods Expenditure			Floorspace Requirement (Net)	
	Surplus £m	Commitments <sup>1</sup> £m	Residual £m	Min <sup>2*</sup> sq.m	Max <sup>3*</sup> sq.m
2015	139.7	125.8	13.9	1,100	2,800
2020	165.1	124.8	40.4	3,100	8,100
2025	181.5	124.5	57.0	4,400	11,500
2030	196.8	124.5	72.3	5,600	14,600

<sup>1</sup> Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 13 (October 2015)

<sup>2</sup> Average sales density assumed £13,000 per sq.m (based on the average sales density of the leading four supermarkets as identified by Verdict 2014)

<sup>3</sup> Average sales density assumed to be £5,000 per sq.m

\*Rounded to the nearest 100 sq.m

At 2013 prices

7.25 A number of new convenience retail stores have opened in CE since the 2011 CRSU was completed, which were not planned at the time of the 2011 assessment including, a Morrisons on West Park Drive in Macclesfield (542 sq.m gross), a Sainsbury’s Local at The Square in Holmes Chapel (566 sq.m gross) and M&S Simply Food in Nantwich (701 sq.m gross).

7.26 This new retail floorspace will have impacted on the capacity for future convenience floorspace in CE compared to the position at 2011. Whilst other supermarkets have also opened in CE since the completion of the CRSU, such as the Waitrose on Park Lane in Poynton, these stores were committed at the time of the 2011 CRSU and were taken into account in the assessment of capacity.

### Capacity within Crewe, Macclesfield and each of the Defined Key Service Centres

7.27 Below we assess the capacity and need for additional convenience floorspace in Crewe, Macclesfield and each of the nine Key Service Services in CE (Alsager, Congleton, Handforth, Knutsford, Middlewich, Nantwich, Poynton, Sandbach and Wilmslow ), assuming that the current market share of facilities in each of these towns is maintained over the study period. Table 7.5 provides a summary of the identified baseline quantitative capacity in convenience expenditure terms for Crewe, Macclesfield and each of the Key Service Centres prior to taking account of planning commitments.



**Table 7.5: Estimated Baseline Capacity for Convenience Goods Facilities in Crewe, Macclesfield and the Defined Key Service Centres**

Year	Benchmark Turnover of Existing Stores <sup>1</sup> £m	Market Share of Study Area Expenditure %	Available Expenditure <sup>2</sup> £m	Surplus Expenditure £m
<b>Crewe</b>				
2015	172.7	5.7%	177.9	5.2
2020	171.3	5.7%	182.0	10.7
2025	171.0	5.7%	185.2	14.2
2030	171.0	5.7%	188.4	17.5
<b>Macclesfield</b>				
2015	117.9	5.7%	180.0	62.1
2020	117.0	5.7%	184.2	67.2
2025	116.7	5.7%	187.4	70.7
2030	116.7	5.7%	190.7	73.9
<b>Congleton</b>				
2015	64.5	2.5%	79.2	14.6
2020	64.0	2.5%	81.0	17.0
2025	63.9	2.5%	82.4	18.5
2030	63.9	2.5%	83.9	20.0
<b>Alsager</b>				
2015	10.9	0.4%	11.4	0.5
2020	10.8	0.4%	11.7	0.9
2025	10.8	0.4%	11.9	1.1
2030	10.8	0.4%	12.1	1.3
<b>Sandbach</b>				
2015	42.6	1.6%	49.3	6.7
2020	42.2	1.6%	50.4	8.2
2025	42.1	1.6%	51.3	9.2
2030	42.1	1.6%	52.2	10.1
<b>Middlewich</b>				
2015	32.0	1.7%	53.8	21.8
2020	31.7	1.7%	55.0	23.3
2025	31.7	1.7%	56.0	24.3
2030	31.7	1.7%	57.0	25.3
<b>Nantwich</b>				
2015	92.1	3.2%	101.5	9.4
2020	91.3	3.2%	103.8	12.5
2025	91.1	3.2%	105.6	14.5
2030	91.1	3.2%	107.5	16.4
<b>Handforth</b>				





2015	4.5	0.1%	2.6	-1.9
2020	4.5	0.1%	2.6	-1.9
2025	4.5	0.1%	2.7	-1.8
2030	4.5	0.1%	2.7	-1.7
<b>Wilmslow</b>				
2015	57.3	1.0%	31.9	-25.4
2020	56.8	1.0%	32.6	-24.2
2025	56.7	1.0%	33.2	-23.5
2030	56.7	1.0%	33.8	-22.9
<b>Knutsford</b>				
2015	37.6	2.6%	81.1	43.4
2020	37.3	2.6%	82.9	45.6
2025	37.3	2.6%	84.4	47.1
2030	37.3	2.6%	85.9	48.6
<b>Poynton</b>				
2015	27.6	0.6%	19.9	-7.7
2020	27.4	0.6%	20.3	-7.0
2025	27.3	0.6%	20.7	-6.6
2030	27.3	0.6%	21.1	-6.3

Source: Tables 27, 29, 31, 33, 35 and 37 at Appendix 6

<sup>1</sup> Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 13 (October 2015)

<sup>2</sup> Assumes a constant market share within Study Area for each centre over the study period.

Rounded to the nearest 100 sq.m

At 2013 prices

7.28 Table 7.5 shows that the main focus of the identified capacity is on Macclesfield (£62.1m convenience goods surplus identified at 2015), followed by Knutsford (£43.4m identified at 2015), Congleton (£14.6m surplus at 2015), Middlewich (£21.8m surplus identified at 2015), Nantwich (£9.4m identified at 2015), Sandbach (£6.7m surplus identified at 2015) and Crewe (£5.2m surplus identified at 2015). In Macclesfield, a convenience goods expenditure surplus of £62.1m is identified at 2015, corresponding to the current level of over-trading at existing foodstores in Macclesfield as identified in Table 7.1 above. By 2020, after increases in population and changes in floorspace productivity<sup>47</sup> are considered against the forecast fall in expenditure per capita, we estimate that the surplus convenience goods expenditure will be £67.2m, rising thereafter to £70.7m by 2025 and £73.9m by 2030. The convenience goods expenditure surplus in Knutsford increases to £45.6m at 2020, £47.1m

<sup>47</sup> Account has been made for the turnover efficiency of existing convenience goods floorspace to change in accordance with the projections set out in Table 4a of Experian Retail Planner Briefing Note 13 (October 2015), these being -0.4% per annum between 2015 and 2016, -0.1% per annum between 2017 and 2022, and 0.0% between 2023 and 2030. Operators have historically been able to make their existing floorspace more productive over time. However, these negative turnover efficiency growth rates reflect current forecasts for convenience goods floorspace productivity to fall or remain static over the study period.



in the period to 2025, and £48.6m in the longer term period to 2030. In Congleton, the convenience goods surplus increases to £17.0m at 2020, £18.5m at 2025 and £20.0m at 2030. The increases in the surplus convenience goods expenditure up to 2030 in Middlewich, Alsager, Crewe, Nantwich and Sandbach are also identified at Table 7.5.

- 7.29 A deficit in convenience goods expenditure is identified in Wilmslow, Poynton and Handforth which at 2015 correspond to the current level of under-trading in these three centres of –£25.4m, –£7.7m and –£1.9m respectively. The convenience goods expenditure in Wilmslow, Poynton and Handforth remains negative throughout the study period to 2030, as the modest growth in available expenditure arising in these centres in the period up to 2030 due to population growth remains less than the current deficit.
- 7.30 Table 7.6 below sets out the residual convenience expenditure capacity in Crewe, Macclesfield and each of the Key Service Centres taking into account the turnover requirements of the extant commitments for new convenience retail floorspace. We have assumed that all of the estimated convenience turnover of the commitments within each of the Principal Towns and Key Service Centres will be drawn from the corresponding centre (i.e. the £16.5m turnover requirements of the commitments in Crewe which will be drawn from the Study Area will all be drawn from expenditure within Crewe and so on).

**Table 7.6: Residual Quantitative Capacity for Additional Convenience Goods Facilities Crewe, Macclesfield and the Key Service Centres Floorspace Post Implementation of Commitments**

Year	Convenience Goods Expenditure			Floorspace Requirement (Net)	
	Surplus £m	Commitments <sup>1</sup> £m	Residual £m	Min <sup>2*</sup> sq.m	Max <sup>3*</sup> sq.m
<b>Crewe</b>					
2015	5.2	15.5	-10.3	-800	-2,100
2020	10.7	15.4	-4.7	-400	-900
2025	14.2	15.3	-1.1	-100	-200
2030	17.5	15.3	2.1	200	400
<b>Macclesfield</b>					
2015	62.1	12.7	49.4	3,800	9,900
2020	67.2	12.6	54.6	4,200	11,000
2025	70.7	12.6	58.1	4,500	11,700
2030	73.9	12.6	61.4	4,800	12,400
<b>Congleton</b>					
2015	14.6	36.7	-22.1	-1,700	-4,400
2020	17.0	36.4	-19.5	-1,500	-3,900
2025	18.5	36.4	-17.8	-1,400	-3,600
2030	20.0	36.4	-16.4	-1,300	-3,300
<b>Alsager</b>					
2015	0.5	25.1	-24.5	-1,900	-4,900



2020	0.9	24.9	-24.0	-1,900	-4,800
2025	1.1	24.8	-23.7	-1,800	-4,800
2030	1.3	24.8	-23.5	-1,800	-4,700
<b>Sandbach</b>					
2015	6.7	0.5	6.2	500	1,200
2020	8.2	0.5	7.7	600	1,500
2025	9.2	0.5	8.6	700	1,700
2030	10.1	0.5	9.5	700	1,900
<b>Middlewich</b>					
2015	21.8	1.1	20.7	1,600	4,100
2020	23.3	1.1	22.2	1,700	4,500
2025	24.3	1.1	23.3	1,800	4,700
2030	25.3	1.1	24.2	1,900	4,900
<b>Nantwich</b>					
2015	9.4	0.1	9.3	700	1,900
2020	12.5	0.1	12.4	1,000	2,500
2025	14.5	0.1	14.4	1,100	2,900
2030	16.4	0.1	16.2	1,300	3,300
<b>Handforth</b>					
2015	-1.9	0.0	-1.9	-100	-400
2020	-1.9	0.0	-1.9	-100	-400
2025	-1.8	0.0	-1.8	-100	-400
2030	-1.7	0.0	-1.7	-100	-400
<b>Wilmslow</b>					
2015	-25.4	0.1	-25.4	-2,000	-5,100
2020	-24.2	0.1	-24.2	-1,900	-4,900
2025	-23.5	0.1	-23.5	-1,800	-4,800
2030	-22.9	0.1	-23.0	-1,800	-4,600
<b>Knutsford</b>					
2015	43.4	0.3	43.1	3,300	8,600
2020	45.6	0.3	45.3	3,500	9,100
2025	47.1	0.3	46.8	3,600	9,500
2030	48.6	0.3	48.3	3,700	9,800
<b>Poynton</b>					
2015	-7.7	8.9	-16.6	-1,300	-3,300
2020	-7.0	8.8	-15.9	-1,200	-3,200
2025	-6.6	8.8	-15.4	-1,200	-3,100
2030	-6.3	8.8	-15.1	-1,200	-3,000

<sup>1</sup> Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 13 (October 2015)

<sup>2</sup> Average sales density assumed £13,000 per sq.m (based on the average sales density of the leading four supermarkets as identified by Verdict 2014)

<sup>3</sup> Average sales density assumed to be £5,000 per sq.m

Rounded to the nearest 100 sq.m

At 2013 prices

7.31 In Macclesfield, a small proportion of the surplus convenience goods expenditure capacity at 2015 is absorbed by existing commitments. However, there is a reasonably substantial convenience expenditure residual of £49.4m at 2015, rising to £54.6mm in 2020, £58.1m at 2025 and £61.4m at 2030. Table 7.6 then converts the residual expenditure into a floorspace requirement and shows that



the residual expenditure identified in Macclesfield would be sufficient to support between around 3,800 and 9,900 sq.m net convenience floorspace at 2015, increasing to between 4,200 sq.m and 11,000 sq.m in the period up to 2020, increasing to between around 4,800 and 12,400 sq.m net convenience floorspace in the period up to 2030. The minimum figure is based on the identified need being met through the delivery of a new foodstore by one of the leading supermarket operators (Tesco, Sainsbury's, Morrisons or Asda) and the maximum figure relates to need being met by independent or discount operators, which generally achieve lower sales densities.

- 7.32 As set out above, on the 21 October 2015, the CE Strategic Planning Board resolved to grant outline planning permission subject to the completion of a Section 111 Agreement for the first phase of the South Macclesfield Development Area. As the formal decision has not yet been issued, this scheme is not included as a commitment within the capacity assessment. However, the scheme is proposed to include the provision of a foodstore (up to 5,000 sq.m for convenience goods). Therefore, if the South Macclesfield Development Area foodstore is implemented, a substantial proportion of the surplus convenience goods expenditure identified in the short to medium term in Macclesfield would be absorbed.
- 7.33 As noted above, we consider that the commitment for a mezzanine floor within Tesco at Hibel Road in Macclesfield is unlikely to be implemented for the foreseeable future. Therefore, in practice, the capacity for additional convenience floorspace in Macclesfield is likely to be higher than suggested by our assessment. It should also be noted that the extant permission (ref. 12/1212M) for the comprehensive mixed use Silk Street redevelopment in Macclesfield, which includes up to 2,300 sq.m convenience goods floorspace, has been omitted from the capacity exercise for Macclesfield as we are aware that alternative development options for the site are being considered.
- 7.34 The residual capacity for additional convenience retail provision in Macclesfield is lower than that identified in the 2011 CRSU, of £70.9m<sup>48</sup> at 2010 rising to £94.1m<sup>49</sup> at 2030. This reduction can be attributed to a slight reduction in the overtrading of stores in Macclesfield, new extant planning permissions and a reduction in expected convenience goods expenditure growth forecasts.
- 7.35 In Crewe, the existing commitments, which have a combined estimated convenience goods turnover of £15.5m, absorb all of the convenience goods expenditure identified in the short to medium term, resulting in a deficit of -£10.3m convenience goods expenditure at 2015, decreasing to -£4.7m at

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<sup>48</sup> Converted from £51.0m in 2007 prices

<sup>49</sup> Converted from £67.7m in 2007 prices



2020 and -£1.1m at 2025. Although by 2030 a small amount of surplus convenience goods expenditure is identified (£2.1m), this could only support a very limited amount of convenience goods floorspace (between 200 sq.m and 400 sq.m net).

- 7.36 In Congleton, the existing commitments – most notably the Bridestone Shopping Centre Extension – are expected to absorb all of the surplus convenience expenditure capacity at 2015, leaving a convenience expenditure deficit of -£22.1m at 2015, decreasing to -£19.5m in 2020, -£17.8m at 2025 and -£16.4m at 2030. Similarly, in Alsager, the existing commitment for a new foodstore (proposed to be occupied by Sainsbury's) at the former Twyford Bathrooms Ltd site on Lawton Road is expected to absorb all of the surplus convenience expenditure capacity up to 2030. Accordingly, in Alsager, a convenience goods expenditure deficit of -£24.5m is identified at 2015, reducing to -£24.0m at 2020, -£23.7m at 2025 and -£23.5m at 2030.
- 7.37 Accordingly, there is no quantitative need for additional convenience goods floorspace in Congleton and Alsager during the study period to 2030, assuming that the current market share of facilities in Congleton and Alsager is maintained over the study period.
- 7.38 The expenditure claimed by the single commitment in Poynton - a new foodstore at London Road South - further increases the baseline convenience retail expenditure deficits over the study period identified in Table 7.5. After taking the existing commitment into account, the deficit in Poynton increases to -£16.6m at 2015, -£15.9m at 2020, -£15.4m at 2025 and to -£15.1m at 2030.
- 7.39 In Sandbach, Middlewich, Nantwich, Handforth, Wilmslow and Knutsford, there are no commitments within CE that will impact on the identified expenditure capacity for new convenience goods floorspace. Although we have assumed that a small proportion of the turnover of the Cheshire FRESH scheme in CWAC Borough will be drawn from Sandbach, Middlewich, Nantwich, Wilmslow and Knutsford, the residual expenditure available to support new convenience goods floorspace in each of these centres remains similarly to the expenditure identified under the baseline assessment in Table 7.5.
- 7.40 As shown in Table 7.6, in Knutsford an identified convenience goods expenditure surplus of £43.1m is identified at 2015, increasing to £45.3m at 2020, £46.8m at 2025 and £48.3m at 2030. This amount of expenditure could support between 3,300 sq.m and 8,600 sq.m net convenience floorspace at 2015, increasing to between 3,500 sq.m and 9,100 sq.m at 2020 and between 3,600 sq.m and 9,500 sq.m net at 2030 depending on the type of operator. This level of surplus expenditure is as a result of the Aldi, Booths and Waitrose supermarkets in Knutsford being identified as trading above their



expected benchmark turnovers (by approximately £20.5m, £18.5m and £3.8m respectively). Accordingly there may be scope for a new foodstore to be delivered in Knutsford.

- 7.41 In Middlewich, the identified convenience goods expenditure surplus of £20.7m at 2015, increasing to £22.2m at 2020 and £24.2m at 2030, could support between 1,600 sq.m and 4,100 sq.m net convenience goods floorspace at 2015, increasing to between 1,700 sq.m and 4,500 sq.m at 2020 and 1,900 sq.m and 4,900 sq.m at 2030. This level of surplus expenditure has resulted from both the Tesco and Lidl stores in Middlewich being identified as trading above their expected benchmark turnovers (by approximately £6.1m and £12.7m respectively). Accordingly there may be scope for an additional small foodstore to be delivered in Middlewich to respond to the overtrading of existing stores. However, WYG would advise that this overtrading is monitored after the opening of the new Asda store at Barons Quay in Northwich which may divert trade from these stores.
- 7.42 In Nantwich, a convenience goods expenditure surplus of £12.4m is identified at 2020, increasing to £16.2m at 2030. The residual equates to a convenience goods floorspace requirement of between 1,000 sq.m and 2,500 sq.m net at 2020, increasing to between 1,300 sq.m and 3,300 sq.m at 2030, which would only be sufficient to support the convenience goods element associated with a small foodstore.
- 7.43 The residual expenditure available to support new convenience goods floorspace in Sandbach is limited, with an identified surplus expenditure, of £6.2m at 2015, £7.7m at 2020, rising to £8.6m at 2025 and £9.5m at 2030. The residual equates to a convenience goods floorspace requirement of between 600 sq.m and 1,500 sq.m net at 2020, increasing slightly to between 700 sq.m and 1,900 sq.m net at 2030, which would only be sufficient to support the convenience goods element associated with a convenience store or small supermarket. As noted above, the maximum floorspace requirement figures relate to the need being met by independent or discount operators. However, long term estimates of capacity should be viewed with some cautions given the difficulties in predicting longer term economic trends, accordingly, we recommend that the Council monitors and re-assesses the requirements identified during the Local Plan period.
- 7.44 In Alsager, Congleton, Handforth, Poynton and Wilmslow, given the identified convenience goods expenditure deficit, there is no quantitative need for additional convenience goods floorspace during the study period to 2030, assuming that that the current market share of facilities in these Centres is maintained over the study period.



## Capacity for Future Comparison Goods Floorspace

7.45 Turning to comparison goods capacity, it is important to note that our methodology deviates from that which has been deployed in respect of convenience goods for two principal reasons. Firstly, it can be extremely difficult to attribute an appropriate benchmark turnover to existing comparison goods provision given the diverse nature of comparison goods floorspace (including retail warehousing, high street multiples, independent retailers, the different types of non-food sectors they operate in and so on). Secondly, there tends to be greater disparity between the trading performance of apparently similar comparison goods provision depending on its location, the character of the area and the nature of the catchment. As a consequence, we adopt the approach with comparison goods floorspace that it is trading 'at equilibrium' at 2015 (i.e. our survey derived turnover estimate effectively acts as benchmark). We therefore assume that there is nil quantitative need for any additional floorspace across CE in the 2015 base year.

## Baseline Quantitative Need for Additional Comparison Goods Floorspace

7.46 Once again, it has been assumed that the future performance of CE's facilities will be commensurate with its current market share. Given the scale of retail provision at the out-of-centre Handforth Dean Retail Park near to Handforth – which includes a large Marks & Spencer store, British Home Stores and a Tesco Extra store – and its proximity to the Study Area boundary and the Manchester urban area, we do consider that facilities at Handforth Dean will attract significant custom from outside the Study Area. We have therefore assumed 80% inflow for spending at the stores within Handforth Dean Retail Park. Based on the above assumption for inflow, we have therefore made an allowance for an additional £69.0m of spending on comparison goods in CE to be generated by visitors from outside of the Study Area (inflow therefore representing 6.8% of the total survey derived comparison turnover of CE). The inflow allowance has the net effect of increasing the identified comparison goods survey derived turnover of facilities in CE from £938.9m to £1,007.9m at 2015. We set out all our detailed assumptions in respect of inflow within Tables 25 and 50i at Appendix 6.

7.47 The £938.9m of all comparison goods expenditure generated by residents of the Study Area claimed by destination within CE at 2015 equates to a market share of 19.7%. This is well below the market share for convenience goods of 27.2%. Our assessment 'rolls forward' the current comparison goods market share to examine the likely level of comparison goods floorspace required to maintain the role and function of CE's comparison goods retail destinations going forward. By 'rolling forward' this market share and making provision for inflow deriving from visitors to the Study Area, we estimate



that the total available comparison goods expenditure in CE will be £938.9m at 2015, increasing to £1,075.2m at 2020, £1,288.5m at 2025 and to £1,545.2m at 2030.

7.48 Given the forecast increases in comparison goods expenditure and population and allowing for year on year increases in the productivity of existing floorspace, we estimate that by 2020 there will be an expenditure surplus of £28.4m to support additional comparison goods floorspace within CE as set out in Table 7.7. This surplus is forecast to increase to £140.1m at 2025 and then to £283.6m at 2030. Account has been made for the turnover efficiency of existing comparison goods floorspace to increase over the study period (on the basis that operators are generally able to make their existing floorspace more productive over time)<sup>50</sup>.

**Table 7.7: Estimated Baseline Capacity for Comparison Goods Facilities in CE**

Year	Turnover of Existing Stores <sup>1</sup> £m	Market Share of Study Area Expenditure <sup>2</sup> %	Available Expenditure £m	Inflow £m	Surplus Expenditure £m
2015	1,007.9	19.7%	938.9	69.0	0.0
2020	1,123.7	19.7%	1,075.2	76.9	28.4
2025	1,238.2	19.7%	1,288.5	89.9	140.1
2030	1,367.1	19.7%	1,545.2	105.5	283.6

Source: Table 50 at Appendix 6

<sup>1</sup> Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 13 (Oct 2015)

<sup>2</sup> Assumes constant market share within the Study Area (19.7%). Includes inflow for stores at Handforth Dean Retail Park of 80%.  
At 2013 prices

### Commitments for New Comparison Goods Floorspace

7.49 There are a number of commitments for new comparison goods floorspace in CE that are expected to draw on the surplus comparison goods expenditure identified. As summarised in Table 7.8, we estimate that the turnover requirements of the extant retail planning permissions<sup>51</sup> for new comparison goods floorspace across CE is £70.2m.

7.50 Planning permission was also granted for the comprehensive mixed use redevelopment of land in Macclesfield town centre in September 2013 (known as the Silk Street Redevelopment), to include the development of department store, A1-A5 units and a cinema, providing in the region of 18,200 sq.m of comparison retail floorspace and up to 2,300 sq.m of convenience floorspace (Application ref.

<sup>50</sup> In accordance with the projections set out in Table 4b of Experian Retail Planner Briefing Note 13 (October 2015), these being 3.1% per annum in 2016, 2.2% per annum in 2017, 1.9% per annum between 2018 and 2022 and 2.2% between 2023 and 2030.

<sup>51</sup> As reported by CE Council to WYG at August 2015





12/1212M). Whilst this permission remains extant, the Council terminated the development agreement with the Council's delivery partner for the scheme, Wilson Bowden, and withdrew the Compulsory Purchase Order for the scheme in June 2015. The Council are instead pursuing the leisure-led redevelopment of a smaller surface car park sites in the town centre. The scheme is therefore highly unlikely to be implemented in its current approved form and we have therefore excluded this permission from our assessment of retail capacity.

- 7.51 Not all of the comparison turnover of the committed schemes within CE is expected to be drawn from the Study Area residents or from CE. The proposed development of an out-of-centre Next store at Earl Road near Handforth (application ref. 12/4652M) is expected to function as part of the adjacent Handforth Dean Retail Park located in close proximity to the northern boundary of the Study Area. From examination of the household survey findings and the findings of the Stockport Retail Study Update (August 2014) in relation to trade at the existing Handforth Dean Retail Park, we estimate that this new store will draw 70% of its expected turnover from the Study Area, equating to £10.7m, with the remaining 30% drawn from residents outside of the Study Area, in Stockport and Manchester. For all other committed schemes within CE, we have assumed that 100% of the comparison turnover requirements will be drawn from the Study Area residents.
- 7.52 Of the total £76.1m comparison turnover requirement of committed schemes within CE, we therefore expect that £71.5m will be drawn from the Study Area as summarised in Table 7.8.
- 7.53 We further expect that one committed scheme outside of CE – the proposed development of a rural business hub named Cheshire FRESH on the outskirts of Middlewich (but within the administrative area of CWAC) – will attract spending from the residents of CE. The Cheshire FRESH scheme includes a retail element, which at this stage is expected to comprise a garden centre and farm shops, and would achieve a comparison turnover of £9.4m, 92.5% of which we expect will be drawn from the Study Area<sup>52</sup> (£8.7m). We expect that of the total £8.7m comparison turnover that will be drawn from the Study Area, 51.4% will be drawn from CE<sup>53</sup>.
- 7.54 In total, therefore, we anticipate that £75.9m of the comparison turnover requirement of committed schemes will be drawn from the available expenditure within CE. Full details of the assumptions made in estimating the turnover of commitments are provided in the notes which accompany Tables 26 and 50iii of Appendix 6.

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<sup>52</sup> In accordance with the RIA from application ref. 13/03828/FUL

<sup>53</sup> Table 50iii, Appendix 6



**Table 7.8: Turnover of Extant Comparison Retail Commitments Drawn from Cheshire East**

Proposal	Planning Application Reference	Comparison Sales Area Floorspace sq.m	Estimated Turnover at 2015 £m	Estimated Turnover from Study Area at 2015 £m
<b>CHESHIRE EAST</b>				
<b>Macclesfield</b>				
Office block with ground floor retail, King Edward House, King Edward Street, Macclesfield	14/3619M	121	0.4	0.4
Former Cheshire Building Society, Castle Street Mall, Macclesfield	13/3082M	1,648	5.8	5.8
Mezzanine floor, Tesco, Hibel Road, Macclesfield	07/0200P	317	3.7	3.7
Mezzanine floor, Oak Furniture Land, Silk Retail Park, Hulley Road, Macclesfield	14/5565M	531	1.4	1.3
Subdivision and mezzanine floor in existing retail unit, Unit A, Silk Retail Park, Hulley Road, Macclesfield	14/4088M	598	1.8	1.8
<b>Subtotal Macclesfield</b>		<b>1,567</b>	<b>13.2</b>	<b>13.1</b>
<b>Poynton</b>				
Foodstore and A1-A5 unit, Brookfield Hydro Motors, London Road South, Poynton	14/1904M	741	3.2	3.2
<b>Subtotal Poynton</b>		<b>741</b>	<b>3.2</b>	<b>3.2</b>
<b>Alsager</b>				
Redevelopment for a new foodstore, former Twyford Bathrooms site, Lawton Road, Alsager	15/01204/FUL	348	3.5	3.5
<b>Subtotal Alsager</b>		<b>348</b>	<b>3.5</b>	<b>3.5</b>
<b>Congleton</b>				
Extension to the Bridestone Shopping Centre for a new foodstore and speciality retail units	12/1211C	1,320	10.6	10.6
<b>Subtotal Congleton</b>		<b>1,320</b>	<b>10.6</b>	<b>10.6</b>
<b>Crewe</b>				
A1 retail unit and unit for A1, A3 or A5 use, 15 Grand Junction Way, Crewe	12/0087N	475	1.5	1.5
Extension of existing Aldi supermarket, Grand Junction Way, Crewe	14/3477N	101	0.7	0.7
Replacement warehouse / showroom, Huntsbank Business Park, Crewe Road, Wistaston	13/1573N	244	0.7	0.7
Mixed use development comprising residential, employment and three A1 retail units, Lockitt Street/Mill Street, Crewe	P07/0639	3,252	11.8	11.8
Retail unit, Bristol Street Motors, Macon Way, Crewe	14/4644N	2,601	8.0	8.0
<b>Subtotal Crewe</b>		<b>6,672</b>	<b>22.8</b>	<b>22.8</b>
<b>Other</b>				



Proposal	Planning Application Reference	Comparison Sales Area Floorspace	Estimated Turnover at 2015	Estimated Turnover from Study Area at 2015
		sq.m	£m	£m
New Next store including conservatory and garden centre, Earl Road, Handforth (Zone 1)	12/4652M	4,203	15.3	10.7
Redevelopment for a new foodstore and petrol filling station, former Fisons Site, London Road, Holmes Chapel (Zone 3)	13/3294C	476	4.7	4.7
CoU to warehouse/showroom/retail/trade counter and four employment units, Congleton Road North, Scholar Green (Zone 3)	11/1542C	358	1.1	1.1
CoU of covered riding arena to retail with ancillary storage, Somerford Park Farm, Holmes Chapel Road, Somerford (Zone 3)	14/4031C	310	0.9	0.9
Craft and antiques workshops/shops, Dagfields, Crewe Road, Walgherton (Zone 4)	15/2422N	300	0.9	0.9
<b>TOTAL CHESHIRE EAST</b>		<b>17,944</b>	<b>76.1</b>	<b>71.5</b>
<b>OUTSIDE OF CHESHIRE EAST</b>				
<b>Other, Out-of-Centre</b>				
Garden centre, auction centre and associated livestock accommodation, retail units and farm shop (Cheshire FRESH), Holmes Chapel Road, Middlewich	13/03828/FUL	3,591	9.4	4.5
<b>TOTAL OUTSIDE OF CHESHIRE EAST</b>		<b>3,591</b>	<b>9.4</b>	<b>4.5</b>
<b>TOTAL</b>		<b>19,888</b>	<b>85.5</b>	<b>75.9</b>

Source: Table 26 of Appendix 6  
2013 Prices

### Residual Quantitative Need for Additional Comparison Goods Floorspace Post Implementation of Commitments

7.55 Table 7.9 below sets out the residual comparison expenditure capacity in CE taking into account the turnover requirements of extant commitments for new comparison retail floorspace as identified in Table 7.8. As noted above, we have assumed that a total of £75.9m of the comparison turnover requirement of committed schemes will be drawn from the available expenditure within CE. Table 7.9 identifies a residual comparison goods expenditure deficit of –£56.3m at 2020 once the turnover requirements of existing commitments are taken into account. However, a positive residual comparison goods expenditure surplus in CE of £46.8m is identified at 2025, rising to a more substantial £180.6m at 2030. Even accounting for the existing commitments, therefore, our assessment indicates that there remains significant residual expenditure available to support additional comparison retail provision in CE arising in the medium to longer term period from 2025 to 2030.



**Table 7.9: Residual Quantitative Need for Additional Comparison Goods Floorspace in CE Post Implementation of Commitments**

Year	Comparison Goods Expenditure			Floorspace Requirement (Net)	
	Surplus £m	Commitments <sup>1</sup> £m	Residual £m	Min <sup>2*</sup> sq.m	Max <sup>3*</sup> sq.m
2015	0.0	75.9	-75.9	-15,200	-25,300
2020	28.4	84.7	-56.3	-10,100	-16,800
2025	140.1	93.3	46.8	7,600	12,700
2030	283.6	103.0	180.6	26,600	44,400

Source: Table 50a at Appendix 6

<sup>1</sup> Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 13 (October 2015)

<sup>2</sup> Average sales density assumed to be £5,000 per sq.m

<sup>3</sup> Average sales density assumed to be £3,000 per sq.m

\*Rounded to the nearest 100 sq.m

At 2013 prices

7.56 In order to account for the differing trading performance of potential end operators, we have applied sales densities of £3,000 per sq.m and £5,000 per sq.m to the identified residual expenditure. Allowing for increases in the productivity of existing floorspace, it is estimated that at 2030 there will be a requirement for an additional 26,600 sq.m net to 44,400 sq.m net of comparison retail floorspace in CE, depending on the format of the floorspace and assuming current the market share of existing comparison retail facilities in CE is maintained.

## Capacity within each of the defined Principal Towns and Key Service Centres

### *Capacity assuming a Constant Market Share*

7.57 Below, we assess the capacity and need for additional convenience floorspace in the defined Principal Towns of Crewe and Macclesfield and the Key Service Centres of Alsager, Congleton, Handforth, Knutsford, Middlewich, Nantwich, Poynton, Sandbach and Wilmslow – assuming that the current market share of facilities in each of CE’s Principal Towns and Key Service Centres is maintained over the study period.

7.58 Table 7.10 provides a summary of the identified baseline quantitative capacity in comparison expenditure terms for Crewe, Macclesfield and each of the Key Service Centres in CE prior to taking account of planning commitments. Our assessment of expenditure capacity corresponds to the whole of the urban area of each settlement, encompassing in, edge and out-of-centre destinations.

7.59 Table 7.10 shows that the main focus of the capacity is on Crewe and Macclesfield. After increases in population and per capita spending on comparison goods are considered against the forecast changes



in floorspace productivity<sup>54</sup>, we estimate that the surplus comparison goods expenditure in Crewe will be £9.9m at 2020, rising thereafter to £47.1m at 2025 and £94.8m at 2030. The comparison goods expenditure surplus in Macclesfield is identified to be £7.6m at 2020, increasing to £35.8m at 2025 and £72.1m in the longer term period to 2030.

7.60 Substantial surplus comparison goods expenditure is also identified in Nantwich, Congleton and Knutsford, of £10.6m, £6.9m and £6.2m at 2025, respectively, rising to £21.4m, £13.9m and £12.5m at 2030. In Wilmslow and Sandbach, we estimate that the surplus comparison goods expenditure will be £3.7m and £4.9m at 2020, respectively, rising to £7.5m at 2025 and £9.8m at 2030. The surplus comparison goods expenditure identified in Middlewich, Poynton, Handforth and Alsager is more modest, at £1.8m, £1.5m, £1.5m and £1.1m at 2020, respectively, rising to £3.6m, £3.1m, £3.1m and £2.2m at 2030.

7.61 The surplus expenditure capacity identified for Crewe, Macclesfield, Alsager, Congleton, Knutsford, Middlewich, Nantwich and Sandbach – assuming a constant market share and prior to taking account of extant permissions – is substantially less than that found in the 2011 CRSU<sup>55</sup>. In Crewe we identified a surplus comparison retail expenditure capacity of £94.8m at 2030 compared to £257.9m<sup>56</sup> at 2026 in the CRSU. In Macclesfield, the £72.1m surplus comparison retail expenditure capacity identified at 2030 compares to £226.7m<sup>57</sup> at 2026 identified in the CRSU. This decline in the surplus expenditure capacity identified is primarily attributable to the substantially lower forecasts for growth in comparison goods spending over the study period than estimated in the 2011 CRSU, which as noted in Section 6 reflects the slower economic recovery from the 2008 recession, more modest future outlook and increased sales in floorspace efficiency and in the current and forecast levels on spending on SFT compared to that anticipated in 2011.

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<sup>54</sup> Account has been made for the turnover efficiency of existing comparison goods floorspace to change in accordance with the projections set out in Table 4a of Experian Retail Planner Briefing Note 13 (October 2015).

<sup>55</sup> The surplus expenditure capacity identified for Poynton, Wilmslow and Handforth is not comparable to that identified in the 2011 CRSU. Poynton was not identified in the 2010 household survey as a comparison retail destination (the comparison retail floorspace in Poynton is relatively limited). The surplus expenditure capacity identified for Wilmslow in the 2011 CRSU included spending at Handforth Dean Retail Park and is not therefore directly comparable to our current assessment, which is based current spending at facilities in Wilmslow only (excluding Handforth Dean Retail Park). The surplus expenditure capacity for Handforth was not assessed in the 2011 CRSU.

<sup>56</sup> Converted from £265.6m in 2007 prices

<sup>57</sup> Converted from £233.5m in 2007 prices



**Table 7.10: Estimated Baseline Capacity for Comparison Goods Facilities in Crewe, Macclesfield and each of the Key Service Centres**

Settlement	Year	Turnover of Existing Stores <sup>1</sup>	Market Share of Study Area Expenditure <sup>2</sup>	Available Expenditure	Surplus Expenditure
		£m	%	£m	£m
<b>Crewe</b>	2015	327.7	6.9%	327.7	0.0
	2020	365.3	6.9%	375.3	9.9
	2025	402.6	6.9%	449.7	47.1
	2030	444.5	6.9%	539.3	94.8
<b>Macclesfield</b>	2015	249.3	5.2%	249.3	0.0
	2020	277.9	5.2%	285.5	7.6
	2025	306.2	5.2%	342.1	35.8
	2030	338.1	5.2%	410.2	72.1
<b>Alsager</b>	2015	7.8	0.2%	7.8	0.0
	2020	8.6	0.2%	8.9	0.2
	2025	9.5	0.2%	10.6	1.1
	2030	10.5	0.2%	12.8	2.2
<b>Congleton</b>	2015	48.0	1.0%	48.0	0.0
	2020	53.5	1.0%	55.0	1.5
	2025	59.0	1.0%	65.9	6.9
	2030	65.1	1.0%	79.0	13.9
<b>Handforth</b>	2015	10.7	0.2%	10.7	0.0
	2020	12.0	0.2%	12.3	0.3
	2025	13.2	0.2%	14.7	1.5
	2030	14.6	0.2%	17.7	3.1
<b>Knutsford</b>	2015	43.2	0.9%	43.2	0.0
	2020	48.2	0.9%	49.5	1.3
	2025	53.1	0.9%	59.3	6.2
	2030	58.7	0.9%	71.2	12.5
<b>Middlewich</b>	2015	12.5	0.3%	12.5	0.0
	2020	14.0	0.3%	14.3	0.4
	2025	15.4	0.3%	17.2	1.8
	2030	17.0	0.3%	20.6	3.6
<b>Nantwich</b>	2015	73.9	1.5%	73.9	0.0
	2020	82.4	1.5%	84.7	2.2
	2025	90.8	1.5%	101.4	10.6
	2030	100.3	1.5%	121.7	21.4
<b>Poynton</b>	2015	10.7	0.2%	10.7	0.0
	2020	11.9	0.2%	12.3	0.3
	2025	13.2	0.2%	14.7	1.5
	2030	14.5	0.2%	17.6	3.1
<b>Sandbach</b>	2015	34.0	0.7%	34.0	0.0
	2020	37.9	0.7%	39.0	1.0
	2025	41.8	0.7%	46.7	4.9
	2030	46.1	0.7%	56.0	9.8
<b>Wilmslow</b>	2015	26.1	0.5%	26.1	0.0
	2020	29.1	0.5%	29.8	0.8
	2025	32.0	0.5%	35.8	3.7
	2030	35.3	0.5%	42.9	7.5

Source: Tables 28, 30a, 32, 34, 36, 38, 40, 42, 44 and 48 at Appendix 6

<sup>1</sup> Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 13 (October 2015)

<sup>2</sup> Assumes a constant market share within Study Area for each centre over the study period.

At 2013 prices



- 7.62 Table 7.11 below sets out the residual comparison expenditure capacity in Crewe, Macclesfield and each of the nine defined town centres taking into account the turnover requirements of the extant commitments for new comparison retail floorspace. We have assumed that all of the estimated comparison turnover of the commitments within Macclesfield, Poynton, Alsager, Congleton, Middlewich, Crewe and Nantwich that will be drawn from the Study Area and will be drawn from the corresponding Centre (i.e. the £22.8m turnover requirements of the commitments in Crewe that will be drawn from the Study Area will all be drawn from the available expenditure within Crewe and so on).
- 7.63 Of the turnover drawn from the Study Area for the out-of-centre commitments within CE identified at Table 7.8, we have assumed that 4% of the turnover of the proposed scheme will be diverted from Wilmslow town centre and 5% will be diverted from destinations in Macclesfield<sup>58</sup>. The remaining turnover is expected to be drawn from the expenditure currently flowing to existing destinations within Handforth Dean and the similar out-of-centre retail facilities nearby, such as Stanley Green Retail Park. None of the other out-of-centre commitments in CE are expected to divert a discernible level of trade from any of the Principal Towns and Key Service Centres.
- 7.64 Table 7.11 then converts the residual expenditure into a floorspace requirement for each centre.
- 7.65 In Crewe, the existing commitments – most notably the proposed development of three retail units at Lockett Street/Mill Street in Crewe – are expected to absorb all of the surplus expenditure capacity in the shorter term period up to 2020. However, even accounting for the existing commitments, the strong population growth and growth in spending on comparison goods forecast over the study period will still generate a significant expenditure residual to support additional comparison retail provision in Crewe in the medium and longer term periods up to 2025 and 2030. Table 7.12 identifies an expenditure residual of £17.7m at 2025, rising to a more substantial £62.3m at 2030. It is estimated that this equates to a requirement for an additional 2,900 sq.m to 4,800 sq.m net of comparison retail floorspace at 2025 and between 9,200 sq.m and 15,300 sq.m net at 2030, depending on the format of the floorspace.
- 7.66 The residual comparison goods expenditure capacity identified for Crewe (£62.3m at 2030) is slightly less than that found in the 2011 CRSU, which once commitments were taken into account identified

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<sup>58</sup> In accordance with the Retail Impact assessment submitted in support of the planning application for the proposed Next store (application ref. 12/4652M)



no quantitative need for additional comparison retail floorspace in the period up to 2021 and a residual comparison goods capacity of £86.2m<sup>59</sup> at 2026.

**Table 7.11: Residual Quantitative Capacity for Additional Comparison Goods Floorspace in Crewe, Macclesfield and the Defined Key Service Centres Post Implementation of Commitments**

	Year	Comparison Goods Expenditure			Floorspace Requirement (Net)	
		Surplus £m	Commitments <sup>1</sup> £m	Residual £m	Min <sup>2*</sup> sq.m	Max <sup>3*</sup> sq.m
<b>Crewe</b>	2015	0.0	24.0	-24.0	-4,800	-8,000
	2020	9.9	26.7	-16.8	-3,000	-5,000
	2025	47.1	29.4	17.7	2,900	4,800
	2030	94.8	32.5	62.3	9,200	15,300
<b>Macclesfield</b>	2015	0.0	13.9	-13.9	-2,800	-4,600
	2020	7.6	15.5	-8.0	-1,400	-2,400
	2025	35.8	17.1	18.7	3,000	5,100
	2030	72.1	18.9	53.2	7,800	13,100
<b>Alsager</b>	2015	0.0	3.5	-3.5	-700	-1,200
	2020	0.2	3.9	-3.6	-600	-1,100
	2025	1.1	4.2	-3.1	-500	-800
	2030	2.2	4.7	-2.4	-400	-600
<b>Congleton</b>	2015	0.0	11.2	-11.2	-2,200	-3,700
	2020	1.5	12.5	-11.1	-2,000	-3,300
	2025	6.9	13.8	-6.9	-1,100	-1,900
	2030	13.9	15.2	-1.3	-200	-300
<b>Handforth</b>	2015	0.0	0.0	0.0	0	0
	2020	0.3	0.0	0.3	100	100
	2025	1.5	0.0	1.5	300	400
	2030	3.1	0.0	3.1	500	800
<b>Knutsford</b>	2015	0.0	0.1	-0.1	0	0
	2020	1.3	0.2	1.2	200	300
	2025	6.2	0.2	6.0	1,000	1,600
	2030	12.5	0.2	12.3	1,800	3,000
<b>Middlewich</b>	2015	0.0	0.8	-0.8	-200	-300
	2020	0.4	0.9	-0.5	-100	-200
	2025	1.8	1.0	0.8	100	200
	2030	3.6	1.1	2.5	400	600
<b>Nantwich</b>	2015	0.0	0.0	0.0	0	0
	2020	2.2	0.0	2.2	400	700
	2025	10.6	0.0	10.6	1,700	2,900
	2030	21.4	0.0	21.4	3,200	5,300
<b>Poynton</b>	2015	0.0	3.2	-3.2	-600	-1,100
	2020	0.3	3.6	-3.3	-600	-1,000
	2025	1.5	4.0	-2.4	-400	-700
	2030	3.1	4.4	-1.3	-200	-300
<b>Sandbach</b>	2015	0.0	0.4	-0.4	-100	-100
	2020	1.0	0.4	0.6	100	200
	2025	4.9	0.5	4.4	700	1,200
	2030	9.8	0.5	9.3	1,400	2,300
<b>Wilmslow</b>	2015	0.0	0.8	-0.8	-200	-300

<sup>59</sup> Converted from £88.8m in 2007 prices





	Year	Comparison Goods Expenditure			Floorspace Requirement (Net)	
		Surplus £m	Commitments <sup>1</sup> £m	Residual £m	Min <sup>2*</sup> sq.m	Max <sup>3*</sup> sq.m
	2020	0.8	0.9	-0.1	0	0
	2025	3.7	0.9	2.8	500	800
	2030	7.5	1.0	6.5	1,000	1,600

Source: Tables 28, 30a, 32, 34, 36, 38, 40, 42, 44 and 48 at Appendix 6

<sup>1</sup> Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 13 (October 2015)

<sup>2</sup> Average sales density assumed to be £5,000 per sq.m

<sup>3</sup> Average sales density assumed to be £3,000 per sq.m

Rounded to the nearest 100 sq.m

At 2013 prices

- 7.67 In Macclesfield, the existing commitments are also expected to absorb all of the surplus expenditure capacity in the period up to 2020. However, Table 7.12 identifies a significant comparison goods expenditure residual after existing commitments are taken into account in the period up to 2025, of £18.7m, rising to £53.2m at 2030. The residual expenditure identified in Macclesfield converts to a requirement for between 3,000 sq.m and 5,100 sq.m net of comparison retail floorspace at 2025 and between 7,800 sq.m and 13,100 sq.m at 2030. As set out above, this assessment omits the extant permission (12/1212M) for the comprehensive mixed use Silk Street redevelopment in Macclesfield, as this scheme is no longer being progressed.
- 7.68 Table 7.12 indicates that the existing commitments in Alsager, Congleton and Poynton will absorb all of the comparison goods expenditure growth arising in each of these settlements over the study period to 2030.
- 7.69 There are no commitments that are expected to impact on the identified expenditure capacity for new comparison goods floorspace in Handforth. While in Knutsford and Sandbach, only the Cheshire FRESH scheme near Middlewich is expected to draw any trade from these centres. Accordingly, the residual expenditure available to support new comparison goods floorspace in these settlements is comparable to the surplus expenditure identified above in Table 7.10. Table 7.11 identifies a small comparison expenditure residual in Knutsford, Sandbach and Nantwich in the short term period up to 2020, of £6.0m, £4.4m and £2.2m respectively, rising to a more significant £12.3m, £9.3m and £21.4m in the longer term period to 2030. The comparison goods expenditure residual in Nantwich equates to a comparison goods floorspace requirement of between 1,700 sq.m and 2,900 sq.m net at 2025 increasing to between 3,200 sq.m and 5,300 sq.m net at 2030. In Knutsford, the comparison goods expenditure residual equates to a requirement for between 1,000 sq.m and 1,600 sq.m net comparison goods floorspace at 2025 rising to between 1,800 sq.m and 3,000 sq.m net at 2030. The comparison goods expenditure residual identified in Sandbach equates to a comparison goods floorspace requirement of between 1,400 sq.m and 2,300 sq.m net at 2030.



7.70 In Wilmslow, Handforth and Middlewich and, a small comparison goods expenditure residual remains in these settlements after 2020 once the commitments are taken into account, of £2.8m, £1.5m and £0.8m respectively at 2025, rising to a more significant £6.5m, £3.1m and £2.5m in the overall study period to 2030. Table 7.11 shows that residual expenditure identified in Wilmslow converts to a requirement for between 500 sq.m and 800 sq.m net of comparison retail floorspace at 2025 and between 1,000 sq.m and 1,600 sq.m at 2030. The more modest expenditure residual in Handforth equates to a requirement for between 300 sq.m and 400 sq.m net of comparison retail floorspace at 2025 and between 500 sq.m and 800 sq.m at 2030. Furthermore, modest expenditure residual in Middlewich equates to a requirement for between 100 sq.m and 200 sq.m net of comparison retail floorspace at 2025 and between 400 sq.m and 600 sq.m at 2030.

7.71 As noted above, these estimates assume that the current market share of facilities in Macclesfield, Crewe and Key Service Centre is maintained over the study period. However, we consider that there is scope for an improvement to the comparison goods market share currently achieved by Macclesfield through the introduction of well designed managed retail space in the town. Later in this section, we therefore consider the comparison retail capacity arising in Macclesfield assuming that its market share will increase over the study period.

*Capacity within Macclesfield assuming an Uplift in Market Share*

7.72 In Tables 7.12 and 7.13 below, we consider a 'uplift in market share' scenario for Macclesfield, whereby the overall comparison goods market share of Macclesfield (including all in, edge and out-of-centre destinations in Macclesfield) increases from its current level of 5.2% at 2015 to 6.4% by 2025, and remains at 6.4% thereafter. An improvement in the market share of Macclesfield of around 1.2 percentage points (or 23.0%) could be achieved through a substantial enhancement to the quantity and quality of Macclesfield town centre's comparison retail facilities to boost to the overall attractiveness of Macclesfield compared to competing retail locations elsewhere in the sub-region. As identified in 7.01 previously, this enhanced capacity estimation should not be viewed as justification for new comparison goods floorspace outside of Macclesfield town centre. Instead it is an estimation solely to allow the local planning authority to plan positive in line with paragraph 23 of the NPPF to secure a future growth strategy for the regeneration of the town centre based focused on improving the retail offer and reversing decentralisation of shopping activity.

7.73 The overall comparison goods market share for Macclesfield of 5.2% has fallen by 1.1 percentage points, or 17.5%, since 2010 when the findings of the previous household survey indicated that Macclesfield achieved a market share 6.3%. In its primary catchment area (Zone 1) Macclesfield's



overall comparison goods market share has declined from 41.1% in 2006 to 39.9% in 2010 and to 36.2% in 2015. Macclesfield has therefore lost 4.9 percentage points, or 11.9%, of its market share within its primary catchment zone over the 9 year period from 2006 to 2015, as well as its wider influence beyond Zone 1 diminishing since 2006. It is clear from the evidence that the influence of Macclesfield as a comparison goods destinations has steadily declined since 2006 as residents of CE and the wider Study Area are increasingly choosing to shop at destinations such as the out-of-centre Handforth Dean Retail Park and destinations outside of the Study Area.

7.74 We therefore consider it a realistic prospect that the introduction of well designed managed retail space in Macclesfield town centre could realistically seek to 'claw back' some of the market share lost to competing destinations elsewhere in the sub-region since 2006 and make a significant positive change to its market share. Accordingly, the increased market share scenario is based on the town centre's comparison goods retail offer being expanded through further investment in the town centre. This would allow the town centre to better compete with other retail destinations, reverse its recent decline in market share, and ensure that its vitality and viability is enhanced and then maintained in the longer term. This would best enable the NPPF's 'town centre first' approach to be realised.

**Table 7.12: Estimated Baseline Capacity for Comparison Goods Facilities in Macclesfield with Uplift in Market Share**

Year	Turnover of Existing Stores <sup>1</sup> £m	Market Share of Study Area Expenditure %	Available Expenditure <sup>2</sup> £m	Surplus Expenditure £m
2015	249.3	5.2%	249.3	0.0
2020	277.9	5.2%	285.5	7.6
2025	306.2	6.4% (5.2%)	419.1 (342.1)	112.9 (35.8)
2030	338.1	6.4% (5.2%)	502.6 (410.2)	164.5 (72.1)

Source: Table 30b at Appendix 6

<sup>1</sup> Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 13 (Oct 2015)

<sup>2</sup> Assumes uplift in market share of Macclesfield within the Study Area from 5.6% in 2015 to 6.4% at 2015, remaining at 6.4% thereafter.

The figures in brackets are as identified under the constant market share scenario as set out in Table 7.10. At 2013 prices

7.75 Table 7.12 identifies that the surplus expenditure arising in Macclesfield over the study period increases to £112.9m at 2025 and to £164.5m at 2030 under the uplift in market share scenario, representing an increase in surplus expenditure of £77.1m at 2025 and £92.4m at 2030 compared to the constant market share scenario (of £35.8m at 2025 and £72.1m at 2030).

7.76 Taking the turnover requirements of the existing commitments in Macclesfield into account, Table 7.13 shows that the residual comparison goods expenditure in Macclesfield rises to £112.9m at 2025 and



£164.5m at 2030. The residual comparison goods expenditure identified equates to a requirement for between 15,600 sq.m and 26,000 sq.m net of new comparison retail floorspace at 2025 and between 21,500 sq.m and 35,800 sq.m net at 2030. To put this in to context, Macclesfield town centre currently provides some 42,000 sq.m gross and an estimated 33,500 sq.m net comparison retail floorspace. The identified comparison retail floorspace requirement at 2030 under the uplift scenario therefore represents an increase of between around 64% and 107% compared to the current comparison goods floorspace in the town centre, highlighting the substantial potential for new comparison goods floorspace within Macclesfield town centre.

7.77 As identified from our Health Check of Macclesfield town centre, vacant floorspace in Macclesfield amounted to some 15,300 sq.m gross at August 2015 and is significantly higher than the national average (15.4% compared to 9.2%). It is considered that the existing and emerging town centre redevelopment proposals likely to be delivered over the next few years have the potential to substantially reduce the level of vacant floorspace in Macclesfield over the coming 12 – 24 months. Nevertheless, the particularly high vacancy rate in Macclesfield suggests that some of the identified future capacity for new comparison goods floorspace in Macclesfield is likely to be absorbed by the reoccupation of existing vacant units in the town.

**Table 7.13: Residual Quantitative Need for Additional Comparison Goods Floorspace in Macclesfield with Uplift in Market Share Post Implementation of Commitments**

Year	Comparison Goods Expenditure			Floorspace Requirement (Net)	
	Surplus £m	Commitments <sup>1</sup> £m	Residual £m	Min <sup>2*</sup> sq.m	Max <sup>3*</sup> sq.m
2015	0.0	13.9	-13.9	-2,800	-4,600
2020	7.6	15.5	-8.0	-1,400	-2,400
2025	112.9 (35.8)	17.1	95.7 (18.7)	15,600 (3,000)	26,000 (5,100)
2030	164.5 (72.1)	18.9	145.6 (53.2)	21,500 (7,800)	35,800 (13,100)

Source: Table 30b at Appendix 6

<sup>1</sup> Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 13 (October 2015)

<sup>2</sup> Average sales density assumed to be £5,000 per sq.m

<sup>3</sup> Average sales density assumed to be £3,000 per sq.m

Rounded to the nearest 100 sq.m

The figures in brackets are as identified under the constant market share scenario as set out in Table 7.11.

At 2013 prices

7.78 The comparison goods floorspace requirements arising under the uplift in market share scenario therefore provide an increase in the net comparison goods floorspace requirements for Macclesfield of between around 13,700 sq.m and 22,700 sq.m (depending on the format of the floorspace) in the overall study period to 2030 compared to the constant market share scenario. However, without delivery of a sufficient scale and quality of retail development in Macclesfield town centre, it is unlikely that the comparison goods market share of Macclesfield will improve materially from its current level.



Indeed, the influence of Macclesfield town centre as a comparison goods destination may continue to decline without intervention as has been the case since 2006. We would also add that other interventions relating to positive town centre management and other fiscal and physical improvements should also be considered to help improve the performance of the town centre.

7.79 In considering this uplift in market share scenario, it is important to note that we have identified that there has been a decline in the performance of Macclesfield town centre in recent years and have recommended that interventions are required in order to ensure that the town centre’s vulnerabilities are addressed, so that the centre improves in the future. In accordance with the town centre first approach, we consider that the regeneration and redevelopment of town centre sites in Macclesfield should be a priority for the delivery of any additional comparison goods floorspace. The delivery of additional comparison goods floorspace in Macclesfield town centre would assist in strengthening the overall offer of the centre, which could assist further in clawing back expenditure which is leaking to out-of-centre destinations. We consider that any proposals for further growth of out-of-centre retail areas need to be considered very carefully in order to ensure that opportunities for the delivery of additional retail development within Macclesfield town centre are not prejudiced. Indeed, any proposals for edge and out-of-centre retail floorspace should be required to test the specific impacts on existing, committed and planned investment in Macclesfield town centre, as well as on the vitality and viability of the town centre.

*Summary of Capacity within Macclesfield, Crewe and each of the Defined Key Service Centres*

7.80 We identified that across CE as a whole, there is a quantitative need for between 5,600 sq.m net and 14,600 sq.m net additional convenience goods provision over the study period based on existing market shares.

7.81 Our analysis of Crewe, Macclesfield and the Key Service Centres in CE has identified that there is likely to be no convenience goods expenditure available to support new floorspace in Crewe, Alsager, Congleton, Handforth, Poynton and Wilmslow over the study period based on existing market shares and after commitments have been taken into account. It is estimated that Macclesfield will be able to support additional convenience goods provision, with £49.4m residual expenditure identified at 2015, rising to £54.6m at 2020 and £61.4m at 2030, which could support between 3,800 sq.m and 9,900 sq.m net additional floorspace at 2015, increasing to between 4,200 sq.m and 11,000 sq.m at 2020 and between 4,800 sq.m and 12,400 sq.m at 2030 depending on the type of operator. We are aware that CE’s Strategic Planning Committee has resolved to grant permission, subject to a legal agreement for a mixed use development including a foodstore (to provide up to 5,000 convenience floorspace).



Accordingly, it is likely that a significant proportion of the identified convenience goods capacity would be absorbed by this scheme if it comes forward.

- 7.82 In relation to Knutsford, it is estimated that £45.3m residual expenditure will be available at 2020 based on existing market shares and after commitments have been taken into account, increasing to £48.3m at 2030 which would be sufficient to support the convenience goods element associated with a new large-scale supermarket. However, given recent trends in the convenience goods sector, with the main foodstore operators scaling back in terms of delivery of large foodstores, we would consider it unlikely for all the identified convenience goods capacity to be met via a single large scale supermarket.
- 7.83 In Middlewich, the identified convenience goods expenditure surplus of £20.7m at 2015, increasing to £22.2m at 2020 and £24.2m at 2030, could support between 1,600 sq.m and 4,100 sq.m net convenience goods floorspace at 2015, increasing to between 1,700 sq.m and 4,500 sq.m at 2020 and 1,900 sq.m and 4,900 sq.m at 2030. Accordingly, there may be scope for an additional small foodstore to be delivered in Middlewich to respond to the overtrading of existing stores.
- 7.84 In Nantwich, the identified convenience goods expenditure surplus of £9.3m at 2015, increasing to £12.4m at 2020 and £16.2m at 2030, could support between 700 sq.m and 1,900 sq.m net convenience goods floorspace at 2015, increasing to between 1,000 sq.m and 2,500 sq.m at 2020 and 1,300 sq.m and 3,300 sq.m at 2030. Accordingly, there may be scope for an additional small foodstore to be delivered in Nantwich to respond to the overtrading of existing stores.
- 7.85 A limited amount of convenience goods expenditure surplus is identified in Sandbach, with a surplus of £6.2m identified in Sandbach at 2015, increasing to £9.5m by 2030. This level of expenditure could support between 500 sq.m net and 1,200 sq.m net convenience goods floorspace at 2015, increasing to between 700 sq.m and 1,900 sq.m net convenience goods floorspace at 2030, which would be sufficient to support the convenience goods element associated with a convenience store or small supermarket.
- 7.86 Notwithstanding the capacity identified, we would advise that long term estimates of capacity should be viewed with some caution given the difficulties in predicting longer term economic trends; accordingly, we recommend that the Council monitors and re-assesses the requirements identified during the Local Plan period.



- 7.87 In relation to comparison goods, there is no requirement for additional provision across CE as a whole in the period up to 2020, primarily because the turnover requirements of extant commitments for new comparison retail floorspace are expected to absorb the growth in available comparison goods expenditure up to 2020. However, the strength of forecast population growth and growth in expenditure per person on comparison goods still generates substantial capacity for additional comparison retail provision in CE over the medium and longer term periods to 2025 and 2030, even after existing commitments are taken into account, of between 7,600 sq.m and 12,700 sq.m net at 2025 rising to between 26,600 sq.m and 44,400 sq.m net at 2030.
- 7.88 In terms of the requirement for additional comparison goods floorspace in each of the Principal Towns and Key Service Centres, our analysis identified that there is likely to be no comparison goods expenditure available to support new floorspace in Alsager, Congleton and Poynton over the study period based on existing market shares and after commitments have been taken into account.
- 7.89 In Crewe, our assessment found that there is no expenditure available to support additional comparison goods floorspace in the period up to 2020 based on its current market shares and once commitments are taken into account. However, we identified substantial capacity arising later in the study period, of £17.7m at 2025 rising to £62.3m at 2030. Our assessment of Macclesfield similarly found no expenditure capacity for new comparison goods floorspace in Macclesfield in the period up to 2020 once existing commitments were taken into account, but we identified £18.7m of comparison retail expenditure capacity at 2025 rising to £53.2m at 2030 assuming that the Macclesfield's existing market share is maintained throughout the study period.
- 7.90 However, we consider that there is potential to improve Macclesfield's market share from 5.2% back to its 2010 level of 6.4%. This could be achieved through the delivery of a substantial expansion and enhancement to Macclesfield's existing comparison retail offer. WYG expects that the delivery of a scheme in Macclesfield town centre could sustainably 'claw back' Study Area residents' expenditure lost to competing destinations elsewhere in the sub-region since 2010, such as Handforth Dean Retail Park as well as destinations outside of the Study Area. Assuming a modest 1.2 percentage point uplift in Macclesfield's market share, we identified residual comparison goods expenditure in Macclesfield after commitments were taken into account of £95.7m at 2025 rising to £145.6m at 2030. This would be sufficient to support between 15,600 sq.m to 26,000 sq.m net of comparison retail floorspace at 2025 and between 21,500 sq.m and 35,800 sq.m net at 2030.
- 7.91 If the Council is to successfully promote and implement any development opportunity in Macclesfield town centre, it will be imperative that the Council consider planning applications carefully in the future





to control the level of out-of-centre floorspace which comes forward. This will ensure that out-of-centre retail development does not inadvertently absorb any future capacity which could reduce the viability of a Town Centre scheme and reflects the need to direct retail development towards the in-centre locations.

- 7.92 In Nantwich, a significant comparison goods expenditure residual has been identified in the short term period up to 2020 once the commitments are taken into account, of £2.2m, rising to a more significant £21.4m in the overall study period to 2030. Table 7.11 shows that residual expenditure identified in Nantwich converts to a requirement for between 1,700 sq.m and 2,900 sq.m net of comparison retail floorspace at 2025 and between 3,200 sq.m and 5,300 sq.m at 2030.
  
- 7.93 In Wilmslow, Sandbach, Knutsford and Nantwich, a small comparison goods expenditure residual has been identified over the medium and longer term based on existing market shares and after commitments have been taken into account, of £2.8m, £4.4m, £6.0m and £10.6m at 2025, respectively, rising to £6.5m, £9.3m, £12.3m and £21.4m in the longer term period to 2030. The expenditure capacity identified at 2030 would be sufficient to support between 1,000 sq.m and 1,600 sq.m net comparison floorspace in Wilmslow, between 1,400 sq.m and 2,300 sq.m net of comparison retail floorspace in Sandbach, between 1,800 sq.m and 3,000 sq.m net in Knutsford, and between 3,200 sq.m and 5,300 sq.m net in Nantwich. Although some surplus comparison goods expenditure is identified in Handforth and Middlewich, this is relatively limited and it is considered that there is no significant requirement for additional comparison goods floorspace in these settlements over the study period beyond the existing commitments and based on existing market shares being maintained.
  
- 7.94 Table 7.14 below provides a summary of the identified capacity for new comparison goods floorspace in Crewe, Macclesfield (under the uplift in market share scenario) and the nine Key Service Centres.



**Table 7.14: Summary of Quantitative Capacity for Additional Comparison Retail Facilities Crewe, Macclesfield and the Key Service Centres**

Year	Convenience Retail Floorspace Requirement (Net)		Comparison Retail Floorspace Requirement (Net)	
	Min <sup>1*</sup> sq.m	Max <sup>2*</sup> sq.m	Min <sup>3*</sup> sq.m	Max <sup>4*</sup> sq.m
<b>Crewe</b>				
2015	-800	-2,100	-4,800	-8,000
2020	-400	-900	-3,000	-5,000
2025	-100	-200	2,900	4,800
2030	200	400	9,200	15,300
<b>Macclesfield</b>				
2015	3,800	9,900	-2,800	-4,600
2020	4,200	11,000	-1,400	-2,400
2025	4,500	11,700	15,600	26,000
2030	4,800	12,400	21,500	35,800
<b>Alsager</b>				
2015	-1,900	-4,900	-700	-1,200
2020	-1,900	-4,800	-600	-1,100
2025	-1,800	-4,800	-500	-800
2030	-1,800	-4,700	-400	-600
<b>Congleton</b>				
2015	-1,700	-4,400	-2,200	-3,700
2020	-1,500	-3,900	-2,000	-3,300
2025	-1,400	-3,600	-1,100	-1,900
2030	-1,300	-3,300	-200	-300
<b>Handforth</b>				
2015	-100	-400	0	0
2020	-100	-400	100	100
2025	-100	-400	300	400
2030	-100	-400	500	800
<b>Knutsford</b>				
2015	3,300	8,600	0	0
2020	3,500	9,100	200	300
2025	3,600	9,500	1,000	1,600
2030	3,700	9,800	1,800	3,000
<b>Middlewich</b>				
2015	1,600	4,100	-200	-300
2020	1,700	4,500	-100	-200
2025	1,800	4,700	100	200
2030	1,900	4,900	400	600
<b>Nantwich</b>				
2015	700	1,900	0	0
2020	1,000	2,500	400	700
2025	1,100	2,900	1,700	2,900
2030	1,300	3,300	3,200	5,300
<b>Poynton</b>				
2015	-1,300	-3,300	-600	-1,100
2020	-1,200	-3,200	-600	-1,000



2025	-1,200	-3,100	-400	-700
2030	-1,200	-3,000	-200	-300
<b>Sandbach</b>				
2015	500	1,200	-100	-100
2020	600	1,500	100	200
2025	700	1,700	700	1,200
2030	700	1,900	1,400	2,300
<b>Wilmslow</b>				
2015	-2,000	-5,100	-200	-300
2020	-1,900	-4,900	0	0
2025	-1,800	-4,800	500	800
2030	-1,800	-4,600	1,000	1,600

Source: Tables 27-29, 30b and 31-48 at Appendix 6

Assumes uplift in market share of Macclesfield within the Study Area from 5.2% in 2015 to 6.4% at 2025, remaining at 6.4% thereafter

Assumes a constant market share for Crewe, Alsager, Congleton, Handforth, Knutsford, Middlewich, Nantwich, Poynton, Sandbach and Wilmslow over the study period.

<sup>1</sup> Average sales density assumed £13,000 per sq.m (based on the average sales density of the leading four supermarkets as identified by Verdict 2014)

<sup>2</sup> Average sales density assumed to be £5,000 per sq.m

<sup>3</sup> Average sales density assumed to be £5,000 per sq.m

<sup>4</sup> Average sales density assumed to be £3,000 per sq.m

\*Rounded to the nearest 100 sq.m

At 2013 prices



## 8.0 Commercial Leisure

- 8.01 Our approach to the assessment of quantitative need in the leisure market necessarily departs from our retail methodology for a number of reasons, including the fragmentation of the market and the limited availability of data. However, the household survey undertaken to inform the Study asked respondents questions about their use of commercial leisure facilities and, through reference to market share, we are therefore able to form a view as to how the Study Area, and specifically CE, currently meets the need of its population in relation to the bingo, cinema and ten-pin bowling sectors. We also use national statistics in respect of the typical level of provision of specific types of facilities to assist our judgement in respect of the likely future need for additional facilities in the administrative area. By reference to estimated increases in the Study Area population, this 'benchmarking' exercise informs our judgement in respect of the likely future need for additional commercial leisure facilities in the Study Area and specifically within CE.
- 8.02 In considering future leisure provision, it should be noted that certain types of facility are often provided in locations proximate to large Centres. Accordingly, we anticipate that some of CE's commercial leisure needs could possibly be met within or in the vicinity of Centres in the adjoining authority areas which are located in close proximity to parts of CE. The analysis that follows seeks to apportion future growth in commercial leisure provision on the basis of the current market share achieved by the Study Area, but this should be viewed with some flexibility in respect of how opportunities that come forward 'on the ground' can appropriately contribute to meeting identified needs.
- 8.03 For each leisure sector, we consider the current broad patterns of existing use, before then assessing the quantitative need for additional facilities.

### Leisure Expenditure

- 8.04 We have referred to Experian Micromarketer G3 data to obtain information on expenditure which is available within the Study Area for leisure activities. Table 8.1 sets out the total leisure expenditure and per capita leisure expenditure estimated to be generated by the Study Area population. The total leisure expenditure available within the Study Area is £3,790.3m, which equates to £2,538.10 per person based on the Study Area population of 1,493,372 at 2015. In terms of specific leisure sectors, across the Study Area, there is £26.3m cinema expenditure (£17.60 per capita), £47.1m expenditure for live entertainment (£31.60 per capita) and £1,573.1m expenditure for restaurant, cafes etc (£1,053.40 per capita). In terms of the restaurant and cafe expenditure, this includes restaurant and



cafe meals away from home (£501.10 per capita), alcoholic drinks away from home (£267.90 per capita), take away meals and snack food (£265.30 per capita) and contract catering (£18.90 per capita).

**Table 8.1: Available Study Area Expenditure – Leisure (£m)**

Leisure Sector	Total Expenditure (£m)	Per Capita Expenditure (£)
Cinema	26.3	17.60
Live, entertainment: theatre, concerts	47.1	31.60
Museums, zoos, gardens, theme parks	32.4	21.70
Clubs, dances, discos	21.0	14.00
Social events, gatherings	9.8	6.60
Subscriptions to leisure activities	18.9	12.60
Other Cultural Services	306.2	205.10
Restaurants, cafes etc	1,573.1	1,053.40
Recreational and sporting services	132.4	88.70
Accommodation services	206.0	138.00
Other Leisure	1,417.0	948.90
<b>TOTAL LEISURE</b>	<b>3,790.3</b>	<b>2,538.10</b>

## Bingo

- 8.05 The CE administrative area currently accommodates one permanent, purpose built, bingo hall, namely the Mecca Bingo at Phoenix Leisure Park in Crewe. The Mecca Bingo in Crewe attracts 23.4% of bingo trips which originate within the Study Area. The Mecca Bingo in Crewe is particularly popular with residents from Zones 3 and 4 with more than 8 out of every 10 bingo trips originating in these zones taking place at the Mecca Bingo.
- 8.06 The Mecca Bingo at Phoenix Leisure Park is the most popular facility in the Study Area for bingo trips. The next most popular facilities are the Mecca Bingo on Smithfield Road in Wrexham (14.4%) and the Mecca Bingo in Chester (13.4%).
- 8.07 The Study Area as a whole retains a strong proportion of bingo trips, with 93.2% of such trips which originate in the Study Area being undertaken in the Study Area. The zones which have the lowest retention rates are Zone 1 (45.0%) and 9 (50.0%), with 55.0% of respondents from Zone 1 visiting bingo facilities in Stockport and 50.0% of respondents from Zone 9 visiting bingo facilities in Halton.



**Table 8.2a: Study Area Market Share for Bingo Visits (%)**

Zone	Address	1	2	3	4	5	6	7	8
	<b>CWAC</b>								
2.	Knutsford	0.0%	20.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Plaza Bingo and Social Club, Witton Street, Northwich	0.0%	41.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	The Gladstone Club, Station Road, Northwich	0.0%	0.0%	0.0%	0.0%	0.0%	6.1%	0.0%	0.0%
6.	Frodsham Community Centre, The Cottage, Fluin Lane, Frodsham	0.0%	0.0%	0.0%	0.0%	0.0%	4.2%	0.0%	0.0%
	Helsby Club, Springfield Avenue, Helsby	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%	0.0%	0.0%
	Weaverham	0.0%	0.0%	0.0%	0.0%	0.0%	4.2%	0.0%	0.0%
	Winsford	0.0%	0.0%	0.0%	0.0%	0.0%	4.2%	0.0%	0.0%
7.	Mecca Bingo, Brookdale Place, Chester	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%
8.	Whitby Sports & Social Club, Chester Road, Ellesmere Port	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	7.3%
	Mecca Bingo, Port Arcades, Ellesmere Port	0.0%	0.0%	0.0%	0.0%	0.0%	12.2%	0.0%	21.0%
15.	Mickle Trafford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Waverton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	<b>CWAC Authority Total</b>	<b>0.0%</b>	<b>62.3%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>29.8%</b>	<b>100.0%</b>	<b>28.3%</b>
	<b>CE</b>								
4.	Mecca Bingo, Pheonix Leisure Park, Dunwoody Way, Crewe	45.0%	0.0%	81.7%	100.0%	8.1%	24.3%	0.0%	0.0%
	<b>CE Authority Total</b>	<b>45.0%</b>	<b>0.0%</b>	<b>81.7%</b>	<b>100.0%</b>	<b>8.1%</b>	<b>24.3%</b>	<b>0.0%</b>	<b>0.0%</b>
	<b>Other Authority Areas</b>								
8.	Gala Bingo, Wirral Leisure Land, Bromborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	71.7%
9.	Full House Bingo, Unit K Trident Park, Runcorn Shopping Centre, Runcorn	0.0%	0.0%	0.0%	0.0%	0.0%	27.8%	0.0%	0.0%
10.	Mecca Bingo, Smithfield Road, Wrexham	0.0%	0.0%	0.0%	0.0%	65.2%	0.0%	0.0%	0.0%
	Wrexham	0.0%	0.0%	0.0%	0.0%	19.8%	0.0%	0.0%	0.0%
11.	Prestatyn	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
12.	Apollo Bingo, Brighton Road, Rhyl	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	<b>Study Area Total</b>	<b>45.0%</b>	<b>62.3%</b>	<b>81.7%</b>	<b>100%</b>	<b>100%</b>	<b>87.9%</b>	<b>100%</b>	<b>100%</b>

Source: Question 52 of Household Survey, Appendix 2. Includes all responses located within Cheshire and those receiving more than 2.0% of total market share of trips outside Cheshire.



**Table 8.2b: Study Area Market Share for Bingo Visits (%)**

Zone	Address	9	10	11	12	13	14	15	Total
	<b>CWAC</b>								
2.	Knutsford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%
	Plaza Bingo and Social Club, Witton Street, Northwich	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%
	The Gladstone Club, Station Road, Northwich	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%
6.	Frodsham Community Centre, The Cottage, Fluin Lane, Frodsham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
	Helsby Club, Springfield Avenue, Helsby	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%
	Weaverham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
	Winsford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%
7.	Mecca Bingo, Brookdale Place, Chester	0.0%	0.0%	27.0%	0.0%	85.9%	75.9%	31.6%	13.4%
8.	Whitby Sports & Social Club, Chester Road, Ellesmere Port	0.0%	0.0%	0.0%	0.0%	0.0%	12.0%	0.0%	1.1%
	Mecca Bingo, Port Arcades, Ellesmere Port	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%
15.	Mickle Trafford	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	38.3%	0.3%
	Waverton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	30.8%	0.3%
	<b>CWAC Authority Total</b>	0.0%	0.0%	27.0%	0.0%	85.9%	87.9%	100%	23.8%
	<b>CE</b>								
4.	Mecca Bingo, Phoenix Leisure Park, Dunwoody Way, Crewe	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	23.4%
	<b>CE Authority Total</b>	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	23.4%
	<b>Other Authority Areas</b>								
8.	Gala Bingo, Wirral Leisure Land, Bromborough	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.2%
9.	Full House Bingo, Unit K Trident Park, Runcorn Shopping Centre, Runcorn	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.4%
10.	Mecca Bingo, Smithfield Road, Wrexham	0.0%	56.7%	0.0%	34.0%	0.0%	12.0%	0.0%	14.4%
	Wrexham	0.0%	37.6%	0.0%	13.8%	0.0%	0.0%	0.0%	8.2%
11.	Prestatyn	0.0%	0.0%	56.1%	0.0%	0.0%	0.0%	0.0%	7.3%
12.	Apollo Bingo, Brighton Road, Rhyl	0.0%	0.0%	8.5%	28.7%	0.0%	0.0%	0.0%	2.5%
	<b>Study Area Total</b>	50.0%	100%	100%	100%	85.8%	100%	100%	93.2%

Source: Question 52 of Household Survey, Appendix 2. Includes all responses located within Cheshire and those receiving more than 2.0% of total market share of trips outside Cheshire.

8.08 The Study Area has a total estimated population of 1,493,372 at 2015, increasing to 1,568,586 at 2030. Mintel report<sup>60</sup> that there were 354 bingo halls in the UK at March 2015, which against the Office for National Statistics' estimated population of the UK of 64.6 million (2014)<sup>61</sup>, suggests that each is supported by a catchment of 182,486 persons or thereabouts. Accordingly, we estimate that

<sup>60</sup> 'Casinos and Bingo', Mintel, March 2015

<sup>61</sup> As identified by the National Population Projections: 2014 based projections, Office for National Statistics published October 2015



the Study Area population could support 8.2 bingo clubs at 2015, increasing to 8.6 bingo clubs at 2030. Given the population of CE is approximately 25.6% of the Study Area population as a whole, we could expect 25.6% of these bingo clubs to be supported in the CE Authority Area. Accordingly, there may be potential for 2.1 bingo halls to be supported in the local authority area at 2015, increasing to 2.2 at 2030. As CE currently accommodates only one purpose built bingo hall (the Mecca Bingo in Crewe), there may be scope for a further bingo club to be supported in the local authority area.

8.09 The bingo market has experienced decline in recent years affected by the 2007 ban on smoking in enclosed public places and an increase in the proliferation of fixed odds gaming machines and online gambling. However, recent reports indicate that the industry has begun to stabilise, supported by the Government halving Bingo Duty from July 2014 and a shift towards a refreshed and younger customer base. Mintel forecast modest year of year market growth of around 1% over the coming years with consumer expenditure of £690m at 2014 rising to £728m at 2019.<sup>62</sup>

8.10 Notwithstanding this, new bingo hall openings remain few and far between and therefore it may be unlikely that a bingo hall operator would seek to locate in CE. Accordingly, we do not consider it necessary for the local authority to plan for additional provision in the period to 2030, but instead recommend that, should any proposals for such development be forthcoming, they are judged on their own merit in accordance with relevant town centre planning policy at the time of an application's submission.

**Table 8.3: Bingo Hall Requirement in Study Area**

Year	Study Area Population	Typical Population Required to Support Hall	Potential Number of Clubs Supported by Study Area	Potential Number of Clubs Supported by Cheshire East	Existing Number of Clubs Supported by Cheshire East	Potential Residual Requirement in Cheshire East
2015	1,493,372	182,486	8.2	2.1	1.0	1.1
2020	1,522,147	182,486	8.3	2.1	1.0	1.1
2025	1,548,175	182,486	8.5	2.2	1.0	1.2
2030	1,568,586	182,486	8.6	2.2	1.0	1.2

Note: Typical population to support a bingo hall derived from Mintel's data of UK bingo venues (Casinos and Bingo), March 2015) and the Office of National Statistics UK population projection of 64.6 million persons at 2014, as identified by National Population Projections: 2014 based projections, Office for National Statistics, published October 2015

<sup>62</sup> Casinos and Bingo', Mintel, March 2015



## Cinema

- 8.11 There is a single purpose built multi-screen cinema present within the CE administrative area, namely the Odeon cinema at Phoenix Leisure Park in Crewe, which accommodates a total of 5-screens. In addition, there are single screen facilities at Cinemac at the Heritage Centre in Macclesfield and the Curzon Cinema in Knutsford, as well as facilities which show films on a more ad hoc basis, such as Daneside Theatre in Congleton and Lyceum Theatre in Crewe.
- 8.12 As set out below at Table 8.4, the results of the household survey show that 8.9% of trips to the cinema which originate within the Study Area are secured by the Odeon at Phoenix Leisure Park in Crewe. Nearly 7 out of every 10 cinema trips which originate in Zone 4 (Crewe) are undertaken at the Odeon. The Curzon cinema in Knutsford secures a market share of 4.0% of cinema trips, whilst the Cinemac in Macclesfield secures 3.0% and the Lyceum theatre secures 1.5% of such trips. Overall, facilities in CE attract a cinema trips market share of 21.8%. This is comparable, albeit slightly higher, than the market share achieved by CE in 2010 of 17.6%.
- 8.13 When considering the Study Area as a whole, the Vue Cinema at Cheshire Oaks is the most popular cinema facility, attracting a market share of 19.1%, followed by the Odeon Cinema at Eagles Meadow in Wrexham, which secures a market share of 13.1%. The Odeon at Phoenix Leisure Park in Crewe is the third most popular destination (8.9%), followed by Cineworld at Broughton Shopping Park in Broughton (6.6%) and Cineworld at Trident Park Retail Park in Runcorn (6.0%).
- 8.14 Looking at trips from residents in Zones 1-4 in particular, for Zone 1, the most popular destination is the Cineworld in East Didsbury (36.7%) followed by the Cinemac in Macclesfield (26.7%). Due to the low proportion of trips from other Zones, the facilities in Stockport do not feature in the table, although it is important to note that 7.1% of the residents in Zone 1 travel to the Regent Cinema in Marple and 2.1% travel to the Cineworld in Stockport. Looking at Zone 2, 35.4% of respondents travel to the Vue cinema in Altrinchamr and 27.7% travel to the Curzon Cinema in Knutsford. In Zone 3, 32.7% go to the Odeon in Crewe but a further 21.2% travel to the Vue in Newcastle-Under-Lyme and and 18.6% to the Odeon in Stoke. Finally, turning to Zone 4, 68.9% of respondents travel to the Odeon in Crewe and 9.7% to Cheshire Oaks.
- 8.15 More than 9 out of 10 cinema trips which originate within Zones 7, 8, 10, 14 and 15 are undertaken within the Study Area. Zone 15 achieves the greatest market share of 100.0%, with all respondents from this zone stating that they last visited a facility within the Study Area to go to the cinema. The





lowest Study Area market share is achieved in Zone 12, where less than 3 out of 10 cinema trips originating in this zone are undertaken in the Study Area.

**Table 8.4a: Study Area Market Share for Cinema Visits (%)**

Zone	Address	1	2	3	4	5	6	7	8
	<b>CWAC</b>								
8.	Vue Cinema, The Colliseum, Cheshire Oaks	0.0%	7.2%	1.5%	9.7%	36.3%	43.8%	63.5%	54.7%
	<b>CWAC Authority Total</b>	<b>0.0%</b>	<b>7.2%</b>	<b>2.2%</b>	<b>9.7%</b>	<b>36.3%</b>	<b>43.8%</b>	<b>70.0%</b>	<b>54.7%</b>
	<b>CE</b>								
1.	Cinemac, Heritage Centre, Roe Street, Macclesfield	26.7%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%
	Disley	1.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
2.	Curzon Cinema, Toft Road, Knutsford	5.2%	27.7%	1.8%	0.0%	0.0%	2.7%	0.0%	0.0%
3.	Daneside Theatre, Park Road, Congleton	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%
4.	Crewe	0.0%	0.0%	0.6%	0.0%	0.0%	1.3%	0.0%	0.0%
	Lyceum Theatre, Heath Street, Crewe	0.0%	1.7%	4.1%	8.6%	2.0%	3.5%	0.0%	0.0%
	Odeon, Phoenix Leisure Park, Dunwoody Way, Crewe	0.0%	2.4%	32.7%	68.9%	0.0%	0.9%	0.0%	0.0%
	<b>CE Authority Total</b>	<b>33.8%</b>	<b>31.8%</b>	<b>41.4%</b>	<b>77.5%</b>	<b>2.0%</b>	<b>8.4%</b>	<b>0.0%</b>	<b>0.0%</b>
	<b>Other Authority Areas</b>								
2.	Vue, Altrincham, Denmark Street, Altrincham	5.1%	35.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
8.	Odeon, Welton Road, Wirral	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	28.9%
9.	Cineworld, Trident Park Retail Park, Runcorn	0.0%	5.8%	0.0%	0.0%	0.0%	30.8%	1.6%	0.0%
10.	Odeon, Eagles Meadow, Wrexham	0.0%	0.0%	0.0%	0.0%	45.1%	0.0%	0.0%	0.0%
11.	Scala Cinema & Art Centre, High Street, Prestatyn	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
14.	Cineworld, Broughton Shopping Park, Chester Road, Broughton	0.0%	1.7%	1.8%	0.0%	0.0%	2.4%	26.6%	1.9%
	<b>Study Area Total</b>	<b>38.8%</b>	<b>82.1%</b>	<b>46.4%</b>	<b>87.3%</b>	<b>84.8%</b>	<b>87.7%</b>	<b>98.1%</b>	<b>90.7%</b>
OSA.	Cineworld, Junction Leisure Park, Llandudno Junction	0.0%	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%
	Cineworld, Wilmslow Road, East Didsbury	36.7%	2.0%	5.0%	0.0%	1.7%	0.0%	0.0%	0.0%
	Odeon, Eturia Road, Stoke-on-Trent	0.0%	0.0%	18.6%	3.0%	0.0%	1.3%	0.0%	0.0%
	Odeon, 201 The Dome, Trafford Centre, Manchester	9.4%	10.5%	2.9%	0.0%	0.0%	3.3%	0.0%	0.6%
	Vue, The Square, Market Arcade, Newcastle-under-Lyme	0.0%	0.0%	21.2%	9.0%	0.0%	0.0%	0.0%	0.0%
	Vue, West Parade, Rhyl	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Source: Question 48 of Household Survey, Appendix 2. Includes all responses located within Cheshire and those receiving more than 2.0% of total market share of trips outside Cheshire.



**Table 8.4b: Study Area Market Share for Cinema Visits (%)**

Zone	Address	9	10	11	12	13	14	15	Total
	<b>CWAC</b>								
8.	Vue Cinema, The Colliseum, Cheshire Oaks	2.1%	1.2%	13.4%	0.0%	49.2%	36.8%	78.6%	19.1%
	<b>CWAC Authority Total</b>	<b>2.1%</b>	<b>1.2%</b>	<b>24.2%</b>	<b>0.0%</b>	<b>59.0%</b>	<b>38.6%</b>	<b>86.0%</b>	<b>20.7%</b>
	<b>CE</b>								
1.	Cinemas, Heritage Centre, Roe Street, Macclesfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.0%
	Disley	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
2..	Curzon Cinema, Toft Road, Knutsford	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.0%
3.	Daneside Theatre, Park Road, Congleton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
	Crewe	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
4.	Lyceum Theatre, Heath Street, Crewe	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%
	Odeon, Phoenix Leisure Park, Dunwoody Way, Crewe	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.9%
	<b>CE Authority Total</b>	<b>3.6%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>21.8%</b>
	<b>Other Authority Areas</b>								
2.	Vue, Altrincham, Denmark Street, Altrincham	7.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.6%
8.	Odeon, Welton Road, Wirral	0.0%	0.0%	0.0%	0.0%	10.3%	5.0%	2.6%	4.0%
9.	Cineworld, Trident Park Retail Park, Runcorn	68.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.0%
10.	Odeon, Eagles Meadow, Wrexham	0.0%	92.6%	15.5%	13.5%	0.0%	1.9%	3.9%	13.1%
11.	Scala Cinema & Art Centre, High Street, Prestatyn	0.0%	0.0%	25.0%	1.4%	0.0%	0.0%	0.0%	2.1%
14.	Cineworld, Broughton Shopping Park, Chester Road, Broughton	0.0%	4.6%	14.0%	4.0%	19.0%	50.0%	5.7%	6.6%
	<b>Study Area Total</b>	<b>80.8%</b>	<b>98.4%</b>	<b>80.1%</b>	<b>24.2%</b>	<b>89.8%</b>	<b>97.5%</b>	<b>100%</b>	<b>76.4%</b>
	<b>OSA</b>								
	Cineworld, Junction Leisure Park, Llandudno Junction	0.0%	0.0%	6.2%	34.2%	0.0%	0.0%	0.0%	2.1%
	Cineworld, Wilmslow Road, East Didsbury	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	4.7%
	Odeon, Etura Road, Stoke-on-Trent	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.2%
	Odeon, 201 The Dome, Trafford Centre, Manchester	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%
	Vue, The Square, Market Arcade, Newcastle-under-Lyme	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%
	Vue, West Parade, Rhyl	0.0%	0.0%	13.7%	41.6%	0.0%	0.0%	0.0%	3.0%

Source: Question 48 of Household Survey, Appendix 2. Includes all responses located within Cheshire and those receiving more than 2.0% of total market share of trips outside Cheshire.

8.16 Once again, we estimate that the Study Area has a total estimated population of 1,493,372 at 2015, increasing to 1,568,586 at 2030. The Mintel Cinema Market report of November 2015 estimates that the UK population on average visits a cinema 2.7 times per annum and that each cinema screen attracts around 42,927 separate admissions.



8.17 Applying these benchmark averages to the Study Area, we estimate that there will be 4,032,104 cinema admissions arising from the Study Area population at 2015, increasing to 4,235,182 admissions at 2030. Based on the assumed number of visits per screen, we calculate that around 93.9 screens are supported at 2015, increasing to 98.7 screens at 2030. Our calculations are set out below at Table 9.5.

8.18 The CE administrative area accommodates 25.6% of the Study Area population. Accordingly, we would expect approximately 25.6% of the cinema screens which could be supported in the Study Area to be located within CE. This equates to 24.0 screens at 2015, increasing to 25.3 screens at 2030. Currently, there are seven permanent cinema screens located within the Borough at the Odeon in Crewe (five screens), Cinemac in Macclesfield (one screen) and Curzon Cinema in Knutsford (one screen). Accordingly, once these existing screens are taken into account, there may be the potential for CE to support an additional 17.0 screens at 2015.

**Table 8.5: Cinema Screen Requirement in Study Area**

Year	Study Area Population	Number of Cinema Visits Per Person	Attendance	Number of Admissions Required to Support Screen	Potential Number of Screens Supported by Study Area	Potential Number of Screens Supported by Cheshire East	Existing Number of Screens Supported by Cheshire East	Potential Residual Requirement in Cheshire East
2015	1,493,372	2.7	4,032,104	42,927	93.9	24.0	7.0	17.0
2020	1,522,147	2.7	4,109,797	42,927	95.7	24.5	7.0	17.5
2025	1,548,175	2.7	4,180,073	42,927	97.4	24.9	7.0	17.9
2030	1,568,586	2.7	4,235,182	42,927	98.7	25.3	7.0	18.3

Note: Number of cinema trips per person and number of admissions per screen derived from Mintel Cinema Market report of November 2015 and the National Population Projections: 2014 based projections, Office for National Statistics, published October 2015.

8.19 It would therefore appear that there is potential for additional cinema provision in the CE administrative area. We would expect any such provision which attracts significant customer numbers to be directed towards the higher order Centres in the Borough in the first instance. As there is already a multi-screen cinema located in Crewe, there is more of a qualitative need for such provision to be directed towards Macclesfield, albeit we recognise that there is a single screen cinema present in the town. The leisure-led regeneration scheme which is planned on Churchill Way in Macclesfield may be an appropriate site for such development. In order to further understand whether Macclesfield could support an additional cinema, we have undertaken a 15-minute drive time analysis from Macclesfield town centre to establish to level of population available to support a new cinema. As detailed at Table 8.6 below, there is a population of 108,123 within a 15 minute drive-time of Macclesfield town centre. Such a population would have the potential to support 6.8 screens. Given



that Macclesfield already accommodates a single cinema screen, the residual requirement would be 5.8 screens. This analysis shows there is likely potential for a medium scale cinema to be provided in Macclesfield. The potential for operator interest in cinemas of such a scale is demonstrated by the Barons Quay scheme in Northwich which is currently under-construction and will include a 5-screen Odeon cinema. Taking into account future demand, it is likely that a cinema providing between 5 and 8 screens could be accommodated in Macclesfield.

**Table 8.6: Cinema Screen Requirement in Study Area**

Population within 15 minute drive time of Macclesfield	Number of Cinema Visits Per Person	Attendance	Number of Admissions Required to Support Screen	Potential Number of Screens Supported by Macclesfield	Existing Number of Screens Supported by Macclesfield	Potential Residual Requirement in Macclesfield
108,123	2.7	291,932	42,927	6.8	1.0	5.8

Note: Number of cinema trips per person and number of admission per screen derived from Mintel Cinema Market report of May 2011

8.20 The provision of a cinema in the northern part of the Borough would assist more sustainable leisure trip patterns, as currently 61.2% of respondents from Zone 1 are travelling outside the Study Area to access cinema provision. Currently, 36.7% of respondents from Zone 1 travel to the Cineworld in East Didsbury to visit the cinema and 9.4% of respondents travel to the Odeon at the Trafford Centre. The market share of Zone 1 has improved since 2010, at which time 76.8% of residents from this zone were travelling outside the Study Area to access cinema provision. This improvement has largely resulted from the increased popularity of the Cinemac cinema, which has increased its market share from Zone 1 from 3.4% in 2010 to 26.8% at 2015. Notwithstanding this improvement, the Cinemac only provides a single cinema screen. Accordingly, it is considered that there is scope for the market share retention of Zone 1 to be improved further, and this would likely be achieved if a further multi-screen cinema was delivered at this location.

## Ten Pin Bowling

8.21 There are two purpose built ten pin bowling alleys in the CE administrative area, namely the Superbowl at Lyme Green Business Park in Macclesfield, which has 14 lanes, and Lakeside Superbowl at Phoenix Leisure Park, which has 24 lanes. Lakeside Superbowl in Crewe attracts a market share of 18.9% of ten pin bowling trips and Superbowl in Macclesfield attracts a market share of 11.8%. The market share of ten pin bowling trips achieved by the CE administrative area as a whole is 30.7%. More than half of all ten pin bowling trips which originate in Zones 1, 3 and 4 are undertaken within CE, with 100% of such trips originated in Zone 4 being undertaken in the Borough.



8.22 In terms of the wider Study Area, the ten pin bowling facility which achieves the greatest market share is the Tenpin at Eagles Meadow in Wrexham, which achieves a market share of 21.9%. The Tenpin at Cheshire Oaks attracts the second greatest market share (24.6%) and Lakeside Superbowl in Crewe attracts the third greatest market share (18.9%). The Study Area as a whole achieves a market share of ten pin bowling trips of 85.5%. More than 9 out of 10 bowling trips which originate in Zones 1, 4, 5, 7, 8, 10, 11, 13, 14 and 15 are undertaken in the Study Area. The Study Area retains the lowest market share from Zone 9 (18.0%), where 46.4% of respondents undertook their last ten pin bowling visit at the Superbowl in Widnes and 24.7% last visited the LA Bowl in Warrington.

**Table 8.7a: Study Area Market Share for Ten Pin Bowling Visits (%)**

Zone	Address	1	2	3	4	5	6	7	8
	<b>CWAC</b>								
8.	Tenpin, Coliseum Leisure Park, Cheshire Oaks	0.0%	22.7%	1.2%	0.0%	34.6%	38.9%	87.0%	76.1%
	CWAC Authority Total	0.0%	22.7%	1.2%	0.0%	34.6%	38.9%	87.0%	76.1%
	<b>CE</b>								
1.	Superbowl, Lyme Green Business Park, London Road, Macclesfield	90.6%	9.4%	19.1%	0.0%	0.0%	0.0%	0.0%	0.0%
4.	Lakeside Superbowl, Phoenix Leisure Park, Dunwoody Way, Crewe	0.0%	21.5%	61.2%	100%	28.4%	14.8%	0.0%	0.0%
	CE Authority Total	90.6%	30.9%	80.3%	100%	28.4%	14.8%	0.0%	0.0%
	<b>Other Authority Areas</b>								
8.	Bromborough Bowl, Bassendale Road, Birkenhead	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.9%	23.9%
10.	Tenpin, Wrexham, Eagles Meadow, 36 St George's Crescent, Wrexham	0.0%	0.0%	0.0%	0.0%	31.9%	0.0%	0.0%	0.0%
11.	AstroBowl, Ffrith Beach Fun Parc, Victoria Road West, Prestatyn	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	Flint Bowling, Jade Jones Pavilion, Earl Street, Flint	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	<b>Study Area Total</b>	<b>90.6%</b>	<b>53.6%</b>	<b>81.4%</b>	<b>100%</b>	<b>95.0%</b>	<b>53.6%</b>	<b>96.0%</b>	<b>100%</b>
OSA.	Tenpin, Parris Wood, Manchester	9.4%	19.2%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%
	LA Bowl, Warrington, 10-15 Chetham Court, Winwick Quay, Warrington	0.0%	19.5%	0.0%	0.0%	0.0%	36.8%	0.0%	0.0%
	Superbowl, The Hive Leisure Park, Widnes	0.0%	0.0%	0.0%	0.0%	0.0%	6.8%	0.0%	0.0%
	Tenpin Stoke, Festival Park, Marina Way, Stoke-on-Trent	0.0%	0.0%	15.9%	0.0%	0.0%	0.0%	0.0%	0.0%

Source: Question 51 of Household Survey, Appendix 2. Includes all responses located within Cheshire and those receiving more than 2.0% of total market share of trips outside Cheshire

The responses relating to Tenpin at Greyhound Retail Park have been reapportioned to the Tenpin at Cheshire Oaks, as the Greyhound Retail Park facility closed in 2013.



**Table 8.7b: Study Area Market Share for Ten Pin Bowling Visits (%)**

Zone	Address	9	10	11	12	13	14	15	Total
	<b>CWAC</b>								
8.	Tenpin, Coliseum Leisure Park, Cheshire Oaks	18.0%	3.0%	26.3%	37.5%	100%	70.4%	100%	24.6%
	<b>CWAC Authority Total</b>	<b>18.3%</b>	<b>3.0%</b>	<b>26.3%</b>	<b>37.5%</b>	<b>100%</b>	<b>70.4%</b>	<b>100%</b>	<b>24.6%</b>
	<b>CE</b>								
1.	Superbowl, Lyme Green Business Park, London Road, Macclesfield	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.8%
4.	Lakeside Superbowl, Phoenix Leisure Park, Dunwoody Way, Crewe	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	18.9%
	<b>CE Authority Total</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>0.0%</b>	<b>30.7%</b>
	<b>Other Authority Areas</b>								
8.	Bromborough Bowl, Bassendale Road, Birkenhead	0.0%	0.0%	0.0%	16.4%	0.0%	13.4%	0.0%	3.8%
10.	Tenpin, Wrexham, Eagles Meadow, 36 St George's Crescent, Wrexham	0.0%	95.4%	0.0%	23.1%	0.0%	0.0%	0.0%	21.9%
11.	AstroBowl, Ffrith Beach Fun Parc, Victoria Road West, Prestatyn	0.0%	0.0%	49.2%	6.7%	0.0%	0.0%	0.0%	2.6%
	Flint Bowling, Jade Jones Pavilion, Earl Street, Flint	0.0%	0.0%	24.6%	0.0%	0.0%	16.2%	0.0%	2.0%
	<b>Study Area Total</b>	<b>18.0%</b>	<b>98.4%</b>	<b>100%</b>	<b>83.6%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>85.5%</b>
OSA.	Tenpin, Parrs Wood, Manchester	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.1%
	LA Bowl, Warrington, 10-15 Chetham Court, Winwick Quay, Warrington	24.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.6%
	Superbowl, The Hive Leisure Park, Widnes	46.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.9%
	Tenpin Stoke, Festival Park, Marina Way, Stoke-on-Trent	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.6%

Source: Question 51 of Household Survey, Appendix 2. Includes all responses located within Cheshire and those receiving more than 2.0% of total market share of trips outside Cheshire  
 The responses relating to Tenpin at Greyhound Retail Park have been reapportioned to the Tenpin at Cheshire Oaks, as the Greyhound Retail Park facility closed in 2013.

8.23 In terms of the expected benchmark level of provision, we note that the Mintel Tenpin Bowling report of May 2014 identified that there were 5,617 bowling lanes across the UK in 2014. Given that the UK population at 2014 was approximately 64.6 million<sup>63</sup>, this equates to one lane for every 11,500 persons.

8.24 We again estimate that the Study Area has a population of 1,493,372 at 2015, increasing to 1,568,586 at 2030. Based on the assumed benchmark identified above, we calculate that around 129.9 ten pin bowling lanes could be supported by the Study Area population at 2015, increasing to 136.4 lanes at 2030.

<sup>63</sup> As identified by the National Population Projections: 2014 based projections, Office for National Statistics, published October 2015



8.25 Based on the population of CE comprising 25.6% of the total Study Area population, it could be assumed that 25.6% of the potential ten pin bowling lanes which could be supported by the Study Area could be accommodated in CE. Accordingly, 33.3 bowling lanes could be accommodated at 2015, increasing to 34.9 lanes at 2030. As CE currently provides two purpose built bowling facilities, which in combination provide 38 lanes, our assessment shows that there is currently an adequate number of ten pin bowling lanes present in the local authority area. In addition, given the general downturn in the ten pin bowling market in the last decade, there may not be an appetite from operators to locate in CE, particularly as there are already ten pin bowling facilities located in the Principal Towns of Crewe and Macclesfield. Notwithstanding this, in larger towns and cities a different type of ten pin bowling experience has begun to emerge, with the provision of 'boutique' ten pin bowling alleys which are typically of a smaller scale and incorporate bars and restaurants in order to integrate into a Centre's evening economy and attract a relatively affluent clientele. Accordingly, if any proposals to provide a further ten pin bowling facility do come forward, it may well be that they conform to this operating model.

8.26 We would recommend that should any proposals for ten pin bowling development be forthcoming, that they are judged on their own merit in accordance with relevant town centre planning policy at the time of the application's submission. Given the downturn in the market in previous years and the existing provision in the local authority area, we do not consider it necessary for the local authority to plan for additional provision in the period to 2030.

**Table 8.8: Ten Pin Bowling Requirement in Study Area**

Year	Study Area Population	Typical Population Required to Support One Ten Pin Lane	Potential Number of Ten Pin Lanes Supported by Study Area	Potential Number of Ten Pin Lanes Supported by Cheshire East	Existing Number of Ten Pin Lanes Supported by Cheshire East	Potential Residual Requirement in Cheshire East
2015	1,493,372	11,500	129.9	33.3	38.0	-4.7
2020	1,522,147	11,500	132.4	33.9	38.0	-4.1
2025	1,548,175	11,500	134.6	34.5	38.0	-3.5
2030	1,568,586	11,500	136.4	34.9	38.0	-3.1

Note: Typical number of persons required to support a bowling lane derived from Mintel Tenpin Bowling report of May 2014

### Other Leisure Activities

8.27 Respondents to the household survey were asked which centre or facility they last visited for indoor sports or health and fitness activity. The responses provided to this question were widespread and varied, with no facilities within the Study Area dominating in relation to this sector. Facilities within the Knutsford area achieve the greatest market share for indoor sports or health and fitness activities in



the Cheshire East administrative area, attracting a market share of 4.1%, including Knutsford High School (1.5%) and the Council-owned leisure centre on Westfield Drive (1.2%). Facilities in the Nantwich area obtain the second greatest sport and fitness market share (4.0%), followed by Macclesfield (3.9%) and Congleton (3.0%).

- 8.28 In terms of those respondents to the household survey who undertake restaurant visits, the most popular destination for such trips in the CE administrative area is Crewe town centre (3.8%), followed by Knutsford town centre (3.7%) and Macclesfield town centre (2.8%).
- 8.29 Respondents to the household survey who stated that they go to bars, pubs and night clubs were asked which destination they last visited. The most popular destination in CE for such trips is Nantwich town centre (3.5%), followed by Crewe town centre (3.3%) and Knutsford town centre (2.6%).
- 8.30 In terms of trips to undertake art and cultural activities, the household survey shows that Crewe town centre attracts a market share of 4.7% of such trips, while Macclesfield town centre attracts 0.4% of such trips. When considering all destinations, including those outside the Study Area, Manchester City Centre attracts the greatest market share (26.2%) of art and cultural trips, followed by Liverpool City Centre (23.8%) and London City Centre (8.3%).





## 9.0 Future Retail Strategy and Recommendations

9.01 The NPPF requires LPAs as part of their Local Plan to set out a strategy for the management and growth of Centres over the Plan period. As part of their strategy, LPAs should, inter alia:

- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- Define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- Promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- Allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres;
- Allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre; and
- Set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres.

9.02 Each of the above requirements is considered where relevant below in relation to the two Principal Towns (Crewe and Macclesfield), nine Key Service Centres and 13 Local Service Centres in CE in the context provided by this Study.

### Key Findings: Retail Need

9.03 The floorspace requirements identified in this Study – which are summarised below – are of some relevance to the determination of future planning applications for new retail floorspace in the



Borough. However, whilst any level of identified quantitative need has some relationship to the test of impact, it is necessary to be mindful that 'need' is no longer a direct planning test. Accordingly, identified floorspace requirements should not be considered a 'cap' on appropriately located development. Instead, proposals that come forward should be assessed against the relevant policies of the NPPF and the development plan.

### Convenience Goods Floorspace Requirement

- 9.04 Since 2010, there has been a modest increase in the main food market share achieved by CE, from 24.2% to 25.6%, in relation to main food shopping. In terms of top-up shopping, since 2010, there has been an increase in the market share achieved by CE, from 27.1% to 29.8%. The slight improvement in main food market share since 2010 can largely be attributed to changes which have occurred within Zone 2 and Zone 3, where the main food shopping market share achieved by facilities in CE have increased by 18.6 and 7.7 percentage points respectively. Since 2010, the main food shopping market share of Macclesfield (by 0.5 percentage points), Knutsford (by 1.8 percentage points), Alsager (by 0.2 percentage points), Middlewich (by 1.0 percentage points), Sandbach (by 0.2 percentage points) and Nantwich (by 0.3 percentage points) have increased. While the main food shopping market shares of Crewe (by -0.6 percentage points), Handforth (by -0.8 percentage points), Wilmslow (by -2.0 percentage points) and Congleton (by -0.8 percentage points) have decreased.
- 9.05 As set out at Section 7, we have identified a quantitative requirement for between 1,100 sq.m net and 2,800 sq.m net additional convenience goods floorspace within the CE administrative area at 2015 (depending on format and operator) once existing commitments are taken into account. This requirement increases to between 3,100 sq.m net and 8,100 sq.m net at 2020, and between 5,600 sq.m net and 14,600 sq.m net at 2030.
- 9.06 It should be noted that on the 21 October 2015, the CE Strategic Planning Board resolved to grant outline planning permission subject to the completion of a Section 111 Agreement for the first phase of the South Macclesfield Development Area, which includes provision of a foodstore (up to 5,000 sq.m convenience goods floorspace). As the formal decision has not yet been issued, this scheme is not included as a commitment within the capacity assessment. However, if implemented, this scheme will absorb a large proportion of the capacity identified in CE in the short to medium term.



**Table 9.1: Quantitative Need for Convenience Goods Floorspace in CE**

	2015 (sq.m)	2020 (sq.m)	2025 (sq.m)	2030 (sq.m)
Minimum Convenience Goods Requirement	1,100	3,100	4,400	5,600
Maximum Convenience Goods Requirement	2,800	8,100	11,500	14,600

<sup>1</sup> Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 13 (October 2015)

<sup>2</sup> Average sales density assumed £13,000 per sq.m (based on the average sales density of the leading four supermarkets as identified by Verdict 2014)

<sup>3</sup> Average sales density assumed to be £5,000 per sq.m

\*Rounded to the nearest 100 sq.m

At 2013 prices

- 9.07 As well as considering the Borough wide capacity, we have also considered the capacity and quantitative need for additional convenience goods floorspace in relation to each of the Principal Towns (Crewe and Macclesfield) and each of the Key Service Centres, as set out at Table 10.2.
- 9.08 Our assessment has identified capacity for between 4,800 sq.m and 12,400 sq.m net additional convenience goods floorspace in Macclesfield at 2030. However, as explained above, in October 2015 CE’s Strategic Planning Committee resolved to grant permission, subject to a legal agreement, for a mixed use development including a foodstore (to provide up to 5,000 convenience floorspace) as part of the South Macclesfield Development Area. As formal consent has not yet been granted for this scheme (as the legal agreement has not been signed), this foodstore has not been included as a commitment within our assessment. However, a substantial proportion of the convenience goods capacity identified will be absorbed by this development if implemented. The level of capacity identified also does not include the extant planning permission for the ‘Silk Street’ development, as we are aware that the former scheme for this site has been scrapped and that the Council have selected Ask Real Estate as development partner to bring forward a revised leisure-led scheme at Churchill Way. Accordingly, it is likely that the convenience goods floorspace to be delivered within the South Macclesfield Development Area will absorb a significant proportion of the capacity identified. Therefore, we do not consider it is necessary for the Council to plan for the delivery of additional convenience goods floorspace in Macclesfield.
- 9.09 In relation to Middlewich, capacity for between 1,900 sq.m net and 4,900 sq.m net has been identified at 2030. This capacity has been identified as a result of the overtrading of the existing Tesco at Southway and Lidl at Chester Road foodstores in Middlewich. Therefore, we consider there is scope for a further small foodstore to be delivered in Middlewich. We are aware that consent was previously granted in Middlewich for the delivery of a replacement Tesco store on land which is allocated for



retail development in the Congleton Local Plan (Policy DP4); however, in line with the supermarket chain's currently strategy of rationalisation, these plans have been scrapped.

- 9.10 A requirement for between 3,300 sq.m net and 8,600 sq.m net in Knutsford convenience goods floorspace has been identified by 2030. The surplus level of expenditure identified to support additional floorspace has resulted from the overtrading of the Booths and Waitrose foodstores. Accordingly, there is scope for a new foodstore to be delivered in Knutsford.
- 9.11 A limited amount of convenience goods capacity has been identified in Nantwich and Sandbach up to 2030. In Nantwich, capacity for between 1,300 sq.m net and 3,300 sq.m net additional convenience goods floorspace has been identified at 2030. Accordingly, there may be scope for an additional small foodstore to be delivered in Nantwich to respond to the overtrading of existing stores. While in Sandbach, a requirement for between 700 sq.m net and 1,900 sq.m net convenience goods floorspace has been identified at 2030, which would be sufficient to support the convenience goods element associated with a convenience store or small supermarket.
- 9.12 We do not consider there to be a need for the Council to actively plan for the delivery of additional convenience goods floorspace in Crewe, Alsager, Congleton, Handforth, Poynton or Wilmslow given the deficit capacity or extremely modest convenience goods capacity identified in these centres. Notwithstanding this, if any applications for additional convenience goods floorspace are forthcoming, they should be considered on their own merits and in accordance with the requirements of the NPPF and Development Plan.

**Table 9.2: Quantitative Need for Convenience Goods Floorspace in Principal Towns and Key Service Centres**

	2015 (sq.m)	2020 (sq.m)	2025 (sq.m)	2030 (sq.m)
<b>Crewe</b>				
Minimum Convenience Goods Requirement	-800	-400	-100	200
Maximum Convenience Goods Requirement	-2,100	-900	-200	400
<b>Macclesfield</b>				
Minimum Convenience Goods Requirement	3,800	4,200	4,500	4,800
Maximum Convenience Goods Requirement	9,900	11,000	11,700	12,400
<b>Alsager</b>				
Minimum Convenience Goods Requirement	-1,900	-1,900	-1,800	-1,800
Maximum Convenience Goods	-4,900	-4,800	-4,800	-4,700



Requirement				
<b>Congleton</b>				
Minimum Convenience Goods Requirement	-1,700	-1,500	-1,400	-1,300
Maximum Convenience Goods Requirement	-4,400	-3,900	-3,600	-3,300
<b>Handforth</b>				
Minimum Convenience Goods Requirement	-100	-100	-100	-100
Maximum Convenience Goods Requirement	-400	-400	-400	-400
<b>Knutsford</b>				
Minimum Convenience Goods Requirement	3,300	3,500	3,600	3,700
Maximum Convenience Goods Requirement	8,600	9,100	9,500	9,800
<b>Middlewich</b>				
Minimum Convenience Goods Requirement	1,600	1,700	1,800	1,900
Maximum Convenience Goods Requirement	4,100	4,500	4,700	4,900
<b>Nantwich</b>				
Minimum Convenience Goods Requirement	700	1,000	1,100	1,300
Maximum Convenience Goods Requirement	1,900	2,500	2,900	3,300
<b>Poynton</b>				
Minimum Convenience Goods Requirement	-1,300	-1,200	-1,200	-1,200
Maximum Convenience Goods Requirement	-3,300	-3,200	-3,100	-3,000
<b>Sandbach</b>				
Minimum Convenience Goods Requirement	500	600	700	700
Maximum Convenience Goods Requirement	1,200	1,500	1,700	1,900
<b>Wilmslow</b>				
Minimum Convenience Goods Requirement	-2,000	1,900	-1,800	-1,800
Maximum Convenience Goods Requirement	-5,100	-4,900	-4,800	-4,600

<sup>1</sup> Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 13 (October 2015)

<sup>2</sup> Average sales density assumed £13,000 per sq.m (based on the average sales density of the leading four supermarkets as identified by Verdict 2014)

<sup>3</sup> Average sales density assumed to be £5,000 per sq.m

Rounded to the nearest 100 sq.m

At 2013 prices



- 9.13 As well as considering any quantitative requirements for additional convenience goods floorspace in the Borough, we have also considered whether any qualitative needs for additional convenience goods floorspace exist across the Borough. In order to determine such needs, we have considered whether the existing foodstores in each Centre are overtrading or undertrading in comparison to company benchmark, whether there are any gaps in relation to access to convenience goods provision across the Borough and any notable changes in market shares which have occurred in each Centre in recent years.
- 9.14 In considering the level of convenience goods overtrading or undertrading in each centre, as set out in detail at Table 7.1, the household survey found existing foodstores in Poynton and Wilmslow as a whole to be undertrading. While existing facilities in Sandbach are trading close to equilibrium. Accordingly, there does not appear to be an immediate qualitative need for additional convenience goods provision in these Centres, as existing facilities appear to be meeting current needs. Currently, existing convenience goods facilities in Macclesfield, Crewe, Knutsford, Alsager, Congleton, Nantwich and Middlewich are overtrading. However, the level of overtrading in Alsager, Crewe and Nantwich is modest and accordingly we do not consider there to be a qualitative requirement for additional convenience goods provision in these locations. Indeed, in terms of Alsager, a new Asda store has recently opened in the centre and there is an extant consent for a new foodstore on the outskirts of the Centre. While in Nantwich a new M&S Simply Food has recently opened at the edge of the town centre. As we have set out above, the development of a new foodstore to the south of Macclesfield is planned as part of the South Macclesfield Development Area. Accordingly, if delivered these schemes will likely respond to the overtrading identified and therefore, we do not consider there is any further qualitative need for the Council to plan for the delivery of additional convenience goods floorspace, above these two schemes, in Macclesfield. However, in order to respond to the current levels of overtrading in Knutsford, Congleton and Middlewich, there may be qualitative benefits of delivering additional convenience goods floorspace to serve these locations.
- 9.15 In terms of the spatial distribution of foodstores across the Borough, we do not consider that there are any significant gaps in provision which need to be responded to, as the existing foodstores are reasonably well distributed across the Borough. There is a reasonable representation from different fascias across the Borough, including from each of the 'main four' supermarkets, discount retailers and higher end foodstores.



### Comparison Goods Floorspace Requirement

- 9.16 Since 2010, CE has improved its comparison goods market share in relation to Books, CDs and DVDs (+2.7 percentage points), chemist goods (+1.5 percentage points), small household goods (+0.6 percentage points), electrical goods (+0.5 percentage points) and DIY goods (+0.2 percentage points). However, in relation to clothing and footwear (-1.1 percentage points), recreation goods (-2.1 percentage points) and furniture goods (-1.1 percentage points), the market share achieved by CE has decreased. In considering the main comparison goods destinations in CE, since 2010, the overall comparison goods market share of expenditure achieved by Crewe town centre (-2.2 percentage points), Macclesfield town centre (-1.4 percentage points) and Congleton town centre (-0.4 percentage points) has decreased, while the market shares of expenditure achieved by Grand Junction Retail Park (+0.9 percentage points) and Nantwich town centre (+0.5 percentage points) have increased. Accordingly, it is evident that CE's Principal Towns are facing increased competition from alternative destinations.
- 9.17 In terms of comparison goods need, although a deficit requirement is identified in the short term (up to 2020). However, we identify a requirement for between 26,600 sq.m and 44,400 sq.m net of additional comparison goods sales floorspace at 2030 (again, depending on format and operator), after account has been taken of existing commitments.

**Table 9.3: Quantitative Need for Comparison Goods Floorspace in CE**

	2015 (sq.m)	2020 (sq.m)	2025 (sq.m)	2030 (sq.m)
Minimum Comparison Goods Requirement	-15,200	-10,100	+7,600	+26,600
Maximum Comparison Goods Requirement	-25,300	-16,800	+12,700	+44,400

Source: Table 50a at Appendix 6

<sup>1</sup> Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 13 (October 2015)

<sup>2</sup> Average sales density assumed to be £5,000 per sq.m

<sup>3</sup> Average sales density assumed to be £3,000 per sq.m

\*Rounded to the nearest 100 sq.m

At 2013 prices

- 9.18 In considering the identified requirement, we would recommend that the Council should seek to plan for the reuse, refurbishment or redevelopment of existing vacant units in the defined centres in the Borough wherever possible in order to improve the vitality and viable of these existing centres. Our surveys of Crewe town centre, Macclesfield town centre and the Key Service Centres in the Borough identified a total of 44,358 sq.m gross vacant floorspace. Accordingly, it is considered that opportunities to redevelop or re-use this vacant floorspace should be pursued where possible. Notwithstanding the benefits associated with the re-use or redevelopment of vacant floorspace, we



acknowledge that the available vacant units may not be suitable for use by modern format retailers or suitable for redevelopment.

- 9.19 In accordance with the roles of Crewe and Macclesfield, as the Principal Towns in the Borough, we recommend that the identified requirement for additional comparison goods floorspace in the Borough is directed towards these centres. We note that Draft Strategic Locations Policy SL1 of the emerging CE Local Plan Strategy seeks to support the provision of comparison retail floorspace in Crewe, including at least one anchor store and this is a policy which we agree should be supported and built upon in order to enhance the town centre’s retail offer. In order to assist in the delivery of improvements to Crewe town centre’s retail offer, the Crewe Town Centre Regeneration Framework for Growth has been prepared in order to provide a framework for the transformation of the town centre. The framework sets out Key Opportunity Sites, several of which may be suitable for redevelopment for retail use. One of the opportunity sites is the Royal Arcade Site which the Council has acquired and includes the bus station and 26 retail units. We are supportive of the Council’s policy to direct additional comparison goods floorspace to Crewe town centre, as one of the Principal Towns in the Borough and we consider that the Royal Arcade site represents a potential redevelopment site. We would recommend that further masterplanning and viability work is undertaken by the Council in relation to the identified Key Development Opportunity sites in order to fully understand which sites represent viability redevelopment opportunities, the type of uses which would be most suitable on each site and the likely quantum and arrangement of floorspace which could be delivered. Such an exercise will provide further clarity in terms of the deliverability potential of each site.
- 9.20 Draft Policy SL4 of the emerging Local Plan seeks to support the strengthening of retail and leisure development in central Macclesfield. Again, we are supportive of this policy and consider that the identified comparison goods requirement should be directed towards Macclesfield town centre, as well as Crewe town centre. We are aware that the Council has secured a development partner. Further to which, we would encourage the development of a masterplan for the area in order to determine the optimum mix and quantum of uses to be delivered on the site.
- 9.21 In addition to our consideration of the Borough wide comparison goods requirement, we have also considered the requirement for additional comparison goods floorspace in each of the Principal Towns and Key Service Centres in the Borough, as set out at Table 9.4 below.
- 9.22 In relation to Macclesfield town centre, we have considered two scenarios. The first considers the comparison goods requirements should the comparison goods market share of Macclesfield town centre remain as existing at 5.2% and the second considers an uplift in the comparison goods market





share of the town centre to 6.4%. We note that the market share of Macclesfield at 2010 was 6.3% and therefore we consider it is a realistic prospect that a well designed and managed retail scheme in Macclesfield town centre could 'claw back' the market share lost to competing destinations elsewhere in the sub-region since 2010. The likely improvement to Macclesfield town centre's market share as a result of the delivery of a town centre retail scheme, is also evidenced by considering the effects of town centre schemes elsewhere. For example, in Bury, further to the implementation of the Rock retail and leisure development in 2010, the comparison goods market share of the town centre increased from 69% to 73%<sup>64</sup>. Similarly in Warrington, further to the opening of the redeveloped Golden Square Shopping Centre in 2009, the comparison goods market share of Warrington town centre increased from 42.9% and 49.5%<sup>65</sup>. While in Liverpool, further to the implementation of Liverpool ONE in 2008, the comparison goods market share of the City Centre increased from 74% to 75%<sup>66</sup>.

9.23 The existing market share scenarios identifies a requirement for between 7,800 sq.m and 13,100 sq.m net additional comparison goods floorspace in Macclesfield up to 2030, while the increased market share scenario identifies a requirement between 21,500 and 35,800 sq.m net at 2030. The increased market share scenario is based on the town centre's comparison goods retail offer being expanded via the delivery of a town centre scheme, which we would expect to improve the Centre's market share retention, as the centre would be better equipped to compete with other retail destinations. Although a masterplan for the Churchill Way redevelopment scheme has not been determined, with the Council having recently selected Ask Real Estate as their development partner, we would expect any retail element of that scheme would provide unit/units which are suitable for modern format operators. We consider that Macclesfield town centre should be a priority for the delivery of any additional comparison goods floorspace. In addition, we recommend support for the re-use and regeneration of existing vacant floorspace in the town centre. Our survey of Macclesfield town centre identified 15,310 sq.m gross vacant floorspace within the town centre and accordingly in order to improve the vitality and viability of the town centre, any scheme for the re-use and redevelopment of such vacant floorspace for comparison goods uses, should be supported where in accordance with other policies of the Development Plan.

9.24 In Crewe, although we have identified a deficit comparison goods requirement up to 2020, by 2030 we identify a requirement for between 9,200 sq.m net and 15,300 sq.m net comparison goods

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<sup>64</sup> Source: Bury Retail Capacity Update (BRCU) (Drivers Jonas Deloitte, 2012).

<sup>65</sup> Source: Quantitative Assessment Update (Martin Tonks, 2009)

<sup>66</sup> Source: Liverpool Retail and Leisure Study (GL Hearn, 2011)



floorspace. As we have set out before, we are aware that a range of development opportunity sites have been identified in Crewe and we recommend that further work is undertaken in order to determine the feasibility of these sites for the delivery of retail floorspace and the quantum of floorspace which could be delivered. We recommend the allocation of any appropriate retail sites in the town centre in order to prioritise the delivery of the sites to provide for the additional comparison goods floorspace requirement identified. As with Macclesfield, we also recommend support for the re-use and regeneration of existing vacant floorspace in the town centre. Our survey of Crewe town centre identified 10,950 sq.m gross vacant floorspace within the town centre and accordingly in order to improve the vitality and viability of the town centre, any scheme for the re-use and redevelopment of such vacant floorspace for comparison goods uses should be supported, where in accordance with other policies of the Development Plan. Indeed a proportion of this vacant floorspace would be incorporated as part of the redevelopment opportunity sites identified in the town centre, such as the opportunity at the Royal Arcade.

9.25 In Knutsford, a requirement for between 1,800 sq.m net and 3,000 sq.m net additional comparison goods floorspace is identified at 2030. While in Nantwich, a requirement for between 3,200 sq.m net and 5,300 sq.m net comparison goods floorspace is identified at 2030. In each of these Centres there has been a reduction in the level of comparison goods floorspace provided in the Centre since 2010. Accordingly, we consider it may be unrealistic for the local planning authority to seek to allocate specific sites within these Centres for additional comparison goods development. Accordingly, we would suggest a flexible approach to the delivery of any additional comparison goods floorspace. Both Knutsford and Nantwich provide a strong independent offer, therefore, it may be beneficial to provide incentives which encourage additional independent comparison goods operators to take up accommodation in these town centres.

9.26 Although a requirement for additional comparison goods floorspace is identified in Handforth, Middlewich, Sandbach and Wilmslow up to 2030, this is relatively limited and there is not considered to be a requirement for the Council to actively plan for the delivery of additional comparison goods floorspace in these towns. However, proposals for additional comparison goods floorspace within these centres should be supported taking into account the provisions of national policy and the Development Plan. In relation to Alsager, Congleton and Poynton a deficit capacity is identified up to 2030 and therefore, there is no requirement for the Council to plan for additional floorspace at this location.

**Table 9.4: Quantitative Need for Comparison Goods Floorspace in the Principal Towns and Key Service Centres**

	2015 (sq.m)	2020 (sq.m)	2025 (sq.m)	2030 (sq.m)
<b>Macclesfield – Constant Market Share (5.2%)</b>				
Minimum Comparison Goods Requirement	-2,800	-1,400	3,000	7,800
Maximum Comparison Goods Requirement	-4,600	-2,400	5,100	13,100
<b>Macclesfield – Uplift in Market Share (6.4%)</b>				
Minimum Comparison Goods Requirement	-2,800	-1,400	15,600	21,500
Maximum Comparison Goods Requirement	-4,600	-2,400	26,000	35,800
<b>Crewe</b>				
Minimum Comparison Goods Requirement	-4,800	-3,000	2,900	9,200
Maximum Comparison Goods Requirement	-8,000	-5,000	4,800	15,300
<b>Alsager</b>				
Minimum Comparison Goods Requirement	-700	-600	-500	-400
Maximum Comparison Goods Requirement	-1,200	-1,100	-800	-600
<b>Congleton</b>				
Minimum Comparison Goods Requirement	-2,200	-2,000	-1,100	-200
Maximum Comparison Goods Requirement	-3,700	-3,300	-1,900	-300
<b>Handforth</b>				
Minimum Comparison Goods Requirement	0	100	300	500
Maximum Comparison Goods Requirement	0	100	400	800
<b>Knutsford</b>				
Minimum Comparison Goods Requirement	0	200	1,000	1,800
Maximum Comparison Goods Requirement	0	300	1,600	3,000
<b>Middlewich</b>				
Minimum Comparison Goods Requirement	-200	-100	100	400
Maximum Comparison Goods Requirement	-300	-200	200	600
<b>Nantwich</b>				
Minimum Comparison Goods Requirement	0	400	1,700	3,200
Maximum Comparison Goods Requirement	0	700	2,900	5,300



<b>Poynton</b>				
Minimum Comparison Goods Requirement	-600	-600	-400	-200
Maximum Comparison Goods Requirement	-1,100	-1,000	-700	-300
<b>Sandbach</b>				
Minimum Comparison Goods Requirement	-100	100	700	1,400
Maximum Comparison Goods Requirement	-100	200	1,200	2,300
<b>Wilmslow</b>				
Minimum Comparison Goods Requirement	-200	0	500	1,000
Maximum Comparison Goods Requirement	-300	0	800	1,600

Source: Tables 28, 30a, 32, 34, 36, 38, 40, 42, 44 and 48 at Appendix 6

<sup>1</sup> Allows for increased turnover efficiency as set out in Table 4b Experian Retail Planner 13 (October 2015)

<sup>2</sup> Average sales density assumed to be £5,000 per sq.m

<sup>3</sup> Average sales density assumed to be £3,000 per sq.m

Rounded to the nearest 100 sq.m

At 2013 prices

9.27 The capacity figures in Section 7 are estimated at a specific point in time, therefore, given the fluidity of the retail market WYG would recommend that any capacity requirements set out in the Local Plan should refer to the latest retail capacity estimates available in the Retail Study rather than being fixed for the duration of a planning policy document, which can often last 10 or 15 years. This will allow the policy to be cross referenced to the latest evidence base and ensure that the policy is sufficiently flexible enough to monitor and accord with the most up to date data.

### Key Findings: Leisure Need

9.28 In terms of the leisure sector, we do not consider there to be a requirement for the Council to plan for the delivery of any further bingo halls within the Borough. Our assessment found that the Borough could support up to 2.2 bingo halls by 2030. As CE currently only accommodates one purpose built bingo hall, there may be scope for a further club to be supported in the Borough. However, in light of the current bingo hall market and the fact that new bingo hall openings are few and far between, we do not consider there's likely a high demand from such operators to locate in CE. Notwithstanding this, if any such proposals are forthcoming, we recommend they should be judged on their own merits and in accordance with town centre planning policy. As there is already a bingo hall located in Crewe, it would be logical for any such provision to be directed towards Macclesfield, to provide a spread of provision across the Borough.



- 9.29 In relation to cinema provision, our assessment has found that the Borough could be expected to support 24.0 cinema screens at 2015, increasing to 25.3 screens at 2030. As there are currently seven permanent screens in the Borough, we consider there is a potential requirement for an additional 17.0 screens at 2015 increasing to 18.3 screens at 2030. As there is already a multi-screen cinema located in Crewe, we consider there to be a qualitative need for such provision to be directed towards Macclesfield. The leisure-led regeneration scheme which is planned at Churchill Way in Macclesfield may be an appropriate site for such development. The provision of a multi-screen cinema within Macclesfield town centre would improve the Centre's overall leisure offer, which would assist the town centre in competing with alternative leisure destinations outside of the Borough, such as those provided to the north of the Borough at the Trafford Centre and Parrswood. Such provision would help in creating more sustainable leisure trip patterns and would also assist in improving dwell times in the town centre.
- 9.30 In terms of ten pin bowling, our assessment has shown potential for 33.3 lanes to be accommodated in the Borough at 2015, increasing to 34.9 lanes at 2030. As CE currently accommodates two ten pin bowling facilities, which in combination provide 38 lanes, we are of the view that the ten pin bowling needs of the local authority area are already well provided for. Accordingly, we do not consider there to be a requirement for CE to plan for additional ten pin bowling provision. However, if any such proposals are forthcoming they should be considered on their merits and in accordance with relevant policies of the NPPF and the development plan.

## Key Findings: Performance of Defined Centres and Future Development Priorities

### Crewe Town Centre

- 9.31 It is evident from our assessment of Crewe town centre that there has been a decline in the performance of the centre in recent years. The weakening of the centre's performance is evidenced by a decline in a number of key performance indicators. For example, the town centre's Venuescore ranking has decreased by 3 places since 2010, the vacant floorspace rate has increased by 7.7 percentage points during this period and the town centre's comparison goods market share of expenditure has decreased by 2.2 percentage points. Since 2010, the amount of comparison goods floorspace present in the centre has also declined.
- 9.32 Notwithstanding the decline in the performance of the town centre since 2010, it is clear that the centre provides an important shopping and service role for residents in the south of the Borough.



There is a strong representation from national multiples, although such operators are largely focused on the value end of the market. It is positive that steps have already been taken with the aim of improving the offer of Crewe town centre, including the provision of a new Lifestyle Centre, which opened in April 2016 to improve the leisure and community offer of the Centre and the development of the Crewe Town Centre Regeneration Framework for Growth to encourage the regeneration of, and improvements to, the centre.

- 9.33 Accordingly, in order to improve the strength and performance of the town centre, and to reserve the decline in the performance of the centre which has been witnessed in recent years, we support the provision of additional comparison goods and leisure floorspace in the town centre. As stated, above, we recommend that further work is undertaken in relation to the Key Opportunity Sites identified by the Council in order to further understand their feasibility, with the production of a masterplan to understand the quantum and mix of floorspace which can be provided. Following which, we recommend the allocation of any suitable town centre sites within the Development Plan in order to afford them adequate protection and to direct investment towards these sites.
- 9.34 The provision of the retail and leisure scheme will provide the opportunity for new, modern units to be provided in the centre which respond to operator requirements. By strengthening the offer of the town centre, the centre will be able to better compete with alternative destinations, including higher order centres in proximity to CE.
- 9.35 We also recommend that a strategy should be developed for Crewe which seeks to better connect and provide synergy within the centre. For example, although Grand Junction Retail Park acts to enhance the appeal of the wider Crewe area, the retail park which is situated approximately 300m from the town centre, also provides a competing destination to the town centre. Since 2010, while the comparison goods market share of expenditure achieved by Crewe town centre has decreased by 2.2 percentage points, the market share of Grand Junction Retail Park has increased by 0.9 percentage points. If connectivity between the retail park and the town centre could be improved, the town centre would be able to benefit from customers drawn to the retail park.

### Macclesfield Town Centre

- 9.36 Overall, there are some positive indicators with regard to the health of Macclesfield town centre. However, since 2010 there has been a slight decline in the town centre's performance and accordingly it is considered that interventions are needed to improve the performance of the centre and ensure it is healthy in the future. The slight decline in the centre's health since 2010 is evidenced by the fact



that there has been a reduction in the town's Venuescore ranking by 2 places, the proportion of vacant floorspace in the centre has increased by 6.6 percentage points and the comparison goods market share of expenditure has decreased from 5.1% to 3.7% during this period. Despite this decline, Macclesfield still benefits from a strong comparison goods and retail service offer, and provides an attractive public realm.

- 9.37 It is evident that measures are already being progressed in order to bolster the town centre's offer. The plans for the delivery of a leisure-led redevelopment scheme at Churchill Way will widen and strengthen the town centres offer, introducing modern units which meet operator requirements. We recommend that measures are taken to safeguard investment in and the delivery of the Churchill Way Regeneration Scheme.
- 9.38 Several successful initiatives have already been implemented in Macclesfield to improve the town centre environment, including improvements to shopfronts, lighting and the public realm. We consider that further targeted initiatives could build on this success further, such as a refurbishment to the internal environment of the Market Hall.

## Key Service Centres

### Alsager

- 9.39 Alsager is considered a vital and viable centre, which provides an important resource for the local communities in catering for their convenience and service needs. The centre offers a reasonable range of goods for a centre of its size. Since 2010, the convenience offer of the centre has improved considerably further to the delivery of the new Asda store. The centre is characterised by a high proportion of independent units and this is something which we consider should be supported further in the future to provide a diverse retail and service offer.
- 9.40 The centre also provides an important community function, containing a library, civic centre and medical services. It is recommended that these important community facilities should be protected and supported where possible, given their role in supporting the overall vitality of the centre by bringing activity to the centre.



### Congleton

- 9.41 The health of Congleton town centre is considered to be varied. The town centre benefits from a good environmental quality and strong levels of footfall, however, the vacancy rate in the centre is substantially greater than the national average, and the comparison goods and financial and business service offer of the centre has declined since 2009.
- 9.42 Given the vulnerabilities of the town centre, we recommend intervention in order to improve the health of those areas of the town that are underperforming. We are aware that public realm improvements are already being planned along Bridge Street, Duke Street, High Street and Little Street, as well as plans to refurbish or rebuild the leisure centre at its existing location at Worrall Street. We consider these schemes will assist in improving both the offer and image of the town centre.

### Handforth

- 9.43 Handforth is an accessible Centre, which offers reasonable convenience and leisure service provision for a Centre of its size. However, given the Centre's location in close proximity to Wilmslow and Handforth Dean Retail Park, the Centre provides for the day-to-day needs of local residents, who will look to the surrounding higher order Centres for a wider range of goods.
- 9.44 We consider the main challenge that Handforth faces is its high vacancy rate, with a high proportion of vacant units present at the Paddock parade. The spatial form of Handforth does not assist the vibrancy of the centre, as there is a small strip of units located in an isolated position in the southern part of the centre. Accordingly we consider that Handforth would benefit from the consolidation of the centre, to provide a more condensed retail and service core. The redevelopment of The Paddock and change of use or redevelopment of more peripheral units for alternative uses, including retail, would assist in improving the vitality of the centre, with any additional residential development providing an improved walk-in catchment for the centre.

### Knutsford

- 9.45 Knutsford is considered to be a vibrant and thriving centre. It provides an important retail and service destination for local residents and a varied and unique retail offer, as a result of the high proportion of independent operators, and evening economy, the centre also attracts customers from further afield. The vacancy rate in Knutsford is low, demonstrating that operators are keen to have a presence.





- 9.46 Knutsford's convenience shopping offer has improved in recent years via the opening of a new Aldi supermarket and small format Waitrose store. As set out above, we have also identified that Knutsford could accommodate further convenience goods floorspace, as a result of the overtrading of the existing Booth and Waitrose foodstores. Given Knutsford's strengths in providing an independent offer, such needs could potentially be met via independent convenience goods retailers, rather than looking towards the main supermarkets. In addition, the potential requirement for between 1,800 sq.m net and 3,000 sq.m additional comparison goods floorspace has been identified, and therefore similarly there may be potential to encourage additional independent comparison goods retailers to respond to this need. We are aware that OKA, a homeware retailer with 10 shops across the UK, will be opening a shop in the former Conservative Club on Manchester Road in spring 2016, which will assist in responding to this requirement.
- 9.47 As Knutsford is currently performing well, we do not consider there is a need for any further targeted intervention. Although we would recommend that the Centre continues to build on its strong independent offer and vibrant evening economy, favourable environmental quality and niche in providing a location for the purchase of higher order goods.

### Middlewich

- 9.48 Middlewich largely caters for convenience and retail service needs of the local catchment. The comparison goods offer of the centre is limited, given the proximity of the centre to Crewe, however this is to be expected given the centre's size. Although Middlewich is considered to be reasonably healthy, we recommend interventions to ensure the centre is better equipped to withstand competition provided by nearby higher order centres.
- 9.49 We have identified that Middlewich could potentially support between 1,900 sq.m net and 4,900 sq.m net additional convenience goods floorspace up to 2030. The provision of further convenience goods floorspace may be a means to build on the centre's strength as a convenience shopping destination and act to attract further activity to the centre. In addition, we would recommend measures to improve the image of the centre via public realm and environmental improvements.

### Nantwich

- 9.50 Nantwich is a healthy centre. It provides a good range of speciality and independent shops, which creates a unique shopping environment and caters for visitors, as well as local residents. The niche



offer of the centre means it is able to compete and provide a different offer to nearby Crewe and Grand Junction Retail Park.

9.51 As set out above, we have identified a potential requirement for between 3,200 sq.m net and 5,300 sq.m net comparison goods floorspace in the centre. Given the town centre's identity in providing an independent and specialist offer, incentives could be put in place to encourage additional independent comparison goods retailers to the centre in order to meet this requirement.

### Poynton

9.52 Poynton is considered to be a healthy centre. Indeed, its vitality and viability have improved considerable since 2010. The provision of a new Asda and Waitrose has widened the centre's convenience goods offer and there have been significant improvements to the public realm and environmental quality.

9.53 We do not consider that there is a requirement for any substantial intervention in Poynton. However, we recommend that policies seek to promote the continued vitality and viability of the centre by supporting a range of retail, leisure and other main town centre uses in the Centre.

### Sandbach

9.54 Sandbach is considered to be a healthy Key Service Centre, which provides an important resource in catering for the retail and service needs of the local population. The centre has a low vacancy rate, the environmental quality is good and there is good mix of retail and service uses, with extra interest provided by the indoor, outdoor and farmers market.

9.55 As a result of the historic road alignment, there are some conflicts between vehicular and pedestrian traffic; this is something which could be improved upon in order to aid movement and connectivity within the centre.

9.56 We do not consider that there is a requirement for any substantial intervention in Sandbach. However, we recommend that policies seek to promote the town centres' strengths, by providing support for existing retail and service uses, improving the public realm and promoting the Centres offer.



## Wilmslow

- 9.57 Wilmslow is viewed as a reasonably healthy centre. The centre is located in close proximity to the out-of-Centre retail outlets at Handforth Dean and Cheadle Royal, which provide competition to the town centre. Currently the centre appears to be withstanding the competition provided by these destinations. However, the centre may benefit from a stronger identity to ensure it withstands such pressure in the future.
- 9.58 Accordingly, we would recommend a strategy which seeks to further widen the mix of uses present in the centre and to improve the public realm to create a more distinctive environment.

## General Considerations

### *Digital Shopping*

- 9.59 The digital shopping revolution has significantly impacted the high street by offering consumers convenient alternatives to simply transact with business than in the traditional physical manner. Therefore WYG recommend that the Council considers initiatives to digitise the high street<sup>67</sup> to help it adapt and engage with the digital revolution that is transforming the ways we shop and buy products - failure to embrace such structural changes may result in an erosion of the vitality and viability of the Borough's defined centres. Such means can be used to promote the identity and distinct offer that individual centres provide and can assist in creating more sustainable shopping patterns by enabling consumers to access goods locally. It is important that the centres within CE seek to keep pace with consumers and technology advances which are changing at rapid velocity in order to provide the digital access and infrastructure to allow users to embrace and use on-line shopping channels. Measures should also be implemented to encourage town centre businesses, including independent retailers and retailers in the smaller town centres, Key Service Centres and Local Centres to deliver OMNI channelling, which basically supports all formats of trading platforms, from website, to smartphone, click and collect to traditional bricks and mortar channels. This multiple channel approach will assist businesses in the town centre by maximising interactions with both physical and digital consumers.

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<sup>67</sup> Digital High Street 2020 Report, Digital High Street Advisory Board, March 2015



### *Role of Residential Development*

9.60 In addition, in considering the future retail strategy for CE and the performance of defined centres in the Borough, recognition should be given to the positive role that residential development can have on the vitality and viability of town centres, as identified at paragraph 23 of the NPPF. We consider that residential development within or in close proximity to town centres should be encouraged, where appropriate, taking into account other national and local planning policies. In centres where high vacancy levels are identified, we consider that positive policy mechanisms can be used to actively encourage the re-use of failing commercial floorspace for alternative uses in appropriate location. In addition, encouraging more people to live in close proximity to the town centre may assist in improving the overall vibrancy and activity in the centre during both the day and evening periods. The encouragement of residential development in close proximity to centres can also help to improve trading performance as people living in close proximity to a centre are more likely to buy goods and services from the nearest local facilities available to them. By diversifying the town centre offer and encouraging uses 'beyond retail' through the introduction of land uses which generate large volumes of trips, the overall retail function of a town centre can be supported.

### *High Speed 2 (HS2)*

9.61 In November 2015, the Government announced that it is committed to building the HS2 high-speed rail link via Crewe. It is planned that the northern section of HS2 to Crewe will be completed by 2027. In terms of the Council's future retail strategy, it will be important to take into consideration the effects which HS2 may have on shopping and leisure patterns. The delivery of HS2 will improve the connectivity of Crewe town centre to other locations on the HS2 line, including Manchester, Birmingham and London, which inevitably will have an impact on shopping and leisure trends in the centre. The rail link will likely also have wider impacts for other centres within CE, particularly those located in proximity to the HS2 line. Accordingly, we recommend that future retail studies consider further the likely impacts that HS2 will have on retail and leisure patterns in CE.

## **Town Centre Boundaries, Primary Shopping Areas and Frontages**

9.62 In considering the Council's future strategy for CE, we have provided recommendations in relation to appropriate Town Centre Boundaries and Primary Shopping Areas for the Principal Towns and Key Service Centres, alongside Retail Frontages where appropriate. We have made these recommendations taking into account the definitions provided by the NPPF as follows:



**Primary shopping area: Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).**

**Primary and secondary frontages: Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.**

**Town centre: Area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area.**

9.63 The recommendations which have been made by WYG in relation to the Town Centre Boundaries, Primary Shopping Areas and Retail Frontages are based on the evidence which has been derived from this Retail Study, in particular, the health check assessments as discussed in detail at Section 5. The recommended designations are based on both the existing diversity of uses present within each centre and the aspirations for each centre moving forward. Our recommendations are aimed at assisting CE in determining up-to-date town centre designations within the Development Plan.

## Crewe

### *Town Centre Boundary*

9.64 We consider the Town Centre Boundary for Crewe as currently defined in the Crewe and Nantwich Local Plan Proposals Map (2005) to be broadly appropriate. As detailed on the plan for Crewe contained at Appendix 7, we have recommended some minor changes to the line of the town centre boundary in the western part of the town centre in order that the boundary sits more closely with the line of development. We recommend that Vernon Way continues to form the eastern boundary, Oak Street/Dunwoody Way as the southern boundary and West Street as the northern boundary.

9.65 The Town Centre Boundary as proposed incorporates an area which is predominantly occupied by main town centre uses. Within the northern part of the boundary lies the whole of the recommended Primary Shopping Area which incorporates the main concentration of retail and service units. The south eastern part of the recommended boundary incorporates the Forge Street Retail Park and the site of the under construction Crewe Lifestyle Centre. To the south west, the boundary incorporates Phoenix Leisure Park, car parks which serve the town centre and public sector offices.



*Primary Shopping Area (PSA) and Retail Frontages*

- 9.66 In terms of the Primary and Secondary Shopping Frontages in the town centre we recommend some minor changes to the Frontages which are detailed within the Crewe and Nantwich Local Plan Proposals Map (2005). We recommend that the Primary Shopping Frontages in the centre include the Market Shopping Centre and the Victoria Centre, Queensway, the eastern end of Delamere Street, the northern end of Market Street and Earle Street. Our recommendation provides for more concentrated Primary Shopping Frontages than are provided by the Crewe and Nantwich Local Plan Proposals Map (2005), in order to allow more flexibility in terms of the uses which can occupy those units in the peripheral area of the Primary Shopping Area. The Primary Shopping Frontages as proposed incorporate the main concentration of retail uses in the centre.
  
- 9.67 In terms of Secondary Frontages, we recommend that the units on Victoria Street and along the southern part of Market Street (which were formerly designated as Primary Shopping Frontages) should be designated as Secondary Frontages, in recognition of the wider mix of town centre uses present at these locations. Indeed, on Victoria Street there are a high proportion of vacant units and the designation of this street as a Secondary Shopping Frontage may provided more flexibility to encourage a wider mix of operators to occupy these units. We consider that Chester Bridge Street and High Street should remain as Secondary Shopping Frontages given they provide a greater opportunity for a diversity of uses given their more peripheral location.
  
- 9.68 We recommend that the Primary Shopping Area incorporates the majority of the streets which we have recommended be designated as Primary and Secondary Shopping Frontages, albeit with exception of those units on Chester Bridge and High Street. It is considered that these units are slightly more separated from the core retail area than the other Secondary Shopping Frontages identified, with this area of the centre providing a slightly different character. Indeed, given the high proportion of vacant units present on High Street, it is considered that this area of the centre should be identified as a redevelopment opportunity site.

**Knutsford**

*Town Centre Boundary*

- 9.69 We consider the Town Centre Boundary for Knutsford, as previously defined by the adopted Macclesfield Borough Local Plan (2004), in the most part, appropriately reflects the extent of main town centre uses which together function as the town centre. However, we would advise a number of



amendments to the Town Centre Boundary to omit areas which are predominately in residential use and to more accurately draw the boundary around the extent of area which is predominantly occupied by main town centre uses, in accordance with the NPPF’s definition of town centres. The northern extreme of the town centre, as defined in the adopted Macclesfield Borough Plan, includes the principally residential streets of Queen Street, George Street, Albert Street and Windsor Way. Similarly an area in the north eastern extreme of the adopted town centre encompassing properties on Drury Land, Moorside and Egerton Square which are also predominantly in residential use. It is therefore considered that the Town Centre Boundary should be revised omitting these residential locations from forming part of the centre. A further minor change to the previously defined boundary is recommended to allow for the full extent of the Aldi supermarket site to fall within the Town Centre Boundary.

*Primary Shopping Area (PSA) and Retail Frontages*

9.70 Knutsford’s retail and service offering is predominantly focussed on Canute Place, Tatton Street, Princess Street and King Street and the connecting pedestrian streets which cross the centre from west to east. In acknowledgement of Knutsford’s retail offering being mostly concentrated along Princess Street, King Street, Regent Street and on the northern side of Canute Place we recommend for these streets to be identified as providing Primary Retail Frontage. The more outlying parts of these shopping streets provide a greater diversity of uses alongside retail and are therefore identified as providing Secondary Retail Frontages. Together the Primary and Secondary Frontages encompass a natural circuit within the town centre where the shopping offer is concentrated, and it is advised that the Primary Shopping Area for the town is drawn to encircle these Primary and Secondary Frontages. In the adopted Macclesfield Borough Local Plan (2004) the Booths supermarket was identified as providing Primary Frontage. In being separated from the concentrated shopping offer provided on Princess Street and King Street and being outside of the recommended boundary for the Primary Shopping Area, it is advised that this store appropriately comprises part of the wider town centre but does not provide Primary Retail Frontage.

**Macclesfield**

*Town Centre Boundary*

9.71 We consider the Town Centre Boundary for Macclesfield as currently defined in the Macclesfield Local Plan (2004) to be broadly appropriate. However, as detailed on the plan for Macclesfield contained at Appendix 7, we have recommended some amendments.



9.72 In particular, WYG recommend amending areas along the western and north-western edges of Macclesfield's Town Centre Boundary to principally exclude non main town centre uses such as residential. We also recommend that the Town Centre Boundary is extended to the south to include retail warehousing on the southern side of Churchill Way and main town centre uses along the southern side of Mill Lane at Park Green, as these existing uses make an active contribution to Macclesfield's town centre offer. These areas form a logical extension to the Boundary given that established pedestrian and vehicular routes already exist between these areas and the rest of the town centre.

9.73 We also recommend that the Duke Street and Churchill Way car parks are included within the recommended Macclesfield Town Centre Boundary in light of these two sites being allocated as development sites for a range of retail and leisure uses. As such, these would therefore form a complementary addition to the town's offer which would blend seamlessly with the existing the town centre.

#### *Primary Shopping Area (PSA) and Retail Frontages*

9.74 We recommend that the extent of the Primary Shopping Frontages should be along the upper section of Chestergate, The Grosvenor Centre and Upper Mill Street which is largely consistent with the existing PSA defined within the Macclesfield Local Plan 2004. The Primary Shopping Frontages would however, exclude properties on the southern side of Castle Street which consists of long term vacancies which have not actively contributed towards the Primary Shopping Frontages for over ten years. As such, the southern section of Castle Street no longer reflects the characteristics of a Primary Shopping Frontage.

9.75 Secondary Shopping Frontages are located along the lower section of Chestergate, the lower section of Mill Street and Church Street, which are consistent with the Secondary Shopping Area defined within the Macclesfield Local Plan 2004. The main change proposed is to Queen Victoria Street where it is proposed to include as a Secondary Shopping Area, which is currently allocated as Prime Shopping Area within the Macclesfield Local Plan 2004. However, the lower proportion of comparison and convenience retailing and higher proportion of vacancies and other retail service uses, is consistent with the character of a Secondary Shopping Frontage rather than Primary Shopping Frontage.

9.76 In relation to the recommended PSA, this would incorporate the Primary Shopping Frontages, Secondary Shopping Frontages and closely reflects areas identified as Shopping Redevelopment Areas, Prime Shopping Areas and Secondary Shopping Areas within the Macclesfield Local Plan 2004. We are





not recommending that the boundary is extended to include the Duke Street and Churchill Way car parks as WYG understand that the extant permission for the Silk Street scheme is unlikely to come forward and the Council is considering other options for the redevelopment of these two car parks. These areas do not at present have continuous active retail frontages (or are likely to shortly have active retail frontages) and would not closely relate to the proposed Primary and Secondary Shopping Frontages. On that basis we do not recommend that these two car parks should be included within the PSA.

## Alsager

### *Town Centre Boundary*

- 9.77 We consider Alsager's existing Town Centre Boundary, as identified by the Congleton Borough Local Plan Proposals Map (2005), to accurately reflect the main town centre uses identified during our survey in September 2015. We therefore recommend using broadly the same Town Centre Boundary as the former Local Plan. This area incorporates the retail and service uses along Lawton Road and Crewe Road, as well as those to the north of Sandbach Road South. In addition, the Town Centre Boundary also includes the Station Road and Fairview car parks, Milton Park and the civic uses around the library adjacent to Sandbach Road North.

### *Primary Shopping Area (PSA) and Retail Frontages*

- 9.78 The focus of Alsager's retail activity is split across two areas. Within the eastern part, we recommend that the parade of units between the south-east of Lawton Road and the north of Sandbach Road South should be a primary retail frontage. This is because of the high proportion of retail units, particularly when considered in the context of Alsager town centre. Similarly, the Adsa supermarket and the four adjoining smaller units to the south are also either already in retail use or are being marketed for retail purposes. In addition, the units to the north-east of Sandbach Road South also have a high proportion of retail uses. We therefore recommend that these frontages should also be primary. We also consider the eastern part of the town centre to have two further secondary retail frontages. The northern side of Lawton Road between Sandbach Road North and Shady Grove has the retail units and other service related units that are typical of a secondary retail frontage. In addition, this frontage also had two empty units at the time of our survey that could come back into retail use. We also consider the small parade on the southern side of Lawton Road to the east of Ashmore Road's junction with Lawton Road to also have that character of a secondary retail frontage.



9.79 The western part of Alsager town centre has a focus of retail activity, albeit to a lesser extent than the east due to the higher proportion of leisure uses. For this reason, we do not consider this area to have any primary shopping frontages. However, we consider that several units to the north of Crewe Road (between 51-77 Crewe Road) and the south of Crewe Road (between 38-68 Crewe Road) to be a secondary retail frontage.

## Congleton

### *Town Centre Boundary*

9.80 We consider Congleton's existing Town Centre Boundary, as identified by the Congleton Borough Local Plan Proposals Map (2005), to largely reflect the extent the main town centre uses that we observed during our survey in September 2015. However, we recommend not including the southern part of Moody Street and Chapel Street within the Town Centre Boundary, as this area comprises mainly residential uses and St Peter's Church, which are not main town centre uses. Similarly, the buildings located at the south-east of Fountain Street and to the south of Rood Hill are also in residential use. Finally, the buildings on the southern part of Silk Street are mostly occupied by vehicle repair facilities, which are not main town centre uses. We therefore recommend not including these units within the Town Centre Boundary.

### *Primary Shopping Area (PSA) and Retail Frontages*

9.81 We consider Congleton's Primary Shopping Area to be the same as the Congleton Borough Local Plan Proposals Map (2005) Principal Shopping Area. This area reflects what we consider to be Congleton's Primary and Secondary Retail Frontages. We recommend that the Primary Retail Frontages should comprise both sides of Duke Street, Bridge Street and Victoria Street, the eastern side of Market Street and the south-western side of Mill Street. These frontages are where convenience and comparison goods uses are most concentrated with low proportions of service and other uses. The streets containing the Primary Retail Frontages are also largely pedestrianised. We consider Congleton's secondary retail frontages to be both sides of Little Street, Capitol Walk and High Street east of its junction with Albert Terrace, as well as the south-western side of Mill Street between its junctions with Little Street and Duke Street. These areas retain a high proportion of retail uses but have a greater diversity of uses, including restaurants, public houses and banks. The western side of Swan Street/Mill Street, West Street and Lawton Street also have a concentration of services uses, but we do not consider these areas to contain sufficient retail uses or have the connectivity with the retail core that would normally be expected of a secondary retail frontage.



## Handforth

- 9.82 The health check for Handforth has described the issues affecting its centre: a failure to generate consistently active frontages throughout the centre and a high vacancy rate. In response it is considered that there is a need to consolidate the Primary Shopping Area (PSA) – concentrating activity in an appropriately sized core and allowing other parts of the centre the flexibility to convert to alternative uses.
- 9.83 The sensible basis for this Primary Shopping Area is The Paddock, which incorporates the Tesco Express (the key anchor store within the centre) and the surrounding parts of Wilmslow Road. On the opposite side of Wilmslow Road to the Paddock is the Spar which includes the Post Office. This helps to anchor the parade of shops on this side. All of The Paddock is included within the PSA - the aspiration should be that all of these frontages could be returned to active retail/leisure use. A redevelopment of this area could also be supported if it retains an active retail frontage to Wilmslow Road, even if this does not extend to as large an area behind this as it does currently.
- 9.84 The PSA is extended southwards until the non-retail uses intervene. There is however, more uncertainty over the block between Meriton Road and School Road. Although there are retail and leisure uses present, this block is further from the anchors described above, and further from car parking, and has experienced more change and vacancies recently. Whilst this section has potential to remain as an active part of the centre, a more flexible approach may be required. At present it is included within the PSA but this may need to be reviewed.
- 9.85 All of the PSA has been identified as secondary frontages. In a centre of this scale it is not considered appropriate to identify primary frontages. The mix of uses will include a high proportion of leisure, retail service and financial & business service uses, which will play an important role in contributing to the vitality of the centre. It will be important that all of these frontages have active public-facing ground floor uses.
- 9.86 South of the Sagars Road there is a smaller cluster of retail uses, separated from the PSA by non-retail uses (offices and community uses). Although closer to the train station, these are more distant to the Tesco and the Spar/Post Office anchors. As such, this section may not have a viable future as part of the centre, indeed several units here have been converted to offices. We recommend that this section is not allocated within the PSA, or as secondary frontages, in order to allow greatest flexibility for change.



## Middlewich

### *Town Centre Boundary*

- 9.87 In relation to the Town Centre Boundary for Middlewich, which we consider should also act as the Primary Shopping Area, we consider that St Michael’s Way provides a logical boundary to the north, given the majority of development to the north of St Michael’s Way is in residential use. To the east, we consider the boundary should run along the canal in order to incorporate the offices and retail uses to the west of the canal. We consider the plot between the canal and Leadsmithy Street could provide a potential development opportunity site. We recommend that boundary should extend to the south as far as the White Horse public house, incorporating the Library and the Civic Hall, given the uses further to the south are largely residential.
  
- 9.88 To the west, we consider the Town Centre Boundary should be extended to include the Lidl store. Although there is a requirement to cross St Michael’s Way in order to access the core of the centre, the distance is short and we consider there is the opportunity for linked trips between the store and wider town centre. Indeed, the Lidl store provides an important contribution to the town centre’s convenience goods offer.
  
- 9.89 Along the southern boundary, we consider the Town Centre Boundary should stretch along the rear of the properties which are located along Wheelock Street, with the incorporation of the Tesco store also. Planning consent was previously granted for the development of a replacement Tesco store to the west of the existing Tesco site, incorporating an area of land to the south of Wheelock Street. Given Tesco’s current strategy, which scales back their operations, we understand that this site will not be brought forward for the scale of supermarket as previously planned and the planning consent on this site has now expired. Notwithstanding this, we consider that the site, which is allocated within the Congleton Local Plan for retail development, still forms a redevelopment opportunity site, particularly given its proximity to the core of the town centre.

### *Primary Shopping Area (PSA) and Retail Frontages*

- 9.90 In the case of Middlewich, we do not consider it would beneficial to allocate Primary and Secondary Shopping Frontages. Convenience and comparison goods retail uses are present at various locations along Wheelock Street, with no particular concentration and therefore it is not considered that there is a particular area of the centre which current acts as a Primary Shopping Frontage. We are of the view



that by solely defining a town centre Boundary/Primary Shopping Area rather than Frontages this will provide more flexibility in terms of the development of the centre.

## Nantwich

### *Town Centre Boundary*

- 9.91 In terms of Nantwich, we recommend the extension of the Town Centre Boundary further to the south to incorporate the existing Aldi foodstore. The store is located directly to the south of the Morrisons supermarket, with a pedestrian link between. Accordingly, it is considered that the Aldi contributes to the overall offer of the town centre. We also recommend the extension of the Town Centre Boundary at the north east of the centre to incorporate the units to the south of Beam Street, including the M&S Simply Food, the library, civic hall and the bus interchange, and the units to the north of Beam Street which include a mix of comparison goods and leisure service units. We have also recommended that the boundary is extended slightly to the north west in order to include the car park directly to the north of Beam Street which serves the town centre.
- 9.92 The remainder of our recommended Town Centre Boundary is comparable to that defined by the Crewe and Nantwich Local Plan (2005) in order to incorporate the areas predominantly occupied by main town centre uses.

### *Primary Shopping Area (PSA) and Retail Frontages*

- 9.93 We consider that the Primary Retail Frontages in Nantwich should comprise High Street, Pepper Street, the western end of Beam Street, the eastern side of Oat Market, the western end of Hospital Street and the northern point of Pillory Street. We consider that these streets comprise the retail core of Nantwich and incorporate a high proportion of retail uses, albeit interspersed with service units. We recommend that the Secondary Shopping Frontages in Nantwich should comprise the eastern end of Beam Street, the western side of Oat Market, the eastern end of Hospital Street, Mill Street and the southern part of Pillory Street. These streets are considered to form the more peripheral areas of the town centre and include a greater diversity of uses than the Primary Shopping Frontages. Although there are some retail and service units located outside the areas which we have recommended should be designated as retail frontages, such units do not form part of a continuous frontage and are interspersed with other uses e.g. residential uses.



9.94 We recommend that the Primary Shopping Area is drawn tightly around those streets which we've recommended are designated as Primary and Secondary Shopping Frontages, which are adjoining and closely related.

## Poynton

### *Town Centre Boundary*

- 9.95 We consider Poynton's existing Town Centre Boundary identified in the Macclesfield Local Plan to broadly reflect the extent of its main town centre uses. Minor amendments are suggested to provide an updated Town Centre Boundary with consideration given to the current land uses recorded which fall within the existing Town Centre Boundary but are not main town centre uses. Examples of this include St George's C of E Church at the junction of London Road South and Chester Road, and residential development along Abbey Court located to the west of London Road South, adjacent to the existing Aldi store. As these do not function as a part of the town's shopping and service offering, it is recommended that these are removed from the boundary.
- 9.96 Given the concentrated character of the town centre based around Park Lane and London Road South alongside the modern Aldi and Morrison supermarkets, it is considered appropriate for the Primary Shopping Area to cover the entirety of the area within the Town Centre Boundary. Notwithstanding the designation of a PSA and Secondary Frontages within the Macclesfield Local Plan, the character of the town centre does not lend itself to the identification of Primary and Secondary Frontages with no clear differentiation in terms of the shopping offer evident between the various separate retail frontages.
- 9.97 An emerging Neighbourhood Plan for Poynton is proposed and is currently at an early stage, with draft policies covering six subject areas (including the town centre) consulted upon through a series of Public Exhibitions in February 2016. As part of this planning process, a new boundary for the town centre has been proposed. WYG consider the boundary defined within the emerging Neighbourhood Plan to largely be appropriate, subject to minor revisions including the exclusion of uses which are not main town centre uses. Subject to these amendments, it is recommended that the emerging Neighbourhood Plan's defined Town Centre Boundary is taken forward in future planning policies.



## Sandbach

### *Town Centre Boundary*

- 9.98 In terms of Sandbach, we recommend that the Town Centre Boundary be drawn more tightly than the boundary included within the Congleton Local Plan (2005) in order to remove a number of areas which are not occupied by main town centre uses. Accordingly we have reduced the extent of the boundary, particularly to the west, to exclude a number of residential and industrial areas. The Town Centre Boundary as defined includes the main retail core of the centre, in addition to other main town centre uses including leisure and office uses.

### *Primary Shopping Area (PSA) and Retail Frontages*

- 9.99 Sandbach contains a mix of uses including a range of both retail and service uses, which are interspersed. Accordingly, it is somewhat difficult to identify a defined retail core in the centre. Notwithstanding this, the units located along the northern end of High Street and along Hightown incorporate a reasonable concentration of convenience and comparison goods units and provide a hub of shopping activity in the centre. Therefore, we consider these streets should be defined as Primary Retail Frontages. We recommend that the southern end of High Street, Market Square, Penda Way, The Commons, Congleton Road, Green Street, Welles Street, Bold Street and Old Middlewich Street are designated as Secondary Shopping Frontages. Although these streets incorporate retail uses, they also provide a wider diversity of uses including retail service, leisure service and financial and business service uses. The designation of these streets as Secondary Shopping Frontages will provide more flexibility in terms of the evolution of the centre. Although some retail and service units are located along Middlewich Road, these units are interspersed with residential and office uses and accordingly we do not consider these units should be defined as Shopping Frontages.
- 9.100 We recommend that the Primary Shopping Area is drawn around those units which are recommended for designation as Primary and Secondary Shopping Frontages as shown on the plan for Sandbach provided at Appendix 7.



## Wilmslow

### *Town Centre Boundary*

9.101 We have proposed a number of minor alterations to the Town Centre Boundary. To the east of the town centre the small residential pockets at Ladyfield Street/Mopmaker's Green and Covington Place have been removed. We believe that St Bartholomew's Church, and the Memorial Gardens opposite, should be included within the Town Centre Boundary. Town centres are defined by uses beyond retail, and community uses are increasingly important in the Town centre offer. These uses are important historical, community and conceptual elements to the town centre (especially the Church) and this fact should be reflected by including within the Town Centre Boundary.

### *Primary Shopping Area (PSA) and Retail Frontages*

9.102 We have defined a Primary Shopping Area Boundary. This reflects the established retail core, which is focused on Grove Street and includes Water Lane and Alderley Road. Providing a continuous retail circuit between the anchors of Sainsbury's, Hoopers and Waitrose, and incorporating Grove Street and the key Alderley Road/Water Lane/Grove Street junction should be the key the aim. This area forms the core of the PSA and should be protected with primary frontage designations.

9.103 Wilmslow's traditional retail role is effectively shrinking as alternative uses (leisure, retail services, financial & business services) take the place of comparison retail. This trend is likely to continue when the planned extension to Handforth Dean retail park opens. In response, the primary retail frontages have been relatively tightly defined, incorporating the core area described above but defining retail frontages outside of this as secondary frontages to allow flexibility for units to respond to the market and deliver new uses. These should nevertheless remain as active frontages which contribute positively to the vitality of the town centre.

9.104 These secondary frontages include all of Water Lane. Whilst this is within the PSA and does include a good proportion of comparison and convenience units, it is characterised by fewer national multiple retail units than other parts of the PSA. Water Lane is located further from the anchor stores and the shops at its western end are more local and independent in nature. It does however, have a strong basis for a high quality office and evening leisure offer. We consider that the trend to diversification is likely to continue at this location and we consider that allowing alternative town centre uses here will protect the primary frontages defined elsewhere and support specialisation within the centre.





- 9.105 Church Street is also defined as a secondary frontage, as is the eastern end of Hawthorn Street, in order to facilitate a flexible response to the market. It will be important to maintain active frontages here, especially on Church Street where the street links Grove Street to Waitrose as part of the town centre retail circuit.
- 9.106 Outside of these areas, parts of the town centre are not defined within the PSA or with primary or secondary retail frontages, for example the By-Pass section of Alderley Road and on Station Road / Swan Street and most of the western side of Alderley Road. Although some of these areas have existing retail or leisure uses it is considered that they have less potential to support new or continuing retail and leisure uses. Allowing more scope for diversification would help them adapt to changing town centre circumstances. For example these areas could accommodate community and health uses, office or potentially town centre residential. The western side of Alderley Road is already becoming a successful destination for health and office uses.

## Glossary of Terms

<b>Capacity</b>	Retail capacity in terms of this report refers to surplus/deficit of expenditure (£m) which represents the difference between the expenditure and turnover of the identified facilities.
<b>Comparison Goods</b>	Comparison goods relate to items not obtained on a frequent basis, these include clothing, footwear, household and recreational goods. A more detailed breakdown of comparison goods categories is provided below.
<i>Furniture Goods</i>	<i>Includes all consumer expenditure on furniture, floor coverings and household textiles such as beds, sofas, tables, cupboards, bed linen, curtains, towels, lamps, mirrors, and so on.</i>
<i>DIY Goods</i>	<i>Includes all consumer expenditure on hardware, DIY, decorators' supplies and garden centre type goods. This category includes products such as hammers, saw, screwdrivers, wallpaper, plumbing items, floorboards, ceramic tiles, plants, pots, turf for lawns, and so on.</i>
<i>Electrical Goods</i>	<i>All consumer retail expenditure on domestic electrical and gas appliances, such as washing machines, dryers, dishwashers, ironing and press machines, cookers, freezers and fridge-freezers, coffee makers, radios, televisions, DVD players, and so on.</i>
<i>Clothing &amp; Footwear</i>	<i>All consumer retail expenditure on shoes and other footwear, garments for men, women, children and infants either ready-to-wear or made-to-measure, underwear, ties, handkerchiefs, scarves, and so on.</i>
<i>Household Goods</i>	<i>Includes household textiles and soft furnishings, china, glassware, jewellery and other miscellaneous goods such as greeting cards, notebooks, pens, pencils, and so on.</i>

<i>Recreational Goods</i>	<i>All consumer retail expenditure on bicycles and tricycles (excluding toy bicycles), musical instruments, sports equipment, camping equipment, toys of all kinds including dolls, soft toys, and so on.</i>
<i>Chemist Goods</i>	<i>All consumer retail expenditure on prescription and non-prescription drugs, adhesive and non-adhesive bandages, first-aid kits, hot-water bottles, toilet shops, sponges, and so on.</i>
<b>Convenience Goods</b>	Convenience goods relate to everyday essential items including confectionary, food, drinks, newspapers and magazines.
<b>District Centre</b>	District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.
<b>Expenditure Per Capita</b>	The average spend of each person within the defined Study Area on a variety of retail goods.
<b>Expenditure</b>	Expenditure is calculated by taking the population within a defined area and then multiplying this figure by average annual expenditure levels for various forms of goods.
<b>Expenditure Forecasts</b>	This assessment has been undertaken using the 'goods based' approach as prescribed in the Planning for Town centres Practice Guidance. Retail expenditure forecasts have been derived from Experian Retail Planner Briefing Note 11 (October 2013).
<b>Experian (MMG3)</b>	The database used to identify population, expenditure and socio-economic breakdown of the Study Area population.
<b>Gross Floorspace</b>	Represents the level of total floorspace or footprint of a specific development (i.e. sales area, storage, checkouts, café, display, and so on).
<b>GOAD Plans</b>	Provide accurate information on the composition of town centres, shopping areas, out-of-town retail parks and outlet villages in the

UK. Identifies the fascia name, retail category, floorspace, and exact location of all retail outlets and vacant premises.

**GOAD Reports**

Provide a snap-shot of the retail status or demographic make-up of Goad surveyed town centres. Provides a comprehensive breakdown of floorspace and outlet count for all individual trade types in the Convenience, Comparison, Retail Service, Leisure, Financial/Business Services and Vacancy sectors.

**Local Centre**

Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.

**Main town centre uses**

Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).

**Market Share**

Market shares derived from the household survey results, which are based on either the proportion of shopping trips or the proportion of expenditure attracted to a particular centre/facility.

**National Multiple**

This is a retail or service operator which is or part of a network of nine or more outlets.

**Net Floorspace**

Represents the level of internal area devoted to the sale of goods.

**Price Base**

The price base for the Study is 2013; all prices are or have been adjusted to 2013 in order to be consistent.

<b>Primary and Secondary Frontages</b>	<p>Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods.</p> <p>Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.</p>
<b>Primary Shopping Area</b>	<p>Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).</p>
<b>Rates of Productivity</b>	<p>This takes into account the potential for existing retail floorspace to improve their turnover productivity (e.g. smaller goods could be sold from a smaller area for more money, increased opening hours, etc.).</p>
<b>Sales Density</b>	<p>Retail capacity figures are expressed in term of floorspace, relying on the application of assumed sales density figures to the surplus expenditure identified. This is based on the typical turnover of a store by square metre/foot.</p>
<b>Special Forms of Trading</b>	<p>Defined by Experian as expenditure not directed to traditional floorspace such as the internet, mail order, party plan and vending machines and other non-store activity such as market and road-side stalls.</p>
<b>Study Area</b>	<p>This represents the household survey area, which is based on postal sectors.</p>
<b>Trade Draw</b>	<p>This refers to the level of trade attracted to a particular facility/centre.</p>
<b>Turnover</b>	<p>The turnover figure relates to the annual turnover generated by existing retail facilities.</p>
<b>Town centre</b>	<p>A town centre will usually be the second level of centres after City centres and, in many cases, they will be the principal centre of centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the</p>

future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability.