



South Derbyshire District Council

Swadlincote Town Centre Retail and Leisure Study

Final Report

October 2015

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## 1.0 Introduction

### Instruction

- 1.01 WYG Planning (hereafter referred to as 'WYG') was commissioned by South Derbyshire District Council ('the Council') in June 2015 to undertake a Retail and Leisure Study for Swadlincote Town Centre.
- 1.02 A key purpose of this Study is to provide an assessment of retail and leisure needs and capacity in the South Derbyshire Local Plan period to 2028 and beyond (to 2030), and to review the current performance of Swadlincote town centre. The Study will act as the evidence base to assist in the formulation of future development plan policy, in particular the South Derbyshire Local Plan Part 2. The Study also provides baseline information to assist in the determination of planning applications for retail and leisure development. The Study provides recommendations in respect to the Council's future strategy for Swadlincote town centre to help safeguard its future vitality and viability, and it will assist corporately in bringing forward the redevelopment of key town centre sites.
- 1.03 The Study draws upon new empirical research, with NEMS Market Research Limited (NEMS) undertaking telephone surveys of 800 households within the defined Study Area in July 2015. The Study Area for the household survey comprises eight zones which are based on ward boundaries grouped to reflect areas which are likely to exhibit similar patterns of shopping behaviour. The Study is also informed by in-surveys undertaken in Swadlincote town centre, in order to understand the behaviours and obtain the views of customers using the town centre. The Study draws upon the most recent Experian Micromarketer G3 population and expenditure data (published October 2014) in order to establish the up-to-date position with regard to both convenience and comparison goods capacity.

### Structure of Report

- 1.04 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 Study;
  - Section 5 sets out an overview of the vitality and viability of Swadlincote town centre;



- 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 commercial viability of potential development opportunity sites in Swadlincote;
- Section 9 considers the need for additional commercial leisure development; and
- Section 10 sets out our recommendations in respect of Swadlincote's future town centre strategy.



## 2.0 Current and Emerging Retail Trends

### Introduction

- 2.01 The retail property landscape across the UK has evolved significantly over the past 50 years, from post-war redevelopment in town centres, through to the emergence of retail warehouse parks and out-of-town regional shopping malls. For most of this period, the retail and leisure sectors have experienced considerable expenditure growth, which has been attributed to a number of factors, including greater disposable income, availability of credit, new technology and a general overall increase in our standard of living. However, recent economic conditions have had a clear impact on expenditure and convenience goods spending per capita has actually reduced in recent years. The way in which goods are purchased has also altered due to the increased popularity of 'e-tailing', which now claims more than one in every ten pounds spent in the UK.
- 2.02 The retail and leisure market and the need for new development continually evolves as a result of numerous factors including demographics, consumer demands, car ownership, planning policy and technological advancements. The share of retail spending has undergone a significant shift in the decade since 2002, with Verdict identifying that town centre spending as a proportion of overall spending declined from 47.7% to 39.9% at 2012. In contrast, spending in out of centre locations has increased over the same period by 2.1% and non-store locations (principally internet retailers) by 6.6%<sup>1</sup>. These changes have had a major impact on the format and location of retail and leisure floorspace, which has led to recent Governments reaffirming their commitment to the 'town centre first' policy approach that is now outlined in the National Planning Policy Framework (NPPF) (March 2012).

### Current Retail Picture

- 2.03 A recent report by Colliers<sup>2</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

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<sup>1</sup> 'UK Out of Town Retailing', Verdict Datamonitor, April 2012

<sup>2</sup> 'National Retail Barometer: Summer 2014', Colliers, September 2014



resulting in a reduction in vacant retail space. Furthermore, it is evident that the UK unemployment rate is currently falling (recorded as being 5.7% between October and December 2014, compared to 6.0% between July and September 2014)<sup>3</sup> and that average pay for employees in Great Britain increased 2.1% between October and December 2014 compared to the same period 12 months earlier<sup>4</sup>.

- 2.04 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, in recent years inflation has consistently been at a level beyond average earnings growth and a delay in reviewing business rates has been identified by both the Portas<sup>5</sup> and Grimsey<sup>6</sup> Reviews as a key factor affecting the success of many operators.
- 2.05 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 the top 650 town centres. The Centre for Retail Research<sup>7</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.
- 2.06 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

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<sup>3</sup> 'Labour Market Statistics, February 2015 Release', ONS, February 2015

<sup>4</sup> Ibid

<sup>5</sup> 'The Portas Review', December 2011

<sup>6</sup> 'The Grimsey Review – An Alternative Future for the High Street', September 2013

<sup>7</sup> 'Retail Futures 2018', Centre for Retail Research, May 2013



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.

- 2.07 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.
- 2.08 In terms of retail rental values, Colliers<sup>8</sup> notes that national rates increased by 0.1% in Quarter 1 of 2014, to end 11 consecutive months of decline and to provide evidence that conditions in the retail market are stabilising. However, Colliers also reports that this position is skewed by growth in London and a small number of other destinations, with towns that have benefitted from growth typically being able to offer: an under-supply of retail floorspace; a tight prime pitch; strong tenant demand; affordable rents; a wealthy demographic; and, limited out of town provision.
- 2.09 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>9</sup> forecast annual per capita convenience goods growth rate is -0.5% at 2014, +0.5% at 2015 and +0.4% at 2016. By way of contrast, Experian<sup>10</sup> forecast in 2009 that per capita convenience goods growth would equate to +1.1% per annum across these same three reporting years.
- 2.10 However, Experian's forecast annual per capita comparison goods growth rates are significantly more positive than in the recent years and are similar to those recorded prior to the recession. Experian identifies per capita growth of +5.6% at 2014, +4.4% at 2015 and +3.1% at 2016.

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<sup>8</sup> 'Midsummer Retail Report 2014: Coming Up for Air', Colliers, July 2014

<sup>9</sup> Experian Retail Planner Briefing Note 12.1 (Figure 1a), October 2014

<sup>10</sup> Experian Retail Planner Briefing Note 7.1 (Figure 1), August 2009





2.11 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 of comparison goods 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 in the last two years, with the Grimsey Review<sup>11</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 2011.

### Trends in Comparison Goods Retailing

2.12 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 larger units enable operators to provide a greater range of goods; for example, in 2011, when the retail market was generally stagnant, Primark opened one million sq.ft of new retail space.

2.13 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

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<sup>11</sup> 'The Grimsey Review – An Alternative Future for the High Street', September 2013



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 ongoing downturn 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

- 2.14 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.
- 2.15 Mintel<sup>12</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 now realise 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. It is noted that as weekly food budgets fall and consumers alter their shopping habits, growth will be limited and the battle for market share

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<sup>12</sup> 'Food & Drink Retailing', Mintel, March 2013



will intensify further. Winning a share of consumer spend will require more than low prices, with shoppers increasingly seeking to source high-quality, good value food.

- 2.16 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.
- 2.17 Verdict<sup>13</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 27.0% (Tesco), 16.3% (Asda), 15.6% (Sainsbury's) and 10.1% (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 90.9%.
- 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.
- 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. It also intends to open a further number of petrol filling stations and develop locations where shoppers can pick up groceries ordered online. Asda's focus for additional openings is believed to be London and the south of England.
- 2.20 Morrisons also intends to open fewer larger stores once its current pipeline of development is completed. In September 2015 Morrisons announced that it would be selling 140 of its M Local format stores. The M Local stores have been purchased by a team of investors backed by Greybull Capital

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<sup>13</sup> 'UK Food & Grocery – Verdict Sector Report', Verdict, October 2013



who intend to rebrand the stores as 'My Local' convenience stores. The remaining five M Local stores are to remain on forecourts or be converted to small supermarkets. Its current priority is believed to be investment into its existing portfolio of stores.

- 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'. 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). Recent announcements suggest that Aldi is seeking to add more than 1 million sq.ft of additional floorspace in 2015 through the opening of around 60 stores and that Lidl will also add around 340,000 sq.ft this year.
- 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%.

## Leisure Sector

- 2.24 The daytime and evening leisure sector has undergone a major shift in the last five years, with the reduction in the income levels of consumers having an impact on their ability to spend on these types of discretionary activities and items. Mintel calculated that the total UK leisure market was worth

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<sup>14</sup> 'What Does the Future Hold for Town Centres?', BCSC, September 2011



almost £70 billion in 2012, only 0.2% higher than in 2007<sup>15</sup>. 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 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 the difficult trading conditions for the leisure sector are set to continue in the immediate future as a result of the shortfall in the amount of money that consumers have available to spend.

- 2.25 The number of leisure centres and swimming pools has increased in the past few years, though many local authorities are currently under budget constraints and there is some evidence that the ongoing operation of such leisure facilities is, on occasion, being threatened. Mintel<sup>16</sup> notes that 38% of adults use a health centre or swimming pool and research by the Leisure Database Company<sup>17</sup> indicates that the health and fitness private 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 15% of adults currently use a private health and fitness club, the potential for a further expansion of the market remains strong.
- 2.26 The health and fitness sector is dominated by the David Lloyd Leisure and Virgin Active operators, with these two health clubs having approximately 455,000 and 435,000 members<sup>18</sup>. There has also been a rapid growth in the number of the no-contract budget club operators, with Pure Gym (260,000 members) and The Gym (255,000 members) ranked fourth and fifth in the list of leading chains behind DW Sports Fitness which has 275,000 members. Mintel identifies that there has been a growth in the popularity of innovative exercise classes and technological features to attract additional people to these clubs, with many of the higher end clubs also adding spa facilities to their offer.
- 2.27 In terms of other leisure activities, the cinema sector is performing steadily, with data indicating that there were 173 million UK cinema admissions in 2012, an increase of 0.5% since 2011. Mintel<sup>19</sup> identifies that the eating out market has grown by around 8% between 2008 and 2013, and by an estimated 2.3% between 2012 and 2013, to an estimated £32.1 billion. It recognises however that

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<sup>15</sup> 'Leisure Review', Mintel, December 2012

<sup>16</sup> 'Leisure Centres and Swimming Pools', Mintel, January 2013

<sup>17</sup> 'State of the UK Fitness Industry', The Leisure Database Company, June 2013

<sup>18</sup> 'Health and Fitness Clubs', Mintel, June 2013

<sup>19</sup> 'Eating Out Review', Mintel, June 2013



this has largely been driven by inflation, with consumer demand muted by recent low consumer confidence levels.

## Office, Residential and Community Use Sector

- 2.28 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.
- 2.29 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 the town centre's walk-in catchment by both residents and workers, thus attracting more consumers and more vibrancy to the town centre.
- 2.30 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. 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

- 2.31 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 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;
- Supporting local growth by increasing footfall to local markets and town centres; and
- Encouraging the local community to make the most of their local market and town centre.

2.32 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 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

2.33 Despite the 'town centre first' planning policies which have been adopted by recent Governments, research undertaken by Verdict<sup>20</sup> indicates that between 2007 and 2012, the amount of out of centre floorspace increased by 23%. However, in very recent years, Colliers notes that the demand for out of centre representation has been limited, with those retailers seeking to acquire stores having a pick of vacant stock which has been made available through the administration of MFI (in November 2008), Land of Leather (in January 2009) and Focus DIY (in May 2011), amongst others. However, only five retailers with any significant out-of-town presence have failed since June 2011, these being Allied Carpets, Clintons, Comet, GAME and Peacocks. Although each of these companies entered

<sup>20</sup> 'UK Out of Town Retailing', Verdict Datamonitor, April 2012





administration, Allied Carpets, Clintons, GAME and Peacocks have since been purchased by other companies, with Clintons, GAME and Peacocks re-opening under the same brand name, but managed under different operating companies.

- 2.34 The national average vacancy rate<sup>21</sup> in out of centre retail warehouses in 2014 was 8.0%, an increase of around 4.1% since 2012. Some of the voids created by administrations remain un-let and the flooding of the market with so much unwanted space has acted to reduce rents. Retailers who have had their pick of the best stores include Dunelm, Pets at Home, Dreams, Matalan, Dixons Group, Go Outdoors, B&M, Mothercare, Next Home and TK Maxx.
- 2.35 Looking forward, Colliers<sup>22</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

- 2.36 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>23</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 indicates that the shopping centre development pipeline for 2015 totals 154,618 sq.m and includes the 51,100 sq.m Westfield Bradford and the 27,870 sq.m Friars Walk in Newport, both of which are scheduled to open in Autumn 2015. It is anticipated that next year will see the delivery of several shopping extensions. Indeed, Birmingham's Grand Central centre has already been completed and opened in September 2015 providing 53,000 sq.m floorspace. Cushman & Wakefield forecasts that the shopping centre pipeline will pick up significantly from 2017 as the economic recovery and the greater

<sup>21</sup> 'Vacancy Report Summary H2 2014', Local Data Company, February 2015

<sup>22</sup> 'Midsummer Retail Report 2014: Coming Up for Air', Colliers, July 2014

<sup>23</sup> 'Marketbeat Shopping Centre Development Report', Cushman & Wakefield, September 2014





availability of finance help to bring forward new schemes and extensions that already have planning permission.

2.37 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. 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.

2.38 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')

2.39 Many consumers who previously shopped in town centres and at retail parks are now increasingly using the internet to make purchases. Experian<sup>24</sup> identifies that internet sales' share of total retail sales stood at 10.6% in mid-2014 compared to just 4.7% at June 2008. The value of internet sales in 2014 is estimated at £37.2 billion.

2.40 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>25</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>24</sup> 'Experian Retail Planner Briefing Note 12.1', October 2014

<sup>25</sup> Ibid



- 2.41 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>26</sup> reports increased from 57% at 2006 to 83% in 2013. A total of 22 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 more than doubled between 2010 and 2014, from 24% to 58%. 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 around a fifth of John Lewis internet orders.
- 2.42 As a consequence of such changes, the Office for National Statistics<sup>27</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.
- 2.43 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 2011 accounted for 44% of operating profit and 32% of group sales. With regard to foodstore operators, food accounts for 20.5% of all internet sales, which equates to 3.1% of all food retailing<sup>28</sup>. Verdict's research identifies that, with the exception of Morrisons (though it is currently in the process of establishing an online presence via Ocado), 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 Colliers noting that the operator has a reported 48% online grocery market share.
- 2.44 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 retailing will continue to put some pressure on retail growth over the next five to ten years. In

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<sup>26</sup> 'Statistical Bulletin: Internet Access Households and Individuals', Office for National Statistics, August 2013

<sup>27</sup> Ibid

<sup>28</sup> 'Shop Expansion and the Internet', CBRE, May 2012



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.

2.45 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

2.46 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.

2.47 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 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 South Derbyshire’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 the 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 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 Swadlincote and we return to them in the concluding section of this report.

## Development Plan

3.25 The adopted development plan for South Derbyshire District is the South Derbyshire Local Plan (adopted May 1998).

3.26 The Local Plan describes Swadlincote as the main focus of the area, serving as an employment, shopping and service centre, with the remainder of the District being mostly rural in character. It is explained that in South Derbyshire, shopping provision is dominated by Swadlincote town centre, which provides for a wide range of every-day goods and services. The Local Plan recognises that for comparison goods shopping, Burton upon Trent and Derby, as well as the larger regional centres of Nottingham, Leicester and Birmingham are within a convenient travelling distance.

3.27 The Local Plan provides further context in relation to Swadlincote town centre in terms of interventions and improvements to the town centre at the time that the Local Plan was prepared.



However, more up-to-date information in relation to Swadlincote town centre is provided by the Swadlincote Town Centre Vision and Strategy 2012.

3.28 Policies in relation to shopping are contained at Chapter 7 of the Local Plan. Shopping Policy 1: Existing Shopping Centres states that new shopping development within Swadlincote and Melbourne shopping centres will be permitted provided that:

- It is of a scale and character compatible with that of the centre; and
- It is acceptable in terms of traffic generation and car parking provision.

3.29 The policy advises that new shopping development immediately adjacent to Swadlincote shopping centre will be permitted, provided that:

- It is of scale and character compatible with that of the centre;
- It is acceptable in terms of traffic generation and car parking provision;
- The development cannot be accommodated within that centre;
- The site is not required for industrial or business use; and
- The development has acceptable links for pedestrians and disabled people to that centre, or such links will be provided.

3.30 Shopping Policy 2 relates to out of town shopping developments and states that such proposals will only be permitted where the proposals meet a range of criteria, including the development not being capable of being accommodated within or adjacent to the town centre and the scale and nature of development, either individually or cumulatively is not such as to affect seriously the vitality and viability of any existing nearby major centre as a whole.

3.31 Shopping Policy 3: Local Shopping states that proposals for small shops will be permitted provided they do not adversely affect the amenities of neighbouring properties and adequate access, car parking and servicing facilities are provided. The supporting text to this policy notes that local shopping facilities in the villages and communities of the Swadlincote urban area, including Church Gresley, Midway, Newhall and Woodville, provide a valuable service to the immediate population.

3.32 Shopping Policies 1 to 3 were 'saved' by the Secretary of State's Direction under paragraph 1(3) of Schedule 8 to the Planning and Compulsory Purchase Act 2004 in September 2007. However, in



accordance with paragraph 215 of Annex 1 of the NPPF, due weight should be given to relevant policies in existing plans according to their degree of consistency with the NPPF (the closer the policies in the plan to the policies of the NPPF, the greater weight that they may be given). Certain aspects of Shopping Policies 1 to 3 are not consistent with the NPPF and therefore only due weight should be given to these policies.

## Emerging Development Plan

### South Derbyshire Local Plan Part 1

- 3.33 Once adopted, the South Derbyshire Local Plan Part 1 will set out the vision and objectives for South Derbyshire District up to 2028. The Plan will allocate development sites, including strategic housing sites, over the plan period and will provide development management policies to guide the determination of planning applications. South Derbyshire Council consulted on the Pre Submission Version of the Local Plan Part 1 between March and April 2014.
- 3.34 The Pre-Submission Local Plan provides a portrait for South Derbyshire. The portrait states that whilst significant new shopping and leisure development has been attracted to Swadlincote town centre, the High Street is characterised by traditional small shop units which may not be ideally placed to attract conventional new retail occupiers. The portrait states that the need to maintain footfall and a vibrant town centre is important and, as part of this, the Council is working on major improvements to the public streets and spaces in the town. The Pre-Submission Local Plan also sets out a vision for South Derbyshire. In terms of Swadlincote, the vision states that a vibrant town will become firmly established in a high quality retail, residential, commercial, leisure and shopping environment. It is stated that this will have been achieved through new development within and around the town and improved connections to the wider road network. In particular, substantial investment in leisure and civic facilities will have been developed to support the town's enhanced role as a major shopping and recreation destination.
- 3.35 In providing commentary on the spatial strategy in South Derbyshire, the Pre-Submission Local Plan states that the retail offer development is limited in South Derbyshire due to its location between the larger city centres of Derby and Nottingham, and also a wider choice in Burton Upon Trent. However, it is stated that retail development in Swadlincote will be encouraged to continue the upward change that has occurred over the last few years.



- 3.36 Draft Policy S7: Retail of the Pre-Submission Local Plan states that the role of Swadlincote town centre will be supported and enhanced where possible. A town centre boundary shall be established through Part 2 of the Local Plan alongside considering the role of the other retail provision in the District. The policy also advises that the urban extension to Derby City will be expected to include some retail provision on site that is appropriate to the size of the development and will not be detrimental to existing retail provision.
- 3.37 The supplementary text states that Swadlincote town centre has undergone significant streetscape investment in recent years. It is explained that this investment, combined with the private investment at Morrisons, The Pipeworks and the extension at Sainsbury's supermarket has improved Swadlincote's retail and leisure offer. It is advised that the second largest shopping area within the district is Melbourne which serves a local catchment area, primarily for convenience goods. It is advised that the local centres in the district, namely Church Gresley, Hilton, Newhall and Woodville, serve the immediate communities with a range of retail facilities.
- 3.38 The plan advises that detailed policies in relation to retail development will be provided by Part 2 of the Local Plan.
- 3.39 The housing growth planned for South Derbyshire is set out at Draft Policy S4: Housing Strategy of the Pre-Submission Local Plan. The Policy identifies that provision will be made for at least 13,454 net additional dwellings over the plan period. The dwellings will be split between the Local Plan Part 1 and Local Plan Part 2 as follows:
- Part 1 – Sites allocated to accommodate at least 12,404 dwellings as strategic sites.
  - Part 2 – The remaining dwellings, around 600, to be dealt with as non-strategic sites across the District including an assumed windfall of 450 dwellings across the Plan Period.
- 3.40 Housing allocations are provided at Chapter 5 of the Pre Submission Local Plan. Draft Policy H6 relates to the provision of up to 2,239 dwellings at Drakelow Park and states that the provision of one or two local retail centres will be required at this location commensurate with the size of development and to provide for day to day needs of the neighbourhood. In terms of Draft Policy H7 which provides for the development of around 375 dwellings at Hilton Depot, it is stated that consideration will be given to retail and other service provision on the site. The same is stated in relation to Draft Policy H11, which provides for around 400 dwellings at land north east of Hatton and Draft Policy H14 which provides for around 500 dwellings on land at Chellaston Fields. In terms of Draft Policy H15, which provides for



around 1,950 dwellings on land at Wragley Way, the policy states that a new on site local shopping centre shall be provided which should be commensurate in size to the needs of the community.

## Other Relevant Documents

### Swadlincote Town Centre Vision and Strategy 2012

- 3.41 The Swadlincote Town Centre Vision and Strategy 2012, provides an update to the original Town Centre Vision and Strategy document which was adopted in 2001. The document seeks to guide and energise the regeneration of the town centre.
- 3.42 It is explained in the 2012 document that over the past decade, many of the original sites and buildings identified in 2001 for redevelopment or refurbishment have now been implemented, including the redevelopment of the former Sharpe's Pottery into a museum, the redevelopment of the derelict Wraggs Pipeworks to provide a Morrisons and Pipeworks mixed use development. However, it is explained that there are now other sites in the town centre which are in need of improvement or have redevelopment potential. It is noted that the District and County Council own considerable amounts of land in or on the edge of the town centre and that there is an opportunity for the public sector uses in the town centre to be consolidated to free up land for sale or private investment.
- 3.43 The Strategy identifies that the town centre suffered a long period of decline and was often overshadowed by neighbouring centres. However, in recent years due to investments in retail and leisure provision, together with a growing and more prosperous local population and the visitor potential associated with The National Forest, the fortunes of Swadlincote town centre have improved.
- 3.44 The Strategy aims to continue the improvements to and revival of Swadlincote town centre as a service centre and attractive destination for the community and visitors. It is seen as a key priority to further improve the appearance and vitality of the town centre to create a focus for community life. The Strategy sets out the Council's view that there is potential for significant retail, leisure, office and residential development within and adjacent to the town centre and that there is potential to recapture spending that is currently leaking to neighbouring centres.



3.45 A number of areas for action are identified in the Strategy including: raising awareness and enhancing the way the town centre is perceived, supporting existing businesses and encouraging new businesses, and improving the physical environment.

3.46 The Strategy sets out a town centre boundary for Swadlincote, as well as primary and secondary retail frontages. However, it should be noted that these boundaries are not formally adopted. The Council will seek to determine a town centre boundary, and primary shopping area and primary/secondary frontages, where necessary, as part of the Local Plan Part 2. It is explained that as well as adopting the sequential and impact tests in relation to proposals for retail development, the Council aims to maintain a concentration of retail units within the core shopping area by resisting changes of use to non-shopping activities.

3.47 The Strategy provides details in relation to the context and composition of the town centre, including in relation to:

- Hubs of evening activity;
- Views, vistas and landmarks;
- Historic context;
- Trees and garden spaces;
- Pedestrian and cycles movements;
- Vehicle movements and car parking;
- Public sector land ownership;
- Potential investment opportunity sites;
- Townscape masterplan; and
- Movement masterplan.

3.48 The Strategy sets out a range of actions aimed at contributing to the realisation of the vision for Swadlincote town centre. These actions include:

- Protect heritage – Restore and enhance historic buildings and landmarks;
- Attract investment – Identify sites with redevelopment potential and options for their delivery;



- Renew public facilities – Explore opportunities to renew or integrate public services, potentially freeing up land for investment;
- Develop the market – Expand and diversify the market;
- Encourage more events – Promote and support businesses and community groups in making greater use of the town centre for events and activities;
- Support business development – Provide assistance to start-ups and support business development for new and existing enterprises;
- Enhance the public realm – To enable further street improvement works, more attractive public realm and better links to and within the town centre;
- Promote community safety – Including pursuing opportunities for further CCTV, enhanced lighting and more visible patrols;
- Maintain the environment – Maintain good standards of cleanliness and landscaping;
- Market the town – To both residents who currently shop elsewhere and visitors, highlighting for example the new investment and free parking;
- Improve signage – Both to the town and within the town centre in order to better integrate different areas;
- Pursue innovative transport solutions – To meet the growing demands for travel to, and parking within, the centre;
- Identify additional parking – Explore long term solutions to increasing parking provision;
- Improve access – Improve crossing points, pedestrian and cycle facilities and key routes to and within the town centre;
- Invest in visitor attractions – To renew existing facilities, such as Eureka Park, Green Bank Leisure Centre and Sharpe’s Pottery Museum, and draw visitors from further afield;
- Integrate town centre management – For example, through a co-ordinated programme of events; and
- Monitor health and vitality – Benchmark the performance of the town against other comparable centres, to inform decision making, policy making and land use planning.



### Swadlincote Town Centre Masterplan 2006

3.49 The Swadlincote Town Centre Masterplan was agreed in June 2006. The masterplan set out a framework and tool to guide comprehensive, but phased, public realm works in the town centre over a 10 to 15 year period, including repaving and decluttering the streets, better lighting and signage and improvements to approaches, car parks and gateways. Works which have been implemented in response to the masterplan include:

- Repaving of the jitties off High Street;
- Improvements to Swadlincote's eastern approach;
- Redefining the streetscape in West Street as part of the creation of a cultural quarter; and
- Revamping The Delph, the main public space in the town centre.

### Conservation Area Management Plan (April 2015)

3.50 The Swadlincote Conservation Area Management Plan was adopted in April 2015. The Management Plan provides guidance for developers, property owners and their professional advisers, shopkeepers, retail outlets, residents and the general public. The document sets out the Council's aspirations for the involvement of property owners and their professional advisers in managing and maintaining Swadlincote's valuable heritage.





## 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. Notwithstanding this, WYG acknowledges that there can be limitations to survey research, particularly with regard to the sample size which can be achieved, and the results should therefore be taken to be a broad indication of consumer preferences. However, WYG's methodology seeks to minimise such limitations.
- 4.02 A key requirement of this Study is the detailed understanding of shopping patterns in terms of the use of Swadlincote town centre and surrounding retail centres, and the identification of the catchment area of Swadlincote town centre. WYG commissioned specialist market researchers NEMS to undertake a comprehensive household telephone survey to identify consumers' habits and preferences in the Study Area. A total of 800 household surveys were undertaken. In addition, in order to gain a greater understanding of the role and function of Swadlincote town centre, and identify from where the centre draws its custom, an in-street survey of shoppers and visitors has also been undertaken by NEMS. A total of 100 surveys were undertaken in Swadlincote town centre.
- 4.03 We set out the general methodological approach to the surveys and the key results below.

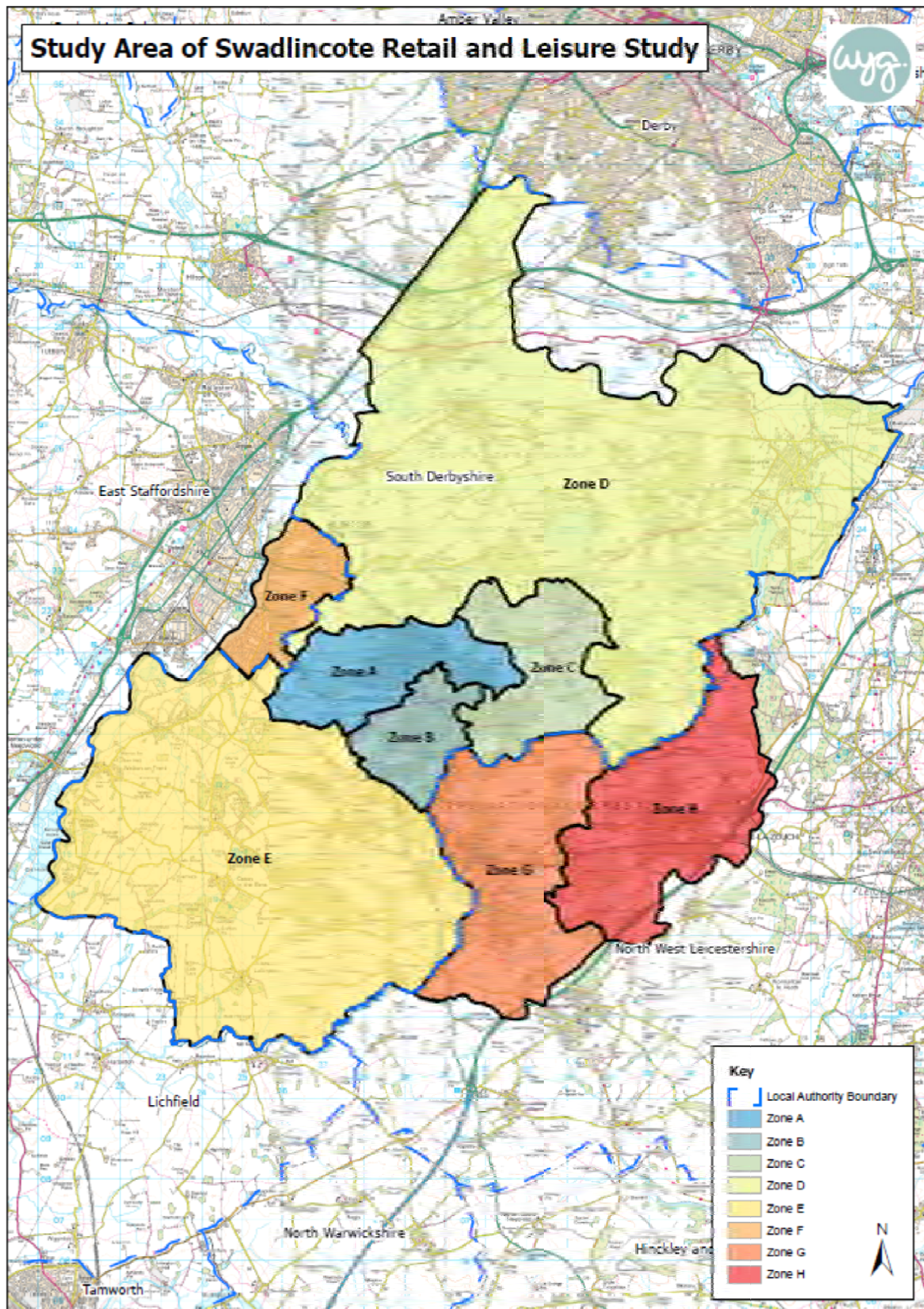
### Household Survey

- 4.04 In July 2015, a survey of 800 households was undertaken across the defined Study Area which comprises eight separate zones and stretches beyond the South Derbyshire administrative boundaries to incorporate outlying areas, including in East Staffordshire and North West Leicestershire. Residents in these outlying areas also, to some extent, look to facilities within Swadlincote to meet some retail and leisure needs.
- 4.05 Swadlincote town centre sits within the northern part of Zone B. Areas within South Derbyshire's administrative area broadly equates to Study Area Zones A, B, C, D and E, while Zone F is located in East Staffordshire and Zones G and H are located in North West Leicestershire.



4.06 Table 4.1 below sets out the wards which comprise each zone and a map of the catchment is provided at Figure 4.1 and Appendix 1. The questions and full tabulation of results from the household survey are provided at Appendix 2.

**Figure 4.1: Study Area**



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**Table 4.1: Wards by Survey Zone**

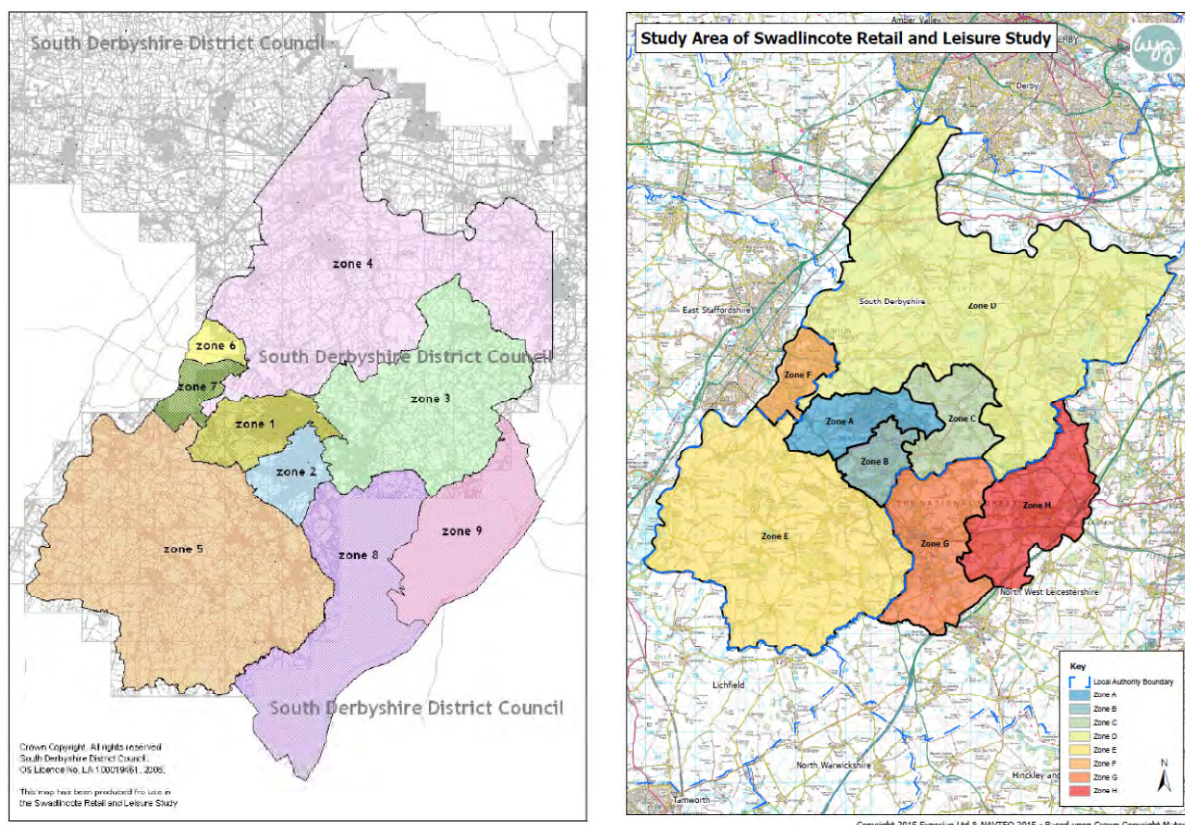
Survey Zone	Postcode Sectors
Zone A	Midway/Newhall and Stanton
Zone B	Church Gresley/Swadlincote
Zone C	Woodville
Zone D	Melbourne/Repton/Willington and Findera
Zone E	Linton/Seales
Zone F	Brizlincote/Stapenhill/Winshill
Zone G	Moira/Oakthorpe and Donisthorpe
Zone H	Ashby Castle/Ashby Holywell/Ashby Ivanhoe

Shaded rows denote those Zones which lie within South Derbyshire

- 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 note that the previous Swadlincote Retail and Leisure Study (Donaldsons, September 2005) provided a limited analysis of market shares, which was based upon the market share of trips attracted to particular destinations. Although it would be useful to compare the market share of trips attracted to particular facilities in 2005 to the market share attracted by these same facilities now, in order to determine how market shares have changed over time, there have been changes to the ward boundaries in South Derbyshire since 2005, which means it is not possible to provide a direct comparison in relation to several of the zones within the Study Area. We provide a copy of the Study Area and Zones which informed the 2005 Study at Figure 4.2, in order that a comparison can be made with the Study Area used in this Study.



**Figure 4.2 – Study Areas at 2005 and 2015**



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 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 eight 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>29</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 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 42.1% of respondents indicate they made their last purchase online); electrical goods (23.2%); toys, games, bicycles and recreation goods (20.5%); clothing and footwear (15.5%) and small household goods (13.8%). However, it should be noted that there is a reasonably significant degree of variation 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 12.1, which was published in October 2014. 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 3.3% is lower than the projected online convenience goods market share estimated by Experian at 2015 of 9.4%. This indicates that a lesser proportion of residents within the Study Area undertaken 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

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<sup>29</sup> This being the household survey results which have not had special forms of trading responses 'stripped out' from the dataset



comparison goods categories. The mean online comparison goods market share of 15.0% is comparable, albeit less, than the projected online comparison goods market share estimated by Experian at 2015 of 16.6%. This indicates that the market share of online comparison goods purchases in the Study Area is similar to that found nationally.

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

Goods Type	A	B	C	D	E	F	G	H	Total	Mean	Experian
<b>Convenience Goods</b>											
Main Food Shopping	5.2%	3.2%	7.0%	8.1%	4.9%	9.0%	2.5%	2.4%	5.7%	3.3%	9.4%
Top-Up Food Shopping	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%	0.0%	0.1%		
<b>Comparison Goods</b>											
Clothing and footwear	11.6%	21.9%	17.2%	16.5%	16.7%	11.0%	20.7%	13.6%	15.5%	15.0%	16.6%
Books, CDs and DVDs	38.1%	50.4%	35.7%	44.5%	48.8%	33.2%	55.9%	39.9%	42.1%		
Small household goods	5.6%	16.4%	17.0%	15.2%	19.5%	15.9%	15.4%	8.2%	13.8%		
Toys, games, bicycles and recreation goods	16.8%	24.2%	13.9%	19.4%	24.9%	20.7%	16.1%	25.7%	20.5%		
Chemist goods	2.9%	9.4%	4.4%	12.8%	5.2%	8.3%	12.0%	0.8%	7.0%		
Electrical goods	19.7%	26.1%	33.4%	25.1%	26.0%	13.9%	18.1%	30.7%	23.2%		
DIY	0.0%	1.9%	6.4%	3.3%	2.7%	0.7%	10.5%	5.8%	3.1%		
Furniture	5.7%	7.9%	6.6%	10.9%	19.0%	3.7%	5.2%	3.1%	7.4%		
Garden	1.6%	3.7%	4.1%	0.9%	3.3%	1.3%	1.2%	2.4%	2.2%		

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

Experian average figure derived from Experian Retail Planner Briefing Note 12.1, 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.

#### Food Shopping Patterns

- 4.17 Tables 4.3 and 4.4 summarise the proportion of main food and top up food shopping trips which are directed to key retail facilities located within the Study Area, based upon the results of the household survey. We have also shown the retail facilities outside the Study Area which attract a substantial proportion of trips originating within the Study Area.
- 4.18 Table 4.3 indicates that foodstores located within the Swadlincote town centre's catchment, within the South Derbyshire administrative area, currently claim a market share of 51.3% of all main food shopping trips which originate inside the Study Area. The most popular foodstores within South Derbyshire include the Morrisons at Coppice Side (which secures 21.6% of all trips originating within the Study Area to undertake main food shopping), the Sainsbury's at Civic Way (15.3%) and the Aldi at the Pipeworks (12.7%).



- 4.19 The Morrisons at Coppice Side secures the greatest proportion of main food shopping trips which originate within any one zone within the Study Area, with the survey indicating that 43.6% of all main food shopping trips which originate within Zone C (which covers the area to the east of Swadlincote) are undertaken at the store. The Morrisons also secures 38.1% of main food shopping trips which originate within Zone A which covers the area to the north of the town centre and 37.2% of such trips from Zone E which covers the south of the district. The Morrisons store is located within Swadlincote town centre and clearly performs an important role in contributing to the town centre's offer.
- 4.20 The stores within South Derbyshire which secure the next greatest market shares of main food shopping trips from the Study Area are the Sainsbury's at Civic Way, which secures 15.3% of main food shopping trips and the Aldi at the Pipeworks which secures 12.7% of trips. Each of these stores secures more than two in ten trips to undertake main food shopping in Zones A and B which cover Swadlincote town centre. During the undertaking of the household survey, the former Lidl store on Belmont Street had been demolished in preparation for the development of a new, larger store. As such, it is likely the case that the market share of alternative, similar destinations, in proximity to the Lidl store may have increased at the time the survey was undertaken as a result of customers who would usually undertake their main food shopping at Lidl switching to an alternative destination while the redevelopment of the new store took place.
- 4.21 As would be expected, the main food shopping market share secured by facilities in South Derbyshire is significantly higher in the zones which broadly correlate to the South Derbyshire administrative boundary, with the exception of Zone D. Facilities within South Derbyshire attract only 20.6% of all main food shopping trips from Zone D. This is likely a result of this zone having boundaries with Derby City, East Staffordshire and North West Leicestershire, which attract 29.8%, 18.5% and 26.0% respectively of main food shopping trips which originate in this zone. In terms of the other Zones located in the South Derbyshire administrative area (namely Zones A, B, C and E), each of these zones predominantly look to facilities in South Derbyshire to meet their main food shopping needs. Indeed, in Zones A and B which cover Swadlincote, more than nine out of ten of all main food shopping trips are directed to facilities in the District.
- 4.22 Within the Study Area, but outside South Derbyshire, the Tesco store at Resolution Road in Ashby-de-la-Zouch secures a main food shopping market share of 13.3%, while the Aldi at Dents Road in Ashby-de-la Zouch secures a main food shopping market share of 5.6%. The Tesco at Ashby-de-la-Zouch secures more than one in every ten main food shopping trips from Zones C, D, G and H. Therefore, it is evident that some residents who reside in close proximity to Swadlincote town centre i.e. Zones C are choosing to shop travel outside South Derbyshire to meet their main food shopping needs.





4.23 Outside of the Study Area, the Tesco store at St Peter’s Bridge in Burton-upon-Trent attracts the greatest proportion of main food shopping trips (8.5%) from the Study Area, followed by the Aldi at Horninglow Street in Burton-upon-Trent (5.5%).

**Table 4.3: Principal Food Shopping Destinations Trip Analysis by Zone – Main Food Shopping (%)**

Zone	Address	A	B	C	D	E	F	G	H	Total
<b>South Derbyshire</b>										
B	Swadlincote town centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.1%
	Morrisons, Coppice Side	38.1%	35.5%	43.6%	4.2%	37.2%	3.2%	22.5%	3.9%	21.6%
	Aldi, Pipeworks	23.1%	28.3%	15.1%	1.6%	21.3%	0.6%	16.5%	1.0%	12.7%
	Sainsbury’s, Civic Way	29.6%	28.9%	18.6%	8.8%	17.4%	3.7%	7.1%	6.3%	15.3%
<b>Total South Derbyshire</b>		<b>91.9%</b>	<b>93.6%</b>	<b>78.0%</b>	<b>20.6%</b>	<b>79.5%</b>	<b>7.4%</b>	<b>46.7%</b>	<b>12.4%</b>	<b>51.3%</b>
<b>North West Leicestershire</b>										
H	Aldi, Dents Road, Ashby-de-le-Zouch	2.0%	0.5%	0.0%	4.1%	0.8%	0.0%	15.6%	28.3%	5.6%
	Tesco, Resolution Road, Ashby-de-la-Zouch	1.7%	2.4%	17.2%	18.5%	0.7%	0.0%	33.1%	51.9%	13.3%
<b>Outside Study Area</b>										
Derby (OSA)	Asda, Sinfin District Centre, Arleston Lane	0.0%	0.0%	0.0%	18.8%	0.0%	0.0%	0.0%	0.0%	2.5%
East Staffordshire (OSA)	Aldi, Horninglow Street, Burton-upon-Trent	1.9%	0.0%	0.0%	4.6%	6.7%	20.7%	0.0%	0.0%	5.5%
	Sainsbury’s, Union Street, Burton-upon-Trent	0.7%	0.0%	0.8%	4.7%	0.0%	8.5%	0.0%	0.6%	2.5%
	Tesco, St Peter’s Bridge, Burton-upon-Trent	1.8%	0.6%	0.0%	3.7%	2.8%	38.8%	0.0%	0.0%	8.5%

Source: WYG Table 3, Appendix 2

4.24 **Table 4.4** shows the main food market share attracted by facilities in Swadlincote town centre<sup>30</sup>, Melbourne town centre, local centres, undefined villages, edge-of-centre locations and out-of-centre locations. Facilities on the edge of Swadlincote town centre attract the greatest main food shopping market share (28.4%). The facilities which are attracting this market share are the Sainsbury’s on Civic Way, and facilities at the Pipeworks, namely the Aldi and Iceland stores. Facilities in Swadlincote town centre attract a strong main food shopping market share of 21.7%, this market share is largely attracted by the Morrisons foodstore. In total, facilities within and on the edge of Swadlincote town centre attract a main food shopping market share of 50.1%. Melbourne town centre and the local centres in the district (as defined by the South Derbyshire Pre-Submission Local Plan) attract main

<sup>30</sup> Swadlincote town centre determined in accordance with the town centre boundary included in Swadlincote Town Centre Vision and Strategy 2012. Although this boundary has not been adopted, it is considered to form a logical and sensible boundary for the purposes of this assessment. However, recommendations in relation to the town centre boundary and primary shopping area are provided in the future retail strategy and recommendations section of this report.



food market shares of 0.2% and 0.3% respectively. In addition, undefined villages in the district which provide small scale convenience goods offers attract a main food shopping market share of 0.7%. The survey found that there are no out-of-centre facilities which attract a main food shopping market share. In total, facilities in South Derbyshire (within the Study Area) attract a main food shopping market share of 51.3%, the remaining market share of main food shopping trips is attracted by facilities outside South Derbyshire (with the exception 0.7% which is attracted by facilities in South Derbyshire but outwith the Study Area).

**Table 4.4: Main Food Shopping Market Shares by Centre**

Address	A	B	C	D	E	F	G	H	Total
Swadlincote Town Centre	38.1%	35.5%	43.6%	4.2%	37.2%	3.2%	22.5%	4.5%	21.7%
Edge-of-Swadlincote Town Centre	53.7%	58.1%	33.7%	10.4%	40.4%	4.2%	23.6%	7.2%	28.4%
Melbourne Town Centre	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.2%
Local Centres	0.0%	0.0%	0.8%	0.0%	0.9%	0.0%	0.6%	0.7%	0.3%
Undefined Villages	0.0%	0.0%	0.0%	4.3%	1.0%	0.0%	0.0%	0.0%	0.7%
Out-of-Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total	91.9%	93.6%	78.0%	20.6%	79.5%	7.4%	46.7%	12.4%	51.3%

Source: WYG Table 3, Appendix 2

Note: Swadlincote Town Centre includes facilities within the town centre boundary as set out in the Swadlincote Town Centre Vision and Strategy 2012

- 4.25 Top up shopping is often undertaken close to home and, as expected, facilities in South Derbyshire claim a reasonable proportion of such shopping trips which originate in South Derbyshire. South Derbyshire claim 54.0% of all top up food shopping trips originating from within the Study Area. As we would expect, large food superstores are generally less able to attract top up food shopping trips from 'far and wide' (as some of them are able to do in respect of main food shopping), but still evidently help to meet this type of food shopping need.
- 4.26 The zones which are proximate to Swadlincote town centre, i.e. Zone A, B and C, retain a high proportion of top-up shopping trips which originate from within these zones. In Zones A and C, over eight in every ten top-up shopping trips which originate in these zones are undertaken in South Derbyshire, while in Zone C, over nine out of ten top-up shopping trips which originate in this zone are undertaken at facilities within South Derbyshire. There is a lower retention rate in Zone D, again due to the proximity of this zone to facilities in Derby, East Staffordshire and North West Leicestershire. Notwithstanding this, given the more localised pattern of top-up shopping trips, over half of such trips originating in this zone take place at facilities in South Derbyshire.



4.27 Overall, both the main food shopping and top up shopping market shares secured by zones within South Derbyshire is considered to be reasonably healthy and where 'leakage' to other destinations is apparent, these facilities are often reasonably well placed to meet such needs in a sustainable manner.

**Table 4.5: Principal Food Shopping Destinations Trip Analysis by Zone – Top-Up Food Shopping (%)**

Zone	Address	A	B	C	D	E	F	G	H	Total
	<b>South Derbyshire</b>									
B	Swadlincote town centre	7.0%	3.6%	5.0%	0.0%	0.9%	0.0%	0.0%	0.0%	2.1%
	Morrisons, Coppice Side	16.2%	13.7%	24.4%	0.0%	12.9%	0.0%	15.1%	0.8%	8.8%
	Aldi, Pipeworks	9.8%	10.0%	4.6%	1.1%	5.1%	0.0%	2.3%	1.3%	4.3%
	Sainsbury's, Civic Way	22.8%	20.5%	15.4%	0.7%	4.7%	5.3%	8.9%	0.0%	10.1%
	Sainsbury's Local, Glamorgan Way	4.8%	19.8%	0.0%	3.1%	8.5%	0.0%	0.0%	0.0%	5.2%
D	Co-operative Food, 2 Castle Way, Willington	1.4%	0.0%	0.0%	23.8%	0.0%	0.0%	0.0%	0.0%	3.5%
	<b>Total South Derbyshire</b>	<b>85.2%</b>	<b>91.2%</b>	<b>87.5%</b>	<b>57.8%</b>	<b>82.7%</b>	<b>6.5%</b>	<b>39.5%</b>	<b>2.1%</b>	<b>54.0%</b>
	<b>East Staffordshire</b>									
F	Co-operative Food, Church Hill Street, Winshill	0.0%	0.0%	0.0%	0.0%	0.0%	15.6%	0.0%	0.0%	3.2%
	Tesco Express, Best Avenue, Stapenhill	0.0%	0.0%	1.3%	2.5%	0.0%	12.6%	0.0%	0.0%	3.0%
	<b>North West Leicestershire</b>									
H	Co-operative Food, Derby Road, Ashby-de-la-Zouch	0.0%	0.0%	0.0%	3.5%	0.0%	0.0%	1.1%	32.8%	4.4%
	Tesco, Resolution Road, Ashby-de-la-Zouch	3.9%	0.7%	6.3%	3.0%	0.0%	1.1%	10.3%	23.8%	5.3%
	<b>Outside Study Area</b>									
	Tesco, St Peter's Bridge, Burton-upon-Trent	0.0%	0.0%	0.0%	0.0%	5.8%	13.8%	0.0%	0.0%	3.3%

Source: WYG Table 3, Appendix 2

4.28 Table 4.6 shows the top-up shopping market shares achieved by defined centres, edge-of-centre locations and out-of-centre locations, as well as undefined villages in South Derbyshire. The greatest market share is achieved by facilities on the edge of Swadlincote town centre, namely, Sainsbury's at Civic Way and facilities at the Pipeworks (Aldi and Iceland), which achieve a market share of 15.6%. Swadlincote town centre achieves a top-up shopping market share of 10.9%, which is largely attracted by the Morrisons foodstore, as well as other units in the town centre selling convenience goods. In total, facilities in and on the edge of Swadlincote town centre attract a top-up shopping market share of 26.5%. In combination, the local centres within South Derbyshire attract a top-up shopping market share of 15.2%. This is considerably higher than the market share attracted by local centres in relation to main food shopping and is a result of top-up shopping patterns generally being more localised. Similarly, undefined villages within South Derbyshire, which may include a small



convenience store, attract a combined top-up shopping market share of 7.8%. Melbourne town centre attracts a limited top-up shopping market share of 3.1% and due to the limited number of out-of-centre facilities in the District, the market share attracted by such facilities is just 0.9%.

**Table 4.6: Top-Up Shopping Market Shares by Centre**

Address	A	B	C	D	E	F	G	H	Total
Swadlincote Town Centre	23.2%	17.3%	29.5%	0.0%	13.8%	0.0%	15.1%	0.8%	10.9%
Edge-of-Swadlincote Town Centre	33.9%	31.6%	24.0%	1.8%	10.8%	6.5%	13.2%	1.3%	15.6%
Melbourne Town Centre	0.0%	0.0%	0.0%	21.9%	0.0%	0.0%	0.0%	0.0%	3.1%
Local Centres	25.5%	37.9%	31.2%	4.5%	15.2%	0.0%	11.2%	0.0%	15.2%
Undefined Villages	1.4%	0.0%	2.8%	26.1%	42.9%	0.0%	0.0%	0.0%	7.8%
Out-of-Centre	1.2%	4.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%
Total	85.2%	91.2%	87.5%	54.3%	82.7%	6.5%	39.5%	2.1%	54.0%

Source: WYG Table 3, Appendix 2

## Linked Trips

- 4.29 Respondents to the household survey were asked if they link their main food shopping trip with any other activity. A quarter (25.0%) of those visiting the Aldi store at The Pipeworks, 22.8% of those who last visited the Morrisons store at Coppice Side, 21.1% of those who last visited the Iceland at The Pipeworks and 12.9% of those who last visited the Sainsbury's store at Civic Way to undertake their main food shopping linked this trip with visiting another shopping or service facility (excludes linked trips to non retail or service facilities, for example, excludes linked trip to work, visit friends etc). Therefore, it is evident that of all the supermarkets located within or on the edge of Swadlincote town centre, the Aldi at The Pipeworks facilitated the most linked trips. The Sainsbury's at Civic Way facilities the least amount of linked trips, which is perhaps to be expected given this store is located further from the town centre boundary than The Pipeworks (where the Aldi and Iceland are located).
- 4.30 When respondents were asked where they undertake this linked trip, 93.1% who link a trip from the Morrisons at Coppice Side stated that they link the trip with Swadlincote town centre. This is the greatest proportion of linked trips to the town centre out of the supermarkets which are present in or on the edge of the town centre. This is perhaps unsurprising given the Morrisons store is located within the town centre, while the other stores are located in edge of centre positions. Notwithstanding this, 87.0% of those who link a trip with their main food shopping trip to Sainsbury's at Civic Way undertook this trip in Swadlincote town centre and 79.7% of those linking a trip with their main food



shopping trip to Aldi at The Pipeworks undertook this trip in Swadlincote town centre. Therefore, it is evident that where linked trips to other retail or service facilities are taking place, the most popular location for this linked trip from each supermarket is to Swadlincote town centre.

#### Conclusions in Respect of Convenience Goods Shopping Patterns

- 4.31 In considering convenience goods shopping patterns in the Study Area, it is of some relevance to compare the percentage of overall journeys attracted to the zones located in South Derbyshire with the percentage of the Study Area population that reside in these zones. In this regard, Experian MMG3 data indicates that the population of Zones A, B, C, D and E (which cover South Derbyshire) at 2015 is 69,640. The population of the zones in South Derbyshire equates to 62.1% of the overall 2015 Study Area population of 112,164. Accordingly, it might be expected – given that shoppers typically seek to use food shopping facilities close to home – that food retail facilities located in Zones A to E would gain a broadly similar market share of overall trips.
- 4.32 In this regard, the household survey indicates that those parts of the Study Area which are part of the South Derbyshire administrative area secure a market share of 51.3% of all main food shopping trips that originate within the Study Area. Accordingly, South Derbyshire secures fewer main food shopping trips than we might expect. However, this is a consequence of there being a number of large food superstores located outside the South Derbyshire administrative boundary but in close enough proximity to cater for the needs of its residents. Such stores include the Aldi, Sainsbury’s and Tesco stores in Burton-upon-Trent (within the East Staffordshire administrative boundary) and the Tesco and Aldi in Ashby-de-la-Zouch (within the North West Leicestershire administrative area), which are located within 10 kilometres of Swadlincote town centre, and the Asda in Sinfin district centre (in the Derby City administrative area) which is located 17km from Swadlincote town centre.
- 4.33 Clearly, the drawing of local authority boundaries is largely immaterial to customers making decisions about where to shop. Accordingly, given the proximity of large food superstores to the South Derbyshire boundary (which are accessible to the District’s residents), the market share secured by South Derbyshire is not considered to be a substantial problem and is considered to be reasonable. However, we do consider that – subject to the availability of appropriate locations to accommodate additional development – there may be potential for facilities in South Derbyshire to secure a slightly greater proportion of convenience goods expenditure which originates within Zone D. We note that permission has been granted for a foodstore at Chellaston fields, and although the opening of this foodstore is unlikely to have an impact on the market share of Swadlincote town centre, it will likely improve South Derbyshire’s market share, as the additional provision will reduce the need for residents to travel further afield to source convenience goods. In addition, there may be opportunities



to improve South Derbyshire's market share via qualitative improvements to the District's offer. For example, although Swadlincote currently accommodates two of the 'top four' supermarkets and two 'discount' supermarkets, there may be opportunities to improve the qualitative convenience goods offer of Swadlincote further via the introduction of an upmarket food retailer, such as M&S Simply Food or Waitrose.

- 4.34 In respect of top up food shopping, South Derbyshire secures a market share of 54.0% of all top-up food shopping trips that originate within the Study Area. Accordingly, the market share for this type of shopping trip is also below the proportion of the Study Area population which is accommodated within Zones A to E (South Derbyshire). This may be as a result of those residents who travel outside of South Derbyshire for employment undertaking their top-up shopping closer to their place of work rather than near their home. Notwithstanding this, the market share is considered to be reasonable. Although the market shares achieved by facilities in South Derbyshire are strong in Zones A, B, C and E, again there is scope for the market share to be achieved in Zone D.

#### Comparison Goods Shopping Patterns: Clothing

- 4.35 As Table 4.7 demonstrates, facilities within South Derbyshire attract a clothing and footwear goods market share of 13.7% from the Study Area. This means that more than eight out of ten trips to purchase clothing and footwear goods which originate within the Study Area are undertaken at facilities outside South Derbyshire. The most popular destination in the Study Area for such goods is Swadlincote town centre, which secures a market share of 10.9%. The second most popular destination in the Study Area, although outside South Derbyshire, is Ashby-de-la-Zouch town centre.
- 4.36 Burton-upon-Trent town centre is by far the most popular destination for clothing and footwear trips which originate from within the Study Area. More than one in four such trips (45.0%) for such goods are undertaken in Burton-upon-Trent town centre. More than half of shopping trips for clothing and footwear which originate in Zones A (58.3%), C (57.4%) and F (71.7%) take place in Burton-upon-Trent town centre. Other popular destinations include Derby city centre (16.0%), Ventura Retail Park in Tamworth (6.9%) and Tamworth town centre (3.4%).
- 4.37 It is clear that destinations which lie outside Swadlincote town centre, and indeed outside South Derbyshire, are a strong attraction for residents of South Derbyshire undertaking trips for clothing and footwear. Considering the performance of the areas of the Study Area located within South Derbyshire, facilities within South Derbyshire claim 13.7% of all shopping trips to purchase clothing and footwear which originate within the Study Area. Accordingly, the market share for such shopping



trips is considerable below the proportion of the Study Area population which is accommodated within the District (62.1%).

**Table 4.7: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Clothing and Footwear (%)**

Zone	Address	A	B	C	D	E	F	G	H	Total
	<b>South Derbyshire</b>									
B	Swadlincote town centre	17.5%	15.8%	16.1%	4.8%	18.4%	2.6%	12.1%	7.1%	10.9%
	Edge-of-Swadlincote Town Centre	1.9%	6.8%	2.1%	0.0%	4.6%	3.4%	0.9%	1.6%	2.8%
	<b>North West Leicestershire</b>									
H	Ashby-de-la-Zouch town centre	0.8%	0.0%	1.0%	2.3%	0.0%	2.4%	6.6%	20.0%	3.9%
OSA	<b>Outside Study Area</b>									
	<b>Derby City</b>									
	Derby city centre	11.6%	33.1%	13.5%	35.1%	6.7%	5.6%	7.1%	12.3%	16.0%
	<b>East Staffordshire</b>									
	Burton-upon-Trent town centre	58.3%	27.4%	57.4%	39.3%	42.2%	71.7%	27.2%	12.7%	45.0%
	<b>Tamworth</b>									
	Tamworth town centre	1.0%	0.0%	0.9%	0.0%	11.9%	2.3%	3.1%	11.0%	3.4%
Ventura Retail Park, Tamworth	1.2%	9.5%	1.8%	2.3%	7.3%	5.5%	27.4%	10.8%	6.9%	

Source: WYG Table 11, Appendix 2

Notes: Burton-upon-Trent includes Coopers Square Shopping Centre and The Octagon Shopping Centre

4.38 When looking solely at facilities within South Derbyshire district, Table 4.8 shows that Swadlincote town centre is the single most popular destination for clothes shopping in South Derbyshire, attracting 10.9% of all such trips which originate in the Study Area. The town centre secures more than one in every 10 trips to purchase clothing and footwear which originate within Zones A, B, C, E and G. Facilities located on the edge of Swadlincote town centre comprise the second most popular destinations in South Derbyshire for clothing and footwear shopping, with Sainsbury's securing 1.6% of such trips and The Pipeworks securing 1.2% of such trips. The household survey found no trips for clothing and footwear to be attracted by Melbourne town centre, villages or out-of-centre destinations.





**Table 4.8: Clothing and Footwear Market Shares by Centre (%)**

Address	A	B	C	D	E	F	G	H	Total
Swadlincote Town Centre	17.5%	15.8%	16.1%	4.8%	18.4%	2.6%	12.1%	7.1%	10.9%
Edge-of-Swadlincote Town Centre	1.9%	6.8%	2.1%	0.0%	4.6%	3.4%	0.9%	1.6%	2.8%
Melbourne Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Centres	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.1%
Undefined Villages	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Out-of-Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total South Derbyshire	19.4%	22.5%	18.2%	4.8%	23.0%	6.0%	13.0%	9.3%	13.7%

Source: WYG Table 9, Appendix 2

#### Comparison Goods Shopping Patterns: Books, CDs and DVDs

- 4.39 Table 4.9 identifies the shopping patterns relating to the purchase of books, CDs and DVDs. Swadlincote town centre is the single most popular destination for such purchases within the Study Area, attracting nearly a fifth (18.4%) of all such trips which originate within the Study Area. Facilities on the edge of Swadlincote town centre attract a further 2.3% of such trips. More than four out of every ten trips to purchase books, CDs and DVDs which originate with Zones A and B are undertaken in Swadlincote town centre. The second most popular destination in the Study Area for trips to purchase books, CDs and DVDs is Ashby-de-la-Zouch, which attracts 13.2% of such trips.
- 4.40 Overall, the most popular destination for trips to purchase books, CDs and DVDs which originate within the Study Area is Burton-upon-Trent town centre. The town centre attracts 43.9% of trips for such goods which originate within the Study Area. Derby city centre also attracts a considerable proportion of trips (11.4%) from the Study Area for books, CDs and DVDs.
- 4.41 In respect of the performance of the South Derbyshire administrative area, Table 4.9 identifies that facilities within the District claim 21.6% of all shopping trips to purchase book, CDs and DVDs which originate within the Study Area, which is considerable below the proportion of the Study Area population which reside within the South Derbyshire administrative area.



**Table 4.9: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Books, CDs, DVDs and so on (%)**

Zone	Address	A	B	C	D	E	F	G	H	Total
	<b>South Derbyshire</b>									
B	Swadlincote town centre	45.7%	45.4%	22.1%	0.0%	25.5%	2.4%	16.4%	1.8%	18.4%
	Edge-of-Swadlincote Town Centre	3.5%	0.0%	2.7%	0.0%	0.0%	5.2%	3.8%	0.0%	2.3%
	<b>North West Leicestershire</b>									
H	Ashby-de-la-Zouch town centre	0.0%	1.5%	18.4%	19.9%	0.0%	0.0%	24.4%	63.9%	13.2%
	<b>Outside Study Area</b>									
	<b>Derby City</b>									
OSA	Derby city centre	10.6%	17.0%	0.0%	31.0%	7.5%	9.6%	4.8%	4.2%	11.4%
	<b>East Staffordshire</b>									
	Burton-upon-Trent town centre	36.5%	28.0%	48.7%	35.2%	45.3%	73.7%	41.9%	11.4%	43.9%

Source: WYG Table 11, Appendix 2

Notes: Burton-upon-Trent includes Burton Place, Coopers Square Shopping Centre and The Octagon Shopping Centre

4.42 Table 4.10 shows the proportion of trips for books, CDs and DVDs which originate in the Study Area which take place in South Derbyshire. As stated above, Swadlincote town centre is the most popular destination (18.4%) for the purchase of such goods within the Study Area, with facilities on the edge of Swadlincote town centre attracting a further 2.3% of trips. Local centres and villages within the District attract only 0.8% and 0.1% respectively of trips for such goods, as would be expected given their function in catering for the day-to-day convenience needs of a localised population.

**Table 4.10: Books, CDs, DVDs Market Shares by Centre (%)**

Address	A	B	C	D	E	F	G	H	Total
Swadlincote Town Centre	45.7%	45.4%	22.1%	0.0%	25.5%	2.4%	16.4%	1.8%	18.4%
Edge-of-Swadlincote Town Centre	3.5%	0.0%	2.7%	0.0%	0.0%	5.2%	3.8%	0.0%	2.3%
Melbourne Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Centres	0.0%	3.7%	0.0%	0.0%	3.1%	0.0%	0.0%	0.0%	0.8%
Undefined Villages	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%	0.0%	0.1%
Out-of-Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total South Derbyshire	49.3%	49.0%	24.8%	0.0%	28.6%	7.6%	24.0%	1.8%	21.6%

Source: WYG Table 9, Appendix 2

#### Comparison Goods Shopping Patterns: Small Household Goods

4.43 Table 4.11 below identifies that Swadlincote town centre attracts 21.5% of shopping trips to purchase small household goods (including such items as tableware, household utensils, jewellery, watches and appliances for personal care) which originate from within the Study Area. The town centre secures



more than three in every 10 trips to purchase small household goods which originate within Zones A, B and E. Facilities on the edge of Swadlincote town centre attract a further 5.5% of trips for small household goods.

- 4.44 The second most popular destination within the Study Area, but outside South Derbyshire to purchase small household goods is Ashby-de-la-Zouch town centre, which secures 11.4% of all such shopping trips which originate within the Study Area. Ashby-de-la-Zouch secures more than half of all trips for small household goods which originate with Zone H (in which the town centre is located).
- 4.45 Overall, the most popular destination for trips to purchase small household goods which originate within the Study Area is Burton-upon-Trent town centre, which is located outside the Study Area, within the East Staffordshire administrative area. The town centre attracts nearly a third (30.7%) of trips for such goods which originate within the Study Area. Other popular destinations for such purchases which originate within the Study Area are Ventura Retail Park (4.9%) and Derby city centre (3.9%).
- 4.46 In terms of the performance of the South Derbyshire area, facilities within South Derbyshire claim 27.0% of all shopping trips to purchase small household goods which originate within the Study Area, which is considerably below the proportion of the Study Area population (62.1%) residing within the South Derbyshire area of the Study Area.

**Table 4.11: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Small Household Goods (%)**

Zone	Address	A	B	C	D	E	F	G	H	Total
	<b>South Derbyshire</b>									
B	Swadlincote town centre	41.3%	33.8%	29.3%	8.6%	35.6%	5.6%	8.1%	6.6%	21.5%
	Edge-of-Swadlincote Town Centre	6.7%	11.4%	4.1%	5.4%	4.8%	4.8%	1.1%	1.7%	5.5%
	<b>North West Leicestershire</b>									
H	Ashby-de-la-Zouch town centre	3.5%	4.7%	9.5%	5.5%	4.8%	0.0%	15.5%	50.8%	11.4%
	<b>Outside Study Area</b>									
	<b>Derby City</b>									
	Derby city centre	1.8%	1.5%	1.7%	17.2%	1.4%	2.0%	6.3%	3.7%	3.9%
	<b>East Staffordshire</b>									
OSA	Burton-upon-Trent town centre	36.9%	20.8%	41.0%	25.4%	27.8%	58.4%	19.0%	8.1%	30.7%
	<b>Tamworth</b>									
	Ventura Retail Park	2.1%	0.0%	1.7%	2.7%	6.8%	0.0%	28.6%	7.0%	4.9%

Source: WYG Table 13, Appendix 2



4.47 Table 4.12 shows the market share of small household goods claimed by facilities within the Study Area. In combination, facilities within and on the edge of Swadlincote town centre achieve a market share of 27.0% for such goods. This equals the market share which is achieved by facilities in South Derbyshire as a whole i.e. the town centre and edge of centre facilities are the only destinations within the South Derbyshire area which attract trips for small household goods. Given the rural nature of the remainder of the District and as local centres and villages largely cater for day-to-day convenience goods needs, it is to be expected that Swadlincote is the main attractor for small household goods trips within South Derbyshire.

**Table 4.12: Small Household Goods Market Shares by Centre (%)**

Address	A	B	C	D	E	F	G	H	Total
Swadlincote Town Centre	41.3%	33.8%	29.3%	8.6%	35.6%	5.6%	8.1%	6.6%	21.5%
Edge-of-Swadlincote Town Centre	6.7%	11.4%	4.1%	5.4%	4.8%	4.8%	1.1%	1.7%	5.5%
Melbourne Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Centres	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Undefined Villages	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Out-of-Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total South Derbyshire	48.0%	45.1%	33.4%	14.0%	40.4%	10.4%	9.2%	8.3%	27.0%

Source: WYG Table 13, Appendix 2

[Comparison Goods Shopping Patterns: Toys, Games, Bicycles and Recreation Goods](#)

4.48 Table 4.13 identifies that Swadlincote town centre secures 19.2% of all shopping trips to purchase toys, games, bicycles and similar items which originate within the Study Area. Facilities on the edge of Swadlincote town centre attract a further 11.3% of trips for such goods. In combination, facilities in and on the edge of the town centre attract over four out of every ten trips for toys, games, bicycles and similar items which originate in Zones A, B and C, which cover the town centre and surrounding area. The second most popular destination for the purchase of such goods within the Study Area, but outside the South Derbyshire administrative area is Ashby-de-la-Zouch, which attracts 5.1% of trips for toys, games, bicycles and other similar items.

4.49 Again, overall, Burton-upon-Trent town centre is the most popular destination (34.9%) for trips to purchase toys, games, bicycles and other such items which originate in the Study Area. Nine out of every ten trips which originate in Zone F are undertaken in Burton-upon-Trent town centre. However, this is to be expected given this zone is located within East Staffordshire and covers the area directly to the east of the town centre. Other popular destinations for trips to purchase toys, games, bicycles



and similar items, which are located outside South Derbyshire and the Study Area, include Derby city centre (8.8%) and Ventura Retail Park in Tamworth (3.8%).

4.50 In respect of the performance of the South Derbyshire area, facilities within South Derbyshire and the Study Area currently claim 30.6% of all shopping trips to purchase toys, games, bicycles and similar items which originate within the Study Area, which again is considerably below the proportion of the Study Area population located within the South Derbyshire administrative area.

**Table 4.13: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Toys, Games, Bicycles and Recreation Goods (%)**

Zone	Address	A	B	C	D	E	F	G	H	Total
	<b>South Derbyshire</b>									
B	Swadlincote town centre	31.7%	22.5%	46.5%	4.2%	32.9%	0.0%	20.0%	2.2%	19.2%
	Edge-of-Swadlincote Town Centre	10.7%	43.9%	2.3%	3.8%	1.6%	0.0%	6.1%	0.0%	11.3%
	<b>North West Leicestershire</b>									
H	Ashby-de-la-Zouch town centre	2.3%	0.9%	5.7%	0.0%	0.0%	0.0%	10.1%	32.4%	5.1%
	<b>Outside Study Area</b>									
	<b>Derby City</b>									
OSA	Derby city centre	19.5%	3.8%	10.4%	22.5%	4.2%	4.7%	2.2%	2.9%	8.8%
	<b>East Staffordshire</b>									
	Burton-upon-Trent town centre	27.4%	17.1%	13.7%	21.7%	41.6%	90.2%	25.3%	15.3%	34.9%
	<b>Tamworth</b>									
	Ventura Retail Park	2.9%	1.0%	0.0%	0.0%	1.6%	0.0%	29.0%	9.1%	3.8%

Source: WYG Table 15, Appendix 2

4.51 Table 4.14 shows the proportion of trips for toys and other recreational goods which area claimed by facilities within South Derbyshire. The vast majority of trips which take place in South Derbyshire are undertaken within or on the edge of Swadlincote town centre. Only 0.1% of such trips are undertaken within the local centres in South Derbyshire, which again is to be expected given the role of such centres is to cater for the day-to-day retail and service needs of a localised catchment.



**Table 4.14: Toys, Recreational Goods Market Shares by Centre (%)**

Address	A	B	C	D	E	F	G	H	Total
Swadlincote Town Centre	31.7%	22.5%	46.5%	4.2%	32.9%	0.0%	20.0%	2.2%	19.2%
Edge-of-Swadlincote Town Centre	10.7%	43.9%	2.3%	3.8%	1.6%	0.0%	6.1%	0.0%	11.3%
Melbourne Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Centres	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.7%	0.0%	0.1%
Undefined Villages	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Out-of-Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total South Derbyshire	42.4%	66.4%	48.9%	8.0%	34.6%	0.0%	27.8%	2.2%	30.6%

Source: WYG Table 15, Appendix 2

Comparison Goods Shopping Patterns: Chemist Goods

- 4.52 Table 4.15 identifies that Swadlincote town centre secures 28.3% of all shopping trips to purchase chemist goods. The town centre secures more than five in every 10 trips to purchase chemist goods which originate within three of the eight zones, namely Zones A, B and E. In addition, facilities located on the edge of Swadlincote town centre attract 3.8% of trips for chemist goods which originate within the Study Area.
- 4.53 The second most popular destination within the Study Area, but outside South Derbyshire, for chemist goods purchases is Ashby-de-la-Zouch town centre which attracts 17.9% of trips which originate in the Study Area for such goods.
- 4.54 Chemist goods are typically purchased in a similar manner to convenience items, with a large proportion of such trips taking place close to home (due principally to the similar nature of many such goods which reduces the propensity to 'shop around'). Accordingly, a wide range of facilities attract such shopping journeys, including defined centres, but also food superstores and standalone pharmacists. In this context, the local centres and villages within South Derbyshire attract a slightly greater market share of chemist goods when compared to most other non-bulky comparison goods categories. Woodville local centre, Newhall local centre, Willington village and Church Gresley local centre attract market shares of 3.8%, 2.7%, 2.1% and 2.0% respectively.
- 4.55 Again, overall, the second most popular destination for the purchase of chemist goods which originate within the Study Area is Burton-upon-Trent town centre, which attracts 22.1% of such trips. Other destinations outside the Study Area which attract a significant proportion of trips for chemist goods include Derby city centre (3.7%) and Ventura Retail Park in Tamworth.

4.56 In respect of the performance of the South Derbyshire authority area, Table 4.16 identifies that facilities within South Derbyshire claim 44.9% of all shopping trips to purchase chemist goods which originate within the Study Area. Although the proportion is substantially below the proportion of Study Area population which reside within the South Derbyshire area of the Study Area, it is greater than the proportion for the other comparison goods categories.

**Table 4.15: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Chemist Goods (%)**

Zone	Address	A	B	C	D	E	F	G	H	Total
	<b>South Derbyshire</b>									
A	Newhall local centre	17.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.7
B	Swadlincote town centre	62.3	53.3	29.9	4.6	50.5	3.4	30.8	1.6	28.3
	Edge-of-Swadlincote Town Centre	5.6	14.4	1.7	2.1	0.8	0.6	1.5	0.8	3.8
	Church Gresley local centre	0.0	9.8	2.2	0.0	3.0	0.0	0.0	0.0	2.0
C	Woodville local centre	1.1	0.0	40.3	1.1	0.0	0.0	0.7	0.0	3.8
D	Willington	0.0	0.0	0.0	15.9	0.0	0.0	0.0	0.0	2.1
	<b>North West Leicestershire</b>									
H	Ashby-de-la-Zouch town centre	1.1	0.7	13.4	14.7	3.8	0.0	31.8	95.0	17.9%
OSA	<b>Outside Study Area</b>									
	<b>Derby City</b>									
	Derby city centre	0.0	3.3	0.0	20.8	0.0	2.4	0.0	0.0	3.7%
	<b>East Staffordshire</b>									
	Burton-upon-Trent town centre	10.9	9.1	11.6	15.6	26.7	69.3	3.0	0.0	22.1%
	<b>Tamworth</b>									
	Ventura Retail Park	0.0	7.4	0.0	0.0	0.9	0.0	13.5	1.0	2.2%

Source: WYG Table 17, Appendix 2

4.57 In relation to facilities within South Derbyshire, Table 4.16 shows that in combination 32.1% of trips take place in facilities in Swadlincote town centre and on the edge of the centre. The next most popular destination for chemist goods is the local centres, which in combination attract 8.5% of such trips. Undefined villages attract 3.0% of trips for chemist goods and Melbourne town centre attracts 1.4% of such trips.



**Table 4.16: Chemist Goods Market Shares by Centre (%)**

Address	A	B	C	D	E	F	G	H	Total
Swadlincote Town Centre	62.3%	53.3%	29.9%	4.6%	50.5%	3.4%	30.8%	1.6%	28.3%
Edge-of-Swadlincote Town Centre	5.6%	14.4%	1.7%	2.1%	0.8%	0.6%	1.5%	0.8%	3.8%
Melbourne Town Centre	0.0%	0.0%	0.0%	10.6%	0.0%	0.0%	0.0%	0.0%	1.4%
Local Centres	19.0%	9.8%	42.5%	1.1%	3.0%	0.0%	0.7%	0.0%	8.5%
Undefined Villages	0.0%	0.0%	0.8%	15.9%	7.4%	0.0%	0.8%	0.0%	3.0%
Out-of-Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total South Derbyshire	87.0%	77.5%	75.0%	34.2%	61.8%	4.0%	33.8%	2.4%	44.9%

Source: WYG Table 17, Appendix 2

Comparison Goods Shopping Patterns: Electrical

- 4.58 Table 4.17 identifies that Swadlincote town centre secures 15.9% of all shopping trips for electrical goods, making the town centre the most popular destination within South Derbyshire, and indeed within the Study Area as a whole, for such purchases. In addition, facilities on the edge of Swadlincote town centre attract 7.1% of such trips. In combination, facilities within and on the edge of Swadlincote town centre attract three out of every 10 trips for electrical goods which originate within Zones A, B, C and E of the Study Area. The second most popular destination in the Study Area for the purchase of electrical goods is Ashby-de-la-Zouch town centre which attracts 9.7% of trips for electrical goods which originate within the Study Area.
- 4.59 Outside the Study Area, Burton-upon-Trent is the most popular destination for the purchase of electrical goods. The town centre attracts a similar proportion of trips (15.7%) to Swadlincote town centre (15.9%). Centrum East Retail Park in Burton-upon-Trent also secures a considerable proportion of trips (13.4%) which originate within the Study Area. Other popular destinations for the purchase of electrical goods outside the Study Area include Wellington Road Retail Park in Burton (7.9%), Ventura Retail Park in Tamworth (6.4%), Derby city centre (2.8%) and Kingsway Retail Park in Derby (2.6%).
- 4.60 In respect of the performance of the South Derbyshire authority area, Table 4.18 identifies that facilities within South Derbyshire claim 24.8% of all shopping trips to purchase electrical goods which originate within the Study Area.



**Table 4.17: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Electrical Goods (%)**

Zone	Address	A	B	C	D	E	F	G	H	Total
	<b>South Derbyshire</b>									
B	Swadlincote town centre	33.9%	22.4%	32.1%	7.1%	29.5%	0.0%	14.6%	4.6%	15.9%
	Edge-of-Swadlincote Town Centre	13.6%	9.5%	3.7%	3.2%	3.3%	8.6%	4.8%	2.9%	7.1%
	<b>North West Leicestershire</b>									
H	Ashby-de-la-Zouch town centre	1.9%	0.7%	11.8%	6.6%	3.7%	0.0%	9.8%	59.6%	9.7%
	<b>Outside Study Area</b>									
	<b>Derby City</b>									
	Derby city centre	0.0%	0.0%	2.1%	19.4%	5.7%	0.0%	0.0%	0.0%	2.8%
	Kingsway Retail Park, Derby	0.0%	2.9%	0.0%	18.8%	0.0%	0.0%	1.4%	0.0%	2.6%
	<b>East Staffordshire</b>									
OSA	Burton-upon-Trent town centre	15.0%	18.6%	7.0%	10.3%	23.6%	25.8%	3.5%	3.8%	15.7%
	Centrum East Retail Park, Burton-upon-Trent	20.2%	16.4%	5.1%	2.0%	11.8%	24.1%	7.5%	0.0%	13.4%
	Wellington Road Retail Park, Burton-upon-Trent	3.4%	6.7%	2.1%	2.0%	7.2%	22.2%	2.0%	0.0%	7.9%
	<b>Tamworth</b>									
	Ventura Retail Park	1.5%	8.1%	8.3%	2.0%	2.5%	0.0%	35.0%	9.3%	6.4%

Source: WYG Table 19, Appendix 2

4.61 Table 4.18 shows the proportion of electrical goods shopping trips attracted by facilities within the South Derbyshire area of the Study Area. As set out above, in combination facilities in and on the edge of Swadlincote town centre attract 23.0% of such trips. The only other destination within South Derbyshire which attracts a proportion of trips for electrical goods is Melbourne town centre, which attracts 1.8% of such trips.

**Table 4.18: Electrical Goods Market Shares by Centre (%)**

Address	A	B	C	D	E	F	G	H	Total
Swadlincote Town Centre	33.9%	22.4%	32.1%	7.1%	29.5%	0.0%	14.6%	4.6%	15.9%
Edge-of-Swadlincote Town Centre	13.6%	9.5%	3.7%	3.2%	3.3%	8.6%	4.8%	2.9%	7.1%
Melbourne Town Centre	0.0%	0.0%	1.6%	15.5%	0.0%	0.0%	0.0%	0.0%	1.8%
Local Centres	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Undefined Villages	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Out-of-Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total South Derbyshire	47.5%	32.0%	37.5%	25.8%	32.8%	8.6%	19.4%	7.5%	24.8%

Source: WYG Table 19, Appendix 2





Comparison Goods Shopping Patterns: DIY

- 4.62 The most popular destination for DIY shopping trips which originate within the Study Area is the Wellington Road Retail Park area in Burton-upon-Trent, which lies outside the Study Area. The Wellington Road Retail Park area attracts over half (53.9%) of such trips. The majority of these trips are attracted by the B&Q store, which attracts 85.9% of trips to the Wellington Road Retail Park area. The B&Q store at Osmaston Park in Derby attracts a further 4.6% of trips.
- 4.63 Within the Study Area, the Wickes store on Nottingham Road in Ashby-de-la-Zouch secures the greatest market share of trips (13.9%) of any destination within the Study Area.
- 4.64 Facilities which are located within and on the edge of Swadlincote town centre attract 9.4% of trips for DIY goods. Zone B is the only zone where over two out of every 10 trips for such goods are undertaken at facilities in or on the edge of the town centre. Woodville local centre and Maseys independent DIY store which is located outside but in proximity to Woodville local centre, in combination attract 3.9% of trips for DIY goods.
- 4.65 With regard to the performance of the South Derbyshire authority area, Table 4.20 identifies that facilities within South Derbyshire area claim 13.5% of all shopping trips to purchase DIY goods which originate within the Study Area. This is the lowest market share achieved out of the different comparison goods categories.

**Table 4.19: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – DIY Goods (%)**

Zone	Address	A	B	C	D	E	F	G	H	Total
	<b>South Derbyshire</b>									
B	Swadlincote town centre	18.0%	21.4%	17.6%	3.5%	9.9%	0.8%	2.1%	0.0%	9.2%
	Edge-of-Swadlincote Town Centre	0.0%	0.5%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
C	Woodville Local Centre/Maseys, Woodville	2.9%	5.2%	15.3%	0.0%	2.0%	0.0%	16.4%	0.8%	3.9%
	<b>North West Leicestershire</b>									
H	Wickes, Nottingham Road, Ashby-de-la-Zouch	1.6%	6.2%	12.5%	18.5%	2.2%	0.0%	27.3%	59.6%	13.9%
	<b>Outside Study Area</b>									
	<b>Derby City</b>									
OSA	B&Q, Osmaston Park, Derby	0.0%	1.7%	3.1%	30.4%	0.0%	0.0%	0.0%	1.2%	4.6%
	<b>East Staffordshire</b>									
	Wellington Road Retail Park, Burton-upon-Trent	74.9%	59.8%	38.5%	24.0%	67.7%	88.6%	14.9%	16.4%	53.9%

Source: WYG Table 21, Appendix 2



4.66 Table 4.20 identifies the market share of trips for DIY goods attracted by facilities within the South Derbyshire area of the Study Area. As we have set out above, in combination facilities in and on the edge of Swadlincote town centre attract 9.4% of trips for such goods. In combination, the local centres within the District attract 2.4% of all such trips and undefined villages attract 0.1% of trips. Out-of-centre facilities in South Derbyshire attract 1.6% of trips for DIY goods in South Derbyshire, which is as a result of Masseys on Swadlincote Road, which attracts 1.6% of such trips.

**Table 4.20: DIY Goods Market Shares by Centre (%)**

Address	A	B	C	D	E	F	G	H	Total
Swadlincote Town Centre	18.0%	21.4%	17.6%	3.5%	9.9%	0.8%	2.1%	0.0%	9.2%
Edge-of-Swadlincote Town Centre	0.0%	0.5%	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Melbourne Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Local Centres	2.9%	0.7%	14.0%	0.0%	2.0%	0.0%	7.8%	0.8%	2.4%
Undefined Villages	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.1%
Out-of-Centre	0.0%	5.2%	1.3%	0.0%	0.0%	0.0%	8.7%	0.0%	1.6%
Total South Derbyshire	20.9%	27.8%	34.2%	4.3%	11.8%	0.8%	18.6%	0.8%	13.5%

Source: WYG Table 21, Appendix 2

[Comparison Goods Shopping Patterns: Garden Goods](#)

4.67 The most popular destination for shopping trips for garden goods which originate within the Study Area is Newhall local centre in Zone A (14.2%), which includes Garden King Garden Market (12.6%) and Blooming Marvels Garden Centre (0.1%), as well as the local shops (1.5%). Swadlincote town centre attracts 12.7% of trips for garden goods, with facilities on the edge of Swadlincote town centre attracting a further 2.1% of such goods. More than two out of every 10 garden goods trips which originate in Zones A, B, C and E are undertaken at facilities in or on the edge of the town centre. The third most popular destination within the Study Area to undertake garden goods shopping is Planters at Bretby near Burton-upon-Trent, which attracts 12.1% of trips.

4.68 Overall, the most popular destination for garden goods trips is the Wellington Road Retail Park area in Burton-upon-Trent (18.8%), which is located outside the Study Area. This figure includes the B&Q store which is located opposite the retail park and attracts 16.0% of such trips. Other destinations outside the Study Area which attract a notable proportion of garden goods trips include Burton-upon-Trent town centre (6.7%) and Byrkley Garden Centre in Burton-upon-Trent (2.8%).



4.69 With regard to the performance of the South Derbyshire authority area, Table 4.22 identifies that facilities within South Derbyshire area claim 49.8% of all shopping trips to purchase DIY goods which originate within the Study Area, which is the highest proportion claimed by South Derbyshire for any of the comparison goods categories.

**Table 4.21: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Gardening Goods (%)**

Zone	Address	A	B	C	D	E	F	G	H	Total
	<b>South Derbyshire</b>									
A	Newhall local centre (including Garden King Garden Market and Blooming Marvels)	30.1%	27.5%	14.0%	0.0%	25.0%	3.6%	18.3%	3.0%	14.2%
B	Swadlincote town centre	26.4%	23.8%	26.5%	2.8%	18.5%	1.5%	5.3%	3.6%	12.7%
	Edge-of-Swadlincote Town Centre	1.2%	7.1%	2.6%	1.3%	2.7%	0.0%	0.0%	1.8%	2.1%
C	Woodville Local Centre/Masseys, Woodville	0.0%	5.0%	12.1%	1.3%	1.3%	0.0%	4.5%	1.7%	2.5%
D	Planters at Bretby, Bretby Lane, Burton-upon-Trent	12.8%	8.3%	16.5%	13.0%	2.9%	15.7%	8.5%	14.4%	12.1%
	Wyevale at Findern Garden Centre, Burton Road, Derby	0.0%	1.4%	0.0%	9.1%	0.0%	3.8%	0.0%	0.0%	2.2%
	<b>North West Leicestershire</b>									
H	Wickes, Nottingham Road, Ashby-de-la-Zouch	0.0%	0.0%	0.0%	3.7%	0.0%	0.0%	12.0%	5.0%	2.0%
OSA	<b>Outside Study Area</b>									
	<b>East Staffordshire</b>									
	Wellington Road Retail Park, Burton-upon-Trent	22.9%	18.0%	15.0%	6.4%	9.3%	42.5%	4.7%	8.6%	18.8%
	Burton-upon-Trent town centre	3.2%	2.4%	2.3%	2.5%	20.7%	17.2%	0.0%	1.5%	6.7%
	Byrkley Garden Centre, Burton-upon-Trent	0.0%	2.0%	1.1%	2.6%	0.0%	9.3%	0.8%	1.0%	2.8%

Source: WYG Table 23, Appendix 2

4.70 Table 4.22 shows the proportion of garden goods which are attracted by facilities within the South Derbyshire area of the Study Area. As stated above, facilities which are located in or on the edge of Swadlincote town centre, in combination, attract 14.8% of such trips. Out-of-centre locations in South Derbyshire attract the greatest proportion of garden goods shopping trips (17.1%). This is largely as a result of the considerable proportion of trips attracted by Planters on Bretby Lane near Burton-upon-Trent. The local centres in South Derbyshire attract 16.0% of garden goods trips, which is mainly as a result of the substantial proportion of trips attracted by Garden King Garden Centre in Newhall local centre. Melbourne town centre attracts 1.0% of garden goods trips and undefined villages attract 1.0% of such trips.



**Table 4.22: Garden Goods Market Shares by Centre (%)**

Address	A	B	C	D	E	F	G	H	Total
Swadlincote Town Centre	26.4%	23.8%	26.5%	2.8%	18.5%	1.5%	5.3%	3.6%	12.7%
Edge-of-Swadlincote Town Centre	1.2%	7.1%	2.6%	1.3%	2.7%	0.0%	0.0%	1.8%	2.1%
Melbourne Town Centre	0.0%	0.0%	0.0%	1.1%	0.0%	0.0%	0.9%	5.5%	1.0%
Local Centres	30.1%	30.8%	21.9%	1.3%	26.3%	3.6%	21.6%	3.6%	16.0%
Undefined Villages	0.0%	0.0%	1.1%	4.5%	4.0%	0.0%	0.0%	0.0%	1.0%
Out-of-Centre	13.8%	13.1%	20.8%	23.4%	13.1%	21.8%	10.7%	15.4%	17.1%
Total South Derbyshire	71.4%	74.8%	72.8%	34.5%	64.5%	26.9%	38.6%	30.0%	49.8%

Source: WYG Table 23, Appendix 2

### Comparison Goods Shopping Patterns: Furniture Goods

- 4.71 Swadlincote town centre attracts 16.0% of furniture goods shopping trips which originate within the Study Area and is the most popular destination for such trips. Facilities which are located on the edge of the town centre attract a further 0.4% of furniture goods shopping trips. More than three in every 10 furniture goods shopping trips which originate in Zones B and C are undertaken in Swadlincote town centre. Facilities in Castle Gresley attract 5.2% of furniture goods shopping trips, with a further 5.1% of trips attracted by Newhall local centre and 4.8% attracted by Church Gresley local centre.
- 4.72 Outside the Study Area, Burton-upon-Trent town centre is the most popular destination for furniture goods trips. The survey indicates that Burton-upon-Trent town centre attracts a lesser proportion of such trips than are attracted by Swadlincote town centre, which is perhaps a little unexpected given the relative size and offer of the centres. However, in addition, the Wellington Road Retail Park area in Burton-upon-Trent attracts a DIY market share of 6.8%. Other popular destinations outside the Study Area include Ventura Retail Park in Tamworth (4.6%) and Measham in North West Leicestershire (3.5%).
- 4.73 With regard to the performance of the South Derbyshire authority area, Table 4.24 identifies that facilities within South Derbyshire area claim a third (33.3%) of all shopping trips to purchase furniture goods which originate within the Study Area.



**Table 4.23: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Furniture Goods (%)**

Zone	Address	A	B	C	D	E	F	G	H	Total
	<b>South Derbyshire</b>									
A	Newhall local centre	24.5%	2.1%	3.9%	0.0%	3.2%	0.0%	7.9%	1.7%	5.1%
B	Swadlincote town centre	20.7%	31.4%	32.3%	4.4%	17.4%	4.9%	14.8%	5.9%	16.0%
	Edge-of-Swadlincote Town Centre	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	1.0%	1.2%	0.4%
	Castle Gresley	3.7%	7.7%	10.8%	3.2%	1.7%	4.8%	4.9%	3.8%	5.2%
	Church Gresley local centre	5.3%	2.9%	6.6%	1.6%	17.1%	3.5%	9.0%	0.0%	4.8%
	<b>North West Leicestershire</b>									
H	Ashby-de-la-Zouch	0.0%	0.0%	0.0%	2.1%	1.7%	0.0%	1.7%	45.5%	6.5%
OSA	<b>Outside Study Area</b>									
	<b>Derby City</b>									
	Derby city centre	2.1%	0.7%	0.0%	15.9%	5.8%	2.8%	0.9%	0.0%	3.5%
	<b>East Staffordshire</b>									
	Wellington Road Retail Park, Burton-upon-Trent	4.0%	3.4%	2.9%	1.9%	1.5%	27.7%	0.0%	1.4%	6.8%
	Burton-upon-Trent town centre	25.7%	10.7%	8.8%	11.8%	13.9%	29.8%	10.6%	1.0%	14.9%
	<b>North West Leicestershire</b>									
	Measham	1.8%	2.8%	6.4%	0.0%	5.3%	4.3%	10.6%	0.0%	3.5%
	<b>Tamworth</b>									
	Ventura Retail Park, Tamworth	1.6%	10.7%	3.2%	0.0%	0.0%	0.0%	6.7%	12.8%	4.6%

Source: WYG Table 23, Appendix 2

4.74 Table 4.24 shows the proportion of furniture goods which are attracted by facilities within the South Derbyshire area of the Study Area. As stated above, facilities which are located in or on the edge of Swadlincote town centre, in combination, attract 16.4% of such trips. The local centres within the District are the next most popular destination for furniture goods shopping trips, attracting 10.4% of such trips. Undefined villages within the District attract a further 5.2% of such trips and Melbourne town centre attracts 1.2% of furniture goods shopping trips. Out-of-centre locations in South Derbyshire attract just 0.1% of furniture goods shopping trips.



**Table 4.24: Furniture Goods Market Shares by Centre (%)**

Address	A	B	C	D	E	F	G	H	Total
Swadlincote Town Centre	20.7%	31.4%	32.3%	4.4%	17.4%	4.9%	14.8%	5.9%	16.0%
Edge-of-Swadlincote Town Centre	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	1.0%	1.2%	0.4%
Melbourne Town Centre	0.0%	0.0%	0.0%	9.5%	0.0%	0.0%	0.0%	0.0%	1.2%
Local Centres	29.8%	5.8%	11.6%	1.6%	20.3%	3.5%	18.0%	3.1%	10.4%
Undefined Villages	3.7%	7.7%	10.8%	3.2%	1.7%	4.8%	4.9%	3.8%	5.2%
Out-of-Centre	0.0%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
Total South Derbyshire	54.2%	45.6%	56.1%	18.7%	39.3%	13.2%	38.7%	14.0%	33.3%

Source: WYG Table 25, Appendix 2

### Conclusions in Respect of Comparison Goods Shopping Patterns

- 4.75 Once again, in considering shopping patterns in the Study Area, it is of some relevance to compare the percentage of overall journeys which are undertaken within the South Derbyshire area of the Study Area with the percentage of the Study Area population that resides in South Derbyshire. In this regard, the population of South Derbyshire equates to 62.1% of the overall Study Area population. We appreciate that Swadlincote town centre is relatively modest in size compared to other town and city centres which are located in close proximity to Swadlincote town centre and South Derbyshire. In particular, Burton-upon-Trent town centre, Derby city centre and Ashby-de-la-Zouch town centre are located in close proximity to Swadlincote and have an influence on shopping patterns. Notwithstanding this, Swadlincote town centre is the principal centre in South Derbyshire and performs an important function in serving the needs of a largely rural catchment. Given the competition that Swadlincote town centre faces from nearby higher order centres, South Derbyshire would be considered to be performing extremely well if it were able to secure a comparable market share to the proportion of population residing in the Study Area.
- 4.76 As set out below in Table 4.25, Swadlincote town centre's market share of shopping trips originating from within the Study Area for the various comparison goods sub-sectors ranges from 9.4% (DIY goods) to 32.1% (recreation goods). When looking at South Derbyshire, the market shares attracted by the administrative area range from 13.5% (DIY goods) to 49.8% (garden goods). Overall, South Derbyshire attracts 23.1% of expenditure on comparison goods which originates within the Study Area, while Swadlincote town centre attracts a market share of expenditure of 19.7%.
- 4.77 The proportion of trips attracted by facilities in South Derbyshire for each comparison goods category is less than the proportion of the Study Area population which resides in South Derbyshire. It is



therefore evident that facilities in South Derbyshire are struggling to compete with higher order centres which are located in close proximity to the South Derbyshire area. This is particularly the case in relation to clothing and footwear, in which case, over 81.4% of clothing and footwear shopping trips which originate within the Study Area are undertaken at facilities outside the Study Area. Similarly, in relation to DIY goods, 71.5% of such trips which originate within the Study Area are undertaken outside the Study Area. This is likely as a result of South Derbyshire (and the Study Area as a whole) not accommodating the type of retailers which are required to attract a substantial proportion of such trips. For example, as we set out in more detail at Section 5, Swadlincote town centre and locations on the edge of the town centre only accommodate five of the top national retailers as identified by Experian Goad. It is therefore evident that shoppers are travelling to higher order centres to purchase such goods.

4.78 The market share of available comparison goods expenditure, which originates within the Study Area, which is attracted by facilities in South Derbyshire, is 23.1%. Although this market share is low, the majority of the market share of expenditure attracted by South Derbyshire is attracted by facilities in or on the edge of Swadlincote town centre (85.3%). This demonstrates that although facilities in South Derbyshire are struggling to compete against higher order centres outside South Derbyshire, that Swadlincote town centre is performing its role as the principal centre in South Derbyshire and is the main destination within South Derbyshire where residents look to meet their comparison goods shopping needs.

**Table 4.25: Comparison Goods Market Share for Swadlincote town centre and South Derbyshire**

	Clothing and footwear	Books, CDs and DVDs	Small household	Recreation goods	Chemist goods	Electrical	DIY	Garden	Furniture	Comparison Goods
Swadlincote town centre	13.6%	20.7%	27.0%	30.5%	32.1%	23.0%	9.4%	14.8%	16.4%	19.7%
South Derbyshire	13.7%	21.6%	27.0%	30.6%	44.9%	24.8%	13.5%	49.8%	33.3%	23.1%

Source: Appendix 2, Tables 9 to 25

Notes: Swadlincote town centre figures includes centres within and on the edge of the town centre  
Percentage for individual comparison goods categories relate to market share of trips, while overall comparison goods percentage relates to market share of expenditure.

4.79 Table 4.26 shows the locations outside South Derbyshire to which comparison goods expenditure is currently leaking. Facilities located within the East Staffordshire administrative area attract a comparison goods market share of expenditure of 38.6%. The market share attracted by East Staffordshire from the Study Area is greater than that attracted by facilities within South Derbyshire, within Swadlincote's catchment. Facilities in Derby City attract a comparison goods market share of 12.4%, while facilities in North West Leicestershire attract a comparison goods market share of 10.7%. In addition, a comparison goods market share of 6.6% is attracted by facilities in Tamworth's administrative area.





**Table 4.26: Comparison Goods Market Share Achieved by Areas Outside South Derbyshire**

Local Authority		Market Share of Expenditure (%)
East Staffordshire	Within Study Area	0.1
	Outside Study Area	38.5
	Total	38.6
Derby City	Outside Study Area	12.4
North West Leicestershire	Within Study Area	9.4
	Outside Study Area	1.3
	Total	10.7
Tamworth	Outside Study Area	6.6

### Changes in Market Share Since 2005

- 4.80 As we explained earlier in this section, there has been a change to the ward boundaries in South Derbyshire since 2005, which means it is not possible to provide a direct comparison between the market shares achieved in 2005, with the market shares achieved at 2015. Notwithstanding this, the changes largely affect changes in individual zones, and although there have been changes to the Study Area as a whole, it is considered that some analysis of the market shares achieved across the Study Area as a whole is useful, albeit, the changes to the Study Area should be borne in mind.
- 4.81 Table 4.27 provides a comparison between the main food and top up shopping market shares achieved in 2005 to the market shares achieved at 2015. Since 2005, the main food shopping market share achieved by facilities in the South Derbyshire portion of the Study Area has increased from 34.5% to 51.3%, an increase of 16.8 percentage points. This is a result of the improvements to main food shopping provision which have taken place since 2005, including the development of Morrisons food store in the town centre, and the development of the Aldi and Iceland stores as part of The Pipeworks, as well as the extension of the Sainsbury’s store at Civic Way. Notwithstanding this, during this time period, the market share of some individual stores in Swadlincote has decreased. For example, the main food market share achieved by the Sainsbury’s store at Civic Way has decreased from 17.6% in 2005 to 15.3% at 2015. This is likely a result of the development of new foodstores in Swadlincote, such as the Morrisons and Aldi, diverting trade from the established Sainsbury’s store. Since 2005, the top up shopping market share achieved by those facilities in South Derbyshire has also increased from 50.3% in 2005 to 54.0% in 2015, an increase of 3.7 percentage points. Although the improvement to the top-up market share since 2005, is substantially less than the improvement to the main food market share, this improvement is likely reflective of the improvements (as set out above) to foodstore and convenience goods provision which has taken place in Swadlincote since 2005.





- 4.82 In terms of comparison goods provision, it is not possible to make a direct comparison for each comparison goods category between the market shares achieved at 2005, with those achieved at 2015, as a result of variations between Donaldson’s and WYG’s methodologies and the differing comparison goods categories used. Notwithstanding, we are able to provide analysis in relation to clothing and footwear goods and DIY goods, due to the similarity in the household survey question used in this regard at both 2005 and 2015. In terms of the clothing and footwear goods market share achieved by facilities in South Derbyshire, the market share has increased since 2005, from 7.8% to 13.7%, an increase of 5.9 percentage points. In terms of DIY goods, the market share achieved by facilities in South Derbyshire has also improved since 2005 from 9.6% to 13.5% at 2015.
- 4.83 We have also been able to compare the total market share for all comparison goods at 2005, compared to 2015. As set out at Table 4.27, the comparison goods market share achieved by facilities within South Derbyshire has increased from 19.7% at 2005 to 23.1% at 2015, an increase of 3.4 percentage points. The improvement in South Derbyshire’s market share is likely a result of the development of The Pipeworks which has increased the number of large format comparison goods units present in Swadlincote and has thus attracted new comparison goods retailers to the centre. In addition to improvements to the supermarket provision in Swadlincote which provide a proportion of comparison goods, such as the development of the new Morrisons store and the expansion to the Sainsbury’s at Civic Way.

**Table 4.27: Changes in Market Share Since 2005**

	South Derbyshire Market Share (%)		
	2005	2015	Change
<b>Convenience</b>			
Main Food	34.5	51.3	+16.8 (+48.7%)
Top-up	50.3	54.0	+3.7 (+7.4%)
<b>Comparison</b>			
Clothing and Footwear	7.8	13.7	+5.9 (+75.6%)
DIY Goods	9.6	13.5	+3.9 (+40.6%)
All Comparison Goods	19.7	23.1	+3.4 (+17.3%)

Note: Household Survey 2005 has been manually adjusted to exclude those who answered 'don't know', 'other' and 'internet' to provide more direct comparison with Household Survey 2015.

- 4.84 The comparisons which we have been able to make between the market shares achieved by facilities in South Derbyshire at 2005 and those achieved at 2015 are encouraging. Although as we explained earlier, facilities in South Derbyshire attract a slightly lower main food market share than may be expected, the main food market share has improved substantially since 2005. It is therefore evident



that the improvements which have taken place in Swadlincote via the development of the Morrisons foodstore and The Pipeworks have been successful in improving main food shoppers and expenditure within South Derbyshire. This is also the case, but to a lesser extent in terms of the top-up shopping market share achieved by facilities in South Derbyshire, which has also improved since 2005.

4.85 Similarly in relation to the comparison goods, although the market share achieved by facilities in South Derbyshire is low at 23.1%, which is largely as a result of the higher order centres, such as Burton-upon-Trent and Derby which are located in close proximity to South Derbyshire, the comparison goods market share achieved by facilities in South Derbyshire has improved since 2005. As explained above, we are unable to accurately ascertain how the market share of several of the comparison goods categories has changed since 2005, due to the variation in methodology applied by Donaldsons and WYG.

#### Customer Behaviour

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

4.87 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 (29.7%) explained that their chosen store was near to home. 18.9% of respondents stated that the reason was for lower prices, 8.9% stated the quality of food goods available, 6.7% stated the choice of food goods available and 5.2% stated habit.

4.88 The majority of respondents (69.6%) to the household survey do their main food shopping at least once a week. 11.8% do their main food shopping at least once a fortnight and 9.2% at least two times per week. The most popular time to undertake main food shopping was on weekdays during the day (43.6%), 14.6% undertake their main food shopping on weekdays during the evening and 13.6% on Saturday. The vast majority of respondents (92.3%) normally travel to their main food shopping destination by car or van (as a driver or passenger), 2.8% walk and 2.2% travel by bus. Very few people travel by taxi (1.6%) and no respondents stated that they travel by bicycle. The majority of respondents (78.9%) travel for less than 10 minutes to reach their main food shopping destination, with only 0.8% of respondents travelling for more than 30 minutes to reach their chosen destination.

4.89 Respondents to the household survey were asked if they ever visit Swadlincote town centre. In response, approximately two thirds of respondents (67.0%) stated that they did, while approximately a third (33.0%) stated that they did not. Of those who did visit Swadlincote town centre, 29.5% stated that they chose to visit Swadlincote due to the centre being close to home, 16.9% stated due



to the choice and range of shops and 14.0% stated due to the choice of services. When asked what measures would encourage these respondents to visit Swadlincote more often, the most frequent answer given was an increased choice and range of shops (34.6%). In terms of those respondents who stated that they did not ever visit Swadlincote town centre, nearly a half (49.3%) stated that they had no reason to visit, while 29.2% stated that they don't visit due to the lack of choice and range of shops.

4.90 Respondents were asked whether they undertake shopping via electronic means i.e. home, mobile or TV shopping. The majority of respondents (68.0%) stated that they shop via home internet, 29.7% shop via portable internet and 2.6% shop via the TV. When asked which goods their household purchases via electronic shopping, the majority of respondents (53.1%) stated that they purchase clothes via this means, while 50.0% purchase books and 46.2% purchase CDs, DVDs and music.

### In-Street Surveys

4.91 In-street surveys were also undertaken in July 2015 in order to provide an insight into the views and behaviours of customers, residents and visitors in relation to Swadlincote town centre. In total, 102 responses were obtained to the Swadlincote town centre in-street survey. A copy of the in-street survey results is provided at Appendix 2.

#### Reason for Visiting the Centre

4.92 Respondents were asked why they choose to shop or visit Swadlincote. The most common response (67.7%) was due to the town centre being close to the respondent's home. Other popular reasons for respondents choosing to visit Swadlincote town centre included that their trip was undertaken out of habit (23.5%), as Swadlincote was close to their work (14.7%) and due to the choice of shops selling non-food goods (9.8%).

**Table 4.28: Main Reason for Choosing to Shop/Visit the City Centre**

Centre	1st		2nd		3rd		4th	
Swadlincote	Close to home	67.7%	Habit	23.5%	Close to work	14.7%	Choice of shops selling non-food goods	9.8%

Source: NEMS In Street Survey, Question 9

4.93 In addition to respondents being asked why they chose to shop/visit Swadlincote town centre, they were also asked their main reason for being in the centre on the day of the survey. The most common reasons for respondents being in Swadlincote town centre were to visit the bank, building



society and Post Office, to browse and to attend work, school or college, which each received a response of 24.9%. Other popular reasons for respondents being in Swadlincote town centre on the day of the survey included to visit the Morrisons foodstore (12.7%), to visit services such as the hairdressers (8.8%) and to visit specialist shops (7.8%).

**Table 4.29: Main Reason for Visiting the Centre on the Survey Day**

Centre	1st		2nd		3rd		4th	
Swadlincote	Bank/ building society/ Post Office	24.9%	Morrisons, Swadlincote	12.7%	Services	8.8%	Visit specialist shops	7.8%
	Browsing							
	Work/ school/ college							
	(Joint 1 <sup>st</sup> )							

Source: NEMS In Street Survey, Question 10

#### Mode of Travel to Centre

4.94 Respondents were asked how they had travelled to the Swadlincote town centre on the day of the survey. By car was the most popular means to access the centre with nearly half (48.1%) of respondents using a car to travel to the centre. The town centre is likely to be attractive to car borne trips due to the free car parking that is available. However, we have been informed by South Derbyshire Council that the town centre car parks are close to capacity which is likely to deter others from travelling to the centre by car. The second most popular mode of travel to the town centre was walking (26.5%). It is therefore evident that Swadlincote has a strong walk-in catchment. Approximately a fifth (20.6%) of respondents to the survey accessed the centre by bus. This is considered to represent reasonably strong bus usage, which is likely a result of the bus interchange being located within the town centre, a short walk from the heart of the town centre. Only a very small proportion (1.0%) of respondents stated that they travelled to the town centre by bicycle. This is likely a result of the limited bicycle infrastructure present in the town centre, which is recognised in the Town Centre Strategy and Vision which advises that there are only one or two dedicated short stretches of cycle path in the centre.

**Table 4.30: Mode of Travel to Centre**

Centre	Car	Walk	Bus	Bicycle
Swadlincote	48.1%	26.5%	20.6%	1.0%

Source: NEMS In Street Survey, Question 3



4.95 Those who travelled to the town centre by car were asked where they parked during their visit and if they had any difficulty parking. The majority of respondents (85.1%) stated that they did not have any difficulty obtaining a car parking space. However the remaining 14.9% of respondents advised that they had difficulty obtaining a space. The most popular car parks used by respondents included the bus station (24.5%), B&M Bargains (16.3%), Morrisons (16.3%), Rink Drive (8.2%) and the Pipeworks (6.1%). No respondents to the in-street survey stated that they had parked at Sainsbury's.

**Table 4.31: Car Parking Location**

Centre	1st		2nd		3rd		4th	
Swadlincote	Bus Station	24.5%	B&M Bargains Morrisons (Joint 2 <sup>nd</sup> )	16.3%	Rink Drive	8.2%	Pipeworks	6.1%

Source: NEMS In Street Survey, Question 4

4.96 Respondents were also asked how long it took them to travel to Swadlincote town centre on the day the survey was undertaken. The majority of respondents (58.8%) stated that their journey had taken either 0-5 minutes or 6-10 minutes. Only a very limited proportion of respondents (4.9%) travelled for more than 30 minutes to access the town centre. This shows that Swadlincote has a fairly localised catchment.

**Table 4.32: Length of Journey**

Centre	0-5 Minutes	6-10 Minutes	11-15 Minutes	16-20 Minutes	21-30 Minutes	31-60 Minutes	Over 60 Minutes
Swadlincote	35.3%	23.5%	11.8%	13.7%	10.8%	2.9%	2.0%

Source: NEMS In Street Survey, Question 6

### Food Shopping

4.97 Respondents to the in-street survey were asked how frequently they visited the Swadlincote town centre to undertake their main food and grocery shop. The most popular answer provided was from respondents who undertake their main food shopping in Swadlincote once a week (44.1%). A reasonable proportion also undertook main food shopping in Swadlincote 2 to 3 times a week (21.6%) or once a fortnight (11.8%). It is encouraging that the majority of respondents (82.4%) do undertake main food shopping in Swadlincote at some point, although the frequency of such trips varies, with only 16.7% stating that they never visit Swadlincote for main food shopping.



**Table 4.33: Frequency of Visit to Undertake Main Food Shopping**

Centre	Every-day	2 to 3 times a week	Once a week	Once a fortnight	Once a month	Less than once a month	Never
Swadlincote	2.9%	21.6%	44.1%	11.8%	2.0%	0.0%	16.7%

Source: NEMS In Street Survey, Question 14

4.98 When asked at which centre or store they last visited to undertake their main food or grocery shopping, the most common destinations cited by respondents were Morrisons at the Pipeworks in Swadlincote town centre (38.2%), Aldi at the Pipeworks on the edge of Swadlincote town centre (23.5%), Sainsbury’s at Civic Way on the edge of Swadlincote town centre (6.9%) and Iceland at the Pipeworks on the edge of Swadlincote town centre.

**Table 4.34: Centre or Store Last Visited for Main Food and Grocery Shopping**

Centre	1st	2nd	3rd	4th
Swadlincote	Morrisons, Swadlincote 38.2%	Aldi, Swadlincote 23.5%	Sainsbury’s, Swadlincote Iceland, Swadlincote (Joint 3 <sup>rd</sup> ) 6.9%	Tesco, Ashby-de-la-Zouch Sainsbury’s Local, Glamorgan Way Don’t do a main food shop (Joint 4 <sup>th</sup> ) 2.9%

Source: NEMS In Street Survey, Question 4

4.99 Respondents who did not choose to do their main food shopping in Swadlincote town centre were asked why they chose to shop elsewhere. The majority (50.0%) stated that the alternative destination was closer to their home, with 20.0% stating that they had no particular reason for undertaking their main food shop elsewhere and 10.0% stating they shop elsewhere out of habit.

**Table 4.35: Reason for Undertaking Main Food Shopping at Alternative Destination to Swadlincote Town Centre**

Centre	1st		2nd		3rd	
Swadlincote	Nearer to home	50.0%	Habit	10.0%	Accessibility by bus Choice of food goods available Shopping environment Good offers in store Online shop	5.0%

Source: NEMS In Street Survey, Question 17

### Non Food Shopping

4.100 Respondents were also asked a series of questions in relation to their non-food shopping habitats. When asked which centre or facility they last visited for non-food goods, the most popular answer was Swadlincote town centre (45.1%). The second most popular destination for non-food goods was Burton upon Trent town centre, with 19.6% last visiting the town centre, including Cooper Square Shopping Centre and The Octagon Shopping Centre. A further 11.7% stated that they last visited the Pipeworks, also known as Hepworth Retail Park, for non-food goods. The fourth most popular destination last visited for non-food goods was Derby city centre. This is generally reflective of the household survey which found Burton on Trent town centre and Derby city centre to be popular destinations for non-food purchases. The in-street survey found Swadlincote town centre to be more popular for non-food goods than the household survey, however, this is to be expected given the in-street survey was undertaken within Swadlincote town centre.

**Table 4.36: Centre or Store Last Visited for Non-Food Goods**

Centre	1st		2nd		3rd		4th	
Swadlincote	Swadlincote town centre	45.1%	Burton town centre including Cooper Square and The Octagon Shopping Centre	19.6%	The Pipeworks/Hepworth Retail Park, Swadlincote	11.7%	Derby city centre	5.9%

Source: NEMS In Street Survey, Question 20





4.101 Respondents who did not last undertake their non food shopping in Swadlincote town centre were asked the reason why. The most popular answers were due to the choice of shops nearby selling non food goods (34.9%) and the quality of shops selling non food goods (27.9%). Others stated that they chose to shop elsewhere for non food goods due to alternative destination being nearer to their home (18.6%) and due to the quality of non food goods (11.6%).

**Table 4.37: Reason for Undertaking Non-Food Shopping at Alternative Destination to Swadlincote Town Centre**

Centre	1st		2nd		3rd		4th	
Swadlincote	Choice of shops nearby selling non food goods	34.9%	Quality of shops selling non food goods	27.9%	Nearer to home	18.6%	Quality of non food goods	11.6%

Source: NEMS In Street Survey, Question 23

4.102 Respondents were then asked how frequently they visited Swadlincote town centre to undertake non food goods. As would be expected, respondents advised that they visited the town centre less frequently for non food shopping than for food shopping. A total of 23.3% of respondents stated that they shopped for non food goods in Swadlincote town centre once a fortnight, which was the most popular frequency. A total of 18.6% of respondents stated that they visited Swadlincote just once a month to undertake non food shopping and 16.3% stated that they visit once a week. A total of 16.3% of respondents stated that they never visit Swadlincote town centre for non food shopping.

**Table 4.38: Frequency of Visit to Undertake Non Food Shopping**

Centre	Every-day	2 to 3 times a week	Once a week	Once a fortnight	Once a month	Less than once a month	Never
Swadlincote	0.0%	4.7%	16.3%	23.3%	18.6%	9.3%	16.3%

Source: NEMS In Street Survey, Question 21

#### Comparison to Other Centres

4.103 As part of the in-street survey, respondents were asked to compare Swadlincote town centre with other similar sized centres, such as Coalville, Ashby De La Zouch and Uttoxeter. A notable proportion of respondents considered that Swadlincote town centre performs worse than other comparable centres in terms of the following criteria: choice of shops (31.4%); choice of High Street names (29.4%); choice of independent specialist shops (32.4%); and quality of shops (35.3%).

4.104 Notwithstanding this, there were several areas where the majority of respondents considered Swadlincote performed about the same or better/much better than comparable centres. The majority



of respondents considered Swadlincote to perform about the same, or better/much better when compared to other centres in terms of car parking prices (63.7%), car parking provision (59.8%) and accessibility by bus (56.8%). This indicates that the current car parking strategy of free parking in the town centre is working well.

- 4.105 Respondents to the in-street survey felt that Swadlincote performed 'about the same' as other comparable centres in terms of the range of services such as banks/financial services (44.1%), town centre environment (39.2%), cleanliness (49.0%), day time safety (64.7%), evening safety (46.1%), layout (45.1%) and general environment (38.2%).

Types of Shops/Services Desired

- 4.106 Respondents were asked what type of shops or services they would like to see more of in Swadlincote town centre. The most common response was more High Street names (44.1%), followed by clothing stores (33.3%), a department store (28.4%) and independent or specialist shops (27.5%). Other popular responses included the desire for click and collect facilities (17.6%), footwear stores (15.7%) and household goods stores (15.7%).

**Table 4.39: Types of Shops or Services Desired by Respondents**

Centre	1st		2nd		3rd		4th	
Swadlincote	High Street names	44.1%	Clothing stores	33.3%	Department stores/retailers	28.4%	Independent/specialist shops	27.5%

Source: NEMS In Street Survey, Question 36

Types of Leisure Facilities Desired

- 4.107 In terms of leisure facilities, 14.7% of respondents stated that they would like to see more restaurants and cafes in Swadlincote town centre and 12.7% stated that they would like a children's activity centre. In addition, 8.8% of respondents would like a bowling alley, 4.9% would like more health and fitness facilities and a further 4.9% would like a new or additional swimming pool. A high proportion of respondents (47.1%) did not mention any particular leisure facility which they would like to see in Swadlincote town centre, with a further 10.8% stating that they did not know what leisure facilities they would like more of.



**Table 4.40: Types of Leisure Facilities Desired by Respondents**

Centre	1st		2nd		3rd		4th	
Swadlincote	Restaurants/cafes	14.7%	Children's activity centre	12.7%	Bowling alley	8.8%	Health and fitness	4.9%
							Swimming Pool	

Source: NEMS In Street Survey, Question 31

Measures to Improve the Centre

4.108 In identifying measures that would help to improve the Swadlincote town centre, the most common suggestion was to fill the empty shops (43.1%). Other suggestions included giving the town centre a general facelift e.g. flowers, painting etc (23.5%), improving the quality of shops (10.8%), more speciality shops (9.8%) and less charity shops (9.8%).

**Table 4.41: Most Popular Suggested Measures to Improve the Centre**

Centre	1st		2nd		3 <sup>rd</sup>		4th	
Swadlincote	Fill empty shops	43.1%	Give it a general facelift	23.5%	Improve the quality of shops	10.8%	More speciality shops	9.8%
							Less charity shops	
							(Joint 4 <sup>th</sup> )	

Source: NEMS In Street Survey, Question 38

Biggest Weaknesses

4.109 When asked about the biggest weaknesses of the town centre, empty shops was cited most commonly (33.3%), which mirrors the fact that a high proportion of respondents see filling empty shops as the best measure to improve the centre. Other matters that were seen as particular weaknesses of Swadlincote town centre include the choice and range of non food shops (24.5%), the quantity of take aways and charity shops (20.6%) and the range of food and beverage facilities (8.8%).

**Table 4.42: Biggest Weaknesses of the Centre**

Centre	1st		2nd		3 <sup>rd</sup>		4th	
Swadlincote	Empty shops	33.3%	Choice/range of non food shops	24.5%	Quantity of takeaways/charity shops	20.6%	Range of food and beverage facilities	8.8%

Source: NEMS In Street Survey, Question 39

Night Time Economy

4.110 Respondents to the in-street survey were also asked about the night time economy in Swadlincote town centre. The majority of respondents (68.6%) stated that they never visit Swadlincote town



centre in the evening. Only 9.8% of respondents visit the town centre in the evening either daily, once a week or less than once a week.

**Table 4.43: Frequency of Evening Visits**

Centre	Daily	Once a week or more	Less than once a week	Less than once a fortnight	Less than once a month	Never
Swadlincote	3.9%	4.9%	1.0%	9.8%	9.8%	68.6%

Source: NEMS In Street Survey, Question 29

4.111 Respondents were asked their main reason for visiting Swadlincote town centre in the evening. The most common response provided was to eat in a restaurant or cafe (37.5%). A further 21.9% stated that their main reason for visiting the town centre in the evening was to visit a pub or bar, 12.5% visited Morrisons in the evening and 6.3% visited Swadlincote in the evening to either go to the cinema, attend work/school/college or use a cash point.

**Table 4.44: Main Reason for Visiting in the Evening**

Centre	1st	2nd	3rd	4th
Swadlincote	Eat in a restaurant or cafe 37.5%	Visit a pub or bar 21.9%	Morrisons, Swadlincote 12.5%	Go to the cinema Work/ School/ College Use a cash point (Joint 4 <sup>th</sup> ) 6.3%

Source: NEMS In Street Survey, Question 30

#### Pipeworks Redevelopment

4.112 Respondents to the survey were asked to describe whether they visit Swadlincote town centre more frequently now than they did before the Pipeworks redevelopment was completed in August 2011. The majority (66.7%) considered that they visit the centre about as frequently as they did before the redevelopment. Notwithstanding this, a higher proportion (19.8%) stated that they visit Swadlincote more/much more frequently since the redevelopment of the Pipeworks, than stated that they visited Swadlincote less/much less frequently (7.8%).

#### High Street Pedestrianisation

4.113 The high street in Swadlincote town centre is currently pedestrianised between 10am and 4pm. Respondents to the in-street survey were asked whether they considered this to be appropriate or whether they thought the high street should be pedestrianised for a different amount of time. The



majority of respondents (73.5%) considered that the existing pedestrianisation from 10am to 4pm was appropriate. The next most popular response was that the high street should be pedestrianised for a longer period (9.8%). A total of 6.9% thought the high street should be pedestrianised all of the time, 2.0% thought the high street should not be pedestrianised at all and 1.0% thought the high street should be pedestrianised for a shorter period within the day. Overall, it seems that there is more support for the high street being pedestrianised, at least for a certain period during the day.

### Swadlincote Market

4.114 In considering the responses obtained in relation to the Swadlincote outdoor market, it should be noted that outdoor market days are Tuesdays, Fridays and Saturdays. Half of the in-street surveys (50.0%) were undertaken on outdoor market days. A total of 13.7% of respondents to the Swadlincote in-street survey intended to visit the market in Swadlincote during their trip to the town centre. Of those who intended to visit Swadlincote market during their visit to the town centre, 27.3% respectively stated that they visit the market less than once a week, less than once a fortnight or less than once a month. Slightly less than a fifth of respondents (18.2%) stated that they visit the market once a week or more.

**Table 4.45: Frequency of Visits to Swadlincote Outdoor Market**

Centre	Daily	Once a week or more	Less than once a week	Less than once a fortnight	Less than once a month	First Time Today
Swadlincote	0.0%	18.2%	27.3%	27.3%	27.3%	0.0%

Source: NEMS In Street Survey, Question 41

4.115 When respondents were asked what they particularly liked about the market, the most popular response was the freshness of the food (45.5%). Other respondents advised that they liked the range of food (18.2%), the range of non-food items (9.1%), that the market is on one level (9.1%), the availability of local produce (9.1%) and that the market is compact/easy to get around (9.1%). The majority of respondents (63.6%) who intended to visit the market during their visit advised that there was nothing they disliked about the market. Three respondents advised that they considered there were not enough stalls and one thought the market was difficult to get around.

**Table 4.46: One Particular Like About the Market**

Centre	1st		2nd	
Swadlincote	Freshness of food	45.5%	Range of food	18.2%

Source: NEMS In Street Survey, Question 42



4.116 Although it is evident that the market forms an important component of Swadlincote town centre's offer, 74.5% of respondents who undertook the survey on a market day did not intend to visit the market during their trip to Swadlincote town centre. Therefore, there may be opportunities to increase the usage of the market.



## 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 has 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 town centre was collated during our survey of Swadlincote town centre in July 2015.
  - **Proportion of vacant street level property** – Vacant properties were also identified during the undertaking of the survey.
  - **Customers' views and behaviour** – Information on customers' views is based on the NEMS in-street survey results, as set out in Section 4.
  - **Retailer representation and intentions to change representation** – Information on the current strength of Swadlincote town centre, 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 in July 2015 through liaison with local property agents and the rental valuations of retail units currently on the market.
  - **Pedestrian flows** – A detailed survey of pedestrian activity has been undertaken by South Derbyshire District Council in 2000, 2008 and 2015, which has informed this section of the report. General footfall and pedestrian flows were also observed during the undertaken during WYG's survey of the town centre.
  - **Accessibility** – Consideration of access to and around Swadlincote is informed by WYG's surveys.





- **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 Swadlincote, most of which are covered within the Swadlincote Town Centre Vision and Strategy (2012). The commentary below provides an analysis of Swadlincote town centre in respect of each of the above indicators.

5.04 We commence our assessment by considering the role of Swadlincote in the District 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. The Venuescore achieved by each of the sub-region’s principal centres and shopping venues is set out in the ‘Score’ column within Table 5.1.

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 at Table 5.1, provides an indication as to whether a retail venue’s focus is upmarket (luxury goods) or more downmarket (discount stores). A high market position index indicates that a destination is bias towards high end retailers and a low index indicates that a destination is bias towards discount orientated retailers. The index is based on an average of 100.

5.07 Swadlincote town centre is classed as a Major District by Venuescore and the centre is currently ranked 526<sup>th</sup> in the country with a Venuescore of 56. The centre’s rank has increased by +185 places since 2010, which may be explained by the completion of the Pipeworks retail and leisure development in 2011, which is likely to have been taken into consideration within the scoring system.



5.08 Swadlincote is the only settlement within the South Derbyshire administrative area to feature within Venuescore's retail rankings. The centre has a lower rank than the neighbouring centres of Burton upon Trent, Tamworth, Lichfield and Derby. In addition, Ventura Retail Park in Tamworth is also ranked higher than Swadlincote town centre. As Swadlincote is geographically located between these higher ranking centres, it is clear that shopping patterns are influenced by these higher-order venues. However, Swadlincote's ranking as a Major District indicates its importance as a shopping destination within the local area.

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

VENUE	SCORE (2014/15)	Location Grade (2014/15)	Market Position Index (2014/15)	Market Position Class (2014/15)	Rank 2014/15	Rank 2013/14	Rank 2010/11	Change in Rank 2010 – 2014/15
Derby City Centre	322	Major Regional	100	Middle	27	27	21	-6
Burton upon Trent Town	176	Regional	91	Middle	118	116	95	-23
Tamworth Town Centre	100	Sub-Regional	87	Lower Middle	261	271	245	-16
Lichfield City Centre	97	Sub-Regional	96	Middle	275	309	284	+9
Tamworth, Ventura Retail	68	Major District	98	Middle	422	405	400	-22
<b>Swadlincote Town Centre</b>	<b>56</b>	<b>Major District</b>	<b>83</b>	<b>Lower Middle</b>	<b>526</b>	<b>557</b>	<b>711</b>	<b>+185</b>
Coalville Town Centre	56	Major District	82	Lower Middle	526	495	450	-76
Derby, Wyvern Retail Park	37	District	99	Middle	824	901	924	+100
Uttoxeter Town Centre	35	District	89	Lower Middle	879	901	778	-101
Ashby De La Zouch Town	32	District	100	Middle	966	930	1098	+132
Uttoxeter, Dovefields	27	Minor District	82	Lower Middle	1,118	1108	2179	+1061
Ashby De La Zouch, Resolution Road	19	Local	93	Middle	1,531	1798	2177	+646
Burton On Trent, Centrum East Retail Park	17	Local	105	Middle	1,680	1907	1657	-23
Burton On Trent, St Peter's Retail Park	17	Local	109	Middle	1,680	1798	2177	+497

Source: Venuescore UK Shopping Venue Rankings 2014-15



## Swadlincote Town Centre

- 5.09 Swadlincote is located approximately six kilometres to the south-east of Burton upon Trent town centre and 16 kilometres to the south of Derby city centre. However, the area surrounding Swadlincote is predominantly rural in character. The town centre is the largest retail centre in South Derbyshire District and provides the main hub of retail and service uses within the District. Swadlincote also functions as key provider of employment services both in the private and public sectors, alongside cultural and leisure facilities including the Green Bank Leisure Centre and the Sharpe's Pottery Museum.
- 5.10 Most of the main shopping area is pedestrianised between 10am and 4pm and The Delph has recently been the subject of a public realm improvement scheme, which has involved over £1 million investment, including the creation of a high quality square that is suitable for community events. However, the town centre suffers with a high vacancy rate in terms of the number of units, which is most acutely found in the area immediately to the south of The Delph, although most of the vacant units have small floorspaces.
- 5.11 The town centre has a market every Tuesday, Friday and Saturday, which operates on High Street. There is also a farmers' market on the last Thursday of the month. The markets are a strong attraction to the town centre and visitor numbers increase significantly on market days.
- 5.12 The town centre currently contains 157 retail and other commercial units, which occupy a total floorspace of 31,145 sq.m. The retail units mainly comprise traditional high street style shops, many of which have good architectural character and sit within the town centre's Conservation Area. Larger purpose built retail units are found on the edge of the town centre at Belmont Street and at the Pipeworks. The Pipeworks also contains several facilities that attract evening use, including a cinema, two restaurants and a supermarket.

**Photograph (top left):** Good quality architecture on High Street



**Photograph (Top right):** Busy High Street on a Monday morning



**Photograph (centre left):** Good quality public realm at the Square



**Photograph (centre right):** Bus station



**Photograph (bottom left):** The Pipeworks Retail Park



**Photograph (bottom right):** Odeon Cinema at The Pipeworks





## Diversity of Main Town Centre Uses

- 5.13 A study of the main town centre uses has been undertaken in Swadlincote town centre to help identify how the different retail sectors are performing and how the composition of the town centre 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.
- 5.14 South Derbyshire District Council undertook surveys of the town centre's uses in September 2010. To ensure the current health check was compiled using the most up-to-date diversity of use and floorspace figures, a survey of the town centre was also undertaken by WYG in July 2015.
- 5.15 Maps showing the diversity of uses in September 2010 and July 2015 are shown at Appendix 4. For the purpose of consistency, the town centre boundary as identified by the Proposals Map of the South Derbyshire Local Plan (1998) has been utilised for analysis of both maps. Although our analysis has focussed on sites inside the town centre boundaries, the units on the edge of the town centre have also been categorised on the diversity of use plans to provide context of the types of use that surround the town centre.

**Table 5.2:** Number of Units in Swadlincote Town Centre (Sept 2010)

	Number of Units	Swadlincote TC	UK*
Convenience	13	9.0%	8.8%
Comparison	44	30.3%	33.5%
Retail Service	30	20.7%	13.1%
Leisure Services	20	13.8%	21.7%
Financial and Business Services	24	16.6%	11.0%
Vacant	14	9.7%	11.5%
<b>Total</b>	<b>145</b>	<b>100%</b>	<b>100%</b>

Source: South Derbyshire District Council survey, September 2010 (includes floorspace within town centre boundary only)

\* UK average from Experian Goad Category Report, September 2010

**Table 5.3:** Floorspace in Swadlincote Town Centre (Sept 2010)

	Floorspace (Sq.m)	Swadlincote TC	UK*
Convenience	10,060	38.8%	14.4%
Comparison	7,031	27.1%	36.9%
Retail Service	2,417	9.3%	7.0%
Leisure Services	2,017	7.8%	22.8%
Financial and Business Services	2,415	9.3%	8.5%
Vacant	1,992	7.7%	9.6%
<b>Total</b>	<b>25,932</b>	<b>100%</b>	<b>100%</b>

Source: South Derbyshire District Council survey, September 2010 (includes floorspace within town centre boundary only) \* UK average from Experian Goad Category Report, September 2010



**Table 5.4:** Number of Units in Swadlincote Town Centre (July 2015)

	Number of Units	Swadlincote TC	UK*
Convenience	13	8.3%	8.5%
Comparison	43	27.4%	32.4%
Retail Service	37	23.6%	14.2%
Leisure Services	24	15.4%	22.5%
Financial and Business Services	15	9.6%	10.8%
Vacant	25	15.9%	11.3%
<b>Total</b>	<b>157</b>	<b>100%</b>	<b>100%</b>

Source: WYG survey, July 2015 (includes floorspace within town centre boundary only)

\*UK average from the Experian Goad Category Report (May 2015)

**Table 5.5:** Floorspace in Swadlincote Town Centre (July 2015)

	Floorspace (Sq.m)	Swadlincote TC	UK*
Convenience	8,675	27.9%	15.1%
Comparison	8,757	28.1%	36.1%
Retail Service	2,468	7.9%	7.4%
Leisure Services	7,129	22.9%	23.3%
Financial and Business Services	1,742	5.6%	8.2%
Vacant	2,546	8.1%	9.2%
<b>Total</b>	<b>31,145</b>	<b>100%</b>	<b>100%</b>

Source: WYG survey, July 2015 (includes floorspace within town centre boundary only)

\*UK average from Experian Goad Category Report (May 2015)

**Table 5.6:** Edge of Centre Uses (July 2015)

	No of Units	Sq.m
Convenience	3	10,198
Comparison	8	4,985
Retail Service	1	523
Leisure Service	7	2,208
Financial and Business Service	-	-
Vacant	1	172
<b>Total</b>	<b>20</b>	<b>18,086</b>

Source: WYG survey, July 2015

\*Includes the Pipeworks, the retail units at Belmont Street and the Sainsbury's at Civic Way

### Convenience Good Units

- 5.16 There are currently 13 convenience units in Swadlincote town centre, which account for 8.3% of the total number of units. This is slightly below the national average of 8.5%. However, with regard to the amount of convenience goods floorspace, the town centre is well represented, as there is currently 8,675 sq.m, which accounts for 27.9 % of the total amount of town centre floorspace. This is significantly higher than the national average of 15.1%.





- 5.17 By far the largest convenience unit is the Morrisons supermarket at Rink Drive, which has a footprint of approximately 7,328 sq.m (gross) and accounts for 84.4% of the total amount of convenience goods floorspace within the town centre. Of the remaining 12 convenience units, there are three bakeries, two general convenience stores (one of which is a Nisa containing a Post Office), two butchers, two confectionary, tobacco and news stores, a herbal remedy shop, a sweet shop and a key cutting shop.
  
- 5.18 The convenience units are spread fairly evenly within the town centre's core, mostly along High Street. Although the Morrisons supermarket is located behind the southern side of High Street, this store also has a frontage onto High Street that connects to the store via a covered walkway.
  
- 5.19 Since September 2010, the number of convenience units within the town centre has remained the same. However, there has been a net loss of approximately 1,385 sq.m of convenience floorspace. This is principally due to the loss of Somerfield, which has since become occupied by B&M Bargains. Notwithstanding this, the amount of convenience provision surrounding the town centre has grown considerably. In 2010, there was previously a Lidl supermarket at Belmont Street and a Sainsbury's superstore at Civic Way. In 2015, however, the offer has increased considerably and now includes two new supermarkets at the Pipeworks, which are occupied by Aldi and Iceland. The Sainsbury's superstore has also received a large mezzanine extension, increasing its floorspace to 5,030 sq.m. The former 1,319 sq.m Lidl supermarket has also recently been demolished to make way for a new 2,016 sq.m replacement Lidl supermarket. The four edge of centre supermarkets and superstores will have a combined floorspace of approximately 12,214 sq.m, which is significantly greater than the total convenience goods floorspace within the town centre.

### Comparison Goods

- 5.20 Swadlincote town centre has 43 comparison goods units. The town centre has experienced a net loss of one comparison goods unit since September 2010. However, the 2015 figure for the proportion of this type of unit (27.4%) is nearly 10% lower than what it was in 2010 and is below the 2015 national average of 32.4%. Notwithstanding this, the pattern of a reduction in the proportion of comparison goods units has also been experienced nationally with the national average falling from 33.5% in 2010 to 32.4% in 2015. There has been a net increase of 1,726 sq.m of comparison goods floorspace since September 2010 and the town centre comparison goods floorspace figure for 2015 stands at 8,757 sq.m and accounts for 28.1% of the town centre's floorspace. Notwithstanding this, the current level of comparison goods floorspace within the town centre is also below the national average of 36.1%.





This is different from the national pattern, as the national average proportion of comparison goods floorspace has decreased from 36.9% in 2010 to 36.1% in 2015.

- 5.21 There are a wide variety of comparison goods on offer within Swadlincote town centre, including 10 shops selling clothing related products and 25 independently operated comparison goods retailers. The largest comparison goods units are the B&M Bargains at High Street (1,810 sq.m) and Poundstretcher at High Street (924 sq.m).
- 5.22 The distribution of comparison goods units is fairly similar to that in 2010, although their concentration has actually grown slightly along High Street. However, many of these units have become occupied by charity shops, which have increased in number from four in 2010 to ten in 2015. The centre also contains a reasonably high proportion of budget national operators, including Pound Stretcher and B&M Bargains, as well as PoundWorld and Home Bargains on the edge of the town centre at the Pipeworks.
- 5.23 When comparing the diversity of use plans from September 2010 and July 2015, it is clear to see that the addition of the Pipeworks has added a considerable amount of comparison goods floorspace to the edge of the town centre. Indeed, the six new comparison goods units have a combined footprint of approximately 4,250 sq.m. In addition, there is a Halfords and Just For Pets on the northern edge of the town centre at Belmont Street, which occupy a further 700 sq.m combined footprint.

### Retail Services

- 5.24 Swadlincote has an overrepresentation in terms of the number of retail service units when compared to the national average. There are currently 37 units within this sector, which comprise 23.6% of the total number of units, and the number of retail service units has grown by seven units since September 2010. Furthermore, the proportion of this type of unit is significantly above the national average of 14.2%. The amount of retail service floorspace, which currently stands at 7.9% of all town centre floorspace, is also slightly above the national average of 7.4%. The amount of retail service floorspace has also seen an increase since 2010, rising from 2,417 sq.m to 2,468 sq.m in July 2015. This is primarily because of a considerable rise in the number of health and beauty providers, which has risen from 16 in 2010 to 25 in 2015.
- 5.25 The retail service units are mainly located within the peripheral areas of the town centre with concentrations towards the far east of High Street, on Midland Road and on West Street. These are the same locations where most retail service units were found in the September 2010 survey. The



retail service units are mainly small in size and their footprints range from 6sq.m to 137 sq.m with an average footprint of only 67 sq.m.

- 5.26 In addition to the increased number of health and beauty units since 2010, there are also five opticians, two travel agents, two units offering repairs, alterations and restoration services, a photo processing operator, a funeral director and a Post Office. The retail service sector contains four national operators, including Thomsons, Co-operative Travel and Specsavers.

### Leisure Services

- 5.27 The town centre is underrepresented in terms of its leisure service units and floorspace, which are both below the national average figures. Notwithstanding this, Swadlincote still has a wide ranging leisure service offer of 24 units, which comprise 15.4% of the total number of units. The amount of leisure service floorspace also stands at 7,129 sq.m and represents 22.9% of town centre floorspace. The respective national averages for the number of leisure service units and the amount of floorspace are 22.5% and 23.3%.
- 5.28 The leisure service units are mainly found towards the west of the town centre, notably in the form of the pubs and restaurants around The Delph (public square) and the Greenbank Leisure Centre. However, there is also a concentration of leisure service units on the edge of the town centre at the Pipeworks. These include a Prezzo restaurant, Costa cafe, The Tall Chimney public house and the Odeon cinema.
- 5.29 With the exception of the new the Pipeworks development, the distribution of leisure service uses has remained fairly consistent since 2010. However, the 2010 survey did not factor in public houses, clubs or the leisure centre, which accounts for the significant increase in the total in leisure service provision figures shown in Tables 5.2-5.5.
- 5.30 The most common types of leisure service providers within the town centre are hot food takeaways, which account for 25.0% of this type of unit. However, the centre also has three cafes, three betting offices, three leisure clubs, two public houses, two restaurants, two casino / amusement facilities, an eat in sandwich shop and the leisure centre. Within the leisure service offer, there are three national multiples, which are all betting shops.

### Financial and Business Services

- 5.31 Swadlincote town centre's financial and business service offer is below that of the national average, both in terms of the proportion of units and floorspace. The town centre currently has 15 units within



this sector, which comprise 9.6% of the total number of units. This compares with the national average of 10.8%. The financial and business service units occupy 1,742 sq.m of floorspace, which accounts for 5.6% of town centre floorspace, which is also below the national average of 8.2%.

- 5.32 The town centre has had a considerable net loss of financial and business service units since September 2010. There were formerly 24 units within this sector but the current total is only 15 units. The floorspace totals have also decreased from 2,415 sq.m to 1,742 sq.m over the same timeframe. Notable losses include the Alliance & Leicester Bank. The town centre has also lost two recruitment agencies, two solicitors' offices, two businesses offering business services and an estate agent.
- 5.33 The current distribution of financial and business service units is towards the east of High Street and along Market Street. The town's offer currently includes five banks and building societies, four estate agents, two insurance providers, two solicitors' offices, a job centre and a pawnbroker. Ten of the financial and business service units are national multiples, which include all of the high street banks and building societies, Swinton Insurance and a Money Shop.

### Non-Retail Units

- 5.34 The town centre also contains a number of important non-retail community uses, including a library, Sharpe's Pottery Museum (which incorporates a tourist information centre), two dentists, a veterinary clinic, a shopmobility centre, the Town Hall and a number of offices, including those of South Derbyshire District Council. The non-retail uses make a significant contribution to the centre's role in also providing a hub for community facilities and jobs, as well as contributing to the overall vitality and viability of the town centre.

### Proportion of Vacant Street Level Property

- 5.35 In addition to the diversity of uses, we have also undertaken a survey of vacant properties in Swadlincote town centre. This enables a comparison of the town centre's vacancy rate against the average national vacancy rate, which can be taken as a measure of the health of the centre. The survey of vacant properties can also identify hot spots where vacancy is a prevalent issue, as well as buildings that have been vacant for prolonged periods of time. In so doing, the survey may also identify potential development opportunities. Plans showing the distribution of vacant buildings in Swadlincote town centre in September 2010 and July 2015 are shown in Appendix 4.
- 5.36 As of July 2015, there were 25 vacant retail or service units in Swadlincote town centre, which account for 15.9% of the total number of units. The vacant units occupy 2,546 sq.m of floorspace, which



equates to 7.6% of retail and service floorspace within the town centre. Although the proportion of vacant buildings is higher than the national average of 11.3%, the amount of vacant floorspace is actually below the national average of 9.2%. This is due to the small average size of the vacant retail units across the town centre, which is only 99 sq.m, and some of the empty units are as small as 10 sq.m. The large scale units present in the centre are all occupied, with the largest vacant unit present at September 2015 being The Paramount building on West Street (344 sq.m gross footprint), which has since been re-let.

- 5.37 The proportion of vacant retail and service units has increased substantially since September 2010. The vacancy rate previously stood at 9.7% but there has been a net increase of 10 empty units, which has elevated the vacancy rate to its current level of 15.9%. The amount of vacant town centre floorspace has also had a net increase over the same timeframe from 1,992 sq.m to 2,546 sq.m
- 5.38 The vacant units were previously distributed evenly throughout the town centre. However, although vacant units can still be found throughout the centre, there are now concentrations of vacancies on the streets that adjoin The Delph, which include Belmont Street, Midland Road and the northern side of West Street.
- 5.39 The types of occupier that have been lost are mainly smaller independent businesses. Examples of these include Extreme Gamez (game shop), Penny's Accessories (ladies wear), Foster Corley Crew (estate agents) and Prime Time (video rental). However, it is apparent that there is now lower demand for these types of small scale units.
- 5.40 This issue is not solely confined to the loss of independent retailers, as since 2010 the town centre has also lost New Look and Woolworths, which were both anchor stores within the town centre. The marked increase in the number of charity shops is also symptomatic of a potential issue of lower demand for retail units. This is exemplified well by the former New Look store now being occupied by the Hillfield Animal Charity Shop.
- 5.41 Notwithstanding the above, the core of the town centre along High Street, which contains most of the current national retailers, has a vacancy rate more akin to the national average. In addition, the retail parks on the edge of the town centre at The Pipeworks and at Belmont Street are fully occupied.
- 5.42 The concentration of vacant units at Belmont Street and Midland Road present a significant opportunity for investment in the town centre. A catalyst to the reoccupation of these units may come

from a development plot that is currently under offer, which extends between Midland Road, Belmont Street and Civic Way.

- 5.43 Despite parts of the town centre having a large number of vacant units, there are two notable buildings within the town centre that are currently under refurbishment. The former Empire Theatre / Paramount pub and club on West Street, which was last used as a public house and club, is now under new ownership. This building is a significant part of Swadlincote's heritage and its reoccupation will be a major gain for the town centre. Also under refurbishment is a large and highly prominent building at 4 High Street. This building was also vacant in 2010, indicating that it may have stood empty for some time. In addition, since our survey was undertaken in July 2015, we understand that 2 Belmont Street and 2 Midland Road have been re-occupied by a cafe and clothes shop. The refurbishment and reoccupation of these units will have reduced the vacancy rate in the town centre. We have also been made aware by South Derbyshire District Council that some of the additional vacant units are unavailable to let. For example, the unit at the northern end of Belmont Street is currently in the ownership of the Council but is being retained as a vacant unit as part of the wider assembly of this area of land. Therefore, if such units were to be excluded from the vacancy rate calculation, Swadlincote town centre's vacancy rate would reduce further.
- 5.44 In considering the vacancy rate in Swadlincote, it should be noted that the Goad categorisation system, which has been used to undertake the health check, works on the basis of vacant street level property. Accordingly, although some units may be identified as vacant in the health check due to the ground floor level being vacant, some properties have active uses on different floor levels or to the rear of the building, such as offices or they are part of a neighbouring retail unit that have a contribution to the function of the town centre.

**Photograph (top left):** Vacant development plot at Belmont Street



**Photograph (Top right):** Former hardware store on High Street



**Photograph (bottom left):** Former estate agent premises at Midland Road



**Photograph (bottom right):** Vacant building under refurbishment at 4 High Street



## Commercial Rents

- 5.45 During our site visit to Swadlincote town centre, we noted properties that were being marketed for sale or to let. We were then able to speak to agents about typical rental and sales values that have been achieved and the valuations of current properties on the market. Although rental prices will vary depending on a number of different factors, Table 5.7 and Figure 5.1 help to demonstrate the typical yearly rental values and the sales prices that are currently being sought within the different parts of Swadlincote town centre. As set out above, the majority of properties which are advertised are small in scale, with the largest advertised property being The Paramount on West Street which has now been re-let.
- 5.46 In more peripheral parts of the town centre, retail rents are typically much lower. A good example of this is the unit on 2 Hill Street, which is located on the western edge of the town centre where a rent of £119 per sq.m is sought. More prominent locations, however, such as 4 and 72 High Street, are being offered for rents closer to £200 per sq.m. Notwithstanding this, the average asking rents across the town centre are more commonly between £140 and £150 per sq.m.



**Table 5.7:** Rental and for sale values in Swadlincote town centre (July 2015)

Location	Size (sq.m)	Rent	Rent/Price (per sq.m)	Type	Agent
<b>To Let</b>					
4 High Street	152	£32,500	£213	Retail	Salloway
2 Midland Road	143	£21,000	£146	Retail	Salloway
2-12 Belmont Street	246	£37,000	£150	Retail	Salloway
2 Hill Street	63	£7,500	£119	Retail	Salloway
72 High Street	40	£8,000	£201	Retail	Salloway
9 West Street	69	£9,950	£145	Retail	Rushton Hickman
31 Market Street	112	£16,000	£143	Retail	Rushton Hickman
26C High Street	157	£13,000	£83	A2 Financial	WBF
The Paramount, 21 West Street	602	£19,950	£33	Public House	Rushton Hickman
<b>For Sale</b>					
65 High Street	134	£195,000	£1,456	Retail	Rushton Hickman
Land to the rear of 24 High Street	161	£45,000	£280	Land	Salloway

**Figure 5.1:** Map of rental values in Swadlincote town centre (July 2015)



## Customers' Views and Behaviour

5.47 The customer's views and behaviours are covered in detail in Section 4, which analyses the results of the household and in-street surveys that were undertaken by NEMS Market Research in July 2015. However, some key messages from the in-street survey are that:

- People choose to visit Swadlincote town centre primarily because it is close to their home;





- The activities that people undertake whilst in the town centre are mainly browsing, visiting a bank, building society or Post Office or because they work, go to school or college in the town centre;
- Nearly half of visitors arrive by car, a quarter arrive on foot and a fifth arrive by bus;
- The most popular car parks are the Bus Station car park, followed by the Morrisons and B&M Bargains car parks;
- Nearly 60% of visitors spend less than 10 minutes travelling to the town centre;
- Approximately 70% of town centre visitors undertake their main food shop once a week or more;
- Nearly half of respondents visited Swadlincote for their last non food shopping trip;
- People choose other destinations for non food shopping mainly for their choice of shops and their quality of shops selling non food goods;
- People most want more high street names in Swadlincote, followed by clothing and department stores;
- The leisure facilities people most want are more restaurants and cafes and a children's activity centre;
- There is also strong desire to fill empty shops and to give the town centre a general face lift;
- Over two thirds of day time visitors never visit the town centre in the evening;
- The main reason visiting in the evening is for a restaurant, cafe, pub or bar;
- Nearly half of the respondents visit the market once every two weeks or more often; and
- People most like the market's fresh food and the range of food products.

## Retailer Representation and Intentions to Change Representation

- 5.48 Multiple retailers, such as Boots, Marks & Spencer and Primark, can act as anchor tenants in a centre and can add to its appeal and create additional pedestrian footfall. Experian Goad produce a list of the top 27 comparison goods retailers, which acts as a measure of the vitality and viability of a centre.
- 5.49 Table 5.8 compares the number of top national retailers within Swadlincote town centre in 2010 and their current representation. The town centre contains four of the top retailers, which are Boots the Chemist, Clarks, Clintons and Superdrug. There is also an Argos on the edge of the town centre at The Pipeworks. The town centre formerly contained five of the list of top retailers, as New Look has since vacated.



**Table 5.8:** Experian Goad list of Major Comparison Retailers

Retailer	Sept 2010	July 2015
Argos	No	*No
BHS	No	No
Boots the Chemist	Yes	Yes
Burton	No	No
Carphone Warehouse	No	No
Clarks	Yes	Yes
Clintons	Yes	Yes
Debenhams	No	No
Dorothy Perkins	No	No
H&M	No	No
HMV	No	No
House of Frasier	No	No
John Lewis	No	No
Marks & Spencer	No	No
New Look	Yes	No
Next	No	No
O2	No	No
Phones 4U	No	No
Primark	No	No
River Island	No	No
Superdrug	Yes	Yes
TK Maxx	No	No
Topman	No	No
Topshop	No	No
Vodafone	No	No
Waterstones	No	No
WHSmith	No	No
Wilkinsons	No	No

Source: Site visit, April 2015 and Goad Experian Goad, February 2007

\* Argos is present in the Pipeworks on the edge of the town centre.

5.50 Swadlincote town centre also contains a number of additional national retailers that are not included on Experian Goad’s list. In total, there are 34 additional national operators, which include 14 comparison goods units, 10 financial and business service units, four retail service units, three leisure service units and three convenience stores. Of note, the additional national multiples include Morrisons, B&M Bargains, Greggs, the Post Office, Specsavers, Thompson Travel and several betting shops. There are also currently 98 independent retailers, which comprise 62.4% of all units.

5.51 There is also considerable national retailer representation adjacent to the town centre. The Pipeworks contains Aldi, Brantano, Costa, Home Bargains, JYSK, Odeon, Poundland, Prezzo, Store Twenty-One and Subway. In addition, the large retail units at Belmont Street contain Halfords, Just for Pets and McDonalds and, as already discussed, the Lidl supermarket has recently been demolished to make way for a new larger Lidl. Furthermore, there is also a newly extended Sainsbury’s superstore located at Civic Way.



- 5.52 A review of recent town centre planning permissions shows that there has only been one significant new retail commitment (2 retail units and a dental surgery) at the site currently occupied by the Council Depot at Darklands Road (application reference: 9/2010/1113). However, this planning commitment has now lapsed.
  
- 5.53 Notwithstanding this, the town centre has good potential to attract new retailer representation. Firstly, there is existing capacity within the relatively large number of vacant units that have potential to become reoccupied, although the majority of these units are more suited to smaller retailers. However, the units at 4 High Street and the former Empire Theatre / Paramount pub and club at 21 West Street have great potential, as they are both likely to be reoccupied in the near future. Furthermore, the occupation of these highly prominent buildings is likely to help attract further investment in this part of the town centre.
  
- 5.54 The Swadlincote Town Centre Vision and Strategy (2012) also identifies several areas for major strategic investment. These include the leisure centre, the council offices, the bus station and the car park and land to the west of Midland Road, which collectively form one large site. Selected investment opportunities are also identified in the northern part of the town centre between High Street and Civic Way and within the southern part of the town centre between Rink Drive and High Street. Within the area between High Street and Civic Way, there is currently a 0.17 hectare development plot that is under offer, which is located adjacent to Belmont Street. This plot presents a significant opportunity for new development and if occupiers could be attracted to this part of the town it would assist in rectifying the high level of vacancies at this location.
  
- 5.55 The Vision and Strategy also sets out to expand the market within the town centre. This will help to capitalise on the recently completed public realm improvement scheme in The Delph, which has created a new functional space.

### **Pedestrian Flows**

- 5.56 A survey of footfall levels was undertaken by South Derbyshire District Council during 2015. This focussed on eight key locations within the town centre. The pedestrian counts were undertaken on a market and non-market day at entrance points and other key locations within the town centre and at different periods of the day. The surveys were undertaken at the same locations and across the same time period as earlier surveys, which were undertaken in 2000 and 2008. This enables direct comparisons to be made of the historical footfall data to show how pedestrian activity has changed



within the town centre over time. This also provides a strong indication of successful parts of the town centre, as well as those areas that may need intervention.

5.57 A plan of the locations where the pedestrian counts were undertaken is provided at Appendix 3. However, a description of their locations is provided below:

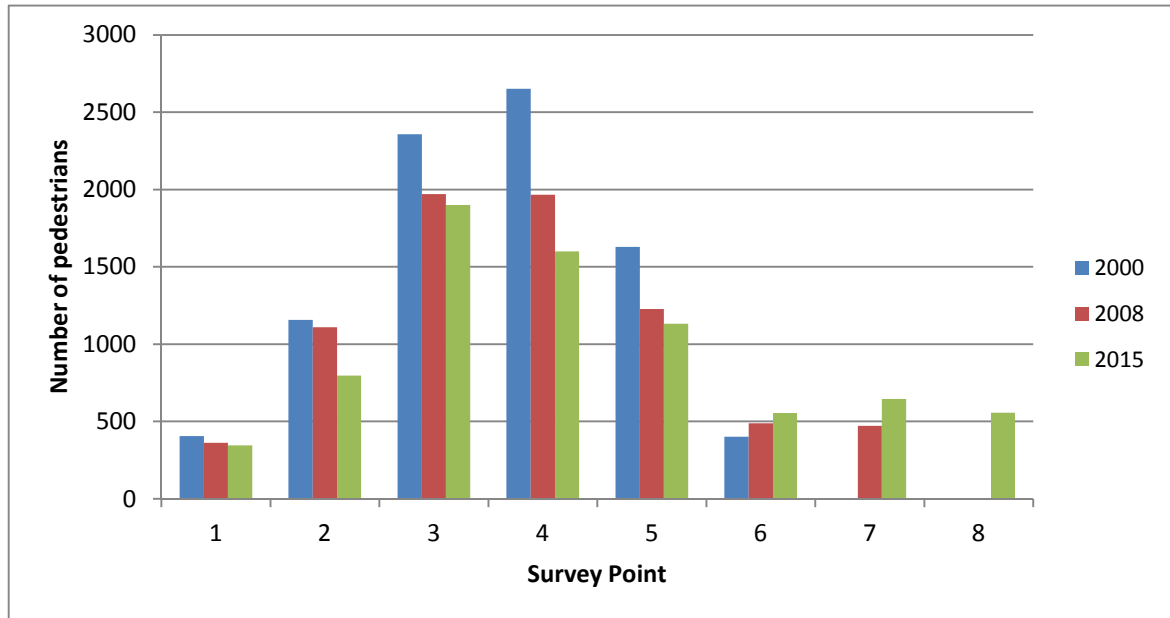
- **Location 1** – western entrance to town centre at West Street
- **Location 2** – entrance to the Delph from Market Street
- **Location 3** – High Street close to The Delph
- **Location 4** – central part of High Street next to 22 High Street
- **Location 5** – central part of High Street next to 55 High Street
- **Location 6** – eastern entrance to High Street close to Hill Street
- **Location 7** – entrance to Morrison’s from High Street
- **Location 8** – entrance to High Street from alleyway leading from Rink Drive car park / Pipeworks

5.58 Figure 5.2 shows that the central and western parts of High Street are the busiest areas of the town centre. The lowest footfall levels were recorded at the town centre’s western gateway at West Street and the eastern gateway close to High Street’s junction with Hill Street.

5.59 Overall footfall levels have decreased more or less across the whole town centre since the year 2000 with only the eastern gateway seeing a slight increase, which correlates with the completion of the Pipeworks. There has been an overall reduction from 8,601 people in the 2000 survey to 7,596 in 2008 survey and the latest survey in 2015 recorded a further reduction to 7,529 people. The 2015 pedestrian count comprises a 14.2% reduction of pedestrian activity since the year 2000.

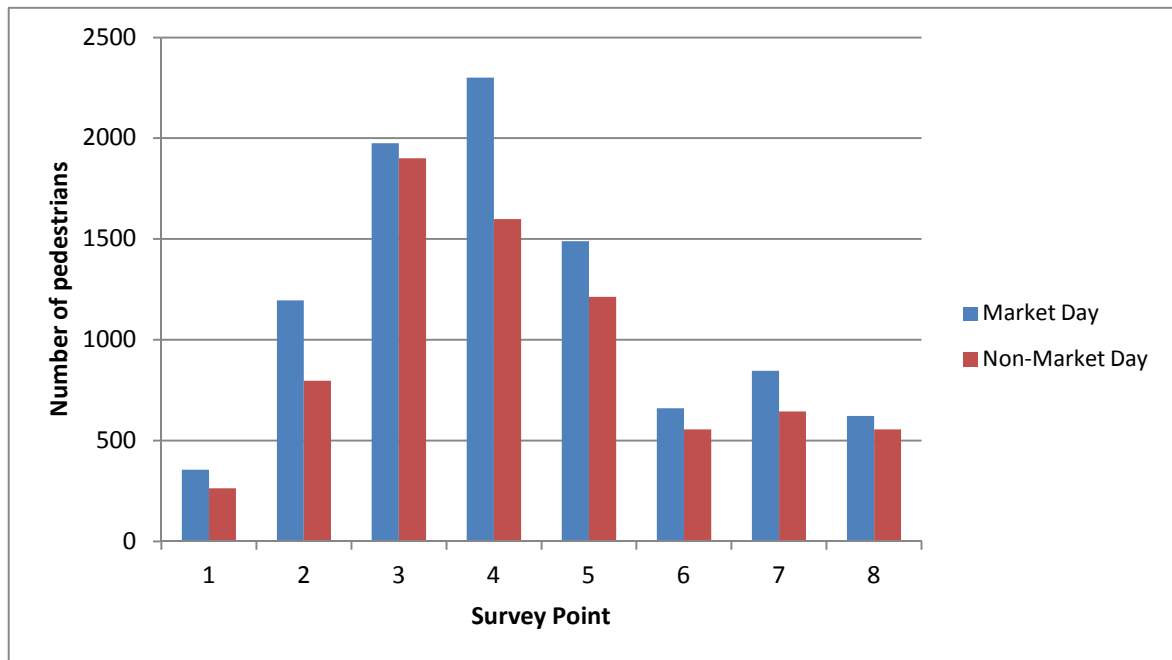
5.60 Pedestrian counts were not taken at location 7 and 8 in the 2000 survey and at location 8 in the 2008 survey. However, footfall levels have recently been recorded in these locations to monitor linked trips between Morrisons, the Pipeworks and the town centre.

**Figure 5.2: Footfall by year and survey point non-market days**



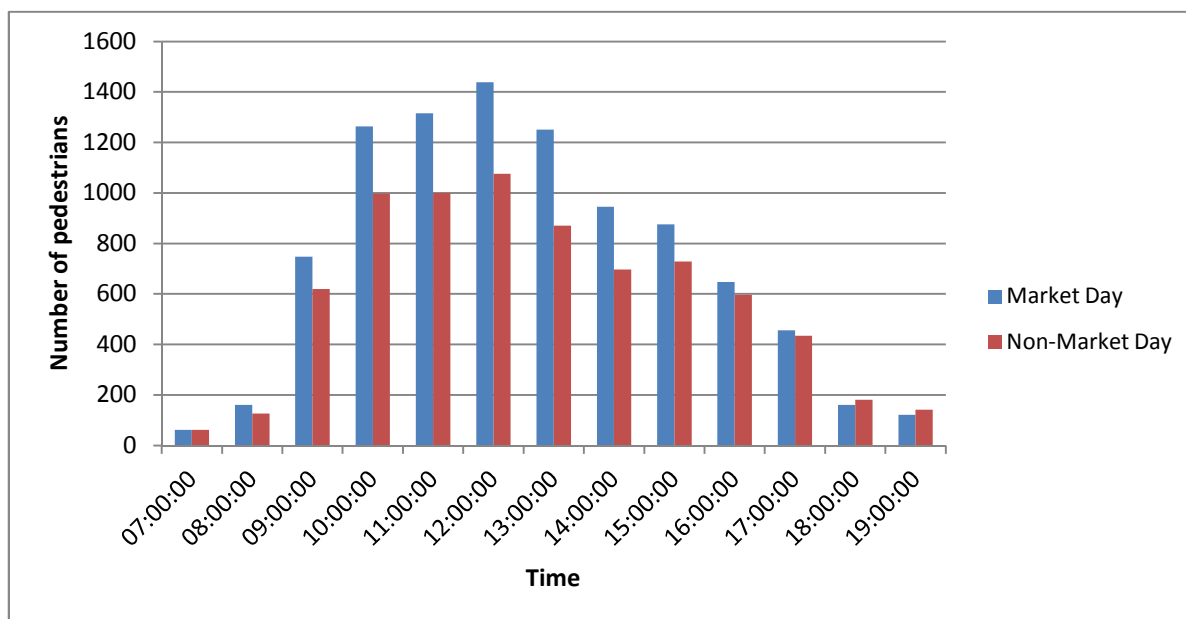
5.61 Figure 5.3 shows the difference between overall footfall levels within the eight survey locations on a market and non-market day. The total pedestrian activity rises from 7,529 people on a non-market day to 9,446 people on a market day, which is a 25.5% increase. Unsurprisingly, the greatest footfall increases are within the central parts of High Street, where the market is held. However, the pattern of increased activity is seen in each of the eight survey locations across the town centre.

**Figure 5.3:** Market and non market day footfall totals (2015)



5.62 Figure 5.4 shows the times of the day when footfall within the town centre is highest on both market and non-market days. The busiest periods are between 10am and 1pm when pedestrian activity peaks at over 1,400 people per hour on market days and nearly 1,100 people per hour on non-market days. However, pedestrian activity decreases considerably throughout the afternoon to between 400 and 700 people per hour on both market and non-market days. Furthermore, the town centre is clearly failing to attract people in the evening, as the level of activity reduces to under 200 people per hour between 5pm and 7pm. This figure confirms the results of the In Street Survey, which found that 68.6% of respondents never visit the town centre in the evening and only 8.8% visit more once a week or more frequently.

**Figure 5.4:** Comparison of total footfall between market and non-market days by hour (2015)



## Accessibility

### Road Access

- 5.63 Swadlincote town centre is located approximately 10 kilometers driving distance to the east of Burton upon Trent town centre and 24 kilometers driving distance to the south of Derby city centre. The town does not have motorway access although the A511, which connects Burton upon Trent with Leicester, is located close by to the north. Civic Way (A514) is located to the north and east of the town centre and many people travel along this route whilst passing through Swadlincote. The pedestrianisation within the town centre between 10am and 4pm means that it is not possible to directly access the shops using a car during these times and visitors are instead required to park and walk from one of the many car parks that surround the main shopping area.
- 5.64 A number of good quality roads link the town centre and the surrounding residential areas. The roads around the town centre appeared to be free flowing on the day of our visit and congestion did not appear to obstruct vehicle movements. The streets within the town centre boundary mostly have one way restrictions and traffic management features, which limit vehicle movements and speeds.





### Car Parking

- 5.65 Those arriving by car are likely to use one of the town centre's many off road car parks due to the pedestrianisation of the main shopping area. Car parking is free throughout the town centre and the facilities appeared to be very well used on the day of our visit, with most car parks approaching full capacity. Notwithstanding this, it was also observed that parking spaces were available in each of the car parks that were visited, although parking availability may be an issue during busier periods of the week.
- 5.66 There is a good distribution of Council operated and private customer car parks that serve the different parts of the town centre. However, we consider that some of the car parks do not relate particularly well to the areas that they are meant to serve. Improvements to the car parking signage would help to address this issue.
- 5.67 The Hill Street (21 spaces, 2 disabled bays) and Civic Way East End (84 spaces, 17 disabled bays) car parks serve the east of the town centre, whilst the Rink Drive (94 spaces, 8 disabled bays) and Alexandra Road (60 spaces, 3 disabled bays) car parks serve the south and the Civic Way Bus Station (75 spaces, 5 disabled bays), Market Street (44 spaces, 3 disabled bays) and Civic Way (Council Office and Greenbank Leisure Centre) car parks serve the west of the town centre. There are also several privately operated car parks, which include the Morrisons (375 spaces) and Pipeworks (227 spaces) car parks towards the south of the town centre and the B&M Bargains (70 spaces) car park towards the north. The car parks all appeared to be well maintained and they also felt safe to use.
- 5.68 Although on street parking in the centre is limited, there have been recent improvements in this regard through the development of additional short stay on-street parking. In addition, the time limitations on the parking bays towards the east of the town centre have recently been relaxed.
- 5.69 Civic Way East End and the Bus Station are the two principal short stay car parks. Both car parks are close to the main shopping area and their locations and three hour time limitations seemed to be appropriate, allowing people enough time to make a quick visit to the shops whilst ensuring a turnover of customers. These car parks also contain the highest number of disabled spaces, enabling disabled people to park and access the shops in the most convenient way.
- 5.70 The only location where the time limitations were considered to be somewhat constraining were at the Pipeworks, where the three hour time limit may not meet the requirements of those watching a longer duration film at the cinema which the car park serves. Longer stays can be made by prior



arrangement, although the signage does not convey this message very well and the process of arranging for an extended stay may deter some people from visiting.

- 5.71 The Bus Station is the most popular car park with 24.5% of respondents to in-street survey parking there. This is closely followed by the B&M Bargains (16.3%) and Morrison's (16.3%) car parks. However, although 85.1% of respondents to the in-street survey reported that they had no difficulties finding a parking space on the day of their visit, 14.9% did experience issues. Although this is a minority, this still comprises a significant number of people who may be deterred from visiting Swadlincote due to parking difficulties. Resolving this issue would help to encourage more people to the town centre.

### Public Transport

- 5.72 Swadlincote town centre does not benefit from a railway station – the nearest railway station being located over 8 km away at Burton upon Trent. However, the town centre can easily be accessed via public transport, as a bus station is located within the northern part of the town centre, which provides convenient access to the shops. The station is of a functional design with five bus stands, each with its own covered waiting area. Network information is freely available in the station and each stand benefits from real time travel information.
- 5.73 The bus services are predominantly operated by Arriva, which link the town centre to Ashby-de-la-Zouch, Burton upon Trent, Coalville, Derby, Measham, Midway, Overseal and the surrounding communities along the routes. The bus station also serves National Express coaches to regional destinations, such as Derby, Nottingham and Birmingham.
- 5.74 The in-street survey identified that 20.6% of people arrive at the town centre by bus, which is a high level in comparison to other centres of a similar nature that WYG have studied.

### Walking

- 5.75 We found the pedestrian linkages to the town centre to generally be very good. Walking to the town centre is also quite popular, as 26.5% of respondents to the in-street survey arrived on foot. Although the main shopping area is bound to the north and east by Civic Way, which is a busy road (A514), there are controlled pedestrian crossings at key desire lines, which provide safe and convenient access between the town centre and the surrounding residential areas.
- 5.76 The connections between the town centre and the Pipeworks were noted as being in need of improvement. It was clear from our visit that improvements have been made to the route from the



Pipeworks as far as the western side of the Rink Drive car park. However, the remainder of the route along the alleyway between the Rink Drive car park and the town centre is of much lesser quality. It was also noted that the signage between the Pipeworks and the town centre could be provided at more regular intervals and made to look more apparent.

- 5.77 The pedestrianisation of the main shopping area is designed to accommodate the needs of those accessing the shops on foot. Furthermore, although the wider town centre is located on a slight incline, which rises from north to south, the main shopping area is relatively flat.

### Cycling

- 5.78 The National Cycle Route 63 runs north to south through Swadlincote town centre, passing through the Delph. However, there are very few dedicated cycle lanes and the cycle route provisions are somewhat limited. Notwithstanding this, secure cycle parking is provided in several locations, including High Street, West Street, Market Street and outside the library. The cycle parking facilities are mostly positioned in prominent locations and comprise purpose built metal rails with associated signage. The Pipeworks also has five Sheffield cycle stands, which are located in view of the Prezzo restaurant. However, it is clear that cycle usage is very low within the town centre. None of the cycle stands that we observed during our visit had parked bikes and the in-street survey identified that only 1% of respondents arrived at the town centre on a bicycle, which is a very low proportion.
- 5.79 Given the lack of cycle facilities and activity within the town centre, we consider that there is an opportunity to promote cycling and increase cycle use. Measures may include a new cycle route along High Street, more signage to say the cyclists are welcome within the town centre and better online promotion of cycle facilities in Swadlincote.

**Photograph (left):** Sheffield cycle stands at the Pipeworks



**Photograph (right):** Secure cycle parking at eastern gateway into town centre on High Street



### Disabled Access

- 5.80 Disabled access within the town centre is generally good. A shopmobility service is in operation, whereby visitors with mobility issues can hire manual wheelchairs, powered wheelchairs and powered scooters for free. This enables them to shop within the town centre and to visit the centre's leisure and commercial facilities. The service is available on a Monday, Tuesday, Thursday, Friday and Saturday between 10.00am to 2.00pm and is located at Grove Street.
- 5.81 As discussed in the parking section, we consider there to be a good distribution and number of disabled car parking bays within the town centre. In addition, we observed there to be adequate dropped curves around the town centre. Where steps are present to address levels changes, alternative ramp options are provided.
- 5.82 The Delph and its connecting side streets now provide a modern flat surface that fulfils modern design standards for disabled users. High Street has a mainly brick paved surface, which contains less features for disabled users, although the area still appears to be relatively free of hazards that would prevent disabled access.
- 5.83 There are seating opportunities throughout the town centre, particularly on High Street and in the Delph, which provide resting points for less able visitors. The street furniture is also positioned so that it does not act as an obstruction.



## Perception of Safety and Occurrence of Crime

- 5.84 During our visit to Swadlincote town centre, we observed the sense of safety and security to generally be very good. A significant contributing factor towards this is the public realm, which is of very good quality and helps to create a sense of place within the shopping environment. The main shopping areas are also overlooked by a mostly active retail frontage, which helps to create a sense of natural surveillance. We also observed very few incidences of graffiti or indications that crime may be an issue around the shops.
- 5.85 However, there are some areas within the town centre that may be perceived to feel less safe. The largely vacant buildings and land on Belmont Street and Midland Road are not well overlooked. The passage linking the Rink Drive car park and High Street, which is also a key pedestrian route from the Pipeworks, is also poorly overlooked and may not feel safe for some users, particularly during evening hours.
- 5.86 The level of pedestrian activity also has a bearing on the sense of security in the town centre, as the presence of people helps to provide a sense of natural surveillance and activity. There is a large variation in pedestrian activity within the town centre between the morning, afternoon and evening and the sense of safety also changes across the day. To this extent, the low level of activity during evening hours is a particular issue.
- 5.87 To help address this issue, a state of the art CCTV camera system has been installed throughout the town centre as part of the Swadlincote Town Centre Masterplan Phase 2. The cameras help visitors and businesses to feel safe and secure, whilst deterring criminal activity and antisocial behaviour. The CCTV system has also already been successful in providing evidence to help bring about a number of prosecutions.
- 5.88 The town centre is also patrolled by Safer Neighbourhood Wardens who attend antisocial behaviour incidents with a CCTV van when needed. In addition, new lighting has also been installed in several locations to help the town centre feel safer in hours of darkness.
- 5.89 There is street lighting throughout the town centre, although the effectiveness of the lighting along High Street may be reduced by the canopies of the trees that line the street. However, one of the aims of the Town Centre Masterplan is to improve lighting provision within the town centre and Phase 1 of the masterplan has already improved lighting along Church Street and within the jitties. Furthermore, the alterations at The Delph have created an open and well lit space. There are also



plans to illuminate some of the heritage buildings within the town centre, which will help the town centre to feel like a safer and more attractive place to visit at night.

- 5.90 The town centre also benefits from a number of additional schemes that are designed to make the area a safe place to live and work. Firstly, the police, district and county councils work together with health providers, the probation service and other local organisations within the Safer South Derbyshire Partnership. This provides a forum to raise concerns and tackle issues collaboratively through positive initiatives that help to prevent crime. The town centre also operates a Pubwatch scheme, which provides a forum for pubs to speak to each other, raise awareness of issues and provide a collective effort to manage antisocial behaviour and excessive drinking.

### State of Town Centre Environmental Quality

- 5.91 We found Swadlincote town centre's environmental quality to be of reasonably good quality for the most part. The town centre's pedestrianisation helps to create a calm and pleasant shopping environment that is free of traffic. Much of the town centre also forms part of a Conservation Area that contains a number of buildings of high architectural quality, which have a large contribution to the centre's character and setting. The buildings are complemented by an avenue of mature trees, which stretches along most of the high street and provides shelter for people shopping within the town centre.
- 5.92 We observed that the streets appeared to be clean and generally free of litter and seasonal planted areas are present in a number of locations within the town centre. The beneficial impact of such features is demonstrated within the In Street Survey, as 5.9% of respondents cited the good quality environment as the reason that they choose to visit Swadlincote.
- 5.93 West Street, Ernest Hall Way and The Delph have recently been the subject of a £1.1 million public realm improvement scheme. This has incorporated new paving, planting, seating areas and litter bins, which have complemented the Conservation Area. The slabbed surface materials used in the revamped square are of excellent quality and their introduction further along High Street would improve the appearance of this part of the town centre. The improvements in the Delph have created a suitable venue for community activities, as well being an improved focal point within the town centre.
- 5.94 Several of the buildings to the south of The Delph, however, are vacant and appear rundown. This creates an unusual juxtaposition between the high quality public realm in The Delph, which has



received considerable investment, and the low quality buildings, which are in need of investment. Notwithstanding this, as reported in the Retailer Representation and Intentions to Change Representation section, a number of buildings close to The Delph are now being refurbished, which will help to make this area more attractive and viable for future investment. Furthermore, South Derbyshire District Council has been granted a £400,000 grant from the Heritage Lottery Fund, which will help to deliver environmental improvements in the town centre and improve the special character of Swadlincote town centre's Conservation Area. The project is planned to start in early 2016 and will run for three years. Initiatives which will form part of the project will include grants for repairs and improvements to historic buildings, the re-design of the Diana Princess of Wales Memorial Garden to improve the town centre green space, as well as heritage activities and events to educate people about the industrial and social heritage of Swadlincote.

- 5.95 The Morrison's supermarket and the Pipeworks essentially have the character of modern and well maintained retail parks. The areas between the shops and the car parks are well landscaped and the Pipeworks also has several public art features, which add cultural interest to this location.
- 5.96 There are, however, parts of the town centre that are of lesser quality. Views from Civic Way, which is located to the north of the main shopping area, are of the car parks and servicing areas to the rear of the commercial units. This is a poor advert of the town centre and is not reflective of Swadlincote's actual character. Civic Way would benefit from landscaping or trees to screen the service yards or possibly a scheme to reintroduce the building line onto parts of Civic Way. The bus station, South Derbyshire District Council and the Council's staff car park also have low quality visual appearance.
- 5.97 The employment estate and builders yard to the south of West Street are of reasonable quality in comparison to other uses of their type. However, they would not normally be considered as main town centre uses.
- 5.98 Several priorities of local people relating to the town centre's environmental quality were raised within the in-street survey. When visitors to the town centre were asked which measures they thought would improve the town centre and make it more attractive, by far the most common answer was for the empty shops to be filled, which received 43.1% of responses. A further 23.5% of the respondents said that they would give the place a general facelift with more flowers and planting and a further 8.8% of people wanted improved cleanliness.

## Summary





- 5.99 In summary, Swadlincote town centre is the largest retail centre in South Derbyshire District and the centre principally serves Swadlincote and the surrounding rural communities. The town centre's convenience offer has decreased in recent years, although the convenience offer of the edge of centre locations has increased considerably. A similar pattern has been observed within the comparison goods sector and there has been a sharp increase in the number of charity shops operating in the town centre. This may partly be due to the completion of the Pipeworks development and the growing number of edge of centre supermarkets, although the recession has also clearly had a substantial impact.
- 5.100 The town centre also has a strong retail service offer, which has had a large rise in the number of health and beauty providers. Although the leisure service offer is currently below the national level, this sector has potential to grow. However, recent leisure service investment has been directed towards the Pipeworks, although opportunities may still exist to link this investment with an improved leisure service offer within the town centre.
- 5.101 The financial and business service offer is below that of the national level, although the variety of this type of service is still considered to be reasonably good. Notwithstanding this, the town centre has a number of non retail units, which have a significant contribution to the centre's role in providing a hub for key community services and jobs.
- 5.102 Although the proportion of vacant units in Swadlincote town centre (15.9%) is greater than the national average level (11.3%), the proportion of vacant floorspace (8.1%) is below the national average figure (9.2%). The higher proportion of vacant units than floorspace is reflective of the fact that the majority of the vacant units in the centre are small in scale. Such units are unlikely to be desirable to modern national operators seeking a large floorplate. The proportion of vacant units and floorspace has increased since 2010. The main concentration of vacant units and land is to the north of the Delph. The increase in vacant units is not helped by pedestrian activity being 14.2% down on what it was previously. Although the proportion of vacant floorspace is greater than the national average if only those units in the town centre boundary (in accordance with the unadopted boundary included in the Swadlincote Town Centre Vision and Strategy) are considered, if the units at the Pipeworks were also included, which is fully occupied, this vacancy rate would reduce. In addition, we are aware that since the town centre survey was undertaken in July 2015 that several vacant units have been refurbished and reoccupied, which is a positive sign.
- 5.103 Given the presence of a range of small scale units in Swadlincote fiscal incentives may need to be directed towards attracting more independent retailers to take up these units. Notwithstanding this,



investment in the public realm, a growing economy, current refurbishments and development opportunities have potential to trigger further private sector investment. This may also be assisted through the expansion of the market, as footfall on market days is over 25% higher than on non-market days.

- 5.104 There also appears to be an opportunity to grow the evening economy. The in-street survey highlights that nearly a third of day time visitors do not visit in the evening and footfall levels reduce steeply in evening hours. Furthermore, there is a strong desire for more restaurants and cafes in the town centre.
- 5.105 The town centre generally has good accessibility. It is easily accessed by car, although an issue with the car parks approaching capacity has been identified. A large number of people also travel to the town centre on foot or on a bus. However, there is an opportunity to increase cycle ridership, which was found to be very low.
- 5.106 The town centre was generally found to have good environmental quality. The public realm improvement scheme around the Delph appears to have been a success and there is potential to expand this type of improvement further east along High Street. The town centre also generally feels safe and secure. However, there are a few areas that are in need of improvement, which include the streets to the north of the Delph, the views of the town centre from Civic Way and the connectivity between the town centre and the Pipeworks.
- 5.107 In conclusion, we find Swadlincote town centre to be in reasonable health. Although the health of the traditional high street in Swadlincote has deteriorated slightly in recent years, there have been improvements to the overall offer of Swadlincote in particular due to the development of The Pipeworks. The town centre faces strong competition from higher order centres that are located in reasonably close proximity to Swadlincote. However, there are a number of opportunities that have the potential to improve the town centre and ensure that it is a vibrant place to visit in future.



## 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 The population within each ward and each zone at 2015 has been calculated using Experian Micromarketer G3 data (2013 estimate, which was issued in October 2014).

6.03 Table 6.1 sets out our estimate of future population growth across the Study Area using Experian Micromarketer G3 data.

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

Zone	2015	2020	2025	2028	2030
A	17,068	17,943	18,733	19,139	19,394
B	16,513	17,406	18,247	18,670	18,927
C	9,679	10,191	10,665	10,902	11,049
D	15,754	16,560	17,295	17,665	17,891
E	10,626	11,192	11,721	11,994	12,158
F	21,902	22,646	23,303	23,648	23,869
G	7,622	7,814	8,003	8,103	8,166
H	13,000	13,298	13,598	13,761	13,866
<b>Total</b>	<b>112,164</b>	<b>117,050</b>	<b>121,565</b>	<b>123,882</b>	<b>125,320</b>

Source: Experian Micromarketer G3 2014 data release

6.04 The above table indicates that Experian forecast that the Study Area population will increase from 112,164 at 2015 to 125,320 at 2030, equating to an increase in population of 13,156 persons. Within Zones A, B, C, D and E – which broadly accord to the area of the Study Area within South Derbyshire – the forecast population increases from 69,640 at 2015 to 79,419 at 2030. This equates to an estimated population increase of 9,779 persons over the 15 year period or 652 persons per annum.

6.05 In determining the population figures to be used to inform this Study, we have also considered the housing growth which is planned within the Study Area during the Local Plan period (up to 2028). As set out at Draft Policy S1 of the South Derbyshire Local Plan Pre-Submission document, a total of 13,454 dwellings are planned to be built in the plan period. In relation to the Study Area, the draft strategic housing land allocations set out that approximately 2,815 dwellings are planned to be



delivered across Zones A to E. The East Staffordshire Submission Version does not propose any strategic housing allocations within Zone F. In relation to Zones G and H, although the North West Leicestershire Core Strategy has been withdrawn, the withdrawn strategy envisaged that 1,400 dwellings would be delivered in Ashby-de-la-Zouch. We set out the planned housing growth at Table 6.2.

**Table 6.2 – Planned Strategic Housing Growth in the Study Area**

Study Area	Households	Population
A	600	1,458
B	515	1,251
C	400	972
D	1,300	3,159
E	1,280	3,110
H	1,400	3,402
<b>TOTAL</b>	<b>5,495</b>	<b>13,352</b>

Source: South Derbyshire Pre-Submission Local Plan, East Staffordshire Submission Local Plan and North West Leicestershire Core Strategy (withdrawn).

Population determined in accordance with average housing occupancy rate of 2.43 persons per dwelling provided by South Derbyshire Council.

6.06 Given that the planned housing growth within the Study Area, when converted to planned population growth, closely correlates to the population growth identified by Experian, our capacity assessment is based on Experian figures.

### Retail Expenditure

6.07 In order to calculate per capita convenience and comparison goods expenditure, we have again utilised Experian Micromarketer G3 data which provides detailed information on local consumer expenditure which takes into consideration the socio-economic characteristics of the local population. Experian is a widely accepted source of expenditure and population data and is regularly used by WYG in calculating retail capacity.

6.08 The base year for the Experian expenditure data is 2013. Per capita growth forecasts have been derived from Experian Retail Planner Briefing Note 12.1. Appendix 3 of the Retail Planner Briefing Note identifies the following annual growth forecasts for convenience and comparison goods which inform our assessment.



**Table 6.3: Expenditure Growth Forecasts**

Year	Convenience (%)	Comparison (%)
2015	0.5	4.4
2016	0.4	3.1
2017	0.5	3.0
2018	0.4	3.0
2019	0.7	3.2
2020	0.7	3.2
2021	0.5	3.0
2022	0.8	3.3
2023	0.8	3.3
2024	0.8	3.3
2025	0.7	3.3
2026	0.7	3.2
2027	0.6	3.2
2028	0.8	3.3
2029	0.6	3.3
2030	0.6	3.3

Source: Appendix 3, Retail Planner Briefing Note 12.1 (October 2014)

- 6.09 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 +0.5% annual growth at 2015, which is then forecast to increase to +0.8% at 2022. Whilst there is some deviation in the rate forecast thereafter, the rate of annual convenience goods growth forecast to 2030 does not fall below +0.6%.
- 6.10 By contrast, Experian identifies an immediate and relatively strong annual comparison growth rate of +4.4% at 2015. A drop in the rate of growth to +3.1% is anticipated at 2016, with growth rates thereafter to 2030 forecast to be extremely stable, within the range +3.0% to +3.3%.
- 6.11 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.
- 6.12 Experian Retail Planner Briefing Note 12.1 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 'stripped out' any expenditure which survey respondents indicated was committed via special forms of trading and instead have made an allowance derived from Experian's recommendation.

- 6.13 In considering special forms of trading, it should be noted that many products which are ordered online are 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.
- 6.14 Accordingly, 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) which makes an allowance for internet sales which are sourced from stores. The proportion of expenditure committed through special forms of trading cited below at Table 6.3 is 'stripped out' of the identified expenditure as it is not available to stores within the Study Area.

**Table 6.4: Special Forms of Trading Forecasts**

Year	Convenience	Comparison
2015	2.8%	12.5%
2020	4.0%	15.7%
2025	4.9%	15.9%
2030	5.4%	15.6%

Source: Appendix 3, Experian Retail Planner Briefing Note 12.1 (October 2014)

- 6.15 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, 2028 and 2030. In doing so, our assessment takes into account both per capita retail expenditure growth and population change.

## Convenience Goods Expenditure

- 6.16 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 £215.7m of convenience goods expenditure<sup>31</sup>. Available convenience goods expenditure is then forecast to increase to £258.0m at 2030, which represents an increase of £42.3m (or 19.6%) between 2015 and 2030. Growth in the short term, up to 2020, is limited to £12.6m.

<sup>31</sup> Expressed in 2013 prices, as is every subsequent monetary value



**Table 6.5: Total Available Study Area Expenditure – Convenience Goods (£m)**

2015 (£m)	2020 (£m)	2025 (£m)	2028 (£m)	2030 (£m)	Growth 2015-2020 (£m)	Growth 2015-2025 (£m)	Growth 2015-2028 (£m)	Growth 2015-2030 (£m)
215.7	228.3	243.5	252.5	258.0	12.6	27.8	36.8	42.3

Source: Table 2a, Appendix 5  
In 2013 prices

## Comparison Goods Expenditure

6.17 For comparison goods, Table 6.6 sets out our estimation that the resident population of the Study Area will generate some £306.8m of comparison goods expenditure at 2015. Available comparison goods expenditure is then forecast to increase to £531.6 at 2030, which represents an increase of £224.9m (or 73.3%) between 2015 and 2030.

6.18 Whilst the identified expenditure increase is clearly significant, the rate of forecast growth is more modest than that which has been previously achieved, principally because of the expectation that an ever increasing proportion of comparison goods expenditure will be committed through special forms of trading (most particularly, internet shopping).

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

2015 (£m)	2020 (£m)	2025 (£m)	2028 (£m)	2030 (£m)	Growth 2015-2020 (£m)	Growth 2015-2025 (£m)	Growth 2015-2028 (£m)	Growth 2015-2030 (£m)
306.8	358.9	436.9	491.7	531.6	52.1	130.1	185.0	224.9

Source: Table 8, Appendix 5  
In 2013 prices

6.19 For the purposes of this Study, comparison goods expenditure has been divided into ten sub-categories: 'DIY', 'Garden', 'Electrical' and 'Furniture' (these four categories collectively being referred to as bulky goods) and, 'Clothing & Footwear', 'CDs, DVDs and Books', 'Health and Beauty/Chemist Goods', 'Small Household Goods' and 'Toys, Games, Bicycles and Recreational Goods' (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zonal basis as detailed at Appendix 5, Table 8.

6.20 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.



## 7.0 Retail Capacity in the Swadlincote Town Centre's Catchment

- 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). We have also assessed the need at 2028, in accordance with the South Derbyshire Local Plan period. 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. 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 5 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

7.08 In order to ascertain the likely need for additional convenience goods floorspace in the Study Area, it is first necessary to consider the performance of the current provision. We have assumed that the future convenience goods expenditure available to South Derbyshire will be commensurate with its current market share i.e. we assume that facilities in South Derbyshire will attract 50.4% of the total convenience goods expenditure available to the Study Area in future years.

7.09 Table 7.1 sets out the current convenience goods trading position compared against the 'benchmark' (or anticipated) turnover of existing convenience goods floorspace and projects this forward to 2030. 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 stores, we have assumed that stores are trading 'at equilibrium' (i.e. the survey-derived turnover equates to the expected level of turnover).

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, the extent of the Study Area and the proximity of higher order centres in proximity to the Study Area, such as Derby, Burton-upon-Trent, Lichfield and Tamworth, 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, which could benefit from a small level



of inflow, but such facilities are generally of a small scale (local convenience grocery stores or farm shops) and have limited bearing on the results of the assessment as a whole. We set out all our assumptions in this regard within Table 5 of Appendix 5.

- 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>32</sup> has been applied to the estimated net floorspace of each foodstore<sup>33</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 Our assessment identifies that taking all convenience goods retail facilities in the Study Area, the expected turnover of provision is £129.0m per annum at 2015, which is greater than the identified survey-derived turnover of £108.8m. This suggests that, taken cumulatively, existing convenience goods facilities are 'undertrading' when compared to their expected turnover. Accordingly, it would appear that the existing food retail provision is broadly appropriate to meet the existing quantitative need.
- 7.14 There are instances where specific facilities trade very strongly or relatively poorly. For example, the Aldi store at the Pipeworks, on the edge of Swadlincote town centre, in Zone B has an estimated convenience goods benchmark turnover of £7.3m, but turns over an estimated £23.4m of convenience goods expenditure. In considering this position, it is noted that during the time that the household survey was undertaken, the Lidl store on Belmont Road had been demolished in order to allow the redevelopment of the site to provide a larger store. It is likely the case that the closure of this store for a temporary period, covering the period when the survey was undertaken, may have improved the

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<sup>32</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 Appendices 5

<sup>33</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



trading performance of the Aldi, as the closest comparable alternative destination to the Lidl. The Co-operative Food store in Willington was also found to be overtrading, with the survey derived turnover of this store (£2.8m) being substantially greater than expected benchmark turnover (£0.9m). The overtrading of this store is likely a result of the limited convenience goods provision available in Zone D where the Co-operative Food store in Willington is located.

7.15 By way of contrast, the convenience goods turnover of the Sainsbury's at Civic Way and the Morrisons at Coppice site (both in Zone B) turn over £6.2m and £16m less than their respective benchmark turnovers of £46.8m and £46.1m.

7.16 Whilst we have no doubt that the Aldi store is performing very strongly indeed and that the abovementioned Morrisons and Sainsbury's stores are performing below benchmark level, it should be noted that the estimation of stores' turnover is subject to a number of assumptions. For example, in apportioning main and top up convenience goods expenditure using the household survey, it is assumed that each person within a zone spends the zonal per capita average amount on such items. However, in actuality, it is likely that the typical discount foodstore customer spends a lesser amount than the typical 'main four' 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.

7.17 In addition, it should be noted that the benchmark turnovers contained in our report are based on national sales densities. Therefore, although a store may be under-trading in comparison to the national benchmark, it may still be considered to be trading relatively well in a more regional context.

7.18 The individual performance of each of the main convenience goods facilities is identified at Table 5 of Appendix 5.

7.19 In order to appraise the need for additional convenience goods retail floorspace, it is necessary to consider how the performance of stores will be affected by future growth in expenditure. Accordingly, Table 7.1 also sets out the anticipated increases in expenditure which will be available to the District's convenience goods retail facilities, assuming that the current market share of 50.4% is maintained. It is anticipated that the available convenience goods expenditure will increase from £108.8m at 2015, to £115.1m at 2020, £122.8m at 2025, £127.3m at 2028 and £130.1m at 2030. It is also assumed that the turnover of existing floorspace will improve through improvements in floorspace efficiency as set out in Experian Retail Planner Briefing Note 12.1. Following this exercise, we then consider the effect



extant planning commitments will have in addressing any identified convenience goods shopping needs under each of the growth scenarios.

7.20 Table 7.1 indicates that taking into account the performance of convenience goods floorspace within Swadlincote’s catchment, there is an effective convenience goods expenditure deficit of -£20.2m is identified at 2015. By 2020, after increases in population and expenditure are considered against changes in floorspace productivity<sup>34</sup>, we estimate that there will still be an expenditure deficit of -£12.3m. By 2025, we estimate that there will be an expenditure deficit of £-4.9m, with this deficit decreasing to £-0.7m by 2028. By 2030, we estimate that there will be an expenditure surplus of £1.8m.

**Table 7.1: Quantitative Need for Convenience Goods Floorspace in Swadlincote’s Catchment**

Year	Benchmark Turnover (£m) <sup>1</sup>	Available Expenditure (£m) <sup>2</sup>	Surplus Expenditure (£m)
2015	129.0	108.8	-20.2
2020	127.4	115.1	-12.3
2025	127.7	122.8	-4.9
2028	128.1	127.3	-0.7
2030	128.3	130.1	1.8

Source: Table 6A of Appendix 5

<sup>1</sup> Benchmark turnover to increase in line with improvements in turnover efficiency set out in Table 4a of Addendum to Experian Retail Planner 12.1 (October 2014)

<sup>2</sup> Assumes constant market share of Study Area expenditure (50.4%) claimed by facilities within Swadlincote’s catchment 2013 Prices

7.21 We estimate that extant retail planning permissions<sup>35</sup> would provide an estimated 1,046 sq.m<sup>36</sup> of convenience goods sales floorspace within Swadlincote. The sole extant planning permission identified is for the demolition of the existing Lidl foodstore on Belmont Street and the erection of a replacement store. As set out at Table 7.2, we estimate that this commitment will have a benchmark turnover of £3.7m if it were operational at base year 2013, which is based on the occupation of this unit by Lidl (planning permission 9/2014/1176). We note that small scale retail provision is planned as part of strategic housing allocation H6 (Drakelow Park) and H12 (Highfields Farm) which are located within the Study Area. Although outline planning permission has been granted for the residential development, it will not be known until the reserved matters application stage how much convenience

<sup>34</sup> Account has been made for the turnover efficiency of existing convenience goods floorspace to change (on the basis that operators have historically been able to make their existing floorspace more productive over time) in accordance with the projections set out in Table 4a of Experian Retail Planner Briefing Note 12.1 (these being -0.3% at 2015, -0.4% at 2016, -0.2% per annum between 2017 and 2021, and +0.1% between 2022 and 2030)

<sup>35</sup> As reported by the Council in its email to WYG of 13 August 2015

<sup>36</sup> Although the replacement foodstore will provide an uplift of 309 sq.m sales floorspace (when compared to the existing store), the total committed convenience goods floorspace has been considered, given the former store had been demolished at the time the household survey was undertaken and accordingly is not included in the calculation of existing convenience goods facilities.



goods floorspace will be delivered at these locations. For this reason, we have not included these permissions with our analysis detailed at Appendix 5 Table 6d. However, these upcoming permissions should be taken into account when considering the need for additional retail floorspace.

7.22 We are also aware that the provision of small scale convenience retail floorspace is planned as part of the strategic housing allocations which are situated at the northern extent of the South Derbyshire administrative area. However, as these strategic housing allocations lie outside the Study Area, the retail floorspace to be delivered has not been included as part of our assessment.

**Table 7.2: Extant Convenience Commitments in Swadlincote’s Catchment**

Zone	Location	Planning Application Reference	Proposal	Net Conv Sales (sq.m)	Conv Sales Density (£ per sq.m)	Estimate Turnover at 2013 (£m)	Status
B	Belmont Street	9/2014/1176	Demolition of existing retail store and erection of replacement store	1,046	3,522	3.7	Under Construction
<b>Total</b>				<b>1,046</b>		<b>3.7</b>	

Source: Table 6d of Appendix 5  
2013 Prices

7.23 Full details of the assumptions made in estimating the turnover of commitments are provided in the notes which accompany Table 6d of Appendix 5. The turnover which would be claimed by Lidl foodstore commitment acts to extinguish the expenditure surplus which exists to support additional convenience goods retail floorspace at 2030. Accordingly, after taking account of this commitment, a deficit of £1.9m is identified at 2030. The deficit in expenditure equates to a deficit in the convenience goods floorspace requirement of between 100 sq.m and 300 sq.m at 2030 (depending on format and operator). Accordingly, there is no quantitative need for additional convenience goods floorspace during the plan period and beyond to 2030, given the current performance of facilities and as the commitment for a new Lidl store has extinguished the very modest capacity identified at 2030. The position is set out at Table 7.3.





**Table 7.3: Quantitative Need for Convenience Goods Floorspace in Swadlincote's Catchment**

Year	Convenience Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus (£m)	Commitments (£m)	Residual (£m)	Min <sup>1*</sup>	Max <sup>2*</sup>
2015	-20.2	3.7	-23.9	-1,800	-3,100
2020	-12.3	3.6	-16.0	-1,200	-2,100
2025	-4.9	3.6	-8.6	-700	-1,100
2028	-0.7	3.7	-4.4	-300	-600
2030	1.8	3.7	-1.9	-100	-300

Source: Table 6c of Appendix 5

<sup>1</sup> Average sales density assumed to be £13,018 per sq.m at 2015 (based on the average sales density of the leading four supermarket operators as identified by Verdict 2014)

<sup>2</sup> Average sales density assumed to be £7,635 per sq.m at 2015 (based on the average sales density of discount food retailers) 2013 Prices

## Capacity for Future Comparison Goods Floorspace

- 7.24 Turning to comparison goods capacity, it is first 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. 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' (i.e. our survey derived turnover estimate effectively acts as benchmark) at 2015.
- 7.25 We assume that there is therefore a nil quantitative need for any additional floorspace in the Swadlincote's catchment. Once again, it has generally been assumed that the future performance of the facilities in South Derbyshire will be commensurate with its current market share.
- 7.26 Through consideration of the in-street shopper survey, which noted the home postcode of respondents, we have identified that 6.6% of visitors who purchase non-food items in Swadlincote town centre reside outside the Study Area. Accordingly, we have allowed for inflow to Swadlincote town centre on this basis. As set out at Table 5 of Appendix 5.
- 7.27 The inflow allowance has the net effect of increasing the identified comparison goods survey derived turnover of Swadlincote's catchment from £70.8m to £75.1m at 2015 (inflow therefore representing 5.7% of total turnover).



- 7.28 The £70.8m of comparison goods expenditure claimed from inside the Study Area at 2015 equates to a market share of 23.1% of all comparison goods expenditure generated by residents of the Study Area. Our assessment 'rolls forward' this market share to examine the likely level of comparison goods floorspace required to maintain the role and function of the comparison goods retail facilities in Swadlincote's catchment going forward.
- 7.29 By 'rolling forward' this market share and making provision for inflow deriving from visitors to the Study Area, we estimate that facilities in Swadlincote's catchment will attract £75.1m of comparison goods expenditure at 2015, increasing to £83.1m at 2020, to £92.5m at 2025, to £98.7m at 2028 and £103.1m at 2030.
- 7.30 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 £4.7m to support additional comparison goods floorspace within Swadlincote's catchment. As set out in Table 7.4, this surplus is forecast to increase to £14.4m at 2025, to £21.6m at 2028 and then to £27.0m at 2030. Account has been made for the turnover efficiency of existing comparison goods floorspace to increase (on the basis that operators are generally able to make their existing floorspace more productive over time)<sup>37</sup>.

**Table 7.4: Quantitative Need for Comparison Goods Floorspace in Swadlincote's Catchment**

Year	Benchmark Turnover (£m) <sup>1</sup>	Available Expenditure (£m) <sup>2</sup>	Surplus Expenditure (£m)
2015	75.1	70.8	0.0
2020	83.1	82.8	4.7
2025	92.5	100.8	14.4
2028	98.7	113.5	21.6
2030	103.1	122.7	27.0

Source: Table 26A of Appendix 5

<sup>1</sup> Turnover of existing stores to increase in line with improvements in turnover efficiency set out in Table 4b of Experian Retail Planner 12.1 (October 12.1)

<sup>2</sup> Assumes constant market share (23.1%) claimed by facilities within the Study Area and inflow of 6.6%. 2013 Prices

- 7.31 Once again, this initial analysis does not take into account existing commitments. As set out at Table 7.5, the only comparison goods extant planning consent which provides for greater than 200 sq.m floorspace is the replacement Lidl store at Belmont Street, which we have estimated will have a

<sup>37</sup> Such increases have been derived from the projections set out in Table 4b of the Addendum to Experian Retail Planner Briefing Note 12.1 (these being +2.3% at 2016, +2.0% per annum between 2017 and 2021, and +2.2% between 2022 and 2031)



comparison goods turnover of £0.2m<sup>38</sup> at 2013 prices. As with the convenience goods commitments, we are aware that small scale retail floorspace is to be provided as part of the strategic housing allocations at Drakelow Park (H6) and Highfields Farm (H12). However, at the current time we are not aware of the exact quantum of comparison goods floorspace to be delivered at these locations until the reserved matters application stage.

7.32 The estimated £0.2m turnover of the comparison goods commitment is modest and does not have a substantial effect on the overall need for additional comparison goods floorspace in the catchment of Swadlincote town centre. A positive residual of £4.7m is identified at 2020, increasing to £14.4m at 2025, £21.6m at 2028 and to £27.0m at 2030. The surplus equates to a comparison goods floorspace (net) requirement of between 800 sq.m and 1,400 sq.m at 2020, increasing to between 2,300 sq.m and 3,900 sq.m at 2025, to between 3,300 sq.m and 5,500 sq.m at 2028 and to between 3,900 sq.m and 6,500 sq.m at 2030. The minimum figure is based on the identified need being met through the delivery of high street floorspace and the maximum figure relates to need being met by bulky goods retailers. The requirement in respect of additional comparison goods floorspace is set out below at Table 7.6.

**Table 7.5: Extant Comparison Commitments within the Study Area**

Zone	Location	Planning Application Reference	Proposal	Net Comp Sales (sq.m)	Comp Sales Density (£ per sq.m)	Estimate Turnover at 2013 (£m)	Status
B	Belmont Street	9/2014/1176	Demolition of existing retail store and erection of replacement store	261	818	0.2	Under Construction
<b>Total</b>				<b>261</b>		<b>0.2</b>	

Source: Table 26d of Appendix 5  
2013 Prices

<sup>38</sup> Although the replacement foodstore will provide an uplift of 309 sq.m sales floorspace (when compared to the existing store), the total committed comparison goods floorspace has been considered, given the former store had been demolished at the time the household survey was undertaken and accordingly is not included in the calculation of existing convenience goods facilities.



**Table 7.6: Quantitative Need for Comparison Goods Floorspace in Swadlincote’s Catchment**

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min <sup>1*</sup>	Max <sup>2*</sup>
2015	0.0				
2020	4.7	0.2	4.7	800	1,400
2025	14.4	0.2	14.9	2,300	3,900
2028	21.6	0.3	22.4	3,300	5,500
2030	27.0	0.3	28.0	3,900	6,500

Source: Table 26c of Appendix 5

<sup>1</sup> Average sales density assumed to be £5,000 per sq.m at 2015

<sup>2</sup> Average sales density assumed to be £3,000 per sq.m at 2015  
2013 Prices

## Qualitative Need

- 7.33 As we have set out above, convenience goods retail facilities in Swadlincote’s catchment turn over £108.8m at 2015, which is less than their expected benchmark turnover of £129.0m. However, in examining the performance of specific stores, it is evident that certain stores in the catchment are performing better than others. Indeed, the Aldi store at the Pipeworks is trading well over its expected benchmark. However, the food superstores in the catchment, such as the Morrisons at Coppice Side and the Sainsbury’s at Civic Way are trading below their expected benchmark.
- 7.34 In this regard, Table 7.9 below provides an overview of the current performance of existing foodstores (which provide an estimated net sales area of 500 sq.m or more) with reference to their expected trading performance. The four foodstores in South Derbyshire which have a floorspace greater than 500 sq.m turn over £95.7m, which is less than their anticipated benchmark turnover of £106.7m. Albeit, as these stores are trading within 10% of expected company benchmark levels, they remain viable stores.
- 7.35 As stated above, the foodstore with the strongest performance is the Aldi at the Pipeworks, which has an estimated convenience goods benchmark turnover of £7.3m and an estimated survey derived turnover of £23.4m (it is therefore effectively overtrading by £16.1m). By way of contrast, the Sainsbury’s at Civic Way has a convenience goods benchmark turnover of £46.1m and an estimated survey derived turnover of just £30.1m (it is undertrading by £16.0m or at 65% of expected benchmark level).



- 7.36 Whilst the trading performance of the Sainsbury's at Civic Way and to a lesser extent the Morrisons at Coppice Side is poor when compared to benchmark turnover, the difference between the benchmark turnovers and the identified trading performance of the superstores is not considered to be particularly unusual. Benchmark performances are clearly representative of a company's average performance and numerous stores will undertrade or overtrade in relation to benchmark without significant issues arising.
- 7.37 Notwithstanding this, when taken as a whole, the performance of the food superstores in Swadlincote's catchment, i.e. the Morrisons at Coppice Side and the Sainsbury's at Civic Way, is such that there does not appear to be any pressing requirement for another store of this format in the catchment area. This is consistent with the current strategy of the 'main four' operators who are currently very circumspect in terms of their plans to bring forward additional large superstores.
- 7.38 We do, however, note that the sole discount foodstore currently operating in the South Derbyshire area of the Study Area is performing strongly. This also mirrors the national circumstance, whereby discount operators have substantially improved their share of the national grocery market in recent years. Notwithstanding this, as we have already explained, at the time that the survey was undertaken the Lidl store on Belmont Street was not operating, as the site was in the process of being redevelopment to provide a slightly larger format store. Therefore, although the results of the household survey show the Aldi store to be substantially over-performing, which indicates that the discount sector in Swadlincote may currently be under-provided for, this qualitative need will be partly responded to once the new Lidl store on Belmont Street is operational. In addition, we note that planning consent has also been granted for a foodstore as part of the strategic housing allocation at Chellaston fields. The application submission documents indicate that this store will be occupied by a discount foodstore operator. Although this store will be located outside the Study Area, it is within the South Derbyshire administrative area and therefore will assist in addressing the qualitative need for discount operators in the northern part of the District. Currently, 20.4% of main food shopping trips which originate in Zone D (north of the Study Area) are being undertaken at discount foodstores outside Zone D.
- 7.39 In addition, although the convenience goods market share retained by facilities in Swadlincote's catchment is reasonable, there is a notable proportion of convenience goods expenditure leaking to facilities outside South Derbyshire, in particular to Ashby-de-la-Zouch, Burton-upon-Trent and Derby. As such, qualitative improvements to Swadlincote's convenience goods offer may assist in improving the town centre's market share through the retention of additional expenditure in Swadlincote. As stated above, it is not considered that there is a particular need for a further 'top four' supermarket.



However, Swadlincote may benefit from the provision of a supermarket providing a more upmarket offer, such as M&S Simply Food or Waitrose, in order to diversify the convenience goods mix which is available in the centre.

7.40 In terms of the spatial distribution of convenience goods facilities, as would be expected in accordance with sustainable development principles, the main food superstores in the South Derbyshire area of the Study Area are located within or on the edge of Swadlincote town centre. Facilities within and on the edge of the town centre attract 44.6% of the overall convenience goods expenditure available within the Study Area, which demonstrates that the town centre is performing well in catering for the convenience goods needs of the Study Area.

7.41 There are also smaller scale convenience goods facilities present within Melbourne town centre and the local centres in order to cater for day to day needs. Although convenience goods facilities are limited in some parts of the catchment, such as Zone D and E, this is to be expected given their rural nature. Notwithstanding this, we are aware that strategic housing allocations are to be brought forward in these parts of the District and as such we agree with the benefits of delivering small scale convenience goods floorspace as part of the wider housing allocations in order that localised needs are met. This will assist in creating sustainable shopping patterns, as residents will be able to access day-to-day convenience items in proximity to their homes, rather than travelling a substantial distance to access goods.

**Table 7.7: Performance of Convenience Goods Floorspace of Principal Foodstores in Swadlincote's Catchment at 2015**

Zone	Store	Gross Floor-space (sq.m)	Estimated Net Con. Floor-space (sq.m)	Sales Density (£ per sq.m)	Benchmark Turnover (£m)	Survey Derived Turnover (£m)	Over-trading (£m)
B	Aldi, The Pipeworks, Swadlincote	1,143	624	11,748	7.3	23.4	16.1
	Morrisons, Coppice Side, Swadlincote	7,677	3,494	13,388	46.8	40.6	-6.2
	Sainsbury's, Civic Way, Swadlincote	8,313	3,632	12,684	46.1	30.1	-16.0
D	Sainsbury's Local, Derby Road, Melbourne	892	510	12,684	6.5	1.6	-4.9

Source: Table 5 of Appendix 5 (Extract providing details of foodstores with a net sales area of 500 sq.m or above) 2013 Prices

7.42 Turning to comparison goods, it is evident that comparison goods shopping patterns in the catchment of Swadlincote town centre are heavily influenced by the higher order centres which are located in proximity to Swadlincote, including Ashby-de-la-Zouch, Burton-upon-Trent and Derby. The market share of comparison goods shopping expenditure claimed by facilities in the South Derbyshire



administrative area of the Study area is relatively low (23.1%), with 19.7% of all comparison goods spend being claimed by facilities in or on the edge of Swadlincote town centre. This indicates that the majority of the comparison goods shopping needs of South Derbyshire's residents are met outside the authority area.

- 7.43 Accordingly, it is evident that there is qualitative deficiency in respect of comparison goods shopping within the catchment of Swadlincote town centre, which is requiring residents within Swadlincote's catchment to travel to higher order centre's to meet their comparison shopping needs. However, as set out in the commercial advice provided by Cheetham and Mortimer at Section 8, it is unlikely that a critical mass of national comparison goods retailers are likely to be attracted to Swadlincote town centre at the current time, although this situation may change in the future. Notwithstanding this, in accordance with 'town centre first' principles, we anticipate that Swadlincote town centre or locations on the edge of the centre will be the preferred venue for any substantial comparison goods floorspace in order to enhance its vitality and viability and ensure that it remains the dominant location for comparison goods retail in South Derbyshire.





## 8.0 Commercial Viability

8.01 This Section of the report has been prepared by Cheetham and Mortimer, chartered surveyors and retail property experts to provide advice on the commercial viability of the redevelopment of sites within Swadlincote town centre, and the market for additional retail, leisure and other commercial development within the town centre.

### Introduction

8.02 Swadlincote's retail and service offer comprises approximately 31,000 sq.m of floorspace focused around High Street, extending to Market Street and West Street, with further tertiary representation situated sporadically from these locations. The town's prime retail core is High Street, which has representation from both local and national multiple operators, including B&M Bargains, Peacocks and Superdrug. In recent years, High Street has witnessed an influx of local / regional charity occupiers, an indicator of the type of demand for a town that predominantly serves the immediate catchment population with value and convenience low level spend shopping and services.

8.03 Swadlincote benefits from one secondary retail / fast food offer and one dominant retail / leisure development as follows:

### Pipeworks Retail & Leisure Development

8.04 Constructed in 2011, and comprising a mixed use retail and leisure scheme located adjacent to the town centre, the Pipeworks extends to approximately 18,000 sq.m. The scheme is anchored by a five screen Odeon Cinema and additional leisure offer including Prezzo, Hungry Horse, Subway and Costa Coffee. The retail tenant offer within the scheme is discount led, with representation comprising: Poundworld, Jysk, Home Bargains, Store 21, Brantano, Argos, Iceland and Aldi.

### Belmont Street

8.05 Forming an edge of town retail parade, with representation comprising: Halfords, Dominos and Just 4 Pets. These occupiers are complemented by a standalone McDonald's drive-thru and a Lidl store, which is currently under redevelopment to provide a store compliant with their modern trading format, increasing the store size from approximately 1,300 sq.m to over 2,000 sq.m with associated car parking provision.



## Competition

- 8.06 In terms of competing retail provision, there are four centres where the majority of leakage for higher end comparable spend will occur. These are Burton-Upon-Trent, Derby, Tamworth and to a lesser extent, Leicester and Nottingham. Table 27 (Shopping Expenditure Retention All Comparison Goods) of Appendix 3 outlines the extent of such leakage.
- 8.07 Whilst Burton forms a stronger retail and leisure destination and will stimulate some deflection for comparable spend, Derby forms a regional centre, benefitting from a much stronger and diverse national multiple retail and leisure representation. As such, it serves the wider catchment population with both comparison and convenience goods in line with current trends whereby the majority of consumers now tend to focus their high end comparable spend on the larger regional centres, due to the enhanced shopping environment, brand offers and leisure facilities they offer. Whilst Nottingham and Leicester are categorised similarly, their more significant distances from Swadlincote's core catchment will deter some leakage, though they will undoubtedly stimulate a deflection in trade for occasional high end comparable goods trips.
- 8.08 As a consequence of the strong retail and leisure destinations within close proximity, Swadlincote's national multiple retail offer is predominantly convenience and value led, serving the immediate catchment population.
- 8.09 As with the majority of mid ranking towns, Swadlincote town centre needs to be actively managed by the Local Authority in conjunction with relevant stakeholders to ensure the town's long term vitality and viability. This could be via council led initiatives ensuring a unified approach although, the fragmented ownership of the town's prime retail core, set in an historic ribbon style context, means that it may be difficult to get stakeholders to adopt a comprehensive, holistic approach in view of prohibitive financial commitments ahead of unsubstantiated demand.

## Demand

### Retail / Leisure

- 8.10 As evidenced on a national basis, national multiple comparable retailer demand now tends to be for fewer 'flagship' type stores in major regional centres and retail parks / transport hubs due to the enhanced accessibility and subsequently wider catchment they serve. To an extent, the longer term strategy is that smaller infill catchments will be served by the internet, resulting in many mid ranking towns now being unable to attract the quality, comparable retailers required to ensure their long term



vitality and viability. Consequently, and again evidenced on a national basis, rental values have witnessed significant decline with prime zone A values within Swadlincote now in the order of £20 per sq.ft in terms of Zone A from an historic high of approximately £40 per sq ft. This lack of demand and subsequent fall in values has stimulated an influx of local operators and charity shops which further detract from the streetscape, therefore accelerating the high street's long term decline.

- 8.11 The Pipeworks offers the strongest indicator of occupier demand for the town, with the retail and leisure aspects let at headline figures of between £14.90 - £19.00/sq.ft and £11.60 - £20.00/sq.ft respectively. These rents have remained stagnant, due to the limited asset management opportunities within the scheme and the paucity of latent demand which in turn will equate to limited growth at review. The value and convenience led representation confirms a lack of demand from national multiple comparable retailers in line with our enquiries, with specific reference to the mid-range fashion operators vital to ensure a town's sustainability as a retail destination and subsequently, its long term vitality and viability. The scheme was constructed with approximately 55-60% pre-let to anchor tenants including Argos and Aldi, with the latter having acquired a section of the site on a freehold basis. It could be argued that the scheme's tenant representation was subject to the market at the time, being developed during the well documented economic downturn, and, if so, one would expect a shift towards stronger tenants through active asset management as the scheme becomes more established in an improving market which is not evident to date. On the understanding that the Pipeworks comprises large format units in line with modern retailer requirements, is well anchored with ample, accessible, car parking adjacent to the town centre, the tenant line up offers the strongest indicator to the lack of quality latent occupier demand for the town as borne out of our research.
  
- 8.12 Whilst there are a number of listed requirements for the town, these are now somewhat historic, being low priority or non-active as retailers prioritise stronger trading locations. In addition a number of acquisitive retailers are now taking advantage of market conditions and 'trading up', achieving representation on schemes and in towns that they historically could not afford, or where they would not previously have been considered. Other than in major regional locations / schemes and established fashion parks, the number of failing retailers and lack of alternative demand has rendered rental evidence low priority with many landlords merely seeking to alleviate empty rates liabilities and other vacant possession costs, as opposed to maintaining an aspirational tenant mix or underpinning rental values.
  
- 8.13 Although not published, we are aware KFC have an active requirement for the town. Their minimum site requirement comprises approximately 1/3 of an acre, though in reality, their optimum is closer to 1/2 an acre in a prominent roadside location on a main arterial route. Their preference would be for sites



with suitable adjacencies, on retail / leisure parks, due to the enhanced draw and the perceived synergies that would be derived.

- 8.14 It must be noted that there are often viability issues with this type of development due to significantly higher construction costs (comprising modular build units and infrastructure) and low density development in terms of land take. This ultimately has a significant impact on land values, often rendering proposed developments unviable or requiring the operator to subsidise the land purchase or development costs.
- 8.15 With regard to the bulky goods sector, the DIY market remains in a period of consolidation with the demise of Focus, Homebase and B&Q undertaking significant rationalisation of their portfolios, either by store disposals or downsizing units where achievable. The only operator that remains active is Wickes, although acquisitions remain selective and predominantly focused in the South, within the M25. Other acquisitive bulky goods operators remain limited, again with the electrical sector undergoing a period of consolidation (including DRG for their Currys and PC World fascias) and the majority of the furniture retailers refining existing portfolios with only strategic store acquisitions in major locations, e.g. Steinhoff. Those retailers that remain acquisitive and can trade with a bulky goods consent, e.g. Hobbycraft, Dunelm, etc, tend to focus on established retail parks or destinations and would therefore be unlikely to consider a town with a perceived finite market and lack of quality adjacencies. Those bulky goods retailers that will consider solus sites, secondary retail parks or smaller conurbations, e.g. Pets at Home, Halfords, The Range, etc, are either represented or have confirmed the town is, at best, marginal with existing representation within the area of influence or focused on the larger towns/destinations unless a scheme of scale with suitable quality adjacencies were delivered, which we would conclude is highly unlikely, given occupier perceptions and lack of demand for the town.
- 8.16 Swadlincote benefits from a mature food store market. Sainsbury's have an extensive modern format full food and non-food offer in a prominent and well located store off one of the town's busiest roundabouts on Civic Way. Morrisons, again occupy a well located, modern town centre store adjacent to the Pipeworks, having direct access from High Street with its car park forming the main parking for the town centre. Although not represented directly within Swadlincote, Tesco occupy a large Extra format store adjacent to the A511, in nearby Ashby de la Zouch approximately 9 kilometres from Swadlincote.
- 8.17 Of the main foodstore retailers, Tesco, Sainsbury's and Morrisons are non-acquisitive, save for perceived exceptional opportunities or their convenience store formats (although Morrisons have



withdrawn from the market). Tesco's problems are well documented, with a significant loss in market share leading to an extensive refinement of their existing portfolio and acquisition strategy resulting in a significant number of store closures with the likelihood of more to follow. Likewise, Sainsbury's have all but ceased acquisitions in respect of their larger trading formats, with both operators looking to withdraw from development contracts where possible.

- 8.18 Until recently, Tesco had an active requirement for Swadlincote, though it must be noted that this was during the food store 'space race', when operators were aggressively expanding in order to accumulate market share. Due to the dominant Sainsbury's offer in the town, the Tesco requirement was for a full Extra offer comprising approximately 9,000 sq.m in order to adequately compete. Consumer trends have witnessed a polarisation of spend, resulting in a loss of market share for the perceived "big four" to discount and higher end operators. The rise of online shopping from websites such as Amazon means that the larger format stores with extensive non-food offers are no longer fit for purpose with the Tesco requirement no longer active.
- 8.19 Since acquiring the Netto portfolio, Asda have now refined their smaller store trading format and as such, will consider smaller stores up to approximately 1,000 – 1,100 sq.m, with their optimum larger store format now being in the order of 2,000 sq.m. Notwithstanding, due to the existing dominant foodstore representation in Swadlincote and the larger scale formats of the existing Morrisons and Sainsbury's stores, they would not be able to adequately compete from a smaller store format and therefore, it would be unlikely to form a requirement.
- 8.20 Due to the Aldi representation on the Pipeworks Retail and Leisure Development and the ongoing redevelopment of the Lidl store, demand from the discount food sector would likely be minimal. Although Netto have again entered the UK market via a joint venture with Sainsbury's, their priority remains for sites in the North, and due to the town's largely rural catchment and the competing representation indicated above, it is unlikely Swadlincote will form a priority requirement in the short to medium term.
- 8.21 With regard to the "premium end" of the foodstore offer, we are aware that M&S have previously considered representation for their Simply Food trading format, comprising a unit of approximately 1,500 sq.m GIA, with approximately 60 car parking spaces. However, potential representation elsewhere within the area of influence may negate a requirement for the town or at the very least will mean that trading patterns would need to be analysed after store opening, before additional representation would be considered.



- 8.22 Waitrose have had mixed success with their northern expansion and as a consequence are now extremely selective in their acquisition strategy. Their focus remains on larger affluent retail centres with Swadlincote unlikely to satisfy the required criteria for consideration for a full store offer in excess of 270-370 sq.m
- 8.23 Leisure demand for Swadlincote town centre would appear minimal, with the current offer split across the Delph Market Square, where a number of vacant units are evident, and Pipeworks. With regard to the existing offer, J D Wetherspoon are represented on Delph Market Square providing a modern offer, with Prezzo and Hungry Horse represented at the Pipeworks scheme, although it should be noted that these requirements were likely Cinema led as opposed to being specific to Swadlincote.
- 8.24 On a national basis, the leisure market has seen a significant increase in demand from restaurant and family pub chains comprising their wet and dry offers. In this regard we are aware that Marstons have an active requirement for the town and have considered a number of sites for a standalone development. They have an unpublished requirement for a prominent freehold site of approximately 0.2-0.4 hectares on a main arterial route close to high density retail or residential development. We would anticipate that, aside from this and the KFC requirement indicated, further leisure demand for Swadlincote would be limited.
- 8.25 Whilst we are not experts, we have considered alternative demand in respect of residential, office and industrial uses.

### Residential

- 8.26 There is a substantial quantum of residential development ongoing or recently completed within Swadlincote. This is of a specific format comprising modern build family homes in attractive edge of town / out of town locations of suitable scale on allocated land or with potential to achieve relevant planning consents. These sites are targeted by the major residential developers as they are perceived less risky in terms of deliverability and demand, comprising larger sites that can be sub divided between like developers to limit exposure. Barratt Homes have recently undertaken significant development within the town in conjunction with David Wilson Homes and have subsequently submitted an outline planning application for 100 homes in Winshill. Although unsuccessful this is a clear indicator of demand and their appetite for further development in the immediate area.
- 8.27 The above does not give consideration to affordable homes and sheltered housing provision which could form potential viable development options on a number of the sites under consideration in



various forms including new build and refurbishment of existing accommodation for apartments or similar. It should be borne in mind that due to the nature and values associated with this sector, residual land values can often be rendered nominal. In addition, local and regional residential developers could also unlock value in smaller or perceived compromised sites where economies of scale will often make them unviable for the major residential developers. These developments would usually take the form of high density residential accommodation, although due to the ongoing difficulties in respect of funding, the larger sites under consideration may require piecemeal or phased development. Again, this type of developer would generally be opportunity / value led on sites that are often compromised in terms of configuration and location and this would be reflected in any attributable site value.

- 8.28 Evidently, the relatively strong residential market in Swadlincote for what would predominantly appear to comprise quality stock, will significantly enhance the town's catchment in terms of both size and demographic which, on the understanding that the right streetscape/town centre ambience can be created should stimulate demand for smaller traditional high street type accommodation from the service and quality convenience sector, which in turn will continue the regeneration of the town centre. Notwithstanding, we would reiterate our previous comments with regard to trends in the comparable sector on the understanding this is unlikely to change in the short to medium term.

### Industrial

- 8.29 Historically, demand for Swadlincote comprised overspill from operators from neighbouring conurbations. Modern trends have seen industrial operator migration onto large, purpose built modern industrial parks on major transport hubs in line with planning policy and operator requirements. Demand for these requirements has led to the development of Tetron Point, a 40 hectare site which is being developed for new employment uses with Bison Manufacturing, Able Engineering, Brunel Healthcare and Euro Car Parts relocating to the area. There is availability within Tetron Point for design and build opportunities, with rental values at approximately £5.50/sq.ft though it must be noted these sites are on the outskirts of the town on a major transport hub in line with operator and planning policy requirements as discussed. The historic, town centre units at Sharpes Industrial Estate are secondary in nature and are occupied by local independent operators.
- 8.30 Values vary considerably dependent on the type and nature of accommodation under consideration with older secondary accommodation attracting rental values of between £3.00 - £3.50/ sq.ft. Compromised accommodation, which is evident within Site 9, within historic properties on multiple levels, will likely have a rental value under £1.50/sq.ft.

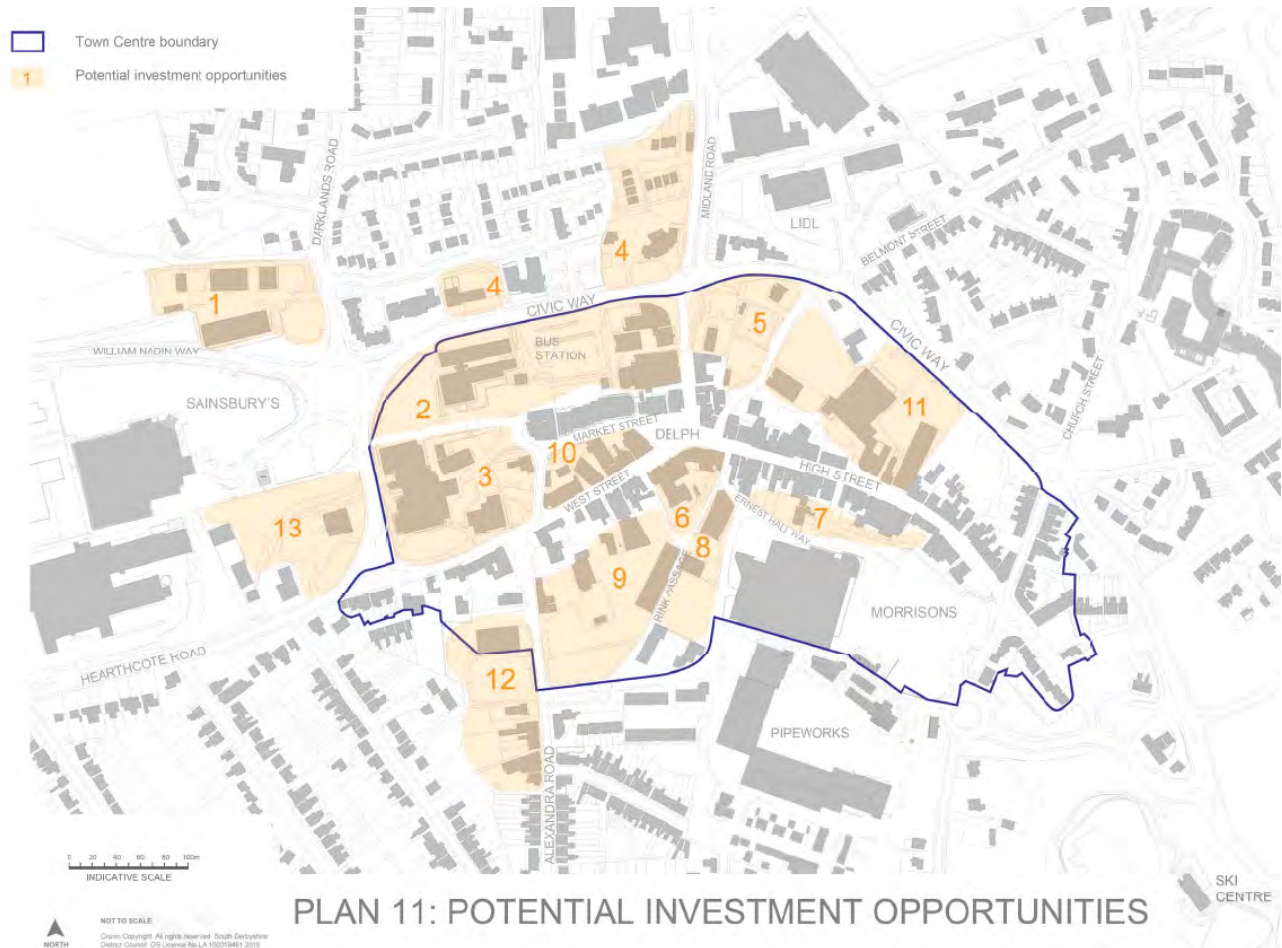




## Office

- 8.31 The town centre Swadlincote office market comprises grade B/C stock of small, multi-level suites typically located above retail units or similar. Although the town does form an administrative centre with dated, purpose built offices occupied by the District Council on Civic Way, the town does not form a commercial centre and as such, demand tends to be local in nature and limited.
- 8.32 There does not appear to be any substantial latent demand from either the public or private sector for modern, purpose-built, high quality office accommodation within the town, evidenced by the high vacancy rates witnessed at Gresley Office Park, where rents equating to approximately £10.00/ sq.ft are sought. Evidently, these rental levels would likely make any new development unviable without Government initiatives such as gap funding, grant allocations or similar. Secondary stock in the town centre would command minimal rental values, with landlords again looking to alleviate empty rates liabilities and similar in line with our previous comments.

**Figure 8.1 – Plan Showing Potential Investment Opportunity Sites**



Source: Swadlincote Town Centre Vision and Strategy 2012 (South Derbyshire District Council)

### Site 2 (Approximately 2.2 hectares)

- 8.33 The majority of the site is controlled by South Derbyshire District Council and Derbyshire County Council, with the Post Office owned by Royal Mail Estates Limited. This site is prominently located on Civic Way, one of the town’s main arterial routes fronting one of its busiest roundabout junctions. The site is currently occupied by the town’s bus station, civic council offices, library and Post Office. Evidently, given the current use, we would not perceive any highways issues, though It is noted that there are some levels issues which we anticipate would require minor ‘cut and fill’ enabling works.
- 8.34 Evidently, the Post Office requirements at this stage would be unknown. Although it is assumed that a rationalisation of their existing representation to a smaller modern build facility could be viewed



favourably. We would caveat that due to internal structure, strategies and prohibitive book values, negotiations with the Post Office can often be protracted.

- 8.35 Given the site's prominence in terms of both location, accessibility and being of a suitable scale, it is our opinion that it offers the best opportunity for both food and non-food retail development within the town. However, due to the lack of any quality demand, as previously discussed, it is likely that any development of this type, in the short to medium term, would be on a speculative basis, with a risk profile rendering any such development unlikely.
- 8.36 Notwithstanding the above, dependent on the Council's future infrastructure requirements, they could facilitate development by incorporating their requirements in any future development proposals. A Development Brief could be formulated with a view to establishing demand on either a joint venture or preferred developer basis. In addition, there are recent examples where Councils have committed to longer term overriding leases on developments, effectively guaranteeing an income stream with fixed uplifts, offering a significantly more fundable proposition to the investment market, which is then reflected in an enhanced yield profile.
- 8.37 Although the site is of a suitable scale that could accommodate industrial development, it is assumed that this would not be a desirable use for the Local Authority due to its proximity to the town centre and our previous comments in respect of planning policy/town planning. Furthermore, inherent values associated with this type of use would likely make any such development in this location unviable.
- 8.38 Given its location and scale, it is plausible that the site offers potential for significant residential development with potential demand from both national and regional developers. Being located adjacent to the town centre, it could offer the potential for major regenerative residential development in line with planning policy, to offer a quality and quantum of housing that will encourage people to move back into the town centre. This in turn will produce a positive "ripple effect" to the town centre, stimulating initial demand from the higher end leisure and service providers, subsequently improving the streetscape both commercially and aesthetically, which in turn should then stimulate additional demand.
- 8.39 Evidently, if the above could be implemented then to an extent, and again dependent on the Local Authority's needs going forward, site values are almost rendered a secondary consideration when weighed against the long term benefits and regenerative impact to the town centre.



### Site 5 (Approximately 0.6 hectares)

- 8.40 Although the majority of the site is controlled by South Derbyshire District Council, we understand the remainder is subject to fractured ownership. Situated prominent to and accessed from Civic Way, adjacent to the town centre, the site is again subject to some minor levels issues, though as previously, we would anticipate this could be remedied by minor cut and fill enabling works.
- 8.41 Potential retail and leisure demand would likely comprise the requirements previously discussed, specifically KFC due to its prominence to Civic Way, proximity to the town centre and Belmont Street Retail Park and the perceived synergies that would be derived, with specific reference to the McDonald's drive-thru unit. Although Marstons may consider representation, it is our opinion that the poor aspect/vistas associated with the site would detract from the opportunity with a preference for more attractive/rural locations possibly closer to the large scale residential developments in the area.
- 8.42 The site currently accommodates existing A2/office accommodation for which it could obviously continue to be utilised but given previous comments in respect of office demand for the town, we are doubtful any comprehensive redevelopment in this regard would be viable.
- 8.43 The size and location of the site would likely restrict any residential demand to more local type developers, possibly utilising the existing accommodation with additional infill development for sheltered housing or similar.

### Site 6 (Approximately 0.4 hectares)

- 8.44 The site has several private owners and sits within close proximity to the town's prime retail core fronting the Delph Market Square although occupancy remains secondary / tertiary in nature. This is evidenced by a number of vacant units and second tier charity shops within the existing buildings.
- 8.45 Evidently, this site could lend itself to future leisure development in any future master planning proposals due to the pleasant aspect that could be created on Delph Market Square and the existing offer that already exists. Notwithstanding, it is likely that any latent leisure demand for the town has been satisfied by the Pipeworks and as previously discussed, this was probably more cinema led than forming a specific requirement for the town and as such, we would again presume any such proposals would be unviable in the current market.



- 8.46 With regard to alternative development and in line with our previous comments, this site would evidently not be suitable for industrial development. Being of a scale not suitable to accommodate the type of demand envisaged including potential trade counter or light industrial development which, more pertinently, would not complement the existing fabric of the town centre or complement any long term planning strategy for the town.
- 8.47 There may be potential for residential development or refurbishment of the existing accommodation, although given its proximity to an aesthetically poor streetscape and the non-complimentary uses nearby, we would assume the site would only be suitable for sheltered housing/affordable accommodation, or similar with any development subject to the constraints of the poor values associated with this sector.
- 8.48 When assessing the possibility of refurbishing these properties for existing use, consideration must be given to existing demand where occupier's perceptions would unlikely shift unless comprehensive development were proposed that would significantly alter the pitch in terms of critical mass, suitable adjacencies, etc. Even then, our research confirms the lack of latent occupier demand for the town, a situation that is unlikely to change given consumer trends, as discussed. Therefore, future demand would likely comprise at best, tenants of poor covenant standing on flexible lease terms with associated rents and yield profiles ultimately rendering any such proposals economically unviable.

### Site 9 – (Approximately 1.4 hectare)

- 8.49 Whilst South Derbyshire District Council control a small section to the south east of the site, it is presumed that the remainder is predominantly under one ownership although, undoubtedly subject to a number of separate leasehold interests, which could render any site assembly protracted and cost prohibitive. As such, any comprehensive redevelopment proposals could require Local Authority assistance via Compulsory Purchase Order or similar. The site is subject to some minor levels issues, although again we would not envisage significant problems in this regard.
- 8.50 The existing provision is evidently not similar in type or nature to the modern large scale industrial estates in edge / out of town locations, being close to main distribution hubs and motorway networks in line with occupier requirements and planning policy. Nevertheless there could still be scope for smaller light industrial or trade counter type uses although again, national multiple demand in this regard would tend to prefer opportunities on main arterial routes closer to larger conurbations/commercial destinations. Therefore, demand would likely comprise more local type



operators requiring flexible lease terms with subsequent rental values and yield profiles ultimately rendering any development unviable.

- 8.51 Although not ideally located, being adjacent to some of the more aesthetically poor elements of the town centre and light industrial accommodation, the site benefits from some appealing aspects including the Sharpe's Pottery Museum with its historic kiln adjacent. It is of sufficient size to accommodate a substantial residential development, potentially with landscaping solutions and affordable housing quotas to help mask poor site lines. It is possible that the site could attract a full spectrum of demand, being of a scale that could appeal to both regional/local and national developers, with potential for all forms of accommodation including apartments/conversions, private housing, sheltered housing and/or retirement living. Notwithstanding, if demand could be generated, it would likely be at the lower end of values associated with these uses, which when considered in conjunction with the potential site assembly and vacant possession issues, could render any redevelopment proposals economically unviable.
  
- 8.52 Given its location and the potential to "punch through" to Delph Square and the town's existing prime retail core beyond, the site would offer an excellent opportunity to create a natural extension to the town centre, with potential for a modern mixed-use scheme incorporating residential, retail and leisure accommodation with associated car parking. Given the scale of the town, catchment and competing centres as discussed, it is our opinion that any such proposals would not stimulate additional quality comparable retailer demand required to create a sustainable development. With the Pipeworks Retail and Leisure Development having sated any latent demand for the town, we would again conclude any such proposals would be unviable.

### Site 10 (Approximately 0.4 hectares)

- 8.53 This forms an island site fronting the Delph Market Square bounded by West Street, Market Street and Grove Street. Although a tertiary location in terms of retail, the site is within reasonable proximity to the town's prime retail core, with an eclectic mix of occupiers including Nisa and West Street Methodist Church in addition to a number of independents and vacant units. The site comprises a number of character buildings, including the Methodist Church and as such, clarification would be required to ensure there are no licensing or listing issues.
  
- 8.54 Again, the site could be ideal for a leisure type development incorporating the existing fabric and being of a scale to accommodate a number of fascias to create a critical mass and synergies, as previously discussed. However, with reference to our previous comments, it is highly unlikely that





significant quality demand could be stimulated to facilitate viable development, with Swadlincote forming, at best, a low priority requirement.

8.55 Obviously, the site is not suitable to accommodate industrial development in terms of both location and scale. Again, there could be the potential for infill new build or redeveloped/refurbished residential accommodation, attracting more local/regional developer demand for high density sheltered housing, retirement living, affordable accommodation or similar.

### Summary and Overview

8.56 On a national basis, there has been a polarisation of spending and shopping habits and we do not anticipate that this will reverse. High end comparable spend is now focussed on the larger regional centres with their enhanced retail and leisure provisions, with mid to low ranking towns such as Swadlincote predominantly existing to provide the local catchment population with value and convenience goods and services.

8.57 Given Swadlincote's position within the retail hierarchy and its area of influence, it cannot and will not compete with nearby Derby, and to a lesser extent Burton. As such leakage for high end comparable spend will continue, reflected by the type and quantum of demand for the town. As indicated, retail and leisure occupier demand for Swadlincote remains limited, evidenced by the lack of rental growth, existing vacancies and the convenience / value led representation on the Pipeworks site and to a lesser extent, the retail units at Belmont Street.

8.58 The fractured ownership negates the ability for a holistic solution to address the town centre's historic prime retail core's long term decline. The development of the Pipeworks has provided large format units which respond to modern retailer requirements. However, the tenant line-up, which is focused on value and convenience led retailers, indicates a lack of quality latent occupier demand. Although there may be improvements in the longer term, it is evident that this demand is likely to remain limited in the short term.

8.59 Trends for industrial operator requirements have moved towards larger out of town industrial estates on main road networks or at major distribution hubs and therefore the sites considered do not provide potential for this type of development. In addition, the lack of quality latent office demand for the town also renders any development of this type unviable. On this basis, there is potential for the introduction of high quality residential development of a quantum and quality to attract the right demographic back into town centre living. In turn, this will stimulate demand for more quality leisure,





coffee shops, service providers and similar, with the 'ripple effect' created by this increased demand ultimately creating a more pleasant aspect to the town centre, thereby stimulating additional occupier demand.



## 9.0 Commercial Leisure

- 9.01 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 South Derbyshire 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.
- 9.02 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 South Derbyshire'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 South Derbyshire. 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.
- 9.03 For each leisure sector, we consider the current broad patterns of existing use, before then assessing the quantitative need for additional facilities.

### Leisure Expenditure

- 9.04 We have referred to Experian Micromarketer G3 data to obtain information on expenditure which is available within the Study Area for leisure activities. Table 9.1 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 £266.2m, which equates to £2,373 per person based on the Study Area population of 112,164 at 2015. In terms of specific leisure sectors, across the Study Area, there is £1.9m cinema expenditure (£17 per capita), £24.6m expenditure for alcoholic drinks (£220 per capita) and £51.4m expenditure for restaurant and cafe meals (£458 per capita).

**Table 9.1: Available Study Area Expenditure – Leisure (£m)**

Leisure Sector	Total Expenditure (£m)	Per Capita Expenditure (£)
Cinema	1.9	17
Live, entertainment: theatre, concerts	3.3	29
Museums, zoos, gardens, theme parks	2.3	21
Clubs, dances, discos	1.5	14
Social events, gatherings	0.7	6
Subscriptions to leisure activities	1.2	11
Alcoholic drinks (away from home)	24.6	220
Contract catering/snack food	15.9	142
Restaurants and cafe meals	51.4	458
Take away meals	14.0	125
<b>TOTAL LEISURE</b>	<b>266.2</b>	<b>2,373</b>

## Bingo

9.05 The South Derbyshire administrative area does not currently accommodate a permanent, purpose built, bingo hall. However, there are several facilities in South Derbyshire which provide bingo on a more occasional basis in social clubs. The facility within the Study Area which attracts the most bingo trips is the South Stapenhall Social Club at Burton-upon-Trent in Zone F, which attracts a market share of 3.2%. The most popular facility overall is the Mecca Bingo at Middleway Park in Burton-upon-Trent in the East Staffordshire administrative area which attracts 77.4% of such trips. The facility attracts more than eight in every 10 trips for bingo which originate in Zones A, B, E and F.

**Table 9.2: Study Area Market Share for Bingo Hall Visits (%)**

Zone	Address	A	B	C	D	E	F	G	H	Total
	<b>South Derbyshire</b>									
A	Midway Inn, Burton Road, Newhall	7.6%	0.0%	0.0%	0.0%	0.0%	83.4%	71.1%	42.9%	1.6%
	Newhall	7.5%	0.0%	0.0%	0.0%	0.0%	16.6%	0.0%	0.0%	1.6%
B	Belmont Services Club, Belmont Street, Swadlincote	0.0%	0.0%	8.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
C	The Tollgate, Woodville	0.0%	0.0%	8.0%	0.0%	0.0%	0.0%	0.0%	24.3%	1.0%
	<b>East Staffordshire</b>									
F	South Stapenhall Social Club, Heath Road, Burton-upon-Trent	0.0%	0.0%	0.0%	0.0%	0.0%	10.4%	0.0%	0.0%	3.2%
	Stapenhill	37.8%	43.3%	0.0%	0.0%	0.0%	4.4%	0.0%	0.0%	1.4%
	<b>North West Leicestershire</b>									
H	Ashby-de-la-Zouch	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	11.9%	1.0%
	<b>Outside Study Area</b>									
OSA	Gala, Foresters Park Centre, Derby	0.0%	0.0%	0.0%	33.8%	0.0%	0.0%	0.0%	0.0%	1.1%
	Mecca, Middleway Park, Burton-upon-Trent	84.9%	81.4%	42.5%	66.2%	100.0%	80.7%	67.7%	78.2%	77.4%
	BJ's Bingo, Mackadown Lane, Birmingham	0.0%	0.0%	17.7%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%



Burton-upon-Trent	0.0%	0.0%	0.0%	0.0%	0.0%	4.4%	0.0%	0.0%	1.4%
Flutters Bingo, Jackson Street, Coalville	0.0%	0.0%	17.7%	0.0%	0.0%	0.0%	0.0%	0.0%	2.3%

Source: Question 49 of Household Survey, Appendix 2. Includes all responses located within Study Area and those receiving more than 1.0% of total market share of trips outside Study Area

- 9.06 The Study Area has a total estimated population of 112,164 at 2015, increasing to 125,320 at 2030. Reports<sup>39</sup> indicate that there were around 400 bingo halls in the UK at 2012, which given the estimated 63.7 million population of the UK at the same year<sup>40</sup>, suggests that each is supported by a catchment of 159,250 persons or thereabouts. Accordingly, we estimate that the Study Area population is slightly less than would be expected to support a purpose built bingo hall. However, there would be potential for the Study Area population to support a smaller scale bingo hall.
- 9.07 In terms of the existing provision, it is clear that the needs of the Study Area are largely being met by facilities outside the Study Area, in particularly the Mecca bingo hall in Burton-upon-Trent, with other facilities such as social clubs providing bingo on a more occasional basis. Given the Mecca bingo at Burton-upon-Trent is located in close proximity to the Study Area, it is not considered particularly problematic, that residents of the Study Area are travelling outside the Study Area. Notwithstanding this, if proposals for a bingo hall to be developed in South Derbyshire were forthcoming, this would provide for more sustainable leisure patterns and would address the deficiency in bingo hall provision in South Derbyshire.
- 9.08 It should be noted that the bingo market has been significantly affected by the 2007 ban on smoking in enclosed public places, and increase in the proliferation of fixed odd gaming machines and an increase in online gambling. As a consequence of this, new bingo hall openings are few and far between and therefore it may be unlikely that a bingo hall operator would seek to locate in the Study Area given the population is less than would normally be required to support such a facility. 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.

<sup>39</sup> Including the HM Treasury announcement titled 'Budget bingo tax to create and save hundreds of jobs and revitalise industry' of March 2014

<sup>40</sup> As identified by the Office for National Statistics' Population Estimates for UK, England and Wales, Scotland and Northern Ireland, Mid-2011 and Mid-2012, August 2013



**Table 9.3: Bingo Hall Requirement in Study Area**

Year	Study Area Population	Typical Population Required to Support Hall	Potential Number of Clubs Supported by Study Area
2015	112,164	159,250	0.7
2020	117,050	159,250	0.7
2025	121,565	159,250	0.8
2028	123,882	159,250	0.8
2030	125,320	159,250	0.8

Note: Typical population to support a bingo hall derived from the Government's estimation (set out the HM Treasury announcement titled 'Budget bingo tax to create and save hundreds of jobs and revitalise industry' of March 2014) and the Office of National Statistics UK population projection of 64.9 million persons at 2015

## Cinema

- 9.09 There is a single cinema present within the South Derbyshire administrative area, namely the Odeon cinema at The Pipeworks in Swadlincote. The Odeon accommodates a total of five screens.
- 9.10 As set out below at Table 9.4, the results of the household survey show that nearly half (49.0%) of trips to the cinema which originate within the Study Area are secured by the Odeon Cinema at The Pipeworks. The Odeon in Swadlincote is the most popular facility visited by those residing within the Study Area. More than six out of every 10 cinema trips which originate in six of the Study zones are undertaken at the Odeon. The second most popular facility visited by those from the Study Area is the Cineworld at Middle Way Park in Burton-upon-Trent (in the East Staffordshire authority area), which secures 32.0% of trips to the cinema which originate within the Study Area. The third most popular cinema is the Showcase cinema at Osmaston Park Road in Derby, which attracts 11.1% of cinema trips.



**Table 9.4: Study Area Market Share for Cinema Visits (%)**

Zone	Address	A	B	C	D	E	F	G	H	Total
	<b>South Derbyshire</b>									
B	Odeon, The Pipeworks, Swadlincote	69.2%	68.6%	87.7%	15.8%	64.5%	2.2%	76.8%	60.8%	49.0%
	<b>Outside Study Area</b>									
OSA	Odeon, Meteor Centre, Derby	0.0%	0.0%	0.0%	3.5%	0.0%	1.4%	0.0%	2.4%	1.1%
	Showcase, Osmaston Park Road, Derby	0.0%	10.1%	0.0%	40.2%	1.4%	14.8%	0.0%	2.7%	11.1%
	Cineworld Cinemas, Middle Way Park, Burton-upon-Trent	22.3%	15.6%	10.7%	32.7%	21.5%	77.8%	18.4%	24.0%	32.0%
	The Red Carpet Cinema, Barton-under-Needwood	0.0%	0.9%	1.6%	2.6%	10.0%	3.8%	0.0%	4.5%	2.9%
	Odeon, Bolebridge Street, Tamworth	0.0%	4.1%	0.0%	0.0%	0.0%	0.0%	4.9%	4.4%	1.7%

Source: Question 45 of Household Survey, Appendix 2. Includes all responses located within Study Area and those receiving more than 1.0% of total market share of trips outside Study Area

- 9.11 Once again, we estimate that the Study Area has a total estimated population of 112,164 at 2015, increasing to 125,320 at 2030. The Mintel Cinema Market report of May 2011 estimates that the UK population on average visits a cinema 2.7 times per annum and that each cinema screen attracts around 45,228 separate admissions.
- 9.12 Applying these benchmark averages to the Study Area, we estimate that there will be 302,842 cinema admissions arising from the Study Area population at 2015, increasing to 338,364 admissions at 2030. Based on the assumed number of visits per screen, we calculate that around 6.7 screens are supported at 2015, increasing to 7.5 screens at 2030. Our calculations are set out below at Table 9.5.
- 9.13 It would therefore appear that there is adequate cinema provision available in the Study Area, given that the Study Area has the potential to accommodate 6.7 screens at 2015 and 5 screens are provided at the Odeon in Swadlincote. The remainder of the need is met by facilities outside the Study Area, which are in the main in close proximity to South Derbyshire. We do not consider it necessary for the local authority to plan for additional cinema provision in the period to 2030 and it is unlikely that proposals for such development are likely to be forthcoming given the presence of the Odeon in Swadlincote. Notwithstanding this, should any further 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 9.5: 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
2015	112,164	2.7	302,842	45,228	6.7
2020	117,050	2.7	316,035	45,228	7.0
2025	121,565	2.7	328,226	45,228	7.3
2028	123,882	2.7	334,481	45,228	7.4
2030	125,320	2.7	338,364	45,228	7.5

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

### Ten Pin Bowling

9.14 There is no ten pin bowling facilities present within the Study Area<sup>41</sup>. Outside the Study Area, the most popular location for residents of the Study Area to undertake ten pin bowling is the Tenpin at Foresters Leisure Park in Derby, which attracts a market share of 46.5%. Stykers Bowl at River Drive in Tamworth is the second most popular ten pin bowling facility, attracting 39.1% of trips from the Study Area. The third most popular facility for ten pin bowling is the Hollywood Bowl at Meridian Leisure Park at Braunstone in Leicester, which attracts 5.2% of trips from the Study Area.

<sup>41</sup> Although 1.6% of respondents stated that they undertake ten pin bowling at Church Gresley indoor bowling club, this is a bowls facility rather than ten pin bowling.





**Table 9.6: Study Area Market Share for Ten Pin Bowling Visits (%)**

Zone	Address	A	B	C	D	E	F	G	H	Total
	<b>South Derbyshire</b>									
B	Church Gresley Indoor Bowling Centre, Swadlincote	0.0%	0.0%	0.0%	0.0%	8.2%	0.0%	0.0%	6.6%	1.6%
	<b>Outside Study Area</b>									
OSA	Tenpin, Foresters Leisure Park, Derby	74.6%	49.3%	17.9%	92.6%	7.8%	91.4%	4.7%	12.2%	46.5%
	MFA/1 <sup>st</sup> Bowl, Derby Road, Ilkeston	0.0%	3.3%	0.0%	7.4%	0.0%	0.0%	0.0%	0.0%	1.8%
	Birmingham	0.0%	4.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%
	Burton-upon-Trent	0.0%	0.0%	0.0%	0.0%	15.0%	0.0%	0.0%	0.0%	1.3%
	Hollywood Bowl, Meridian Leisure Park, Braunstone	0.0%	5.5%	0.0%	0.0%	0.0%	0.0%	50.3%	0.0%	5.2%
	Strykers Bowl, River Drive, Tamworth	25.4%	31.8%	69.4%	0.0%	61.3%	8.6%	45.0%	81.2%	39.1%
	Tenpin, Redfield Way, Nottingham	0.0%	5.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%
Tenpin, Watson Road, Birmingham	0.0%	0.0%	12.7%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	

Source: Question 48 of Household Survey, Appendix 2. Includes all responses located within Study Area and those receiving more than 1.0% of total market share of trips outside Study Area

- 9.15 In terms of the expected benchmark level of provision, we note that the Mintel Tenpin Bowling report of July 2010 identified that there were 5,822 bowling lanes across the UK in 2010. Given that the UK population at 2010 was approximately 62.7 million<sup>42</sup>, this equates to one lane for every 10,769 persons.
- 9.16 We again estimate that the Study Area has a population of 112,164 at 2015, increasing to 125,320 at 2030. Based on the assumed benchmark identified above, we calculate that around 10.4 ten pin bowling lanes are supported by the Study Area population at 2015, increasing to 11.6 lanes at 2030.
- 9.17 As there are currently no ten pin bowling facilities located in the Study Area, it is evident that the need for ten pin bowling facilities is currently being met by facilities outside the Study Area. Although the provision of a ten pin bowling facility in South Derbyshire would respond to the need for 10.4 ten pin bowling lanes at 2015, increasing to 11.6 lanes at 2030, given the general down turn in the ten pin bowling market in the last decade, there may not be an appetite from operators to locate in South Derbyshire, particularly as the need for ten pin bowling lanes is modest. Accordingly, we do not consider it necessary for the local authority to plan for additional provision in the period to 2030, although the provision of such a facility would help to create more sustainable leisure trip patterns,

<sup>42</sup> As identified by the Office for National Statistics' Revised Annual Mid-Year Population Estimates 2001 to 2010, December 2013



given residents of the Study Area are currently being required to travel further afield to access ten pin bowling facilities.

9.18 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 given the modest ten pin bowling need in South Derbyshire. 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.

**Table 9.7: 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
2015	112,164	10,769	10.4
2020	117,050	10,769	10.9
2025	121,565	10,769	11.3
2028	123,882	10,769	11.5
2030	125,320	10,769	11.6

Note: Typical number of persons required to support a bowling lane derived from Mintel Tenpin Bowling report of July 2010

### Other Leisure Activities

9.19 Respondents to the household survey were asked which centre or facility they last visited for indoor sports or health and fitness activity. Table 9.8 shows that the facility which achieves the greatest market share is Greenbank Leisure Centre in Swadlincote, which attracts 30.2% of trips to indoor sports or health and fitness activities. The second most popular destination for such activities is Hood Park Leisure Centre in Ashby-de-la-Zouch which attracts 16.9% of trips, followed by Meadowside Leisure Centre in Burton-upon-Trent which attracts 13.0% of such trips.



**Table 9.8: Study Area Market Share for Indoor Sports or Health and Fitness Activity**

Zone	Address	A	B	C	D	E	F	G	H	Total
	<b>South Derbyshire</b>									
B	Greenbank Leisure Centre, Swadlincote	74.9%	62.7%	53.8%	10.9%	50.0%	4.0%	46.3%	0.0%	30.2%
	<b>North West Leicestershire</b>									
H	Hood Park Leisure Centre, Ashby-de-la-Zouch	0.0%	0.0%	11.8%	7.2%	3.7%	0.0%	14.5%	79.6%	16.9%
	<b>Outside Study Area</b>									
OSA	Champneys Springs, Packington	0.0%	0.0%	8.7%	0.0%	3.7%	0.0%	1.5%	8.0%	2.3%
	Meadowside Leisure Centre, Burton-upon-Trent	0.0%	0.0%	0.0%	10.7%	0.0%	50.9%	0.0%	0.0%	13.0%
	Measham Leisure Centre, Measham	0.0%	5.8%	3.9%	0.0%	0.0%	0.0%	14.0%	0.0%	2.4%
	Etwall Leisure Centre, Derby	0.0%	1.4%	0.0%	14.1%	0.0%	0.0%	0.0%	0.0%	2.0%

Source: Question 44 of Household Survey, Appendix 2. Includes all responses receiving more than 2.0% of total market share of trips

9.20 In terms of those respondents to the household survey who undertake restaurant visits, the most popular destination for such trips is Burton-upon-Trent which achieves a market share of 20.2%. The market share achieved by Swadlincote is only slightly lower at 19.9%. Leicester is also a popular destination for restaurant trips, attracting 17.2% of such trips, followed by Ashby-de-la-Zouch (12.6%) and Derby (7.4%).

**Table 9.9: Study Area Market Share for Restaurants**

Zone	Address	A	B	C	D	E	F	G	H	Total
	<b>South Derbyshire</b>									
B	Swadlincote (including The Pipeworks)	37.2%	46.0%	37.3%	2.4%	13.9%	6.2%	21.3%	3.5%	19.9%
D	Repton	3.8%	0.0%	2.4%	11.3%	6.1%	0.0%	5.5%	0.0%	3.1%
	<b>North West Leicestershire</b>									
H	Ashby-de-la-Zouch	4.0%	4.3%	13.8%	0.0%	12.8%	2.1%	21.2%	55.0%	12.6%
	<b>Outside Study Area</b>									
OSA	Derby	8.9%	1.0%	1.2%	22.7%	1.3%	13.6%	0.0%	0.0%	7.4%
	Burton upon Trent	16.0%	19.2%	5.7%	17.6%	16.8%	49.3%	3.1%	2.3%	20.2%
	Leicester	0.0%	0.6%	0.0%	1.4%	0.0%	0.7%	0.7%	0.7%	17.2%
	Tamworth	0.0%	6.4%	0.0%	0.0%	5.3%	1.9%	0.0%	1.7%	2.1%

Source: Question 46 of Household Survey, Appendix 2. Includes all responses receiving more than 2.0% of total market share of trips

9.21 Table 9.10 sets out the destination which respondents to the household survey stated that they last visited to go to bars, pubs and night clubs. The most popular destination is Burton-upon-Trent which achieves a market share of 20.7%. A similar market share was achieved by facilities in Ashby-de-la-



Zouch which achieved a market share of 20.3%. The market share achieved by Swadlincote is slightly lower at 17.6%.

**Table 9.10: Study Area Market Share for Bars, Pubs and Night Clubs**

Zone	Address	A	B	C	D	E	F	G	H	Total
	<b>South Derbyshire</b>									
B	Swadlincote (including The Pipeworks)	41.4%	47.4%	24.0%	2.7%	20.6%	4.2%	14.2%	1.5%	17.6%
C	Woodville	2.7%	3.5%	20.6%	0.0%	2.4%	1.0%	0.0%	2.8%	3.2%
D	Melbourne	0.0%	0.0%	0.0%	13.3%	0.0%	0.0%	0.0%	1.3%	2.1%
	Repton	0.0%	1.0%	1.5%	15.0%	3.2%	2.9%	8.1%	0.0%	4.0%
	Willington	6.5%	0.0%	1.5%	24.7%	1.7%	0.0%	1.1%	0.0%	4.4%
E	Rosliston	3.1%	4.8%	0.0%	0.0%	7.4%	2.7%	0.0%	0.0%	2.3%
	<b>North West Leicestershire</b>									
H	Ashby-de-la-Zouch	2.7%	8.0%	16.3%	14.5%	11.7%	0.0%	20.0%	80.4%	20.3%
	<b>Outside Study Area</b>									
OSA	Derby	3.0%	7.8%	5.9%	4.1%	0.0%	0.0%	1.0%	0.0%	2.6%
	Burton upon Trent	15.8%	8.6%	0.0%	7.4%	17.7%	74.5%	1.1%	1.7%	20.7%

Source: Question 47 of Household Survey, Appendix 2. Includes all responses receiving more than 2.0% of total market share of trips

9.22 In terms of trips to undertake art and cultural activities, the household survey shows that the most popular destination for such trips which originate within the Study Area is Birmingham, which achieves a market share of 18.3%. Other popular destinations for art and cultural activities include Nottingham (12.5%) and Derby (9.1%). Swadlincote achieves a market share of only 2.2%, however, this is to be expected given the limited amount of art and cultural facilities compared to proximate higher order regional centres.

**Table 9.11: Study Area Market Share for Art and Cultural Activities**

Zone	Address	A	B	C	D	E	F	G	H	Total
	<b>South Derbyshire</b>									
B	Swadlincote (including The Pipeworks)	0.0%	3.5%	2.2%	2.4%	0.0%	1.5%	8.4%	0.0%	2.2%
	<b>Outside Study Area</b>									
OSA	Birmingham	38.2%	24.7%	14.2%	4.7%	29.3%	14.1%	20.4%	12.3%	18.3%
	Derby	4.4%	15.6%	11.2%	28.5%	10.6%	1.7%	2.2%	1.2%	9.1%
	Burton-upon-Trent	3.9%	0.7%	7.3%	2.2%	0.0%	4.5%	1.1%	0.0%	2.3%
	Leicester	3.9%	1.9%	8.8%	4.4%	8.4%	1.6%	6.7%	27.4%	7.6%
	Lichfield	7.6%	0.0%	4.9%	2.2%	6.9%	5.6%	0.0%	0.0%	3.1%
	Nottingham	3.9%	4.9%	4.6%	27.4%	5.4%	14.7%	15.1%	15.9%	12.5%

Source: Question 47 of Household Survey, Appendix 2. Includes Swadlincote and those receiving more than 2.0% of total market share of trips outside Study Area



## 10.0 Future Retail Strategy and Recommendations

10.01 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.

10.02 Each of the above requirements is considered where relevant below in relation to Swadlincote town centre and the wider South Derbyshire administrative area in the context provided by this Study.



## Key Findings: Retail Need

- 10.03 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 District. 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.
- 10.04 As set out at Section 7, we have not identified a quantitative requirement for any additional convenience goods floorspace within Swadlincote’s catchment up to 2030 once existing commitments are taken into account. As set out at Table 10.1 below, based on the existing convenience goods market share claimed by facilities in Swadlincote’s catchment remaining constant at 50.4% up to 2030, there will be an expenditure deficit of £1.9m at 2030. This deficit in expenditure equates to a deficit in the convenience goods floorspace requirement of between 100 sq.m and 300 sq.m at 2030 (depending on format and operator). The deficit is more pronounced in the short term. Accordingly, there is no quantitative need for the Council to plan for the delivery of any additional convenience goods floorspace up to 2030.
- 10.05 Notwithstanding the lack of quantitative need for additional convenience goods floorspace and although the convenience goods market share retained by facilities in South Derbyshire is considered to be reasonable (albeit a little lower than desirable), it is evident from the results of the household survey that a notable proportion of convenience goods expenditure is leaking out of South Derbyshire to surrounding areas, in particular to facilities located in proximity to Ashby-de-la-Zouch, Burton-upon-Trent and Derby. As such, we consider that Swadlincote town centre would benefit from qualitative improvements to its convenience goods offer. Although Swadlincote currently accommodates two of the ‘top four’ mainstream supermarkets and two ‘discount’ supermarkets, it is considered that Swadlincote could benefit from a more ‘upmarket’ supermarket offer, such as M&S Simply Food or Waitrose. Although we note, as set out in Section 8, that Waitrose are currently being highly selective in terms of their acquisition strategy.



**Table 10.1: Quantitative Need for Convenience Goods Floorspace in Swadlincote's Catchment**

	2015 (sq.m)	2020 (sq.m)	2025 (sq.m)	2028 (sq.m)	2030 (sq.m)
Minimum Convenience Goods Requirement	-1,800	-1,200	-700	-300	-100
Maximum Convenience Goods Requirement	-3,100	-2,100	-1,100	-600	-300

10.06 In terms of comparison goods, we identify a requirement for between 3,900 sq.m to 6,500 sq.m of additional comparison goods sales floorspace at 2030 (again, depending on format and operator), after account has been taken of existing commitments. Although it is considered that the Council should seek to plan for the reuse, refurbishment or redevelopment of the existing vacant units in the town centre wherever possible in order to accommodate this comparison goods requirement in the first instance, it is apparent that the demand for small scale retail units is currently limited. As such, the Council may wish to develop incentives to encourage more independent operators to locate in the small scale units within the town centre. Notwithstanding this, our survey of July 2015 identified 2,546 sq.m of vacant floorspace present in Swadlincote town centre, and we are aware that some of this vacant floorspace has since been re-let. Accordingly, even if all existing vacant floorspace in the town centre were to be re-occupied, there would remain a requirement for an additional modest amount of comparison goods floorspace to be delivered in Swadlincote up to 2030.

10.07 If the Council wishes to attract additional national comparison goods operators to Swadlincote, it is likely that further medium to large scale retail units would be required within Swadlincote as the current available stock is small in scale. As identified at Section 8, although there are a number of potential development opportunity sites present in the town centre, the demand from national multiple comparison goods operators to locate in Swadlincote is likely to be limited in the short term. Therefore, any such development in the short term would likely be speculative.

**Table 10.2: Quantitative Need for Comparison Goods Floorspace in Swadlincote's Catchment**

	2015 (sq.m)	2020 (sq.m)	2025 (sq.m)	2028 (sq.m)	2030 (sq.m)
Minimum Comparison Goods Requirement	-	800	2,300	3,300	3,900
Maximum Comparison Goods Requirement	-	1,400	3,900	5,500	6,500

### Key Findings: Leisure Need

10.08 In terms of the leisure sector, there is currently no purpose built bingo hall present in the Study Area. Although our assessment found that the Study Area population is slightly less than would be expected to support a purpose built bingo hall, there would be potential for a small scale facility to be supported



within the Study Area. Currently the needs of the Study Area population are being met by facilities in reasonably close proximity to Swadlincote, such as the Mecca Bingo in Burton-upon-Trent and therefore the lack of an existing bingo hall facility in Swadlincote is not considered particularly problematic. However, if any proposals for bingo halls are forthcoming, it is considered that such a facility in Swadlincote would be beneficial in improving sustainable leisure patterns and such provision would address the current deficiency in the Study Area.

- 10.09 In terms of ten pin bowling, as there is no ten pin bowling facility present in the Study Area, it is evident that the need for ten pin bowling facilities is currently being met by facilities outside South Derbyshire. Our assessment has found a requirement for 10.4 ten pin bowling lanes at 2015, increasing to 11.6 lanes at 2030. Accordingly, it is considered that the provision of a ten pin bowling facility in the Study Area would assist in creating more sustainable leisure trip patterns and would respond to the identified need. However, we recognise that there has been a downturn in the ten pin bowling market in the last decade and therefore there is unlikely to be an appetite from operators to locate in South Derbyshire. As such, although we do not consider there to be a need for the local authority to plan for additional provision, if any proposals are forthcoming they should be judged on their own merits and the benefits for improvement of leisure provision in South Derbyshire recognised.
- 10.10 Given the recent delivery of the Odeon cinema as part of the Pipeworks development, it is not considered that there is a need for further cinema provision in the Study Area. Accordingly, we do not consider it is necessary for the Council to plan for the delivery of additional provision.
- 10.11 Notwithstanding our assessment of the need for additional leisure floorspace, as we have set out in relation to retail floorspace, 'need' is no longer a direct planning test in relation to proposals for additional leisure floorspace. Therefore, even where no need for additional leisure floorspace has been identified, this should not preclude additional floorspace coming forward and any such proposals should be assessed against the relevant policies of the NPPF and the development plan.

### **Key Findings: Performance of Swadlincote Town Centre and South Derbyshire**

- 10.12 Our assessment has found Swadlincote town centre to be in reasonable health. Although the centre struggles to compete with the higher order centres which are located in close proximity to Swadlincote, in particular, Burton-upon-Trent and Derby, there have been improvements to Swadlincote which have strengthened its position in recent years, which has resulted in the town centre's retail ranking improving by 185 places. Although Swadlincote's retail and leisure offer has improved in recent years, especially as a result of the Pipeworks development, the health of the





traditional high street has deteriorated somewhat. It is clear that the Council are keen to revitalise the high street and initiatives have already been put in place to do so; however, it is considered that further revitalisation of the high street is required in order to ensure Swadlincote provides a vibrant town centre.

- 10.13 Since 2010, the convenience and comparison goods offer provided by Swadlincote's traditional high street has decreased. This is partly as a result of improvements to the town's edge of centre convenience and comparison goods retail offer, such as the Pipeworks and Sainsbury's expansion, as well as due to improvements in the high street's retail service provision during this period.
- 10.14 Although our survey of Swadlincote town centre found the proportion of vacant units in the town centre to be greater than the national average, the proportion of vacant floorspace is below the national average figure, which is as a result of the majority of vacant units in the centre being small in scale. We are aware that several of these vacant units have been re-let since July 2015, which is a positive indicator in terms of the centre's health.
- 10.15 Facilities located within and on the edge of Swadlincote town centre attract a main food shopping market share of 50.1% and top up shopping market share of 26.5%. The main food shopping market share attracted by the town centre is considered to be reasonable and shows that convenience goods shopping patterns within South Derbyshire are largely sustainable with trips being directed towards the District's main town centre. It is to be expected that the top-up shopping market share attracted by facilities within and on the edge of Swadlincote town centre is lower, given customers tend to travel shorter distances to undertake such shopping trips.
- 10.16 When considering the convenience goods market share attracted by facilities within Swadlincote's catchment, i.e. the market share achieved by facilities within the South Derbyshire administrative area of the Study Area, these facilities achieve a market share of 51.3% of all main food shopping trips that originate in the Study Area. Although this market share retention is slightly lower than would be typically expected, given the proportion of the Study Area population which reside in South Derbyshire (62.1%), the market share is considered to be reasonable given the presence of a number of supermarkets located outside the South Derbyshire administrative boundary but in close enough proximity to cater for the needs of its residents and travel to work journeys. Notwithstanding this, there may be potential for facilities in South Derbyshire to secure a greater market share of main food shopping trips through improvements to its convenience goods offer.



- 10.17 South Derbyshire secures a slightly higher market share in relation to top-up shopping trips (54.0%), which is to be expected given customers are more likely to undertake their top-up shopping closer to home. Again, although the market share is a little lower than may be expected taking into account the proportion of the Study Area population residing in South Derbyshire, this is to be expected as we understand many residents travel outside South Derbyshire for work and as a result may combine a top-up shopping trip. Again, there may be some opportunities to improve South Derbyshire's market share retention via improvements to the District's convenience goods offer.
- 10.18 In terms of the comparison goods, the market share of trips attracted by facilities within and on the edge of Swadlincote town centre is considered to be low. This is as a result of Swadlincote struggling to compete with nearby higher order centres outside South Derbyshire which provide a wider range and choice of goods, and accommodate a greater number of national multiple retailers. The town centre achieves the greatest comparison goods market share in relation to chemist goods (32.1%), followed by recreational goods (30.5%), small household goods (27.0%), electrical goods (23.0%), books/CDs/DVDs (20.7%), furniture (16.4%), garden goods (14.8%), clothing and footwear (13.6%) and DIY goods (9.4%). It is evident from the low comparison goods market share achieved by facilities in and on the edge of Swadlincote town centre (19.7% for all comparison goods), that the town centre faces substantial competition from other nearby centres and expenditure is currently leaking to these centres. The greatest level of competition is provided by facilities in East Staffordshire, mainly Burton-upon-Trent, which attract a comparison goods market share of 38.6%. Competition is also provided by Derby City, which attracts a market share of 12.4%, North West Leicestershire which attracts a market share of 10.7% and Tamworth which attracts a market share of 10.7%.
- 10.19 When considering the comparison goods market share achieved by facilities in the South Derbyshire area of the Study Area, again the market share is low. A market share of 23.1% is achieved for all comparison goods. South Derbyshire achieves the greatest market share in relation to chemist goods (44.9%) and the lowest market share for DIY goods (13.5%). Again this is as a result of the strong competition provided by larger centres in reasonably close proximity to South Derbyshire, such as Burton-upon-Trent and Derby, which offer a wider range and choice of comparison goods, thus attracting customers from the South Derbyshire area.
- 10.20 Although there has been some changes to the extent of the Study Area since the Swadlincote Retail and Leisure Study was undertaken in 2005 as a result of ward boundary changes, which should be borne in mind when comparing the results of the 2005 Study to this Study, it is considered that it is still possible to make some comparisons in relation to the market share achieved by South Derbyshire



at 2005 and at 2015. Since 2005, the main food shopping market share achieved by facilities in South Derbyshire has increased from 34.5% to 51.3% and the top up shopping market share has increased from 50.3% to 54.0%, which is a positive sign. These increases are likely a result of improvements to convenience goods shopping provision which have taken place since 2005, including the development of Aldi and Iceland at the Pipeworks, the Morrisons and the expansion of the Sainsbury's store at Civic Way. Notwithstanding the overall improvement to the market shares achieved by facilities in South Derbyshire, during this period the main food shopping market share of some individual stores has decreased, which is likely a result of trade being diverted to new stores which have opened since 2005. In terms of comparison goods, the market share achieved by facilities in South Derbyshire for all comparison goods has increased from 19.7% in 2005 to 23.1% in 2015. Again, this is a positive change and is reflective of improvements which have taken place to comparison goods provision in South Derbyshire since 2005 and in particular is likely a result of the Pipeworks development which has improved South Derbyshire's comparison goods offer, as well as improvements to the supermarket provision in Swadlincote which provide a proportion of comparison goods.

10.21 Therefore, although the main food shopping, top-up shopping and comparison goods market shares achieved by South Derbyshire are lower than may be expected given the proportion of the Study Area population which reside in South Derbyshire, albeit still reasonable in terms of convenience goods. It is very positive that the market shares achieved by South Derbyshire for each of these sectors have improved since 2005, thus meaning there has been an improvement to the level of expenditure which is retained within the administrative area.

### **Town Centre Boundary, Primary Shopping Area and Frontages**

10.22 In considering the Council's future strategy for Swadlincote town centre, we have considered the extent of a suitable Town Centre Boundary, Primary Shopping Area and Retail Frontages for Swadlincote. Although a Town Centre Boundary for Swadlincote is included in the Swadlincote Town Centre Vision and Strategy 2012, we are aware that this boundary has never been adopted and although it has been used as a guide for this Retail Study, Draft Policy S7 of the South Derbyshire Presubmission Local Plan confirms that a Town Centre Boundary will be established through Part 2 of the Local Plan.

10.23 In recommending appropriate boundaries, we have taken into account the definitions provided in the NPPF as follow:



**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.**

**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).**

**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.**

10.24 We are of the view that Swadlincote's primary retail frontages are focused on the eastern portion of High Street, stretching from the The Delph and incorporating the units at either side of the entrance to the Morrisons store. This part of Swadlincote town centre contains a higher proportion of retail uses than other areas within the town centre. We consider the secondary shopping streets in Swadlincote are focused on the far eastern end of High Street, Midland Road, Market Street and eastern end of West Street where there is a wider mix of retail and service units. We recommend that the Primary Shopping Area encompasses these primary and secondary shopping areas. Although there are some additional retail and service units present along Church Street, off Civic Way and the western end of West Street, these uses do not form a continuous frontage and are interspersed with residential development. Therefore, although these streets are included within our recommended Town Centre Boundary, we have not included them within the Primary Shopping Area. The exclusion of these streets from the defined frontages will provide more flexibility in terms of their uses.

10.25 Since the development of the Morrisons store and the Pipeworks, the focus of Swadlincote town centre has shifted. The town centre effectively forms two parts – the traditional high street and the Pipeworks. It is clear that the Pipeworks provides a significant contribution to Swadlincote's retail offer by providing several large format units which are suitable for national operators. Indeed, both the convenience and comparison market shares achieved by South Derbyshire have increased since the Pipeworks was developed. Given the contribution the Pipeworks makes to Swadlincote's retail and leisure offer, it is recommended that the Pipeworks be included in the Town Centre Boundary. Notwithstanding this, we have excluded the Pipeworks from the Primary Shopping Area as we consider there is an element of separation between the Pipeworks and the traditional high street. Although steps have been taken to connect the Pipeworks to the rest of the town centre, given the considerable change in topography between the Pipeworks and the high street, and given there is not a continuous retail frontage between the two areas, we have not included the Pipeworks in the



Primary Shopping Area. By concentrating the Primary Shopping Area on the traditional high street, this should also assist in focusing investment and improvements towards Swadlincote's traditional high street by directing retail developments, in accordance with the sequential approach, to the high street in the first instance.

- 10.26 A plan showing our recommendations in relation to the Town Centre Boundary, Primary Shopping Area and Frontages is included at Appendix 6.

### Priorities for Future Development

- 10.27 One of the main challenges facing Swadlincote town centre is the competition it faces from higher order centres which are located in proximity to the centre, such as Burton-upon-Trent and Derby. As set out at Section 8 of this report, the opportunities to attract investment from national multiples to the town centre are limited. Most of the major high street retailers are already represented in the nearby towns of Burton-upon-Trent and Derby, and as result of the lower order status of Swadlincote are unlikely to seek representation in Swadlincote in the short term. Accordingly, it is considered that Swadlincote town centre should concentrate on providing a distinct offer which sets it apart from the offer of these nearby centres.
- 10.28 There is already a high proportion of independent operators present in the town centre and this is something which could be built upon in order to create a specialist offer in the centre. In order to attract both independent retailers and customers to the town centre, it is considered that further improvements are required to the public realm and shop units within the town centre. It is acknowledged that there has already been significant investment in the town centre environment and shop frontages; however, it is considered that further improvements would be beneficial to create a more consistent high quality public realm throughout the centre. A key driver of this specialist offer could be the market, which already acts as an important attractor for Swadlincote, with pedestrian activity in the centre increasing on market days. The existing success of the markets in Swadlincote could be built upon further in order to attract further activity to the centre. The markets also provide an important platform for independent retail and service operators who may be able to start a business at the market in advance of taking up a permanent unit in Swadlincote.
- 10.29 In order to improve the performance of the town centre, Swadlincote would benefit from higher levels of activity. There has already been substantial residential development in or close to Swadlincote town centre which has assisted in increasing the town's walk-in catchment, however, it is considered that further residential development would assist in boosting activity in, and the vibrancy of, the town



centre further. This should be taken into account when considering the options for the potential development opportunity sites within the town centre. Further means to increase activity in the town centre could potentially include encouraging additional food and drink uses in the town centre which would increase dwell time. In addition, although the currently pedestrianised high street creates a pleasant shopping environment, further relaxation of these timings may encourage additional activity within the centre.

10.30 It is considered that the current car parking strategy of offering free car parking in Swadlincote town centre is working well, as evidenced by the result of the in-street survey to which respondents advised that they consider Swadlincote to perform about the same or better than comparable centres in terms of car parking prices and car parking provision. It is considered that the current strategy of offering free parking is one means by which Swadlincote is differentiating itself from the surrounding competing centres.

10.31 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>43</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 Swadlincote town centre. As we have set out above, we consider it is important for Swadlincote to provide a distinct offer which sets it apart from surrounding proximate centres, improvements to the digitalisation of the high street may be one way to do this. It is vitally important that Swadlincote town centre seeks to keep pace with consumers and technology advances which are changing at rapid velocity. The first priority will be to assess the fixed broadband coverage, mobile data coverage and public access Wi-Fi hotspots within and around the defined town centre to understand whether the basic digital access and infrastructure is available to allow users to embrace and use on-line shopping channels. Measures should also be implemented to encourage town centres businesses, including independent retailers 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.

10.32 Section 8 of this Retail Study has provided an assessment of a range of potential investment opportunity sites within and in close proximity to Swadlincote town centre. Cheetham and Mortimer

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<sup>43</sup> Digital High Street 2020 Report, Digital High Street Advisory Board, March 2015



has advised that they consider that Site 2, which is currently occupied by the town's bus station, Council offices, library and Post Office sorting office, offers the best opportunity for both food and non-food retail development within the town. Although they have raised concerns due to a lack of any quality demand from retailers seeking representation in Swadlincote in the short to medium term, there may be scope to create a mixed use development which incorporates retail uses, albeit these may need to be included on a speculative basis in the short to medium term, as well as residential and civic uses. As we have already explained, in order to improve the vitality and viability of Swadlincote town centre, it is considered that additional activity needs to be brought into the town and this could be achieved via the introduction of additional residential development within a walk-in catchment. This site could be an opportunity to introduce such development. The Council may wish to consider the formulation of a Development Brief for the site in order to establish the demand on either a joint venture or preferred development basis. In addition, the production of masterplan options for the site may assist the Council by providing an understanding of the quantum of development which could fit on the site and options for the mix of uses which could potentially be accommodated.

- 10.33 There are several other development opportunity sites present within the town centre. However, as retail and leisure occupier demand for Swadlincote is currently limited and is likely to remain so in the short to medium term, the Council may wish to consider the potential for residential development on a number of these sites. Although residential development has taken place within or close to the town centre in recent years, it is considered that there is the potential to introduce further high quality residential development of a quantum and quality to attract the right demographic back into the town centre. By creating a stronger customer base, the demand for more quality leisure, food and drink and other services will be stimulated, thus creating a more pleasant aspect to the town and stimulating additional occupier demand.



## 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>



*Chemist Goods* 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.

**Convenience Goods** Convenience goods relate to everyday essential items including confectionary, food, drinks, newspapers and magazines.

**District Centre** 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.

**Expenditure Per Capita** The average spend of each person within the defined Study Area on a variety of retail goods.

**Expenditure** Expenditure is calculated by taking the population within a defined area and then multiplying this figure by average annual expenditure levels for various forms of goods.

**Expenditure Forecasts** This assessment has been undertaken using the 'goods based' approach as prescribed in the Planning for Town Centres Practice Guidance. Retail expenditure forecasts have been derived from Experian Retail Planner Briefing Note 11 (October 2013).

**Experian (MMG3)** The database used to identify population, expenditure and socio-economic breakdown of the Study Area population.

**Gross Floorspace** Represents the level of total floorspace or footprint of a specific development (i.e. sales area, storage, checkouts, café, display, and so on).

**GOAD Plans** 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.

<b>GOAD Reports</b>	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.
<b>Local Centre</b>	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.
<b>Net Floorspace</b>	Represents the level of internal area devoted to the sale of goods.
<b>Market Share</b>	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.
<b>National Multiple</b>	This is a retail or service operator which is or part of a network of nine or more outlets.
<b>Price Base</b>	The price base for the Study is 210; all prices are or have been adjusted to 2010 in order to be consistent.
<b>Rates of Productivity</b>	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.).
<b>Sales Density</b>	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.
<b>Special Forms of Trading</b>	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.

<b>Study Area</b>	This represents the household survey area, which is based on postal sectors.
<b>Trade Draw</b>	This refers to the level of trade attracted to a particular facility/centre.
<b>Turnover</b>	The turnover figure relates to the annual turnover generated by existing retail facilities.
<b>Town Centre</b>	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 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.