

East Staffordshire Retail and Leisure Study

Volume 1 – Main Report

On behalf of **East Staffordshire Borough Council**



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1 Introduction

1.1 Purpose of the Study

- 1.1.1 Peter Brett Associates LLP (PBA), which incorporates Roger Tym & Partners (RTP), following the merger of the two firms in April 2011, has been instructed by East Staffordshire Borough Council (ESBC) to prepare a Borough-wide Retail and Leisure Study. This work updates the previous study completed by RTP in August 2007, which identified the floorspace requirements and qualitative needs in the retail and commercial leisure sectors in the period up to 2015, and was used to inform the emerging Core Strategy, the Area Action Plan for Burton-upon-Trent¹, and other Local Development Framework documents.
- 1.1.2 There have been a significant number of important changes since the last Borough-wide study was undertaken in 2007, and many of the inputs and assumptions which underpinned the 2007 study have become out-of-date. In particular, forecast rates of future retail and leisure expenditure growth have been revised downwards as a consequence of the two recessions and the ensuing economic downturn. Furthermore, since our last study there have been a number of new retail developments in the Borough and in surrounding local authority areas, and the Council has new population projections which now need to be taken into account. The policy context has also moved on considerably since 2007, in particular with the publication of the National Planning Policy Framework (NPPF) on 27 March 2012, as well as the revocation of the Regional Spatial Strategy for the West Midlands.
- 1.1.3 ESBC is in the process of preparing a new Local Plan that will set the planning framework for the period up to 2031. To underpin the new Local Plan it is important to provide a robust and up-to-date evidence base on retail and commercial leisure needs in the Borough which accurately reflects current circumstances, the latest available data inputs and assumptions, and changes to national planning policy, supported by a new household survey of shopping patterns. In addition, the Council has also asked us to consider the scope for additional office uses as part of this study, which in summary provides:
- An updated performance analysis of Burton and Uttoxeter Town Centres;
 - An assessment of current patterns of spending and future floorspace requirements in the retail, commercial leisure and office sectors;
 - Advice on the floorspace threshold for edge- and out-of-centre retail developments that should be subject to an impact assessment; and
 - An evidence base that will assist the Council in the determination of future applications for retail, commercial leisure and office development.

1.2 Structure of the Report

- 1.2.1 The remainder of our Volume 1 report is structured as follows:
- **Section 2** summarises the requirements of the NPPF insofar as it relates to development in town centres and planning for sustainable economic growth.
 - **Section 3** provides updated performance analyses ('health checks') of Burton and Uttoxeter Town Centres.

¹ Hereafter referred to as 'Burton' for brevity.

- **Section 4** contains our analysis of current patterns of retail (comparison and convenience) and leisure spending, based on the survey of households which was undertaken by NEMS Market Research in April 2013.
- **Section 5** provides our assessment of quantitative retail needs, drawing on the findings of our updated health checks and our analysis of current shopping patterns.
- **Section 6** considers the qualitative need for additional retail floorspace in the study area up to 2031.
- **Section 7** assesses the need for additional commercial leisure and office uses.
- **Section 8** provides our assessment of whether it is necessary to set a local impact assessment floorspace threshold in East Staffordshire, and what that threshold should be.
- **Section 9** contains a summary of our findings and our recommendations to the Council.

1.2.2 This main report is accompanied by two separate volumes, as follows:

- **Volume 2: Appendices** – containing the health check data for Burton and Uttoxeter Town Centres, the a plan showing the overall catchment area of East Staffordshire, a copy of the household survey questionnaire, and a plan showing existing foodstore provision and IMD rank.
- **Volume 3: Spreadsheets** – containing all retail and leisure capacity spreadsheets.

2 National Planning Policy Requirements

2.1 The National Planning Policy Framework

2.1.1 The National Planning Policy Framework (NPPF) was published by Government on 27 March 2012, and consolidates guidance set out in preceding Planning Policy Statements (PPS), Planning Policy Guidance (PPG), and a number of related circulars, into a single document. Following its publication, this document now forms the statutory national planning policy guidance setting out the Government's planning policies for England and how these are expected to be applied.

2.1.2 However, in relation to retail matters, the DCLG have confirmed that the 'Practice Guidance' which accompanied PPS4 (the predecessor to the NPPF in relation to retail matters) remains extant, prior to Government producing replacement guidance. Therefore, we continue to draw reference to the Practice Guidance where appropriate.

Achieving Sustainable Development

2.1.3 Paragraph 6 of the NPPF confirms that *'the purpose of the planning system is to contribute to the achievement of sustainable development'*. This has three dimensions which give rise to the need for the planning system to perform a number of roles:

- **an economic role** – contributing to building a strong, responsive and competitive economy;
- **a social role** – supporting strong, vibrant and healthy communities; and
- **an environmental role** – contributing to protecting and enhancing our natural, built and historic environment.

2.1.4 Paragraph 9 adds that *'pursuing sustainable development involves seeking positive improvements in the quality of the built, natural and historic environment, as well as in people's quality of life' through a variety of means, including 'making it easier for jobs to be created in cities, towns and villages', and 'replacing poor design with better design'.*

Presumption in Favour of Sustainable Development

2.1.5 The NPPF makes clear that there should be a presumption in favour of sustainable development. The Ministerial Foreword to the NPPF makes this point clear from the outset, stating that *'Development that is sustainable should go ahead, without delay — a presumption in favour of sustainable development that is the basis for every plan, and every decision'*.

2.1.6 This is detailed further in the main text of the NPPF, with Paragraph 14 stating that *'At the heart of the NPPF is a presumption in favour of sustainable development, which should be seen as a golden thread running through both plan-making and decision-taking'*.

2.1.7 For plan-making, this presumption in favour of sustainable development means that *'local planning authorities should positively seek opportunities to meet the development needs of their area' and that 'Local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change'* (unless the adverse impacts of doing so would significantly outweigh the benefits, or specific policies contained within the NPPF indicate that development should be restricted).

2.1.8 Paragraph 15 of the NPPF explains that *'Policies in Local Plans should follow the approach of the presumption in favour of sustainable development, so that it is clear that development which is sustainable can be approved without delay. All plans should be based upon and reflect the presumption in favour of sustainable development, with clear policies that will guide how the presumption should be applied locally'*.

Core Planning Principles

- 2.1.9 Paragraph 17 of the NPPF sets out a series of 12 'Core Planning Principles' which should underpin both plan-making and decision-taking. These 12 principles include a requirement that planning should be 'genuinely plan-led', with 'succinct plans' to shape development of an area. LPAs should also support sustainable economic development, and plans should take account of market signals to set out a clear strategy for allocating sufficient land for development.

Building a Strong, Competitive Economy

- 2.1.10 Paragraph 18 of the NPPF confirms that the Government is committed to securing economic growth in order to create jobs and prosperity. To this end the planning system should encourage and not act as an impediment to sustainable growth. LPAs should plan proactively to meet the development needs of business and support an economy fit for the 21st century, and planning policies should recognise and seek to address potential barriers to investment.

- 2.1.11 To this end, local planning authorities should:

- set out a clear economic vision and strategy for their area
- set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs;
- support existing business sectors and where possible identify and plan for new or emerging sectors likely to locate in their area.
- plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries;
- identify priority areas for economic regeneration, infrastructure provision and environmental enhancement; and
- facilitate flexible working practices such as the integration of residential and commercial uses within the same unit.

Ensuring the Vitality of Town Centres

- 2.1.12 Paragraphs 23 to 27 of the NPPF are of particular relevance to town centre planning. The NPPF retains the approach set out in PPS6, PPS4 and preceding national planning guidance by advocating a 'town centres first approach', stating that planning policies should positively promote competitive town centre environments (paragraph 23). In drawing up Local Plans, LPAs should:

- pursue policies to support the viability and vitality of town centres;
- 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,;
- promote competitive town centres that provide customer choice and a diverse retail offer;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
- allocate a range of suitable sites to meet the scale and type of development needed in town centres, including looking at 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;
- 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
- plan positively for the future of declining centres to encourage economic activity.

2.1.13 Paragraphs 24 to 27 of the NPPF discuss the principal ‘tests’ which LPAs should apply to applications for retail development which fall outside defined town centre locations. Firstly, applications for ‘town centre uses’ (such as retail) outside defined centres will need to demonstrate compliance with the sequential approach — i.e. they must demonstrate the proposed scheme cannot be accommodated on an in-centre site (if the application site is in an edge-of-centre location), or either an in-centre or an edge-of-centre (if the application site is in an out-of-centre location). Both applicants and local planning authorities are expected to demonstrate flexibility on issues such as format and scale.

2.1.14 Applications for ‘town centre uses’ outside defined centres which are above 2,500 sq.m (or a locally-set threshold) must also submit an impact assessment, to assess the impact of the proposal on existing, committed, and planned investment in defined centres in an appropriate catchment area, as well as the impact on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area. The NPPF is clear that in instances where a planning application cannot demonstrate compliance with either the sequential or impact ‘tests’, it should be refused planning permission.

Plan-Making

2.1.15 Paragraph 150 of the NPPF makes clear that ‘*Local Plans are the key to delivering sustainable development*’ and that ‘*planning decisions must be taken in accordance with the development plan, unless material considerations indicate otherwise*’.

2.1.16 Paragraph 156 states that LPAs should set out the strategic priorities for the area in the Local Plan, including policies to deliver ‘*the provision of retail, leisure and other commercial development*’. Crucially, Local Plans should:

- plan positively for the development and infrastructure required in the area;
- be drawn up over an appropriate time scale;
- be based on co-operation with neighbouring authorities, public, voluntary and private sector organisations;
- indicate broad locations for strategic development on a key diagram and land-use designations on a proposals map;
- allocate sites to promote development and flexible use of land;
- access and quantum of development where appropriate;
- identify areas where it may be necessary to limit freedom to change the uses of buildings;
- identify land where development would be inappropriate; and
- contain a clear strategy for enhancing the natural, built and historic environment.

Evidence Base

2.1.17 Paragraph 158 The NPPF explains that the Local Plan must be based on '*adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area*' and be comprehensive in their assessments, ensuring that they are '*integrated and that they take full account of relevant market and economic signals*'.

2.1.18 Paragraph 161 confirms that the evidence base should assess:

- the needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development;
- the existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs;
- the role and function of town centres and the relationship between them, including any trends in the performance of centres; and
- the capacity of existing centres to accommodate new town centre development.

Examining Local Plans

2.1.19 The NPPF stipulates that Local Plans must undergo independent examination. In addition to showing that a Local Plan has been prepared in accordance with the Duty to Cooperate, legal and procedural requirements, the Local Plan must also be found to be 'sound'. Paragraph 182 stipulates that a 'sound' plan is one that is:

- positively prepared – based on a strategy which seeks to meet objectively assessed development and infrastructure requirements;
- justified – the plan should be the most appropriate strategy, when considered against reasonable alternatives, based on proportionate evidence base;
- effective – the plan should be deliverable over the plan period; and
- the plan should enable the delivery of sustainable development in accordance with policies in the Framework.

2.2 Planning Policy Statement 4 – Practice Guidance (2009)

2.2.1 Government published the 'Practice guidance on need, impact and the sequential approach' to accompany PPS4 (subsequently referred to in this study as the 'Practice Guidance'). This Practice Guidance does not constitute a statement of Government policy. However, its contents are likely to be a consideration when retail aspects of emerging development plan documents are examined in public. As noted above, in the absence of an equivalent publication alongside the NPPF, the Government has confirmed that the Practice Guidance remains extant.

2.2.2 When assessing the need for retail and leisure developments, local planning authorities are advised to (paragraph 2.4):

- Take account of the quantitative and qualitative need for different types of retail and leisure developments.
- In deprived areas, which lack access to a range of services and facilities, give additional weight to meeting these qualitative deficiencies.

- When assessing quantitative need, have regard to relevant market information and economic data.
- When assessing qualitative need, assess whether there is provision and distribution of shopping and other services which allow genuine choice to meet the needs of the whole community; and take into account the degree to which shops may be overtrading and whether there is a need to increase competition and retail mix.

2.2.3 The guidance provides detailed advice on how to produce an evidence base for retail and leisure developments, which is taken into account in this study.

3 Performance Analysis

3.1 Introduction

- 3.1.1 We have undertaken performance analyses (commonly referred to as ‘health checks’) of Burton and Uttoxeter Town Centres, looking at a range of key vitality and viability indicators. Our appraisals have involved on-foot surveys of each centre on different days of the week, together with desk-based research. Wherever possible we have benchmarked the study centres against a range of comparator centres².
- 3.1.2 As well as providing the base position for the future monitoring of town centre vitality and viability, this exercise identifies the key strengths of the two centres as well as deficiencies and areas that would benefit from improvement. We then use this information to inform the recommendations in subsequent sections of our report. All of the health check data (tables and figures) referred to below are contained in Volume 2 – Appendices 1 to 4³.

3.2 Performance Analysis of Burton and Uttoxeter Town Centres

Movement in the National Retail Rankings

- 3.2.1 In our previous Retail and Leisure Study we charted the movement in the national retail rankings experienced by Burton and Uttoxeter Town Centres, as well as various comparator centres, using time-series data from both Management Horizons Europe’s (MHE) UK Shopping Index and Javelin Group’s Venuescore. Both utilise a near-identical methodology for ranking the UK’s retail centres, which is calculated using a weighted count of multiple retailers comprising fashion retailers, non-fashion multiples and anchor stores.
- 3.2.2 The last MHE Index was published in 2008, and MHE has advised that it will not be publishing an update of its retail rankings. Therefore, for this study we have utilised the Javelin Venuescore Index, which was first published in 2006 and has since been updated in 2011 and again very recently in April 2013 (see Table A.1 of Appendix 1).

Burton

- 3.2.3 In our 2007 study we reported that Burton was one of only four centres considered whose position in the national retail rankings had improved, having moved up 40 places to 65th position between 2001 and 2006. However, the latest Venuescore Index reveals that Burton has slipped back by 51 places to 116th position in 2013.
- 3.2.4 The slippage experienced by Burton is broadly similar to that of comparator centres such as Lichfield (fall of 72 places) and Tamworth (fall of 47 places) over the same period, while the positions of Wolverhampton and Stoke (Hanley) have remained relatively static. Conversely, Derby, Solihull and Stafford have all strengthened their positions in the national retail rankings (having moved up by 16, 11 and 4 places respectively) since 2006.
- 3.2.5 The decline in Burton’s ranking is of some concern. Although this may be partly attributable to the closure of various national multiple retailers over recent years which has affected town centres across the country, Burton appears to be losing multiples faster than other similar sized centres. Indeed, it is notable that over the same period some of the comparator centres we have looked at have managed to improve their ranking, for example through the provision of new floorspace which

² The comparator centres that we have chosen are Coalville, Derby, Droitwich, Lichfield, Solihull, Stafford, Stoke (Hanley), Swadlincote, Tamworth, and Wolverhampton.

³ All subsequent references to Appendices in this and subsequent sections of our report relate to the Appendices that are contained in the separately bound Volume 2.

has attracted new multiples. Burton therefore appears to have fared worse than other nearby competing centres.

Uttoxeter

- 3.2.6 Uttoxeter has experienced an even more significant degree of slippage in the national retail rankings since 2006 than Burton, having fallen by 110 places from 791st position in 2006 to a current ranking of 901st position in 2013. Looking further back, our previous study showed that Uttoxeter was ranked at 497th position by MHE in 2001, and so there has been a long term decline in the order of 400 places between 2001 and 2013. However, we note that Uttoxeter's current position does represent a slight improvement since 2011, when it was ranked in 944th position.
- 3.2.7 Of the comparator centres we considered, only Coalville has experienced a greater degree of slippage, having moved down 143 places from 352nd position in 2006 to 495th position in 2013. In contrast, Swadlincote has significantly improved its position by 110 places since 2006, and currently ranks at 557th position in 2013, while Droitwich has also experienced a movement up the rankings to 697th position (representing a 67 place improvement).
- 3.2.8 We consider that Uttoxeter's long term decline in the national retail rankings – which has occurred while centres such as Swadlincote and Droitwich have been improving – presents some cause for concern, and may be indicative of more serious underlying problems.

Diversity of Main Town Centre Uses

Burton

- 3.2.9 Burton Town Centre (see Figure A1.3 of Appendix 1, which is the adopted Local Plan boundary) contains 15 convenience retail outlets, which equates to 4.8 per cent of the total units in the town centre compared to the UK average of 8.6 per cent, as shown by Table A1.2 in Appendix 1⁴. However, there is a reasonably good range of convenience retail outlets in Burton, with the town centre benefiting from three main foodstores (Asda, Sainsbury's and Tesco), as well as Aldi, Farmfoods and Iceland. There is also a Lidl supermarket at Derby Street, albeit this is outside the town centre. These stores are complemented by a range of national, regional and independent bakers and confectioners. In our assessment these convenience retail facilities cater for the full spectrum of local residents' needs and the town centre's convenience retail offer is healthy in both quantitative and qualitative terms.
- 3.2.10 Table A1.2 in Appendix 1 also shows that the 141 comparison goods outlets in the town centre equate to 45.5 per cent of the total units in the centre, which is slightly higher than the UK average of 41 per cent. The town has above-average representation in each of the clothing and footwear sub-sectors, which is a key determinant of a centre's attractiveness to shoppers. No sub-sectors are significantly under-represented in numerical terms apart from '*florists and gardens*', although outlets in this sub-sector typically only account for around 1 per cent of a centre's total units (based on the UK average). Thus, in numeric terms at least, Burton Town Centre has a good representation of comparison retail outlets.
- 3.2.11 The town centre contains a good array of national comparison sector multiples – as would be expected given the size and status of the centre – including Next, River Island, Topshop, Marks & Spencer, Republic, Monsoon, Burton, BHS, New Look, Matalan, Primark, TK Maxx, Peacocks, JD Sports, Waterstones, WH Smith, Boots and Ryman. This offer is complemented by a range of independent operators across the various comparison retail sub-sectors, providing a good variety and choice for visitors to the centre. Overall, we consider that the comparison retail offer in Burton Town Centre is generally healthy, although it would benefit from the addition of a department store.

⁴ Experian's latest GOAD survey for Burton Town Centre was in June 2012, and so we have updated it to reflect the position at April 2013.

3.2.12 The overall proportion of service outlets in Burton Town Centre (30.3 per cent) is slightly lower than the UK average (35.7 per cent). In our previous study we noted a particular under-representation of outlets in the *'restaurants, cafés, coffee bars, fast food & take-aways'* sub-sector. Representation in this category has now improved numerically and accounts for 10.6 per cent of town centre units – compared to 9.4 per cent of all town centre units in 2007 – although this is still below the national average of 16 per cent. Representation in the *'travel agents', 'banks & financial services', 'building societies'* and *'travel agents'* sub-categories is good and above the UK average in all cases. We can therefore conclude that Burton is well catered for in terms of local services, with no clear quantitative or qualitative deficiencies. Our overall assessment is that Burton Town Centre continues to boast a healthy mix of retail and service sector uses which are in-keeping with its role in the retail hierarchy, particularly against the backdrop of the very challenging economic climate.

Uttoxeter

3.2.13 Supermarket provision in Uttoxeter is limited to Co-operative and Iceland stores, although all convenience retail sub-sectors are represented. The 12 convenience retail outlets in Uttoxeter Town Centre (Table A1.3 of Appendix 1) equate to 7.6 per cent of total town centre units, which is not far from the UK average (8.6 per cent)⁵. Nevertheless, we note that convenience retail provision in Uttoxeter has declined since our previous study in 2007, when there were 18 convenience retail outlets equating to 11.6 per cent of total town centre units. Uttoxeter Town Centre's existing convenience retail outlets are relatively small-scale and geared towards a local shopper base. While the centre appears to be catering for the day-to-day needs of local residents, we consider that convenience retail provision in Uttoxeter would benefit from improvement, although this is likely to be achieved through the foodstore element of the cattle market scheme which is now progressing.

3.2.14 Table A1.3 of Appendix 1 shows that the 63 comparison retail units in Uttoxeter Town Centre equate to 39.9 per cent of total units, which is only slightly below the UK average of 41 per cent. Although representation in the various fashion sub-sectors appears to have slightly improved since our 2007 study, Uttoxeter still has significantly below-average representation in the *'women's, girl's and children's clothing'* sub-sector – which is a key barometer of a centre's retail strength – and the town centre only contains one outlet in the *'men's & boys' wear'* category. Some strengthening of the town centre's clothing offer would therefore be welcome, although we note that a low proportion of clothing retailers is not untypical of centres operating within the same tier of the retail hierarchy as Uttoxeter.

3.2.15 Uttoxeter is also particularly under-represented in the *'electrical, home entertainment, telephones and video'* and the *'variety, department & catalogue showrooms'* sub-sectors. Conversely, the centre has approximately double the UK average proportion of charity shops, and an above-average representation in the *'cars, motorcycles & motor accessories'* sub-sector (5 per cent of total units compared to the UK average of 1.2 per cent).

3.2.16 There are significantly fewer national comparison retail multiples in Uttoxeter than in Burton, which is unsurprising given its different role in the sub-regional retail hierarchy. In terms of specific operators, national multiple representation in Uttoxeter includes Boots, Peacocks, WH Smith and Wilkinson. The majority of comparison retail outlets in the centre are small local independents, which introduce choice and diversity to the retail mix.

3.2.17 At 34.9 per cent, the proportion of service outlets in Uttoxeter Town Centre is almost identical to the UK average of 35.7 per cent. There is a slight under-representation in the *'restaurants, cafés, coffee bars, fast food & take-aways'* sub-sector relative to the national average, although the town centre does nevertheless contain 16 food and drink outlets and higher than average representation in most of the other service sub-sectors.

⁵ Experian's latest GOAD survey for Uttoxeter Town Centre was in March 2011, and so we have updated it to reflect the position at April 2013.

Operator Demand

Burton

- 3.2.18 FOCUS's most recent Town Report for Burton (which we accessed April 2013) only provides time-series data on retailer requirements up to January 2010. This shows that the number of published retailer requirements for Burton has declined from a peak of 46 in October 2004 down to just 18 requirements in January 2010⁶.
- 3.2.19 Further interrogation of the FOCUS database reveals that the following operators currently have published requirements for premises in Burton (see Table A1.4 in Appendix 1):
- Simply Eat: 600-1,000 sq.ft
 - Monkey Mobile: 300-500 sq.ft
 - Snap Fitness: 2,500-10,000 sq.ft
 - Oakham Ltd: 1,000-1,500 sq.ft
 - Caffé Nero: 800-1,500 sq.ft
 - Savers Health and Beauty: 1,750-2,500 sq.ft (plus 500 sq.ft back-up)
 - Age UK: 800-01,500 sq.ft
- 3.2.20 Despite the limited number of published requirements, anecdotal evidence from our consultations with locally active property market agents indicates that there continues to be a moderate level of operator demand for retail premises in Burton. This tends to come from both multiples (who are predominantly interested in the three shopping centres), and local independents (who tend to focus their search on secondary locations with lower rental levels and service charges).
- 3.2.21 Overall, while we conclude that given the centre's size and position in the national retail rankings the published requirements for Burton are somewhat disappointing – both in terms of number and operator type – this may be partly due to the wider problems in the economy and the retail sector, and may not be indicative of any specific underlying problems in Burton. Furthermore, anecdotal stakeholder evidence indicates that the published requirements do not give the full picture, and that demand for town centre premises is reasonably healthy.

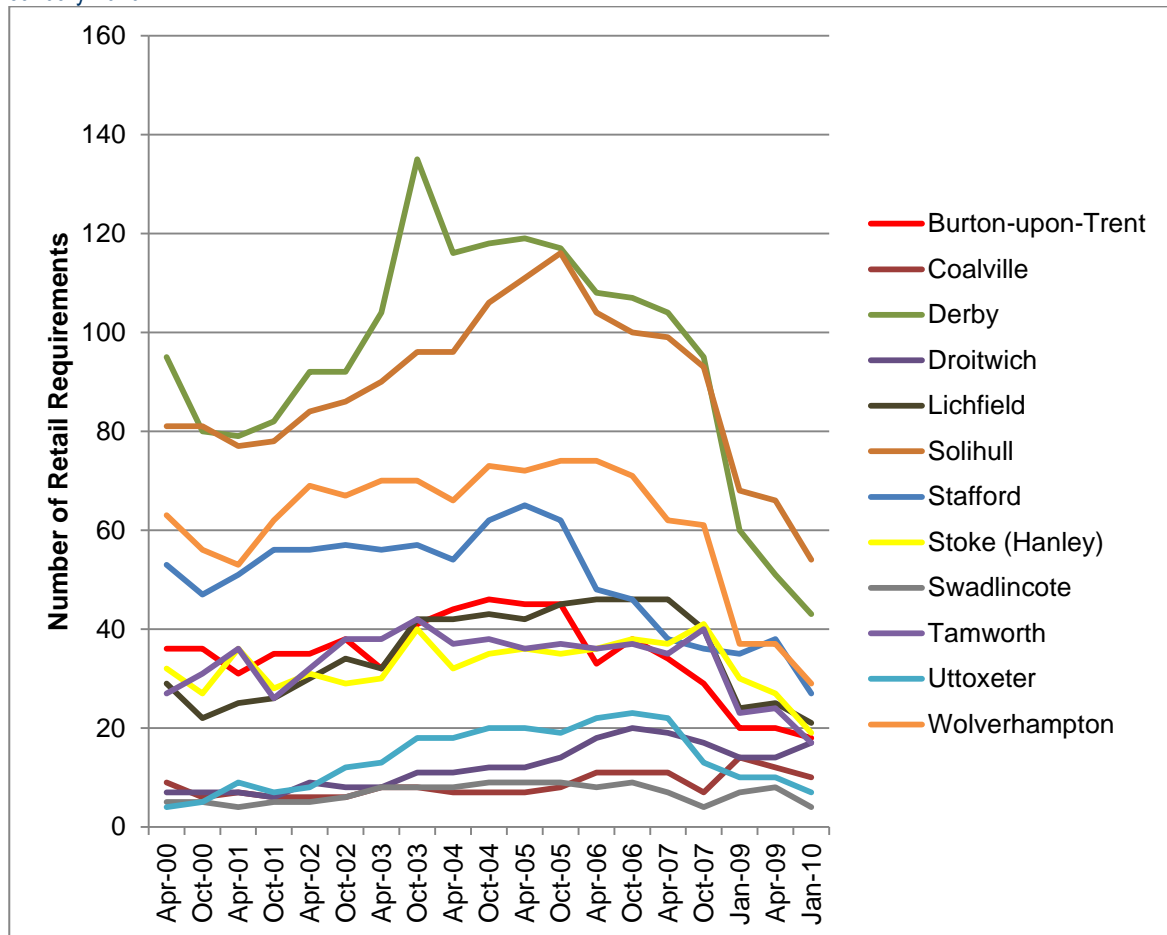
Uttoxeter

- 3.2.22 In our previous study we reported that there had been a steady increase in the level of operator interest in Uttoxeter, from 4 requirements in April 2000 up to 22 requirements in April 2006. FOCUS's most recent Town Report for Uttoxeter only provides time-series data on retailer requirements up to January 2010 and so we are unable to comment on the trend over the last three years.
- 3.2.23 Further interrogation of the FOCUS database reveals that the following operators currently have requirements for premises in Uttoxeter (see Table A1.4 in Appendix 1):
- Topps Tiles: 3,000-8,000 sq ft
 - Caffé Nero: 800-1,500 sq ft
 - Holland & Barrett: 800-1,700 sq ft

⁶ The latest FOCUS Town Reports for Burton and Uttoxeter do not include time series data on retailer requirements after 2010. We have undertaken a separate search for current retailer requirements on FOCUS, and at present the number of operators looking for space in Burton stands at 7 (see paragraph 3.3.20), while 3 operators are seeking space in Uttoxeter (see paragraph 3.2.25).

3.2.24 This level of interest is somewhat disappointing, and coincides with the centre’s slippage in the national retail rankings. Despite the lack of published requirements, anecdotal evidence from locally active property market agents indicates that there are now some tentative signs of improvement in terms of operator interest in the town, although clearly this has yet to translate to any significant new additions.

Figure 3.1 Change in the Number of Retailer Requirements – Burton, Uttoxeter and the Comparator Centres, April 2000 to January 2010



Proportion of Vacant Street Level Property

Burton

3.2.25 Burton Town Centre contained 57 vacant units in April 2013, equating to 18.4 per cent of all town centre units, which is higher than the UK average of 13.7 per cent. In our previous study we reported that Burton contained 34 vacant units (equating to 11.4 per cent of all town centre units), which was slightly below the UK average at the time. These vacant units are generally dispersed across the town centre (as shown in Figure A1.1 of Appendix 1), although there appears to be a fairly high concentration in the Octagon Centre and around George Street/Guild Street.

3.2.26 Most town centres across the country have been affected by the closure of various national multiple retailers and struggling independent operators, who have been unable to weather the difficult economic conditions over the past three or four years. The increasing level of vacancy in Burton is therefore not particularly surprising given these challenging economic conditions and the changes in the retail market since our last study was undertaken. Nevertheless, the level of vacancy in Burton is now above the national average whereas in 2007 it was below the average. This is a cause for concern so we recommend that the situation should be closely monitored.

Uttoxeter

- 3.2.27 Uttoxeter Town Centre contained 30 vacant units in April 2013, equating to 19 per cent of all town centre units, above the UK average of 13.7 per cent. The number of vacant units in Uttoxeter has increased significantly since our previous study, when the centre contained just 8 vacant units (or 7.1 per cent of all units), which was well below the UK average at the time. The centre now contains a number of prominent vacant units along key frontages, such as around Market Place, and there is a particular concentration in The Maltings (as shown in Figure A1.2 of Appendix 1).
- 3.2.28 The notable increase in the level of vacancy in Uttoxeter is of some concern, and while this may be partly attributable to the wider economic conditions discussed above, we consider that the scale of the increase in unit vacancy is greater than we would expect and may be indicative of more serious underlying issues in the centre.

Pedestrian Flows

Burton

- 3.2.29 We are not aware of any formal pedestrian flow counts undertaken by the Council in Burton Town Centre, and are therefore reliant upon stakeholder evidence and observations from our visits to the centre.
- 3.2.30 We observed relatively high levels of footfall throughout the primary shopping areas in Burton, particularly around Burton Place, Coopers Square, Station Street and High Street. More peripheral parts of the town centre were less busy, although this is to be expected and we still observed reasonable levels of footfall in most parts of Burton.
- 3.2.31 Burton's Town Centre Manager was able to report on footfall data for the three shopping centres. Although this does not cover the whole town centre, it serves as a useful barometer of general levels of pedestrian activity. The recorded data shows that after a small increase in pedestrian activity across the three shopping centres in 2010 (+0.22 per cent), footfall has decreased month-on-month and fell by 2.12 per cent in 2011 and by a further 6.83 per cent in 2012.
- 3.2.32 In summary, the anecdotal evidence appears to suggest that footfall levels in the town centre's three covered precincts – which account for approximately three quarters of the town centre's total retail floorspace – have been on a downward trajectory, and that this trend is continuing into 2013.

Uttoxeter

- 3.2.33 As with Burton, we do not have access to any time-series pedestrian flow data. However, we observed the centre to be very quiet each time we visited, with notably fewer visitors than when we carried out our previous health check of the centre.

State of Town Centre Environmental Quality

Burton

- 3.2.34 The general physical condition and environmental quality of Burton Town Centre is very mixed. Parts of the centre – particularly around Market Square, High Street, and the eastern section of Station Street – are attractive and contain high quality historic buildings and public realm. Conversely, some of the more peripheral parts of the centre – as well as some of the more central areas such as around Coopers Square Shopping Centre – are generally less attractive and more worn down and utilitarian. However, the interiors of the main shopping centres are in generally good condition, and provide a reasonably attractive physical environment for visitors.
- 3.2.35 The Town Centre does not appear to capitalise fully on links to the Washland area, which forms the floodplain of the River Trent. This is a genuine asset which should be exploited further, with more legible pedestrian linkages and signage from the town centre.

3.2.36 A Public Realm Implementation Plan for Burton Town Centre was produced in May 2012 by Taylor Young on behalf of the Council, which contains detailed analysis of the various parts of the Town Centre in terms of urban form, public realm and accessibility/movement/ permeability. We concur with the conclusions and recommendations set out in this document, and consider that parts of the centre would certainly benefit from upgrading and enhancement to address the lower quality urban spaces that detract from what is otherwise a generally well maintained centre.

Uttoxeter

3.2.37 Uttoxeter is a very pleasant and attractive market town. The centre contains an array of high quality historic buildings in a mixture of architectural styles, focussed around the refurbished Market Place and High Street. The centre benefits from a generally high quality public realm throughout. The main opportunities for improvement and enhancement are clearly at the former cattle market and JCB sites, which are both directly adjacent to the core retail area and capable of accommodating additional retail and other town centre uses.

3.2.38 It would clearly also be helpful if the vacant units around the town centre could be reoccupied, particularly those at The Maltings, which exert a negative effect on the appearance of the northern part of the town centre. However, as noted earlier in this section of our report, there is very limited operator interest at present.

Town Centre Boundaries

3.2.39 As shown in Figures A1.3 and A1.4 of Appendix 1, we have reviewed the town centre boundaries of Burton and Uttoxeter, and have sought to verify the primary and secondary shopping frontages of each centre. Annex 2 of the NPPF confirms that primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods, while secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.

3.2.40 Accordingly, the primary areas we have identified in each town contain the majority of the retail floorspace and are the clear focus of town centre activity. The secondary areas we have highlighted still contain some retail uses, but perform a more peripheral role and contain a wider mix of occupiers.

3.2.41 The Council should seek to protect and enhance the primary retail areas in Burton and Uttoxeter, which should continue to be the focus of main town centre uses, in particular retail. We consider that proposals that seek the conversion of retail premises in the primary areas to other uses should be restricted to protect town centre vitality and viability. The secondary areas should continue to perform a complementary role, but a wider mix of uses may be appropriate in these locations and the Council will need to carefully consider any applications that further diversify the range of uses in the secondary areas.

Burton

3.2.42 We consider that much of the existing town centre boundary remains relevant, albeit the area around Bargates feels very peripheral to the core area. Normally, we might have suggested redrawing the boundary to exclude this part of the centre, but given the Council's aspirations for Bargates it is appropriate to keep this site within the town centre as this could assist with future development proposals. For the same reason we have also suggested now including the Coors site within the town centre boundary.

3.2.43 The primary shopping area defined in the Local Plan also remains accurate, and represents the focus of retail uses in Burton, mainly comprising the three shopping centres. The western end of Station Street, together with parts of High Street and New Street perform a complementary role and contain a variety of uses, hence we have identified these areas as secondary retail frontage.

Uttoxeter

- 3.2.44 We consider that the existing town centre boundary remains relevant. Although currently vacant, the cattle market and JCB sites should remain within the town centre to assist with development proposals. The frontages along High Street, Market Place and Queen Street are clearly the main focus of retail activity in Uttoxeter, and we have therefore identified these as the primary shopping areas. We have also included retail units at The Maltings within the primary shopping frontage; although there is currently a high level of vacancy in this location, we consider this area should still perform an important role in the town centre and inclusion within the primary shopping frontage may assist in supporting future development proposals.
- 3.2.45 The frontages along the eastern ends of Carter Street and Smithfield Street, and the premises at the corner of Bradley Street and the northern end of High Street also contain a mixture of town centre uses, but appear to perform a more peripheral and complementary role to the core retail area, and have therefore been identified as secondary areas.

Summary

Burton

- 3.2.46 In summary, we consider that Burton remains reasonably healthy overall, although there are some signs of weakness and potential indicators of decline that should be closely monitored. Burton has experienced some slippage in the national retail rankings since our last study, and while this is not in itself an acute cause for concern given the prevailing economic conditions, we note that over the same period some of the other comparator centres – in particular Derby – have improved their ranking and have managed to resist decline more effectively than Burton. The level of published operator demand for space in Burton is also somewhat disappointing, growth in rents has been fairly modest, and levels of unit vacancy have noticeably increased since our last study in 2007.
- 3.2.47 However, Burton continues to boast a fairly strong town centre offer, and is well provided for in terms of both convenience and comparison retail facilities and service uses. The centre contains a good mix of foodstores and independent convenience retail outlets which appear to cater for the full spectrum of local residents' needs in both quantitative and qualitative terms. The number of comparison retail units is broadly in line with the UK average, with above-average representation in each of the clothing and footwear sub-sectors, which are key determinants of a centre's attractiveness to shoppers. Indeed, the town centre boasts a very good array of national comparison sector multiples, complemented by a range of independent operators. Generally, Burton Town Centre continues to boast a healthy mix of town centre uses which are in-keeping with its role in the retail hierarchy, and appears to be reasonably busy in the primary shopping areas.
- 3.2.48 Over recent years there have been a number of proposals to expand and improve the retail offer in Burton, notably the extensions of Coopers Square (which is intended to facilitate a new Debenhams store) and the Octagon Centre, as well as the redevelopment of Burton Rugby Club. However, the Coopers Square application has recently been withdrawn following a change of ownership, and although the shopping centre manager has confirmed that the new owner intends to pursue the extension there is currently no committed scheme and the timescales for a new application are unknown. Meanwhile, no progress has been made with the Octagon extension or the Burton Rugby Club scheme. However, should these schemes come forward then they will no doubt help Burton to make up some of the ground it has lost over recent years.
- 3.2.49 The priority for the town should be to stem any further decline and encourage investment, which will enable it to compete more effectively with nearby centres such as Derby and safeguard vitality and viability for the future.

Uttoxeter

- 3.2.50 Uttoxeter remains an essentially attractive market town, with a good quality public realm throughout and generally well maintained historic buildings. However, in our assessment the general health of

the centre appears to be in decline. Uttoxeter's position in the national retail rankings has slipped significantly over recent years, having fallen a further 110 places since our last study (when we reported a 401 place slippage since 2001). This could be partly attributed to the closure of the cattle market, which previously attracted visitors to the centre, coupled with additional edge- and out-of-centre floorspace (such as Lidl and the Tesco extension). This long term decline in the national retail rankings is a cause for concern, especially when comparator centres such as Swadlincote and Droitwich have both experienced an improvement over the same period. This is coupled with a disappointing level of current published retailer requirements, low footfall, and an alarming increase unit vacancy. The vacancy rate is above the national average, and the centre now contains a number of prominent vacancies along key frontages, together with a particular concentration in The Maltings.

- 3.2.51 Convenience retail provision in Uttoxeter is quite limited and geared towards a local shopper base, and we consider that there is scope for improvement in this sector. The centre contains only a few national multiple comparison operators, and although this is not untypical for centres of the size and function of Uttoxeter, the centre does have significantly below-average representation in the key fashion sub-sectors.
- 3.2.52 In summary, we are concerned about the direction Uttoxeter has been travelling in over recent years. However, we are encouraged to note that work on the Cattlemarket and JCB schemes has now commenced, and these developments will undoubtedly help reverse this decline and provide a much needed boost in investment and interest in Uttoxeter, as well as address some of the deficiencies outlined above.

4 Current Patterns of Retail and Leisure Spending

4.1 Household Survey Methodology

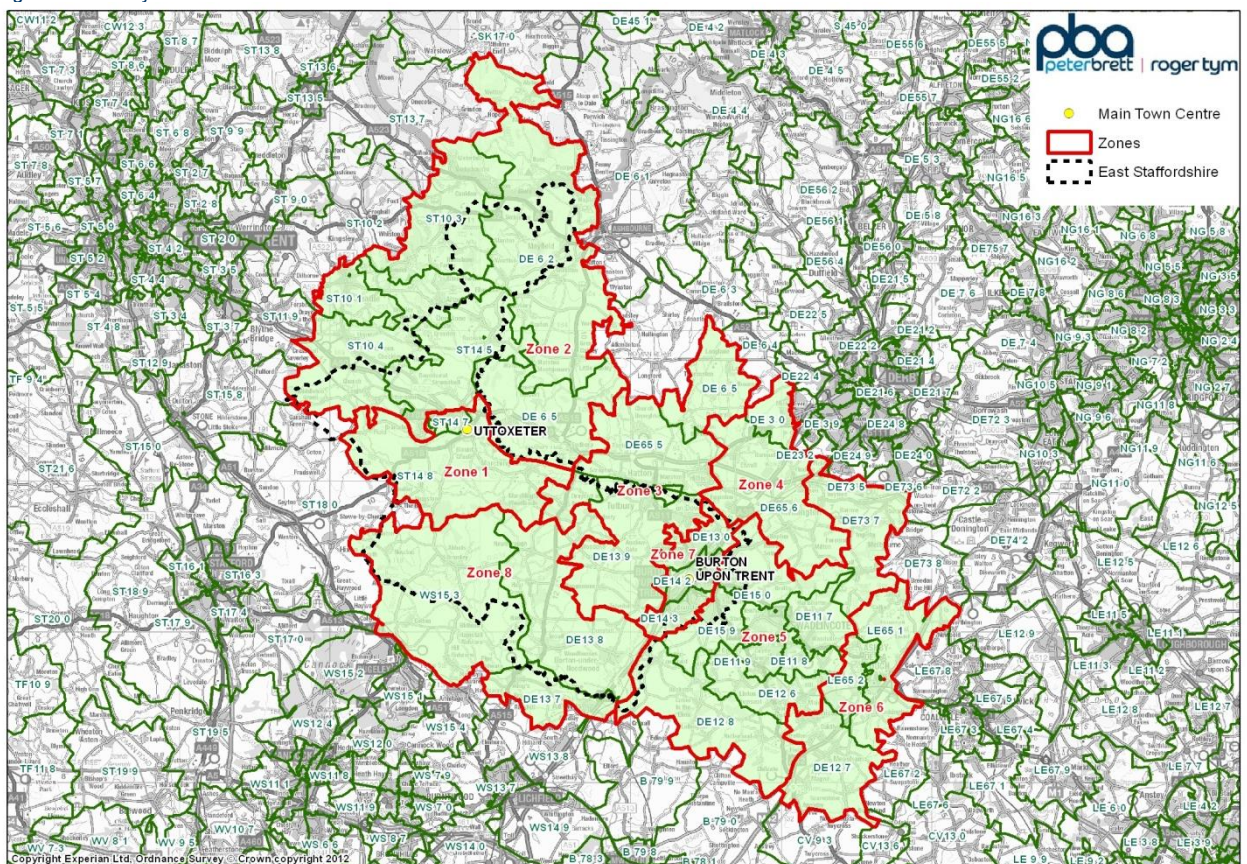
4.1.1 The last comprehensive borough-wide survey of shopping patterns was undertaken six years ago in February 2007, and so the Council decided to commission a new household survey to provide up-to-date evidence of current shopping patterns and inform the present study. Accordingly, our assessment of local patterns of retail spending, as set out in this section of our report, is based on a new telephone survey of 1,003 households undertaken by NEMS Market Research in April 2013.

Survey Area

4.1.2 The survey area (which we also refer to as the ‘overall catchment area’ later in the report) is based on the postcode sectors shown in Figure 4.1 below (the final study area map is provided at Appendix 2). This differs from the survey area used for the 2007 telephone survey, which was based on ward boundaries. However, the overall geography of the survey area is broadly similar to that used in 2007, so that the findings of the new household survey remain generally comparable with those from the 2007 survey. The survey area covers the administrative area of East Staffordshire, but also includes parts of South Derbyshire, Derbyshire Dales, Lichfield, Stafford and Staffordshire Moorlands.

4.1.3 We ensured that there was a minimum of 100 completed interviews in each zone and the results of the survey were weighted according to the actual population in each zone.

Figure 4.1 Survey Area Constituent Postcode Sectors



Survey Questionnaire

4.1.4 The survey questionnaire, which is reproduced in Appendix 3, sought to establish:

- i. patterns of convenience goods spending, based on the location of:
 - o the store where the household last undertook a main food and grocery shop, the store visited the time before that, the amount spent per week and frequency of main shop (questions 1 to 4);
 - o the shop where the household last undertook a 'top-up' food and grocery shop, the shop visited the time before that, the amount spent per week and frequency of top-up shop (questions 5 to 8); and
 - o spending on food and groceries in small shops (questions 9 to 12).
- ii. patterns of comparison goods spending, based on the locations of the last two purchases of:
 - o clothes and shoes (questions 13 and 14);
 - o furniture, carpets or soft household furnishings (questions 15 and 16);
 - o DIY and decorating goods (questions 17 and 18);
 - o electrical items such as TVs, DVD players, digital cameras, MP3 players, mobile phones, computers or domestic appliances, such as washing machines, fridges or cookers (questions 19 and 20);
 - o health, beauty and chemist items (questions 21 and 22);
 - o recreational goods, such as sports equipment, bicycles, musical instruments and toys (questions 23 and 24); and
 - o other non-food items, such as books, CDs, jewellery, glass and china items (questions 25 and 26).

4.1.5 In addition to spending on retail goods, the household survey also sought to identify patterns of spending on leisure services and cultural activities (questions 29 to 36), based on the locations where households spend the most money on:

- restaurants/cafés;
- cinema;
- pubs/bars/nightclubs;
- family entertainment centres such as ten pin bowling and skating;
- theatre/concerts;
- museums/art galleries;
- bingo/casino/bookmaker; and
- health and fitness.

Composite Patterns of Spend on Comparison and Convenience Goods

- 4.1.6 The composite pattern of spending for comparison goods, as shown in Volume 3 Table 4a⁷, was achieved on the basis of expenditure data supplied by Experian in relation to the seven aforementioned categories of spend, as shown in Table 4.1. The composite pattern of spending on convenience goods, as shown in Volume 3 Table 8a, was achieved on the basis of the mean weekly household spend findings, as shown in Table 4.2.

Table 4.1 Composite Patterns of Comparison Goods Spend

	Percentage Weighting
Clothes and shoes	26.62
Furniture, carpets and soft household furnishings	10.66
DIY and decorating goods	25.01
Electrical items and domestic appliances	7.91
Health, beauty and chemist items	3.18
Recreational goods	12.25
Other non-food goods	14.37
All Comparison Goods	100

Table 4.2 Composite Patterns of Convenience Goods Spend

	Mean Weekly Household Spend	Percentage Weighting
Main food and groceries	£76.73	82.38%
Top-up food and groceries	£17.82	13.26%
Small local shops	£14.77	4.37%
All Convenience Goods	£94.33	100.0%

4.2 Current Patterns of Spending on Comparison Goods

- 4.2.1 The resident population of the study area in 2013, disaggregated by zone, is shown in the second row of figures in Volume 3 Table 1. The overall population in 2013 amounts to approximately 264,647 persons, which is derived by applying the revised ONS Based Population and Household Projections to the 2011 Mid-Year Population Estimates supplied by ONS.
- 4.2.2 The per capita spend on comparison goods in 2013 (Volume 3 Table 2a) varies from a low of £2,625 in Zone 7 to a high of £3,573 in Zone 8.
- 4.2.3 The total amount of comparison goods spending for residents of the whole of the study area in 2013 is £771.6m (Volume 3 Table 3a), of which £82.6m, or 10.7 per cent, is spent on special forms of trading (catalogue, TV and internet shopping, which we subsequently abbreviate as SFT), based on Experian data.
- 4.2.4 Volume 3 Table 4a shows the market shares that each zone of the study area achieves of the total spend on comparison goods by residents of each zone within the study area, and Volume 3 Table 4b sets out the pattern of expenditure flows for the comparison goods sector as a whole, as revealed by the survey of households.
- 4.2.5 Table 4.3 below, which is derived from the final column of Volume 3 Table 4b, summarises the main destinations for comparison goods expenditure within and outside the study area. Burton Town

⁷ All references to 'Spreadsheets' in our report relate to the spreadsheets that are contained in the separately bound Appendix Volume 2 entitled 'Retail and Leisure Capacity Spreadsheets.'

Centre is the main destination for comparison retailing within the study area, attracting some £246.3m (35.7 per cent) of available spend. Swadlincote Town Centre, Uttoxeter Town Centre and the B&Q on the edge of Burton are the main secondary destinations for comparison shopping within the study area, attracting £31.1m (4.5 per cent), £27.1m (3.9 per cent) and £26.1m (3.8 per cent), respectively. Other town, village and local centres, retail parks and freestanding stores located within the study area account for a further £115.7m (16.8 per cent) of the comparison goods expenditure available to residents of the study area. Thus, overall, some 61.3 per cent of expenditure on comparison goods available to the study area's residents is spent in town, village and local centres, or in retail parks and freestanding stores, which are located within the study area. This is known as the aggregate retention rate.

Table 4.3 Broad Destinations for Comparison Goods Expenditure

Broad Destinations for Comparison Goods Expenditure	£m	%
Burton-upon-Trent Town Centre	246.3	35.7%
Swadlincote Town Centre	31.1	4.5%
Uttoxeter Town Centre	27.1	3.9%
B&Q, Wellington Road, Burton-upon-Trent	26.1	3.8%
Other destinations within the study area	91.8	13%
Total Retained Expenditure	422.5	61.3%
Derby area	105.4	15.3%
Stoke-on-Trent area	27.4	4.0%
Tamworth area	25.1	3.6%
Other locations outwith the study area	108.6	16%
Expenditure	266.5	38.7%
TOTAL	689.0	100.0%

- 4.2.6 The current aggregate retention rate of 61.3 per cent is less than the retention rate identified by the 2007 household survey, of 67.4 per cent⁸. This reflects the fact that there have been no significant improvements in the comparison retail facilities across the study area in the intervening period, while other competing centres such as Derby have strengthened their offer. It should be noted, however, that in the 2013 survey, respondents were asked about their shopping habits in relation to seven categories of comparison goods, rather than just five categories, as in the 2007 survey. A greater dispersal of response has been achieved in the 2013 survey, compared to the 2007 survey, with smaller centres within the study area featuring more prominently in the 2013 survey findings.
- 4.2.7 We consider that 61.3 per cent is a good level of expenditure retention for the East Staffordshire study area given its proximity to other higher-order centres to the east and west, namely Derby and Stoke-on-Trent (Hanley).
- 4.2.8 Table 4.3 above confirms that over a third (38.7 per cent) of the comparison retail expenditure available within the study area leaks to destinations beyond the study area. A significant proportion of comparison goods expenditure flows to town and other centres, retail parks and freestanding stores located just outside the study area (mainly to Derby, Stoke-on-Trent and Tamworth).

⁸ In 2007, £413.53m of the total £613.54m of comparison goods expenditure available to residents of the study area was spent in town, village and local centres, or in retail parks and freestanding stores, which are located within the study area (2004 prices), Source: p56 East Staffordshire Borough Council Retail and Leisure Capacity Study 2007.

- 4.2.9 The market shares and estimated comparison goods turnovers of the main centres and retail parks/freestanding stores within the study area, prior to making any allowance for any expenditure inflow from those who are resident beyond the study area, are set out in the last column of Volume 3 Table 4b and are summarised in Table 4.4 below.

Table 4.4 Comparison Goods Expenditure Retained Within the Study Area

Defined Centres Within the OCA⁹	£m	%
Burton-upon-Trent Town Centre	246.3	35.7
Swadlincote Town Centre	31.1	4.5
Uttoxeter Town Centre	27.1	3.9
Ashby-de-la-Zouch Town Centre	10.6	1.5
Cheadle Town Centre	8.2	1.2
Retail Parks and Freestanding Stores Within the OCA	£m	%
B&Q Wellington Road, Burton-upon-Trent	26.1	3.8
Tesco, Resolution Road, Ashby-de-le-Zouch	12.8	1.9
Sainsbury's, Civic Way, Swadlincote	7.0	1.0

- 4.2.10 Table 4.4 confirms that Burton is, by a significant margin, the main comparison shopping destination in the study area, achieving an overall market share of 35.7 per cent. Swadlincote Town Centre achieves the second-highest comparison retail turnover, of £31.1m, and a market share of 4.5 per cent, followed by Uttoxeter Town Centre, with a comparison retail turnover of £27.1m and a market share of 3.9 per cent. This analysis highlights the dominance of Burton Town Centre compared to other destinations within the study area.
- 4.2.11 However, the latest household survey indicates that Burton's market share has diminished since the 2007 household survey. Previously, Burton captured £294.56m (48 per cent) of available comparison goods expenditure within the defined study area. It can therefore be assumed that the comparison retail offer in Burton Town Centre may not be as attractive as it was previously, with more people now choosing to shop elsewhere. However, as we noted earlier in this section, the 2013 survey picks up a greater dispersal of response than the 2007 survey and provides a more realistic indication of the true market share that is achieved by centres.
- 4.2.12 The market share of Ashby-de-la-Zouch has also dropped significantly. In 2007 Ashby was capturing £20.9m of comparison expenditure available to study area residents (3.4 per cent market share within the OCA), whereas the 2013 survey shows that it is only accounting for £10.6m (2.5 per cent market share within the OCA).
- 4.2.13 The market shares of the other two main centres within the study area, Swadlincote Town Centre and Uttoxeter Town Centre, have remained broadly static since the 2007 household survey.
- 4.2.14 The main destinations for comparison goods expenditure leakage, again as shown in the last column of Volume 3 Table 4a, are summarised in Table 4.5. The principal destination for comparison goods expenditure leakage is Derby City Centre, which attracts more than a third of the leakage (£99.4m) of the study area's comparison goods expenditure, equating to 14.4 per cent of the available comparison expenditure of study area residents. Compared to the 2007 survey, Derby City Centre's market share has increased significantly, as before it was only capturing a quarter of total expenditure leakage. This reflects the fact that Derby City Centre's comparison retail offer has improved considerably in the intervening period.

⁹ Overall Catchment Area

- 4.2.15 Other principal shopping destinations drawing expenditure away from the catchment area include Stoke-on-Trent City Centre (Hanley) and Tamworth Town Centre. Together, these centres account for some 5.6 per cent of expenditure leakage.

Table 4.5 Main Destinations for Comparison Goods Expenditure Leakage

Town/City Centres Outside the Study Area	£m	%
Derby City Centre (including Westfield Shopping Centre)	99.4	14.4%
Stoke-on-Trent City Centre (Hanley)	19.8	2.9%
Tamworth Town Centre	18.5	2.7%
Retail Parks and Freestanding Stores Outside the Study Area	£m	%
Ventura Retail Park, Ventura Park Road, Bonehill, Tamworth	6.5	0.9%

- 4.2.16 The study area's retention level by zone (see Volume 3 Table 4a, 'Sub-total for study area' row) varies from a low of 22 per cent in Zone 4 to a high of 75.4 per cent in Zone 5.
- 4.2.17 The localised retention rate – which is the proportion of expenditure on comparison goods available to residents in a specific zone that is spent in centres and stores located within that zone – is highest for Zone 7, which contains Burton Town Centre (see Volume 3 Table 4a, 'Zone 7' column and 'Sub-total, survey zone 7' row) and Zone 1, which includes Uttoxeter Town Centre, at 73.6 per cent and 41.1 per cent respectively. This indicates that residents of these zones have relatively narrow comparison shopping patterns. The localised retention rate for Zone 6 (35 per cent) which contains Ashby-de-la-Zouch, is also relatively high. Zone 5, which includes Swadlincote Town Centre, has a retention rate of around 20 per cent. The retention level in Zone 2, which contains Cheadle, is lower at 9.1 per cent. For each of the remaining three zones 3, 4 and 8, the localised retention rates are below 3 per cent, although these zones encompass largely rural areas and contain no defined town centres.

4.3 Comparison Goods Market Shares

- 4.3.1 Below, we provide an analysis of the comparison goods market shares achieved by each of the two main town centres in East Staffordshire. We also briefly examine a number of other significant centres within and just outside the study area.

Centres within East Staffordshire

Burton Town Centre

- 4.3.2 Burton Town Centre achieves a comparison goods market share of 60.6 per cent in its own zone (Zone 7). In neighbouring zones 3, 5 and 8, Burton secures healthy market shares of 45.6 per cent, 42.2 per cent and 51.1 per cent, respectively. However, in Zone 4, the market share is far less at 15.4 per cent. This can be attributed to the zone's close proximity to Derby. Burton Town Centre is also able to secure a reasonable market share in Zones 1 and 6, at 19.5 per cent and 19.3 per cent, respectively. Only in Zone 2 is the market share low at 3.5 per cent. Therefore, overall, these figures indicate that Burton is attractive to residents across most of the study area in terms of comparison retailing.

Uttoxeter Town Centre

- 4.3.3 Uttoxeter Town Centre achieves its highest comparison goods market share of 30.5 per cent in its own zone (Zone 1). The only other zone in which Uttoxeter achieves a material market share, of 14.9 per cent, is in neighbouring Zone 2. Uttoxeter does not achieve a market share in excess of 2 per cent in any of the remaining six survey zones. This evidence indicates that the attraction of Uttoxeter in terms of comparison goods retailing is very localised.

Other Centres Within the OCA

Swadlincote

- 4.3.4 Swadlincote Town Centre achieves a maximum comparison goods market share of 16.6 per cent in its own zone (Zone 5) and does not achieve a market share of over 3 per cent in any of the other seven survey zones. This evidence confirms that Swadlincote is not a particularly significant centre of comparison goods retailing.

Ashby-de-la-Zouch

- 4.3.5 Ashby-de-la-Zouch Town Centre achieves a comparison retail market share of 13.9 per cent in its own zone (Zone 5) but it attracts very little comparison trade from the other zones. This confirms that Ashby-de-la-Zouch also has a fairly limited comparison retail shopping role.

Centres Outside the OCA

- 4.3.6 Derby City Centre achieves a comparison goods market share of 46 per cent in Zone 4, which is the closest zone to Derby. Derby is also able to secure a market share of above 10 per cent in Zones 1, 2, 3 and 7, suggesting that it has fairly wide appeal within the study area.
- 4.3.7 Stoke-on-Trent City Centre (Hanley) secures a market share of 18.7 per cent in Zone 2, which is closest to the City. Elsewhere within the study area, Hanley City Centre does not achieve a market share above 4 per cent, confirming that its influence within the study area is limited to the western part of the study area.

4.4 Overlapping Comparison Goods Catchments

- 4.4.1 Table 4.6 presents an analysis of dominant centres/out-of-centre retail parks – defined for this exercise as instances where the comparison goods market share exceeds 24 per cent – and centres of subsidiary influence, which are defined on the basis of having comparison goods market shares of between 10 per cent and 24 per cent. Table 4.6 reveals that:
- in six of the eight zones, there is at least one dominant centre, and at least one centre of subsidiary influence;
 - Burton Town Centre is the dominant centre in four out of the eight zones and has subsidiary influence in three others;
 - Uttoxeter Town Centre is the dominant centre in its own zone but has no significant influence in any other zone;
 - both Swadlincote and Ashby-de-la-Zouch Town Centres are not the dominant centres in any zones, but each exerts a subsidiary influence in its own zone; and
 - Derby City Centre is the dominant comparison shopping destination in two of the zones nearest to it, and exerts a subsidiary influence in the three other zones. Stoke-on-Trent (Hanley) City Centre has a subsidiary influence in the zone closest to it.
- 4.4.2 The influence of Burton Town Centre stretches beyond its own zone in the study area. As stated above it is therefore a significant comparison shopping destination in the study area.
- 4.4.3 The influence of Uttoxeter Town Centre is important within its own zone, but its wider influence is limited. The influence of Derby City Centre is significant in five of the eight survey zones.

Table 4.6 Dominant Comparison Goods Centres/Retail Parks and Centres/Retail Parks of Subsidiary Influence

Zone	Dominant Centres/Retail Parks (Market Share 24%+)	Other Centres/Retail Parks of Subsidiary Influence (Market Share 10% to 24%)
1	Uttoxeter Town Centre	Burton-upon-Trent Town Centre Derby City Centre
2	-	Stoke-on-Trent City Centre (Hanley) Uttoxeter Town Centre Derby City Centre
3	Burton-upon-Trent Town Centre Derby City Centre	-
4	Derby City Centre	Burton-upon-Trent Town Centre
5	Burton-upon-Trent Town Centre	Swadlincote Town Centre
6	-	Tesco, Resolution Road, Ashby-de-la-Zouch Ashby-de-la-Zouch Town Centre Burton-upon-Trent Town Centre
7	Burton-upon-Trent Town Centre	Derby City Centre
8	Burton-upon-Trent Town Centre	-

4.5 Comparison Goods Sub-Sectors

4.5.1 We now turn to the patterns of shopping for various comparison goods sub-sectors, as revealed by the household survey. The findings are set out in Volume 3 Tables 5a and 5b, and are summarised below for each of the comparison goods sub-sectors as follows:

- clothes and shoes, which account for £183.5m of the comparison goods spending of the study area's residents;
- furniture, carpets, and soft household furnishings, which account for £73.4m;
- DIY and decorating goods, which account for £54.5m;
- electrical items and domestic appliances, which account for £172.4m;
- health, beauty and chemist items, which account for £21.9m;
- recreational goods (for example, sports equipment and musical instruments), which account for £84.4m; and
- specialist and other comparison retail items (for example, books, CDs, jewellery, glass and china items), which account for £99.0m of the comparison goods expenditure available to residents of the study area.

4.5.2 Below, we provide an analysis of the two primary comparison sub-sectors, 'clothes and shoes' and 'electrical and domestic appliances', highlighting the levels of expenditure for both. There is also a brief overview of the other sub-sectors.

Clothes and Shoes

- 4.5.3 Overall, 50.6 per cent of the expenditure on clothes and shoes available to the study area's residents is spent in centres, retail parks and freestanding stores which are located within the study area (see final column of Volume 3 Table 5c). This is a reasonable retention level for clothes and shoes, given the strong competition presented by centres outside the study area such as Derby.
- 4.5.4 Burton Town Centre attracts £77.6m of the £183.5m of clothes and shoes expenditure available to the study area's residents, which equates to a market share of 42.3 per cent, followed by Uttoxeter Town Centre, which attracts £5.6m of expenditure, or 3.0 per cent, and Swadlincote Town Centre which secures £5.2m of expenditure (2.8 per cent). This highlights the fact that Burton-upon-Trent is the primary location for clothes and shoes shopping in the study area, accounting for over 84 per cent of the expenditure on clothes and shoes which is retained within the study area. Burton Town Centre's market share has diminished slightly since the 2007 survey, when it achieved a market share of 54 per cent, but Burton is still the most significant centre in the study area, by a considerable margin.

Table 4.7 Main Destinations for Clothes and Shoes within the Study Area

Destination	Expenditure on Clothes & Shoes (£m)	Market Share (%)
Burton-upon-Trent Town Centre	77.6	42.3
Uttoxeter Town Centre	5.6	3.0
Swadlincote Town Centre	5.2	2.8

- 4.5.5 The main leakage destination for clothes and shoes is Derby City Centre, which attracts £40.4m, or 21.9 per cent, of study area residents' spending on clothes and shoes, as shown in Table 4.8. Derby City Centre's market share has almost doubled since the 2007 household survey, when it had a market share of 11 per cent. This reflects the fact that the clothing and shoes offer in Derby City Centre has improved significantly since the last study, whereas there has been no material improvement in East Staffordshire's centres. The Tamworth and Stoke-on-Trent areas also account for some of the expenditure leakage, attracting £10.1m and £7.3m of the spending of study area residents on clothes and shoes, respectively.

Table 4.8 Main Leakage Destinations for Clothes and Shoes

Destination	Expenditure on Clothes & Shoes (£m)	Market Share (%)
Derby City Centre	40.4	21.9
Tamworth area	10.0	5.5
Stoke-on-Trent area	7.3	4.0

- 4.5.6 We consider Burton Town Centre's clothes and shoes market share to be reasonably good. However, in light of increased competition from Derby City Centre there is a requirement for Burton to improve its offer further, in order to maintain its position in the hierarchy. Indeed, a strong clothes and shoes offer serves as the foundation for an attractive comparison retail offer, and is vital in attracting the expenditure of residents.

Electrical Items and Domestic Appliances

- 4.5.7 Overall, 66.8 per cent of the expenditure on electrical items and domestic appliances available to the study area's residents is spent at destinations within the study area (see final column of Volume 3 Table 5d). In our assessment this is a good retention level for this category of comparison goods.

- 4.5.8 The main destinations for expenditure on electrical items and domestic appliances within the study area, as shown in Table 4.9, are Burton Town Centre (£54.8m, equating to a market share of 31.8 per cent), Swadlincote Town Centre (£13.4m, or 7.8 per cent) and Currys in Centrum East Retail Park (£10.3m, or 5.9 per cent).

Table 4.9 Main Destinations for Electrical Items and Domestic Appliances within the OCA

Destination	Expenditure on Electrical Items and Domestic Appliances (£m)	Market Share (%)
Burton-upon-Trent Town Centre	54.8	31.8
Swadlincote Town Centre	13.4	7.8
Currys, Centrum East Retail Park, Wellington Road, Burton-upon-Trent	10.3	6.0

- 4.5.9 The main leakage destination for electrical items and domestic appliances is Derby City Centre, which attracts £18.3m of expenditure on such goods, equating to a market share of 10.6 per cent, as shown in Table 4.10. The Stoke area attracts some of the leakage, with Festival Park on Etruria Road and Stoke City Centre (Hanley) collectively attracting £6.9m of spend, equating to a market share of 4 per cent.

Table 4.10 Main Leakage Destinations for Electrical Items and Domestic Appliances

Destination	Expenditure on Electrical Items and Domestic Appliances (£m)	Market Share (%)
Derby City Centre	18.3	10.6
Festival Park, Etruria Road, Hanley	3.6	2.1
Stoke City Centre (Hanley)	3.3	1.9

Other Comparison Sub-Sectors

- 4.5.10 Retention levels are relatively high for the other comparison sub-sectors, the highest being for the DIY sector, with over three quarters of spend being kept within the study area. The majority of spend within the study area for these sub-sectors is accounted for by Burton Town Centre. Another notable destination is the B&Q at Wellington Road.
- 4.5.11 In terms of expenditure leakage, again Derby City Centre is a popular destination for residents within the study area, especially for recreational goods.

Summary of Expenditure Retention and Leakage for Each of the Comparison Goods Sub-Sectors

- 4.5.12 Table 4.11 presents a summary of expenditure retention and leakage for each of the seven comparison goods sub-sectors. Burton Town Centre is the primary destination within the study area for each of the seven comparison retail sub-sectors. Burton's highest market shares are within the clothing/shoes and specialist items sub-sectors, at 42.3 per cent and 47.3 per cent, respectively. Conversely, the other centres within the study area have fairly low market shares across the different comparison sub-sectors. Derby City Centre has a relatively high market share in a number of the sub-sectors, including the critically important 'clothes and shoes' sub-sector where it achieves a market share of 21.9 per cent.

Table 4.11 Summary of Expenditure Retention and Leakage by Comparison Goods Sub-Sectors

	Clothes & Shoes	Furniture	DIY	Electrical	Health (etc)	Recreation	Specialist/ Other	All Comparison Goods
Burton-upon-Trent Town Centre	42.3%	30.7%	10.9%	31.8%	30.3%	38.1%	47.3%	35.7%
Uttoxeter Town Centre	3.0%	3.6%	6.6%	4.2%	5.7%	3.5%	3.8%	3.9%
Swadlincote Town Centre	2.8%	6.4%	5.4%	7.8%	12.2%	7.8%	2.7%	4.5%
Ashby-de-la-Zouch Town Centre	0.9%	1.0%	1.3%	1.1%	6.3%	1.0%	3.4%	1.5%
Other centres/retail parks/stores within the study area	1.5%	11.4%	52.1%	21.9%	21.7%	3.3%	14.7%	15.6%
Total Retained Expenditure	50.6%	53.1%	76.3%	66.8%	76.1%	53.8%	72.0%	61.3%
Derby City Centre	21.9%	14.9%	3.1%	10.6%	8.3%	18.6%	11.1%	14.4%
Other locations outwith the study area	27.5%	32.0%	20.5%	22.6%	15.6%	27.7%	16.9%	24.3%
Total Leakage	49.4%	46.9%	23.7%	33.2%	23.9%	46.2%	28.0%	38.7%
TOTAL	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%	100.00%

4.5.13 The overall retention rate achieved by the study area ('Total Retained Expenditure' row in Table 4.11) is highest for the DIY and decorating goods; health, beauty and chemist items; and specialist/other comparison goods sub-sectors, and is lowest for the clothes and shoes sub-sector. A high proportion of expenditure leakage in the clothes and shoes sub-sector is accounted for by Derby City Centre. As this sector forms the core of the 'high street' retail offer, more needs to be done to try and recapture some of this leakage expenditure. The analysis suggests the need to promote quality developments within and around East Staffordshire's centres, which are targeted at higher value comparison retailers.

4.6 Current Patterns of Spending on Convenience Goods

4.6.1 The per capita spend on convenience goods in 2013 (Volume 3 Table 2b) varies from a low of £1,723 in Zone 7 to a high of £2,130 in Zone 8.

4.6.2 The total amount of convenience goods spending for residents of the whole study area in 2013 is £493.8m (Volume 3 Table 3b), of which £11.4m, or 2 per cent, is spent on SFT. The pattern of expenditure flows for the convenience goods sector as a whole, as revealed by the survey of households, is set out in Volume 3 Table 8a.

4.6.3 Table 4.12 – which is derived from the final column of Volume 3 Table 8b – reveals that, overall, some £394.8m, or 81.8 per cent, of the expenditure on convenience goods available to residents of the study area is spent in town and village centres and in freestanding stores which are located within the catchment area; this is known as the aggregate retention rate (see Volume 3 Table 8b, final column, 'Overall sub-total for study area' row). A total of 18.2 per cent of convenience retail expenditure (equating to £87.7m) currently flows to stores outside the study area.

4.6.4 The overall retention rate, at 81.8 per cent, is lower than the retention rate of 87.5 per cent identified by the 2007 household survey¹⁰. The higher retention rate could, in part, be the result of methodological differences between the two household surveys, rather than indicating an improvement in the Borough's convenience retail offer. In particular, residents were questioned in the 2013 survey on where they undertook their last two food and grocery shopping trips and on whether they visit small shops, whereas in the 2007 survey, residents were asked about where they usually go for their food and grocery shopping. Our current approach therefore makes respondents think about actual trips, whereas the way the questions in the 2007 survey were worded is likely to result in a bias towards the larger foodstores, including those located just outside the study area.

Table 4.12 Broad Destinations for Convenience Goods Expenditure 2013

Broad Destination for Convenience Goods Expenditure	£m	%
Destinations within the study area	394.8	81.8
Total Retained Expenditure	394.8	81.8
Destinations outside the study area	87.7	18.2
Total Leakage	87.7	18.2
TOTAL	482.4	100.0

¹⁰ In 2007, £294.51m of the total convenience goods expenditure available to residents of the OCA (£336.69m) was spent at facilities within the study area (2004 prices). Source: p59 East Staffordshire Borough Council, 2007.

- 4.6.5 Overall, we consider that the current level of convenience expenditure retention (81.8 per cent) is reasonably good, given the fact that there are a number of large foodstores outside of, but close to, the study area boundary. However, in our assessment there is still room for improvement by recapturing some of the expenditure leakage.

Main destinations for food and grocery shopping

- 4.6.6 The estimated convenience goods turnovers of the main foodstores located within the study area, prior to making any allowance for expenditure inflow from those residents beyond the study area, are set out in the final column of Volume 3 Table 8b, and are summarised in Table 4.13.
- 4.6.7 Table 4.13 shows that the most popular destination for food and grocery shopping within the study area is the Morrisons store in Burton, which has a convenience goods turnover of around £59.9m, and a market share of 12.4 per cent. The next most popular destinations for convenience shopping within the study area are the Morrisons and Sainsbury's stores in Swadlincote with convenience turnovers of £39.4m and £37.5m, respectively, equating to market shares of 8.2 per cent and 7.8 per cent. The other facilities in the study area which achieve a convenience retail turnover in excess of £15m are the Tesco store in Uttoxeter, the Morrisons store in Cheadle, the Tesco store in Ashby-de-la-Zouch, and the Tesco, Sainsbury's and Asda stores in Burton. These nine largest foodstores within the study area collectively account for just over half of the convenience goods expenditure available to study area residents.

Table 4.13 Main Destinations for Convenience Goods Expenditure Retained within the Study Area

Foodstores within the Study Area	Convenience Goods Expenditure Retained within the Study Area (£m)	Market Share (%)
Morrisons, Wellington Road, Burton-upon-Trent	59.9	12.4
Morrisons, Coppice Side, Swadlincote	39.4	8.2
Sainsbury's, Civic Way, Swadlincote	37.5	7.8
Tesco, Brookside Road, Uttoxeter	29.2	6.0
Tesco, Bond End Wharf, St. Peter's Bridge, Burton-upon-Trent	28.9	6.0
Tesco, Resolution Road, Ashby-de-la-Zouch	26.5	5.5
Sainsbury's, Union Street, Burton-upon-Trent	19.7	4.1
Asda, Octagon Centre, Orchard Street, Burton-upon-Trent	17.4	3.6
Morrisons, Well Street, Cheadle	15.4	3.2
Aldi, Horninglow Street, Burton-upon-Trent	12.2	2.5
Sainsbury's Local, High Street, Newhall, Swadlincote	10.6	2.2
Aldi, The Pipeworks, Coppice Side, Swadlincote	5.3	1.1

- 4.6.8 The main leakage destinations for convenience goods expenditure are set out in Table 4.14. There is substantial leakage to the Tesco store in Mickleover, which accounts for £21.5m of the study area residents' convenience expenditure. However, it should be noted that this store is located just outside the study area.

Table 4.14 Main Destinations for Convenience Goods Expenditure Leakage

Foodstores outside the OCA	Convenience Goods Expenditure Leakage (£m)	Market Share (%)
Tesco, Kipling Drive, Mickleover	21.5	4.4
Sainsbury's, Kingsway Retail Park, Kingsway, Derby	8.3	1.7
Sainsbury's, Coopers Mill, King Edward Street, Ashbourne	7.3	1.5
Asda, Sinfin District Centre, Arleston Lane, Sinfin, Derby	5.6	1.2
Tesco Superstore, Lysander Road, Meir, Stoke-on-Trent	5.4	1.1
Aldi, Uttoxeter New Road, Derby	2.0	0.4
Morrisons, Whitwick Road, Coalville	1.6	0.3

- 4.6.9 The study area's retention level by zone – that is, the proportion of expenditure on convenience goods available to residents in a specific zone which is spent in town centres and stores located within the study area (see Volume 3 Table 8a, 'Overall sub-total for study area' row) – is highest in Zone 5 (Swadlincote) at 97 per cent, and is also high in Zone 7 (Burton) and Zone 1 (Uttoxeter), at 93 per cent and 92 per cent, respectively. The retention level by zone is a more modest 64 per cent for Zone 2 (Cheadle), and a low 23 per cent in Zone 4 (Mickleover). However, it should be noted that there is a Tesco store located just outside Zone 4 and the north-western study area boundary, and so some expenditure leakage to this store is inevitable.
- 4.6.10 The localised convenience goods retention rate – the proportion of expenditure on convenience goods available to residents in a specific zone which is spent in centres and stores located within that zone – is highest for Zone 7, which encompasses Burton Town Centre, and has a localised retention rate of 89.5 per cent (see Volume 3 Table 8a, 'Zone 7' column and 'Sub-total, survey zone 7' row, and Table 4.15). The localised retention rate of Zone 1, which takes in Uttoxeter Town Centre, is also high at 86.5 per cent.
- 4.6.11 The localised retention rate in Zones 5 (Swadlincote) and 6 (Ashby-de-la-Zouch) is a more modest 64 per cent and 59.3 per cent, respectively. Many of the residents of Zone 5 undertake their food and grocery shopping outside of Zone 5, at the Tesco and other stores in Burton in neighbouring Zone 7. Many residents of Zone 6 also undertake their food and grocery shopping in neighbouring zones, for instance at the Morrisons and Sainsbury's stores in Swadlincote (Zone 5).
- 4.6.12 A number of residents within Zone 2 tend to either undertake their convenience shopping within their main local store, the Morrisons in Cheadle, or in the nearby Tesco in Uttoxeter in neighbouring Zone 1.
- 4.6.13 The village centres in Zones 3 and 8 contain some relatively small scale convenience retail provision, with a Co-operative store in Hatton, a Tesco Express in Hilton and a Co-operative in Barton-under-Needwood. The survey findings indicate that a significant proportion of Zone 3

and 8 residents travel to larger foodstores in nearby zones – principally the Sainsbury’s, Morrisons and to Tesco stores in Burton – to meet their convenience shopping needs.

- 4.6.14 The localised retention rate in Zone 4 is extremely low at 6.0 per cent. As we explained earlier in this section of our report, the survey findings indicate that a significant proportion of Zone 4 residents travel to Tesco foodstore in Mickleover just outside the study area to meet their convenience shopping needs.

Table 4.15 Localised Convenience Goods Retention Rates

Zone	Zonal Retention Rate (%)
1	86.5
2	33.9
3	13.9
4	6.0
5	64.0
6	59.3
7	89.5
8	15.1

- 4.6.15 Overall, we consider that there are no zones with an acute deficiency in convenience retail provision. Whilst the convenience retail provision in Zones 3, 4 and 8 is limited, there are no town centres located within these zones and residents are served by existing stores in Burton, Uttoxeter and other locations nearby.

4.7 Convenience Goods Market Shares

- 4.7.1 Table 4.16 shows, for each zone, ‘dominant’ stores with a zonal market share of over 25 per cent, and stores with shares between 8 and 25 per cent, which have a ‘subsidiary’ influence.

Table 4.16 Dominant Convenience Goods Stores, and Stores with Subsidiary Influence

Zone	Dominant Stores (Market Share of 25%+)	Subsidiary Stores (Market Share 8% to 25%)
1	Tesco, Brookside Road, Uttoxeter	Lidl, Dovefields Retail Park, Town Meadows Way, Uttoxeter
2	Morrisons, Well Street, Cheadle	Sainsbury's, Coopers Mill, King Edward Street, Ashbourne
3	-	Sainsbury's, Union Street, Burton-upon-Trent Morrisons, Wellington Road, Burton-upon-Trent Tesco, Kipling Drive, Mickleover Tesco, Bond End Wharf, St. Peter's Bridge, Burton-upon-Trent
4	Tesco, Kipling Drive, Mickleover	Sainsbury's, Kingsway Retail Park, Kingsway, Derby Asda, Sinfin District Centre, Arleston Lane, Sinfin, Derby
5		Morrisons, Coppice Side, Swadlincote Sainsbury's, Civic Way, Swadlincote
6	Tesco, Resolution Road, Ashby-de-la-Zouch	Morrisons, Coppice Side, Swadlincote
7	Morrisons, Wellington Road, Burton-upon-Trent	Tesco, Bond End Wharf, St. Peter's Bridge, Burton-upon-Trent Asda, Octagon Centre, Orchard Street, Burton-upon-Trent Sainsbury's, Union Street, Burton-upon-Trent
8	Morrisons, Wellington Road, Burton-upon-Trent	Co-op, Main Street, Barton-under-Needwood

4.7.2 Table 4.16 shows that:

- No zone has two dominant stores.
- Zone 1 has one dominant store and one store which has a subsidiary influence, both of which are located in Uttoxeter.
- In Zone 2 the dominant store is the Morrisons in Cheadle, with the Sainsbury's store in nearby Ashbourne having a subsidiary influence.
- Zone 3 has no dominant store with a market share of over 25 per cent, although there are four stores which have a subsidiary influence within the zone (the Sainsbury's, Morrisons and Tesco stores in Burton and the Tesco in Mickleover).
- The Tesco in Mickleover is the dominant store in Zone 4, with two stores having subsidiary influence in nearby Derby.
- In Zone 5 there are no dominant stores but there are two stores with subsidiary influence in Swadlincote.
- In Zone 6 there is one dominant store (Tesco in Ashby-de-la-Zouch) along with one store with subsidiary influence, the Morrisons in Swadlincote.

- In Zone 7 all the stores with either dominant or subsidiary influence are located in Burton, with the Morrisons being the dominant store.
- In Zone 8 there is one dominant store (the Morrisons in Burton) and one subsidiary store (Tesco in Mickleover).
- The Tesco store in Uttoxeter and the Morrisons in Cheadle are the dominant stores in their own zones (Zones 1 and 2), but they have no subsidiary influence in any other zones.
- The Tesco store in Mickleover is the dominant store in one zone (Zone 4), and has a subsidiary influence in two further zones (Zones 3 and 8).
- The Tesco in Ashby-de-la-Zouch is the dominant store in its own zone (Zone 6) but has no subsidiary influence in any other zones.
- The Morrisons in Burton is the dominant store in its own zone (Zone 7) and in neighbouring Zone 8, and it has subsidiary influence in Zone 3.
- The Sainsbury's and Tesco stores in Burton are not the dominant stores in any of the survey zones, but they have a subsidiary influence in two zones (Zones 3 and 7).

4.7.3 The highest individual zonal market shares are enjoyed by:

- Tesco in Uttoxeter, which accounts for 51.2 per cent of the convenience goods expenditure of Zone 1 residents, and 19.7 per cent of the convenience goods expenditure of Zone 2 residents;
- Tesco in Ashby-de-la-Zouch, which accounts for 42.4 per cent of the convenience goods expenditure of Zone 6 residents;
- Tesco in Mickleover, which accounts for 40.4 per cent of the convenience goods expenditure of residents of Zone 4; and
- Morrisons in Burton, which accounts for 37.3 per cent and 35.4 per cent of the convenience goods expenditure of residents of Zone 8 and 7 respectively.

4.7.4 The survey findings confirm that most convenience shopping is undertaken on a highly localised basis. Indeed, Volume 3 Table 8a reveals that only one store within the study area has a market share of over 10 per cent in three or more zones (Morrisons in Burton). The two main towns within East Staffordshire are both able to retain the majority of their respective residents' convenience retail expenditure. However, whilst the convenience expenditure of Burton residents is spread across a number of stores in the town, expenditure in Uttoxeter is largely accounted for by the Tesco store in the town, indicating a lack of choice in terms of the main food shopping destinations for residents of Uttoxeter.

4.8 Conclusions in Relation to Retail Spending Patterns

Comparison Goods Spending

4.8.1 Overall, 61.3 per cent of the comparison goods expenditure available to residents of the study area is retained by town centres, retail parks and freestanding stores located in the study area. The main comparison retail destination within the study area is Burton Town Centre, which secures £246.3m of the residents' comparison goods expenditure.

- 4.8.2 Over a third of the total comparison goods expenditure available within the study area therefore 'leaks' to destinations beyond the study area. Short-distance leakage to Derby, Stoke-on-Trent and Tamworth accounts for 22 per cent of residents' comparison goods expenditure.
- 4.8.3 Burton Town Centre achieves a comparison goods market share of 40 per cent in four of the eight zones. It also achieves a market share of at least 15 per cent in three other zones. This indicates that Burton plays a key role in terms of comparison retailing across the study area.
- 4.8.4 Uttoxeter Town Centre's comparison goods market share in excess reaches a maximum of 30.5 per cent in its own zone (Zone 1), but Uttoxeter achieves a material market share, of 14.9 per cent, in only one other zone (neighbouring Zone 2). This evidence indicates that the attraction of Uttoxeter in terms of comparison goods retailing is fairly localised.
- 4.8.5 Our analysis of the seven categories of comparison goods also shows that the overall retention rate is lowest for the key clothes and shoes sub-sector, at 50.6 per cent. This is an important piece of evidence which suggests the need to promote quality developments in town centre locations, targeted at higher value comparison retailers.

Convenience Goods Spending

- 4.8.6 Overall, 81 per cent of the convenience goods expenditure available to residents of the study area is retained by town, village and other centres, retail parks and freestanding stores located in the study area. Thus, as might be expected, there is less strategic leakage than in the comparison sector, because convenience shopping is generally undertaken on a more localised basis.
- 4.8.7 The highest individual convenience market shares within the study area are achieved by Tesco in Uttoxeter, Tesco in Ashby-de-la-Zouch and Morrisons in Burton.
- 4.8.8 There are no parts of the study area where there is an acute localised deficiency in convenience goods provision. The residents located in the more rural areas in Zones 3 and 8, are served by a more limited local food and grocery offer and they have to travel for their food and grocery shopping. There are no town centres located within these areas, but the residents of Zones 3 and 8 are within easy travelling distance of existing convenience retail provision in the immediate surrounding areas.
- 4.8.9 Burton residents' convenience expenditure is spread amongst a number of convenience stores in the town. However, the Tesco in Uttoxeter benefits from a high market share indicating that there may be scope for some increased convenience competition in the town.

4.9 Current Patterns of Spending on Leisure Services and Cultural Activities

- 4.9.1 As noted at the beginning of this section, the household survey questionnaire also sought to identify patterns of spending on various types of leisure and cultural services. The most popular destinations for these different activities for residents of each survey zone are set out in Table 4.17 and are described below in order to provide an insight into whether any of the study centres have additional roles or functions to play in the provision of leisure and cultural services.

Table 4.17 Most Popular Destinations for Expenditure on Leisure Services and Culture

Survey Zone	Main Destination by Category of Leisure and Cultural Pursuit							
	Restaurants /Cafés	Cinema ¹¹	Pubs / Bars / Nightclubs	Family Entertainment	Theatre & Concerts	Museum & Art Gallery	Bingo, Casino & B'maker	Health & Fitness
1	Uttoxeter	CineBowl Uttoxeter	Uttoxeter	CineBowl Uttoxeter	Stoke –on – Trent / Birmingham	Central London	Uttoxeter	Uttoxeter
2	Uttoxeter	CineBowl Uttoxeter	Uttoxeter	CineBowl Uttoxeter	Hanley	Hanley / Central London	Derby	Cheadle
3	Burton / Derby	Cineworld, Burton on Trent	Burton	Foresters Park Centre Derby	Birmingham / Derby	Central London	Burton	Burton
4	Derby	Foresters Park Centre Derby	Derby	Burton / Foresters Park Centre Derby	Derby	Derby	Derby	Etwall
5	Burton / Swadlincote	Cineworld, Burton on Trent / Swadlincote	Burton / Swadlincote	Derby	Birmingham	Central London	Derby	Burton / Swadlincote
6	Ashby-de-la-Zouch	Swadlincote	Ashby-de-la-Zouch	Tamworth / Derby	Birmingham	Central London	Ashby-de-la-Zouch	Ashby-de-la-Zouch
7	Burton	Cineworld, Burton on Trent	Burton	Derby	Birmingham / London	Central London / Birmingham	Burton	Burton
8	Burton	Cineworld, Burton on Trent	Barton-under-Needwood	Tamworth	Birmingham / Lichfield	Birmingham / Central London	Burton	Burton
Main Spend (all zones)	Burton	Cineworld, Burton on Trent	Burton	Derby	Birmingham	Central London	Burton	Burton

Leisure Services and Cultural Activities Sub-Sectors

Restaurants and cafés

- 4.9.2 The most popular destination for visits to restaurants and cafés is Burton Town Centre (28.4 per cent) followed by Derby City Centre (16.4 per cent) and Ashby-de-la-Zouch (5.2 per cent). No other destination accounts for more than 5 per cent of responses. A total of 19.4 per cent of responses were in the 'don't do this activity/don't know/varies' category.
- 4.9.3 Burton Town Centre is the most popular destination for visits to restaurants and cafés for residents of four of the eight survey zones (Zones 3, 5, 7 & 8). The most popular destination for residents of Zones 1 and 2 is Uttoxeter Town Centre; for residents of Zone 4, Derby City Centre is the most popular destination; and Ashby-de-la-Zouch is the most popular in Zone 6. These fairly localised patterns reflect the fact that most people typically do not wish to travel too far when visiting restaurants and cafés.

¹¹ There is also now another cinema at Barton Marina, although this was not open at the time of the household survey.

Pubs, bars and nightclubs

- 4.9.4 As is the case with restaurants/café's, it is Burton Town Centre (17.8 per cent) which is the most popular destination for pubs, bars and nightclubs, followed by Derby City Centre (8 per cent) and the village of Rolleston (4.1 per cent). No other destination accounts for more than 3 per cent of responses. A total of 37.8 per cent of responses were in the 'don't do this activity/don't know/varies' category.
- 4.9.5 Burton Town Centre is the most popular destination for visits to pubs, bars and nightclubs for residents of three of the survey zones (Zones 3, 5 and 7), with Uttoxeter Town Centre being the most popular destination for residents of Zones 1 and 2. For residents of Zone 4, Derby City Centre is the most popular destination, with Ashby-de-la-Zouch being the most popular in Zone 6 and Barton-under-Needwood being the most popular destination for residents of Zone 8. These patterns again reflect the localised nature of spending in pubs and bars, whilst also demonstrating that the expenditure in this category is very limited in Uttoxeter Town Centre. Burton Town Centre attracts more expenditure but its appeal does not extend across the whole of the study area.

Cinemas

- 4.9.6 The most popular cinema destination is the Cineworld in Burton-upon-Trent (34.4 per cent). A small proportion of respondents also visited the CineBowl in Uttoxeter (6.9 per cent) and Foresters Park Centre in Derby (5.4 per cent). Overall, 30.7 per cent of responses were in the 'don't do this activity/don't know/it varies' category.

Family entertainment centres (i.e. ten pin bowling, skating etc)

- 4.9.7 The most popular family entertainment centre destination for facilities such as ten pin bowling alleys and skating rinks is Derby¹² (17.2 per cent) followed by Uttoxeter¹³ (7.3 per cent) and Tamworth (6.8 per cent). No other destination accounts for more than 5 per cent of responses. In total, some 60.8 per cent of responses were in the 'don't do this activity/don't know/it varies' category.

Theatres/concerts

- 4.9.8 The most popular destinations for visits to theatres or concert halls are Birmingham (18.8 per cent) and Derby (10.9 per cent). The next most popular destinations are Central London (7.1 per cent) and Nottingham (6 per cent). No other destination accounts for more than 3 per cent of responses. A total of 44.1 per cent of responses were in the 'don't do this activity/don't know/it varies' category. The highest number of responses for any destination within the study area is Burton Town Centre, which accounted for just 1.8 per cent. These results show that there are very limited opportunities for going to the theatre/concerts within the study area.

Museums & art galleries

- 4.9.9 The most popular destinations for visits to museums and art galleries are Central London (11.7 per cent), Birmingham (5.2 per cent) and Derby (3.5 per cent). No other destination accounts for more than 2 per cent of responses. A total of 71.8 per cent of responses were in the 'don't do this activity/don't know/it varies' category. As with theatres and concerts, the highest number of responses for any destination within the study area was Burton Town Centre which accounted for just 0.6 per cent.

¹² Derby City Centre and Foresters Park Centre (inc. Showcase cinema), Sinfin Lane, Derby.

¹³ Uttoxeter Town Centre, CineBowl (Cinema, Bowling, Ice Rink), Town Meadows Way, Uttoxeter.

Bingo/casinos/bookmakers

- 4.9.10 The most popular destinations for activities which involve gambling, such as visits to bingo halls, casinos and bookmakers, are Burton Town Centre (6.3 per cent) and Derby (4 cent). No other destination accounts for more than 1 per cent of trips. A total of 85.3 per cent of responses were in the 'don't do this activity/don't know/it varies' category.

Health and fitness centres

- 4.9.11 The most popular destination for health and fitness activities is Burton Town Centre (17.1 per cent). The next most popular destinations are Ashby-de-la-Zouch Town Centre (4.6 per cent), and Etwell Village Centre (4.4 per cent). No other destination accounts for more than 4 per cent of trips. A total of 56.1 per cent of responses were in the 'don't do this activity/don't know/it varies' category.

Burton Town Centre

- 4.9.12 Burton Town Centre performs reasonably well in both the 'restaurants and cafés' and 'pubs, bars and nightclubs' categories, where the most localised patterns of trips might normally be expected. This highlights that there is good provision of such facilities in the town centre. However, its appeal for these types of facilities does not significantly extend beyond Burton. This suggests that more can be done to improve Burton's offer in these categories so as to draw more people in from the wider area.
- 4.9.13 Burton also performs relatively well in terms of cinemas and health and fitness centres, being the most popular destination for such facilities in the study area. As is the case with all of the town centres in the study area, the role of Burton in providing leisure facilities such as family entertainment, and cultural facilities like theatres, concerts, art galleries and museums, is very limited. The majority of such visits are to destinations outside of the study area.
- 4.9.14 There are various proposals in Burton which, if implemented would add to the range of leisure facilities within the town centre and enhance its vitality and viability. These proposals are:
- the redevelopment of the former Robins Cinema at Union Street. This will include the creation of a new restaurant and potentially a new nightclub;
 - the Bargates development near the junction of High Street and Horninglow Street. This location has been earmarked as a potential location for cafés/restaurants. Additional leisure uses and potentially cultural uses are encouraged on the site if commercially deliverable; and
 - Plans to refurbish Burton Market Hall and encourage dual use for market stalls and an entertainment venue. There are plans to use the space at night as a comedy club and a live music venue.

Uttoxeter Town Centre

- 4.9.15 The household survey findings demonstrate the relatively localised appeal of Uttoxeter Town Centre in the study area context in the 'restaurants and cafés', 'cinemas', 'family entertainment' and 'pubs, bars and nightclubs' categories. The town centre is able to attract expenditure from Uttoxeter residents, but is not attracting expenditure from the wider area.
- 4.9.16 As is the case with all of the town centres in the study area, the presence of cultural facilities such as theatres, concert halls, art galleries and museums is very limited in Uttoxeter. The majority of visits to such facilities are to destinations outside of the study area.

4.10 Retail Hierarchy

- 4.10.1 The evidence presented in this section of the study shows that Burton is by far the dominant centre in the part of the OCA within East Staffordshire. Burton achieves a total comparison market share – which is a key determinant of a centres position within the retail hierarchy – of 35.7 per cent. This is the greatest share of the 61.3 per cent of expenditure on comparison goods that is currently retained within the study area, Burton is a key destination across most of the study area, and is the dominant centre in zones 5, 7 and 8. Burton is also a centre of subsidiary influence in zones 1, 4 and 6, and has a particularly strong draw in the ‘clothes & shoes’, ‘furniture’, ‘electrical items’ and ‘health’ comparison goods sub-sectors.
- 4.10.2 Uttoxeter is the second most influential centre in East Staffordshire, albeit achieving a much lower comparison market share of 3.9 per cent. Uttoxeter is the dominant centre in zone 1, and attracts a noteworthy amount of expenditure in most of the comparison goods sub-sectors.
- 4.10.3 None of the other villages in the borough achieve a comparison market share of more than 1 per cent, and so we can conclude that these centres perform only a very limited localised role. Furthermore, our household survey did not identify any new centres that need to be defined.
- 4.10.4 Accordingly, we consider that the retail hierarchy is as follows:

Sub-Regional Centre

Burton upon Trent

Market Town

Uttoxeter

Rural Settlements

Tier 1: Strategic Settlements; Tutbury, Barton under Needwood, Rocester and Rolleston on Dove.

Tier 2: Local Service Villages: Abbots Bromley, Yoxall, Marchington, Mayfield, Denstone and Draycott in the Clay

Tier 3: Small Villages: Bramshall, Stramshall, Church Leigh, Hanbury, Ellastone, Newborough, Kingstone, Anslow, Rangemore, Tatenhill, Stubwood, Stanton, Lower Leigh, Withington and Wootton.

- 4.10.5 Accordingly, Burton will continue to act as the key centre in East Staffordshire, and will be the main focus for growth and investment over the plan period. We would anticipate that the majority of new retail development will be directed towards Burton Town Centre, which will need to strengthen its offer in the face of growing competition from nearby centres outside East Staffordshire.
- 4.10.6 Uttoxeter will also play an important role in the borough, and will be the secondary focus for development and economic growth in East Staffordshire. Uttoxeter has experienced a significant decline in the national retail rankings and the centre is showing signs of weakness that must be addressed to arrest any further slippage. The Council should therefore focus on consolidating and bolstering the town centre offer to reverse the decline and safeguard the future vitality and viability of the centre. However, we note that positive steps have already been taken to enhance the retail offer in the form of the cattle market and JCB schemes, both of which are now progressing.

4.10.7 The rural settlements perform a very limited function, and we would expect any further development in these locations to be relatively small scale and aimed at meeting any local needs. Proposals for floorspace above the locally set threshold outside the defined centres or development limits of these settlements will need to be assessed to confirm that they will not lead to unacceptable impacts.

5 Quantitative Need for Additional Retail Floorspace in the Study Area

5.1 Methodology for Assessing Quantitative Retail Need

- 5.1.1 Section 3 and Appendix B of the PPS4 Practice Guidance, which remains extant at the time of writing, provide advice on the assessment of quantitative and qualitative need. The Practice Guidance states that it does not *'...seek to prescribe a single methodology...'* and that *'...alternative approaches may be equally acceptable, provided they are compliant with national policy objectives and clearly justified, transparently presented and robustly evidenced'* (paragraph 1.22). We accept, also, the advice given in paragraph B3 to the effect that *'...forecasts of 'retail need' should not be regarded as prescriptive...'* and that they *'...inevitably involve judgments and ultimately policy choices...'*
- 5.1.2 Thus, we have refined the five step approach set out in Appendix B of the Practice Guidance into eight steps, as follows:
- i Establish the appropriate catchment area for the highest order centres being considered, in this case Burton and Uttoxeter.
 - ii Assess the existing level of population and existing volume of retail expenditure for residents within the defined catchment area.
 - iii Establish where the expenditure of the catchment area's residents is currently spent, through the use of an empirical survey of households in the catchment area, and thereby establish the proportion of expenditure which is currently retained by town centres and freestanding stores located within the catchment – that is, the current retention rate.
 - iv Apply forecasts of population change and per capita expenditure growth, so as to establish the overall level of projected growth in expenditure for residents of the catchment area and an assessment of growth in retained expenditure, using, initially, a constant retention assumption.
 - v Allow for 'claims' on the growth in retained expenditure as a result of:
 - a. floorspace efficiency change (that is, the growth in turnover of existing retailers within existing floorspace);
 - b. growth over time in special forms of trading (SFT), mainly e-tail growth¹⁴; and
 - c. planning commitments.
 - vi Calculate the initial residual expenditure pot which is potentially available for new retail floorspace, based on steps iv) and v) above.
 - vii Make an allowance for under-trading or over-trading in the base year, if this is justified.
 - viii Develop alternative scenarios for calculating growth in residual expenditure, based on:
 - a. increases or decreases in the projected retention level; and

¹⁴ Retail conducted via the internet.

- b. sensitivity testing of key assumptions.

5.1.3 Below, we describe each stage of our assessment of retail need and provide a summary of our findings.

Step i. Definition of the Overall Catchment Area

5.1.4 The study area is as described at the beginning of Section 4 of our report and is split into eight zones based on postcode boundaries, as shown in Figure 4.1. As we explained in Tables 4.3 and 4.13, Burton Town Centre attracts a significant proportion of expenditure from all eight zones and so the entire study area can be regarded as the overall catchment area ('OCA') of the Borough's highest-order centre.

Step ii. Existing Level of Population and Expenditure

5.1.5 The population by zone in 2013 is set out in the second row of Volume 3 Table 1. The overall population in 2013 amounts to approximately 264,647 persons, which is derived by applying the revised ONS Based Population and Household Projections to the 2011 Mid-Year Population Estimates supplied by ONS.

5.1.6 The zonal per capita expenditure data for comparison and convenience goods were supplied by Experian for the year 2011, as set out in the top row of Volume 3 Tables 2a and 2b, respectively. These data were then rolled forward to 2013 using the forecasts as provided by Experian¹⁵ in September 2012.

5.1.7 The total expenditure pot in 2013 is derived from the product of Volume 3 Tables 1 and 2a for comparison goods and from the product of Volume 3 Tables 1 and 2b for convenience goods, and is as set out in the second row of figures in Volume 3 Tables 3a and 3b, respectively. In total, £771.6m of comparison expenditure and £493.8m of convenience expenditure is available to residents of the catchment area in 2013.

Step iii. Establish Existing Retail Spending Patterns

5.1.8 Next we use the household survey findings to establish current patterns of expenditure and the current retention rate, as described in Section 4 of our report. The current pattern of expenditure and the current retention rate for comparison goods is as set out in Volume 3 Table 4b, with the overall retention rate for comparison goods being 61.3 per cent. For convenience goods, the pattern of expenditure and the current retention rate is as set out in Volume 3 Table 8b, which reveals an overall convenience goods retention rate of 81.8 per cent. As we explained in Section 4 of our report, we consider that the convenience retention rate is capable of some improvement.

Step iv. Forecast Growth in Expenditure and Forecast Growth in Retained Expenditure

5.1.9 The next steps are to apply forecasts of population change and per capita expenditure growth, so as to establish the overall level of projected growth in expenditure for all residents of the catchment area, and then assess growth in retained expenditure, using, initially, a constant retention assumption.

Population Growth

5.1.10 Population change is based on the mid-2011 Population Projections, from the ONS, as set out in Volume 3 Table 1. Using this method, the resident population across the OCA is forecast to

¹⁵ Figure 1a, Retail Planner Briefing Note 10.1, Experian, September 2012.

increase from 264,647 persons in 2013, to around 308,066 persons in 2031. This equates to a total population increase of approximately 43,419 persons, or 16.4 per cent, over the entire study period.

Expenditure Growth

- 5.1.11 The expenditure growth rates estimated by Experian in September 2012 are relatively low between 2013 and 2014. The legacy of the severe economic recessions is expected to continue with an extended period of high unemployment, weak consumer confidence, reduced availability of credit and a severe fiscal squeeze.
- 5.1.12 The per capita comparison and convenience goods expenditure growth rates that we have adopted are provided by Experian, and are set out in full for each forecast year in the footnotes Volume 3 Table 2a (for comparison goods) and Volume 3 Table 2b (for convenience goods). For comparison goods the annual growth rate is 1.8 per cent between 2013-14, 2.4 per cent between 2014-15 and 2.9 per cent thereafter. For convenience goods the annual growth rate equates to -0.1 per cent between 2013-14, no growth between 2014-15, 0.6 per cent between 2015-19 and 0.8 per cent thereafter.
- 5.1.13 The data on growth in per capita expenditure are as set out in Volume 3 Tables 2a and 2b, which utilise the growth rates as described above, are summarised for each of the forecast periods in Table 5.1 below.¹⁶

Table 5.1 Expenditure Growth Per Capita for each Forecast Period

Period	Rate per Annum	
	Comparison Goods	Convenience Goods
2013-2014	1.8%	-0.1%
2014-2015	2.4%	0.0%
2015-2019	2.9%	0.6%
2019+	2.9%	0.8%

Total Expenditure Pot

- 5.1.14 The available expenditure for all residents of the OCA is set out in the final column of Volume 3 Table 3a for comparison goods, and in Volume 3 Table 3b for comparison goods.

¹⁶ The per capita expenditure forecasts are derived from Figure 1a of Experian Retail Planner Briefing Note 10.1 (September 2012). The forecasts only go up to 2029, whereas the end of the forecasting period in this study is 2031. For the purpose of this study we have therefore assumed that the per capita growth will remain the same as in the 2019-2029 set out in Figure 1a of the Briefing Note. While these are industry standard forecasts, some caution should be exercised in relation to the later years of the study period given the diminishing accuracy of projecting that far into the future. This will be dealt with through future updates of the retail study.

Step v. 'Claims' on Growth in Retained Expenditure

5.1.15 The next stage is to make an allowance for further 'claims' on the growth in retained expenditure, which are:

- growth in floorspace efficiency (growth in the turnover of existing retailers within their existing floorspace);
- growth over time in SFT; and
- an allowance for the predicted turnover of planning commitments.

Growth in Floorspace Efficiency

5.1.16 In making an allowance for growth in existing retailers' floorspace efficiency we adopted the rates of floorspace efficiency change set out in Table 5.2 below.

5.1.17 Sales density growth (also known as floorspace productivity growth) is the amount of expenditure which is 'ring fenced' for existing floorspace to improve its turnover each year. The DCLG Practice Guidance (paragraph B.48) advises that such allowances should be 'realistic' and the choice will depend on the 'capacity of existing floorspace to absorb increased sales' and should be 'compatible with assumptions about the growth in per capita expenditure'. Allowances for sales density growth are linked to expenditure growth. The level of comparison and convenience sales density growth that we have allowed for in the study area is summarised in Table 5.2. Owing to the low levels of retail expenditure growth presently being forecast by the data providers for the short term period, we do not make any allowance for sales density growth until after 2016.

Table 5.2 Rates of Floorspace Efficiency Change

Period	Rate per Annum	
	Comparison Goods	Convenience Goods
2013-2016	0.0%	0.0%
2016+	1.5%	0.3%

5.1.18 This is a blanket sales density growth for all floorspace in the study area. Inevitably, different types of floorspace have different abilities to absorb expenditure growth, with modern floorspace better equipped than older stock. However, since this is a Borough-wide study and we are aware that the centres have both modern and older floorspace, we consider this such a uniform approach is robust.

Allowance for Growth in Special Forms of Trading (SFT)

5.1.19 The total spending on SFT in each of the forecast years is set out in the final column of Volume 3 Table 3a for comparison goods and in Volume 3 Table 3b for convenience goods.

5.1.20 We have based our allowance for increases in expenditure claimed by SFT over the study period on the forecasts set out in Appendix 3 of Experian's Retail Planner Briefing Note 10.1 (September 2012).

5.1.21 In the comparison goods sector, Experian's estimates that 'non-store retail sales' will account for 10.7 per cent of total comparison expenditure at 2013, rising to 12.9 per cent at 2016, increasing further to 15.8 per cent at 2021, 16.0 per cent at 2026 and 16.1 per cent at 2031. On this basis, we have allowed for the same SFT 'leakage' that is predicted by Experian for the forecast years of 2016, 2021, 2026 and 2031, as described above and set out in Table 5.3.

5.1.22 For convenience goods, we have also adopted Experian estimates for growth in non-store convenience goods sales. Growth in SFT is predicted to rise steadily from 2.3 per cent in 2013 to 4.7 per cent in 2031.

Table 5.3 Projected Rates of SFT

Year	Comparison Goods	Convenience Goods
2016	12.9%	2.9%
2021	15.8	3.9%
2026	16.0	4.4%
2031	16.1	4.7%

Allowance for Planning Commitments

5.1.23 The next step is to allow for the future turnover requirements of commitments for new comparison and convenience retail floorspace, having made an assessment of how much of the commitments' turnovers will be derived from residents of the OCA.

5.1.24 Various extant planning permissions need to be taken into account, as follows:

- Permission has been granted to extend the Octagon Centre (P/2010/00967/CEH) in Burton-upon-Trent;
- Outline permission has been granted for 8 retail units at Burton Rugby Club (P/2011/01093/JPM/PO);
- A new Tesco store has been granted permission in Burton-upon-Trent (P/2010/01452/CEH/PO);
- Approval for a new foodstore has been granted in Uttoxeter (OU/05254/018/JR/PO); and
- Approval for another foodstore in Uttoxeter (P/2012/00771) has been granted (likely to be an Asda).

5.1.25 Our assessment of the comparison and convenience goods turnover of these permitted developments is set out in Volume 3 Table 6. We have assumed that all elements of these schemes will be open and trading by 2016.

Table 5.4 Comparison Retail Commitments in the East Staffordshire OCA (as at May 2013)

Application Ref.	Date Approved	Details of Proposal	Address	Gross Floorspace (sq.m)	Sales Area Floorspace (sq.m)	Comparison Sales Density at 2016 (£ per sq.m)	Comparison Turnover from OCA at 2016 (£m)
P/2010/00967/CEH	26/10/2010	Erection of first floor and two storey extensions	The Octagon Centre New Street Burton Upon Trent Staffordshire DE14 3TN	4,200	2,940 ¹⁷	6,000 ¹⁸	17.6
P/2010/01452/CEH/PO	25/10/2011	Construction of a mixed use development	Former Alumasc Grundy Ltd Hawkins Lane Burton upon Trent Staffordshire DE14 1GY	-	3,391 ¹⁹	7,498 ²⁰	25.4
OU/05254/018/JR/PO	11/04/2011	Outline application for a mixed use development	Bamford Works Pinfold Street Uttoxeter Staffordshire ST14 8TL	-	627 ²¹	5,088 ²²	3.2
P/2012/00771	07/09/2012	Erection of food and non-food retail units, cafe, doctors surgery	Land at former Cattle Market Smithfield Road Uttoxeter Staffordshire ST14 7LG	5,206	1,578 ²³	8,059 ²⁴	12.7
P/2011/01093/JPM/PO ²⁵	02/03/2012	Outline application for a mixed use development	Burton Rugby Club and Blockbuster Lichfield Street Burton upon Trent	9,788	6,852 ²⁶	3,500 ²⁷	24.0
Total				-	15,388	-	83.0

¹⁷ Assumed gross: net ratio of 70:30

¹⁸ PBA estimate of sales density

¹⁹ Figures taken from RIA produced for application by DPP

²⁰ Ibid

²¹ Figures taken from RIA produced for application by Alyn Nicholls & Associates

²² Ibid

²³ Assumed sales area 3,644.2 sq.m (70/30 split). Comparison floorspace 43.3% of net sales area, based on figures for Asda sources from Verdict

²⁴ Based on PBA figures

²⁵ Recent discussions between the Council and landowner have revealed that this site may be promoted for residential development. Nevertheless, for the purpose of this report we have continued to include the retail consent at Burton Rugby Club as a commitment since the planning permission is extant and therefore theoretically capable of being implemented. We consider it important to note that should this site not come forward for retail use, then the scope for additional comparison retail floorspace in East Staffordshire over the study period may increase as this 'claim' on existing capacity will no longer apply.

²⁶ Assumed gross: net ratio of 70:30

²⁷ PBA estimate of sales density

Table 5.5 Convenience Retail Commitments in the East Staffordshire OCA (as at May 2013)

Application Ref.	Date Approved	Details of Proposal	Address	Gross Floorspace (sq.m)	Sales Area Floorspace (sq.m)	Comparison Sales Density at 2016 (£ per sq.m)	Comparison Turnover from OCA at 2016 (£m)
P/2010/01452/CEH/PO	25/10/11	Construction of a mixed use development	Former Alumasc Grundy Ltd Hawkins Lane Burton upon Trent Staffordshire DE14 1GY	-	3,756 ²⁸	11,168 ²⁹	41.9
OU/05254/018/JR/PO	11/04/2011	Outline application for a mixed use development	Bamford Works Pinfold Street Uttoxeter Staffordshire ST14 8TL	-	2,090 ³⁰	11,321 ³¹	23.7
P/2012/00771	07/09/2012	Erection of food and non-food retail units, cafe, doctors surgery	Land at former Cattle Market Smithfield Road Uttoxeter Staffordshire ST14 7LG	5,206	2,066 ³²	14,317 ³³	29.6
Total				-	7,912	-	95.2

²⁸ Figures taken from RIA produced for application by DPP

²⁹ Ibid

³⁰ Figures taken from RIA produced for application by Alyn Nicholls & Associates

³¹ Ibid

³² Assumed net sales area 3,644.2 (70/30 split). Convenience floorspace 56.7% of net sales area, based on figures for Asda sourced from Verdict

³³ Based on PBA figures

Step vi. Residual Expenditure Potentially Available for New Floorspace

- 5.1.26 Row O of Volume 3 Table 7 for comparison goods and Row P of Volume 3 Tables 9a and 9b for convenience goods, set out the residual expenditure potentially available for new retail floorspace, having allowed for all of the claims on the growth in retained expenditure – that is, growth in floorspace efficiency, growth over time in SFT and commitments.
- 5.1.27 Row Q of Table 7 in Volume 3 for comparison goods, and Row R of Tables 9a and 9b for convenience goods, also in Volume 3, then converts the residual expenditure to a floorspace requirement expressed as a net sales area. We have divided the residual expenditure by an average sales density for comparison goods of £5,000 per sq.m sales area in 2013³⁴, which is an average PBA estimate for comparison goods. In relation to convenience goods, we have divided the residual expenditure by an average sales density of £13,500³⁵ per sq.m sales area in 2013. Finally, we convert the sales area requirement to a gross floorspace requirement, as set out in Row R of (convenience goods), Table 7 (comparison goods), and Row S of Tables 9a and 9b (convenience goods), using a gross to net ratio of 70 per cent for comparison goods and 65 per cent for convenience goods.

Step vii. Adjustments for Under- or Over-trading in the Base Year

Comparison goods sector

- 5.1.28 Next, we consider the current trading position of existing stores relative to their 'benchmark' level.
- 5.1.29 Volume 3 Table 4b reveals an estimated comparison goods turnover for Burton Town Centre of approximately £246.3m, excluding any expenditure inflow from those who live outside of the Borough. It is our professional judgment that around 5 per cent of the comparison turnover of the town centre is likely to be derived from beyond the catchment area; that is, from people who live outside the Borough, but travel into Burton for leisure or shopping purposes, or for work. Taking into account this level of inflow, the total comparison turnover of Burton Town Centre rises to £258.6m in 2013.
- 5.1.30 Using the latest data from Experian GOAD, we estimate that there is around 58,610 sq.m of comparison retail sales floorspace in Burton Town Centre, which would imply a comparison sales density of £4,413 per sq.m. This is a reasonable comparison sales density, albeit we might have expected it to be slightly higher.
- 5.1.31 Volume 3 Table 4b reveals a comparison goods turnover for Uttoxeter Town Centre of £27.1m, excluding any expenditure inflow from residents beyond the OCA. Making an allowance for an additional 1 per cent from expenditure inflow – lower than the 5 per cent figure that we have assumed for Burton, given the narrower town centre offer in Uttoxeter and, hence, a less extensive sphere of influence – indicates a total comparison goods turnover of £27.3m. Based on the floorspace data supplied by Experian GOAD, this suggests an average comparison goods sales density in Uttoxeter of £2,072 per sq.m. This is relatively low but reflects the findings from our health check, which show that Uttoxeter Town Centre has been in decline and now contains few national multiple retailers.
- 5.1.32 Accordingly, we make no adjustments for over- or under-trading at comparison retail stores in East Staffordshire's two main towns for the year 2013.

³⁴ PBA estimate based on the fact that the town centres within the OCA contain a mixture of relatively modern comparison goods floorspace (which will trade at higher than £5,000 per sq.m) and older, smaller, less efficient units (often in secondary locations) which will trade at lower than £5,000 per sq.m

³⁵ PBA estimate based on averages of the 'big four' supermarket retailers

Convenience Goods Sector

- 5.1.33 For the ten largest foodstores within the OCA, we have compared the survey-based turnover estimates with the 'benchmark' turnover levels, as shown in Table 5.6. Our analysis indicates that whilst the Morrisons store in Cheadle is trading more or less in line with expectations, five of the ten main foodstores in the OCA (Morrisons in Burton, Morrisons in Swadlincote, Tesco in Burton, Sainsbury's in Swadlincote and Tesco in Uttoxeter) are trading above their respective company averages. Of these five stores, the Morrisons in Burton, Sainsbury's in Swadlincote and Tesco in Uttoxeter are substantially over-trading. The remaining four main foodstores (Sainsbury's and Asda in Burton and the Tesco and Co-operative store in Ashby-de-la-Zouch) are trading below their company average benchmark.
- 5.1.34 Four out of the five stores which are over-trading are not within defined centres, and instead operate in edge or out-of-centre locations.
- 5.1.35 In Burton, both of the town centre food superstores are under-trading whereas the two edge-of-centre food superstores are significantly over-trading. The level of over-trading at these stores may be an indicator of need for additional convenience floorspace provision, although we return to this issue later in our report.
- 5.1.36 In Uttoxeter, the edge-of-centre Tesco store is over-trading by £15.7m. We therefore consider that the £15.7m of over-trading could be regarded as 'expenditure capacity' available to support additional convenience floorspace within the town centre.
- 5.1.37 It should be noted that we have only undertaken a detailed analysis of performance against benchmark turnovers for the main foodstores within the OCA, and we have not included smaller or independent traders in our analysis. Whereas published information in relation to benchmark sales densities for the major foodstore operators is available, there are no published data on sales densities for independent foodstores. The ten largest foodstores within the OCA collectively account for some 70 per cent of the aggregate convenience goods expenditure that is retained within the OCA, and our analysis therefore provides a good indication of the overall trading position of existing foodstores within the OCA.

Table 5.6 Benchmark Assessment of Convenience Turnover of the Main Foodstores in OCA

Main Foodstores within East Staffordshire	Location of Store (in, edge or out-of-centre)	Convenience Sales Area Floorspace ³⁶ (sq.m)	Benchmark Sales Density (£ /sq.m) ³⁷	Benchmark Turnover (£m)	Actual Convenience Goods Turnover 2011 ³⁸ (£m)	Level of Under/Over Trading (£m)
Morrisons, Wellington Road, Burton-upon-Trent	Out	3,020	12,910	39.0	59.6	20.9
Tesco, Resolution Road, Ashby-de-la-Zouch	Edge	3,919	13,082	51.3	26.5	-7.4 ³⁹
Morrisons, Coppice Side, Swadlincote	Edge	2,671	12,910	34.5	39.4	4.9
Sainsbury's, Union Street, Burton-upon-Trent	In	2,500	13,184	33.0	19.7	-13.2
Tesco, Bond End Wharf, St. Peter's Bridge, Burton-upon-Trent	Edge	1,714	13,082	22.4	28.9	6.5
Asda, Octagon Centre, Orchard Street, Burton-upon-Trent	In	1,469	14,317	21.0	17.4	-3.7
Sainsbury's, Civic Way, Swadlincote	In	1,442	13,184	19.0	37.5	18.5
Morrisons, Well Street, Cheadle	Edge	1,260	12,910	16.3	15.4	-0.8
Tesco, Brookside Road, Uttoxeter	Edge	1,033	13,082	13.5	29.2	15.7
Co-op, Derby Road, Ashby-de-la-Zouch	In	983	7,785	7.7	2.8	-4.8
Total				252.7	276.8	36.5

³⁶ Sales area floorspace of all main foodstores except the Morrisons in Swadlincote is sourced from the IGD 2009. For the Morrisons in Swadlincote we took the floorspace figure used in the RIA which supported the application by CDP Limited on land at the Mason Arms public house, Burton Road, Midway, Swadlincote.

³⁷ The benchmark sales densities used are PBA RTP estimates derived from Verdict's UK Grocery Food and Retailers 2011 report.

³⁸ Actual convenience goods turnover derived from the results of the household survey and includes an allowance for expenditure inflow of 70 per cent of the total convenience turnover for the Tesco on Resolution Road, Ashby-de-la-Zouch from residents of Coalville.

³⁹ Assumed 70% of under-trading captured by trade from Coalville

Step viii. Sensitivity Test Alternative Scenarios for Calculating Growth in Retained Expenditure

Increase or Decrease in the Geographical Size of the Catchment Area

Comparison goods sector

- 5.1.38 Alternative scenarios for calculating growth in residual expenditure can be based on an increase or decrease in the geographical size of the catchment area, where this is justified as part of a strategy to raise the role and function of the centre(s) as part of the local development plan process.
- 5.1.39 As the East Staffordshire OCA is surrounded by higher order centres such as Derby and Stoke-on-Trent (Hanley), expansion of the OCA is not likely to be achievable. Therefore, more needs to be done to develop a strategy for East Staffordshire's centres to retain at least the current level of comparison expenditure from residents within the OCA that is currently achieved.

Convenience goods sector

- 5.1.40 The NPPF seeks to ensure that people's every day needs, such as convenience shopping, are met on as localised basis as possible. As a consequence, East Staffordshire's OCA is defined, primarily, on the basis of comparison goods spending patterns, where the very existence of the retail hierarchy demands that people travel to higher order centres for their higher order goods and services.

Changes to the Expenditure Retention Level

Comparison goods sector

- 5.1.41 In the comparison goods sector we have tested a 'constant retention' scenario in Volume 3 Table 7, in which the overall retention level remains at 61 per cent in the period up to 2031. The current level of expenditure retention is reasonably good. Due to significant competition from neighbouring centres outside the OCA we therefore consider that there is little scope for further improvement and as such we have not adopted a 'rising retention' level scenario for the comparison goods sector.

Convenience goods sector

- 5.1.42 In the convenience goods sector we similarly test a 'constant retention' scenario in Volume 3 Table 9a, in which the overall retention level remains at 81.8 per cent in the period up to 2031. Unlike in the comparison goods sector, however, we consider that there is scope for further improvement.
- 5.1.43 In Volume 3 Table 9b, we therefore consider a 'rising retention' level scenario, whereby the overall retention level increases from 81.8 per cent in the year 2013, to 85 per cent by 2016, to 87 per cent by 2021, and increasing to 90 per cent by 2031.
- 5.1.44 An improvement in the localised retention rate, of around 9 percentage points, could be achieved through the delivery of a number of new food superstore schemes in East Staffordshire, of a sufficient scale to compete better with the existing foodstore provision in the surrounding centres. Indeed, the implementation of extant foodstore commitments would go some way towards improving the existing retention rate.

5.2 Findings in Relation to Retail Expenditure Capacity

Comparison Goods Sector

- 5.2.1 Volume 3 Table 7 sets out the quantitative comparison goods retail need under the constant retention rate scenario, which are summarised in Table 5.7 below.

Table 5.7 Quantitative Need in the Comparison Goods Sector

Period	Floorspace Requirements (sq.m net)
	Constant Retention
2013-16	-9,856
2016-21	7,212
2021-26	11,184
2026-31	12,546
2013-31	21,086

- 5.2.2 Table 5.7 shows that the comparison floorspace requirement arising under the constant retention scenario is negative in the period up to 2016. This means that the growth in retained expenditure up to 2016 is not sufficient to support prior 'claims' on that growth, namely an improvement in sales densities of existing centres and stores, growth in SFT and the turnover requirements of the extant comparison retail permissions noted in Table 5.4.
- 5.2.3 There is, however, a positive residual for additional comparison retail floorspace over the period to 2021 and a more substantial residual in the longer-term period to 2031. Table 5.7 shows that under the constant retention scenario, there is capacity for approximately 7,200 sq.m of additional comparison sales area floorspace across the OCA in the period between 2016-2021, and around 21,000 sq.m in the overall study period up to 2031. The Council should direct any new floorspace to town centre locations – in accordance with the thrust of national planning policy – rather than an alternative strategy of permitting large-scale retail development in out-of-centre locations.
- 5.2.4 The proposed extensions to Coopers Square and the Octagon Centre, together with the redevelopment of Burton Rugby Club, should help improve the quantity and quality of East Staffordshire's comparison retail offer if implemented. Making the town centres more attractive will require high-quality comparison retail development of sufficient scale and critical mass to make them more competitive, vis-à-vis the competing centres and retail destinations located outside of, but close to, the Borough. Even if this is achieved, however, in our assessment we see little scope to materially improve the existing comparison retention rate. These schemes are required to maintain Burton and Uttoxeter's position in the overall retail hierarchy.

Convenience Goods Sector

- 5.2.5 Volume 3 Tables 9a and 9b set out the quantitative convenience goods retail need under the constant and rising retention rate scenarios, as summarised in Table 5.8 below.

Table 5.8 Quantitative Need in the Convenience Goods Sector

Period	Floorspace Requirements (sq.m net)	
	Scenario 1 Constant Retention	Scenario 2 Rising Retention
2013-16	-3,454	-2,352
2016-21	1,858	2,671
2021-26	1,969	2,479
2026-31	1,944	2,940
2013-31	2,317	5,766

- 5.2.6 Table 5.8 shows that for the catchment area as a whole, the quantitative need in the period up to 2016 is negative under Scenario 1. As in the comparison sector, this means that the growth in retained expenditure is not sufficient to support prior 'claims' on that growth in the short-term period to 2016, namely an improvement in sales densities of existing centres and stores, growth in SFT, and the turnover requirements of the commitments detailed in Table 5.5. However, we do not advocate this scenario because the floorspace requirements arising under it reflect a perpetuation of the current aggregate retention rate in the OCA, which at 81 per cent is too low, in our assessment. Furthermore, the retention rate will inevitably improve when the commitments are implemented and so planning on the basis of a constant retention rate would be a flawed approach.
- 5.2.7 Under the rising retention scenario the quantitative need up to 2016 is also negative. However, there is a positive residual need for convenience floorspace in each of the subsequent assessment periods up to 2031.
- 5.2.8 We consider it a sound policy aspiration for the Council to seek to increase the overall level of convenience expenditure retention, because food shopping should be undertaken on as localised a basis as possible. Under our rising retention rate scenario, there is scope for approximately 2,700 sq.m of additional convenience sales area floorspace across the OCA in the period to 2021. In the longer term period to 2031, there is a requirement for approximately 5,750 sq.m of convenience sales area floorspace, in addition to the current foodstore commitments in Uttoxeter and Burton.

6 Qualitative Need for Additional Retail Facilities in the Study Area

6.1 Introduction

6.1.1 Paragraph 158 of the NPPF makes clear that local planning authorities should ensure that the Local Plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area.

6.1.2 Paragraph 161 of the NPPF goes on to state that LPAs should use this evidence base to assess *'the needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development'* (our emphasis added).

6.1.3 The PPS4 Practice Guidance explains that, although qualitative need is a subjective concept, there are five main factors that are frequently identified, as follows:

- deficiencies or 'gaps' in existing retail provision;
- consumer choice and competition;
- overtrading, congestion and overcrowding of existing stores;
- location specific needs such as deprived areas and underserved markets; and
- the quality of existing provision.

6.1.4 In this section, we consider the qualitative need for additional convenience and comparison retail floorspace in the Borough. We focus primarily on the town centres of Burton and Uttoxeter, which – as the largest centres in East Staffordshire – are most likely to attract interest from retail operators and developers and possess the physical capacity to accommodate further new retail floorspace (albeit Uttoxeter is perhaps more constrained than Burton). Major new retail development would not be appropriate in the smaller 'Strategic Settlements' of Rocester, Tutbury, Rolleston on Dove and Barton under Needwood, or the other 'Local Service Villages' in the Borough.

6.1.5 Below, we consider in turn the five main factors of qualitative need, as identified in the PPS4 Practice Guidance, drawing on the findings of our updated health checks of Burton and Uttoxeter Town Centres where appropriate.

6.2 Assessment of Qualitative Retail Needs

Deficiencies and 'Gaps' in Existing Provision

6.2.1 The main settlements in East Staffordshire are Burton and Uttoxeter, which contain most of the retail floorspace in the Borough. Our survey of Burton Town Centre found the breadth of comparison and convenience retail provision to be generally good, and in-keeping with its role in the retail hierarchy. The centre contains a good mix of foodstores and independent convenience retail outlets which appear to cater for the full spectrum of local residents' needs in both quantitative and qualitative terms. The number of comparison retail units is broadly in line with the UK average, with above-average representation in each of the clothing and footwear sub-sectors, which are key determinants of a centre's attractiveness to shoppers.

Indeed, the town centre boasts a very good array of national comparison retail sector multiples, complemented by a range of independent operators.

- 6.2.2 Nevertheless, despite there being good provision of clothes and shoes outlets in numeric terms, the household survey does reveal that there is a moderately high level of leakage in this sub-sector, most of which is flowing to Derby City Centre. As this sector forms the core of the 'high street' retail offer, more needs to be done to try and claw some of this leakage back within the OCA. The analysis suggests the need to promote quality developments within and around East Staffordshire's centres, which are targeted at higher value comparison retailers.
- 6.2.3 Allied to the above, the most obvious deficiency in Burton is the lack of a department store, following the closure of Beatties. The closest Burton currently has to a department store is BHS, although we classify this as a variety store. In our previous study we concluded that Burton would benefit from an additional department store, and plans had been submitted for an extension to Coopers Square which would accommodate a new Debenhams. However, following a change of ownership this application has been withdrawn and at present there are no firm proposals in place. However, anecdotal evidence from our stakeholder consultations suggests that the new owners of Coopers Square are committed to delivering the extension and bringing Debenhams to Burton, which would address this identified deficiency and could assist in reducing leakage in the clothes and shoes sub-sector.
- 6.2.4 Our health check of Uttoxeter Town Centre concluded that there is room for improvement in terms of both comparison and convenience retail facilities in the centre. Although comparison retail provision in the centre is just slightly below the UK average in numeric terms, there are clear qualitative deficiencies which the Council may seek to address. The centre contains only a few national multiple comparison operators, and although this is not untypical for centres of the size and function of Uttoxeter, the centre does have significantly below-average representation in the key fashion sub-sectors which are important in terms of the attractiveness of a centre to shoppers. Furthermore, we note that Uttoxeter only accounts for 4 per cent of the comparison goods expenditure available to the Borough's residents, which is quite low considering it is the second largest settlement in the Borough. Convenience retail provision in Uttoxeter is geared towards a local shopper base, and the centre would benefit from improved provision (although this will be addressed through the cattle market scheme which is now progressing).
- 6.2.5 Overall, the household survey shows that around two thirds of the available comparison retail expenditure within the OCA is retained, although we note that this also includes areas outside of East Staffordshire (notably Swadlincote, which is within South Derbyshire). Nevertheless, Burton is clearly the dominant comparison retail destination in the OCA and is responsible for the majority of the retained expenditure in the study area, reflecting the strong comparison retail facilities in the centre. In terms of convenience retail, the majority of all available expenditure within the OCA is retained, which is to be expected given that people generally undertake food and grocery shopping on a localised basis.

Consumer Choice and Competition

- 6.2.6 We have previously noted that Burton contains a good range of convenience retail outlets, including a number of supermarkets and independent operators. The findings from the telephone household survey undertaken in April 2013 show that the convenience expenditure of residents in the Burton zone (zone 7) is spread across a number of stores in the town. The Morrisons at Wellington Road attracts the greatest proportion of visitors, accounting for 35.4 per cent of the convenience expenditure of residents of zone 7, followed by Tesco at 11.8 per cent, Asda at 8.6 per cent and Sainsburys at 8.4 per cent. We therefore do not consider that there is any issue in relation to consumer choice and competition in relation to convenience retail provision in Burton. In any case, we note that planning permission for a new Tesco

superstore at Hawkins Lane was granted in October 2011, which if delivered will further bolster the range of convenience retail facilities in the town.

- 6.2.7 The provision of large supermarkets or food superstores offering a full range of food and grocery products in Uttoxeter is very limited, with the household survey showing that 51 per cent of all convenience expenditure available to residents in the Uttoxeter zone (Zone 1) is currently spent in one store (Tesco at Brookside Road). Convenience retail facilities in Uttoxeter Town Centre have a combined market share of 17 per cent in zone 1, although as we have previously noted convenience retail provision is limited to Co-Operative and Iceland stores, neither of which offer a full range of food and grocery products. The only other notable foodstores in the Uttoxeter zone are the Tesco Express at New Road and Lidl at Dovefields Retail Park. Overall, the food and grocery offer in Uttoxeter Town Centre is notably limited in both quantity and quality. The lack of a further large supermarket or food superstore in Uttoxeter, which offers a full range of food and grocery products, is therefore a key qualitative deficiency, although we note that this will be addressed if the proposed foodstore at the Cattlemarket site is delivered (which we understand is likely to be an Asda).
- 6.2.8 Accordingly, we consider that there is a qualitative need for a larger floorplate supermarket in Uttoxeter, which would inject additional competition into the local convenience sector and thereby enhance consumer choice. Uttoxeter would also benefit from more modern comparison retail units to attract some of the non-food retailers that are presently missing. The schemes at the cattle market and JCB sites will address these qualitative needs. Over and above these schemes, we acknowledge that there is limited scope to accommodate additional comparison and convenience retail floorspace in the existing town centre unless existing units/floorspace can be redeveloped.

‘Over-trading’, Congestion and Overcrowding of Existing Stores

- 6.2.9 The PPS4 Practice Guidance explains that the extent to which the turnover of existing stores significantly exceeds benchmark turnovers may be a qualitative indicator of need, as well as informing quantitative need considerations. This issue is of more relevance in the convenience retail sector, and so we focus on this here.
- 6.2.10 Our benchmark analysis in Table 5.6 shows that the aggregate trading position of the ten main foodstores in the OCA is some £24.1m above the corresponding benchmark level. Although this may be an indicator of qualitative need for additional convenience floorspace provision in the catchment area, it is important to note that most of this ‘over-trading’ arises in stores which are not within the defined centres of Burton or Uttoxeter. In fact, the headline aggregate trading position masks under-performance in the town centre stores, and therefore must be treated with caution.
- 6.2.11 Most notably, Morrisons (Wellington Road) and Tesco (Bond End Wharf) in Burton, and the Tesco at Brookside Road in Uttoxeter – none of which are within the defined town centre – are ‘over-trading’ by £20.9m, £6.5m and £15.7m above their respective company benchmarks. Meanwhile, the Sainsbury’s at Union Street and the Asda in the Octagon Centre – both of which are within Burton Town Centre – are ‘under-trading’ by £13m and £3.7m respectively. We therefore consider that there is scope to claw back expenditure to Burton and Uttoxeter Town Centres, which is currently flowing to edge- or out-of-centre locations. On this basis, the ‘over-trading’ we have identified may be an indication of a qualitative need to improve the town centre convenience retail provision in Burton and Uttoxeter, rather than justification for any further out-of-centre convenience retail development.
- 6.2.12 We have visited each of the existing convenience stores in and around Burton and Uttoxeter Town Centres on several occasions, and have not witnessed any evidence of excessive queues at the check-outs, difficulties in parking, congested aisles, or shortfalls of stock.

- 6.2.13 Overall, we consider that the extent of the ‘over-trading’ at some of the existing main foodstores within the OCA – in particular Morrisons at Wellington Road and Tesco at Brookside Road in Uttoxeter – provides some indication that there may be a qualitative need to enhance convenience retail provision in East Staffordshire. However, the town centre foodstores in Burton and Uttoxeter are underperforming, and so the Council should avoid any further proposals (over and above those permitted) which would exacerbate this situation, and instead look to bolster the in-centre provision.

Location-Specific Needs – Deprived Area Considerations

- 6.2.14 Appendix 4, which maps the Index of Multiple Deprivation rankings across the OCA, shows that there are concentrations of multiple deprivation on the eastern and western sides of Burton and to the north of Uttoxeter, as well as a small pocket of multiple deprivation in Tutbury. These areas appear to be generally well served in terms of convenience retail provision, although the planned schemes at the Cattle Market and JCB sites in Uttoxeter which are underway, and the various commitments in Burton – if implemented – may bring significant benefits to local residents in terms of improving the range, choice and quality of the retail offer locally available to residents living in deprived areas, and generating new employment opportunities.

Quality of Existing Provision

- 6.2.15 Burton Town Centre contains a mixture of traditional commercial buildings, which are mainly concentrated along Station Street, High Street and Market Place, and more modern purpose built retail units at the Octagon Centre, Coopers Square and Burton Place. The retail premises in the centre are in generally good condition, in particular the purpose built shopping centres. The older traditional premises are also mostly well maintained, although some are more run down than others and would benefit from selective upgrading.
- 6.2.16 Overall the quality and range of retail floorspace in Burton Town Centre is good, although new/refurbished property that is compatible with contemporary retailer requirements would be welcome and could help improve the health of the centre by attracting new operators into the town. The planned extensions to The Octagon Centre and Coopers Square (if brought forward), together with the redevelopment of the Rugby Club would help widen the choice of floorspace available.
- 6.2.17 Many of the retail units in Uttoxeter are located in historic buildings within a conservation area, and thus offer limited scope for extension. Uttoxeter’s retail property offer is therefore characterised by relatively small, constrained retail units, which do not necessarily meet the requirements of modern ‘high street’ comparison retail operators. Nevertheless, we recognise that Uttoxeter is an historic market town, and therefore the range of premises available is commensurate with its character and urban form. Overall the quality and condition of the retail property in the centre is good, and as we have noted elsewhere the physical environment of the centre is generally attractive and well maintained throughout.
- 6.2.18 The most significant opportunities for expansion and/or improvement are the Cattle Market and JCB sites – both of which have planning permission for 5,000 sq.m and 4,000 sq.m gross retail floorspace respectively and are now underway – together with The Maltings, which is in decline and may be a candidate for some form of refurbishment and/or redevelopment.

6.3 Conclusion in Relation to Qualitative Retail Needs

- 6.3.1 Taking into account the findings of our health checks of Burton and Uttoxeter Town Centres, and the five indicators of qualitative need listed in the PPS4 Practice Guidance, we have identified a particular qualitative need for:

- The provision of a department store in Burton. This is the most obvious deficiency in the centre, and would help underpin the role and function of Burton as the main retail centre in East Staffordshire. The proposed extension of Coopers Square was intended to accommodate a Debenhams, although this application has been withdrawn. At this stage there are no firm proposals to deliver the extension, although the shopping centre manager has told us that the new owners still intend to bring this forward.
- Additional modern retail units in Burton to accommodate the requirements of 'high street' comparison operators. Burton already contains a good range of comparison multiples and independents, yet the centre has been losing ground in the face of increased competition from nearby centres such as Derby. In order to arrest this decline and bolster the performance of the centre, it is important to ensure that Burton remains competitive and is able to offer the appropriate type of floorspace required to maintain operator interest and attract new occupiers. The proposed extensions to the Octagon Centre and Coopers Square (now withdrawn) – together with the proposal at Burton Rugby Club – would assist in achieving this and are supported. We have also noted that the main town centre foodstores appear to be under-performing against their expected benchmark levels, and this might indicate a need to improve provision in the town centre in order to stem the flow of leakage to edge or out-of-centre facilities.
- In the case of Uttoxeter – which appears to be struggling – we have identified a qualitative need for improved comparison and convenience provision. The town centre is currently lacking a large format foodstore, and has significantly below-average representation in the key fashion sub-sectors which are important in terms of the attractiveness of a centre to shoppers. We note that these deficiencies may be addressed now that the proposals at the Cattle Market and JCB sites are coming forward. We have also identified The Maltings as a potential candidate for redevelopment/ refurbishment to provide more modern retail units.

7 Assessment of Need for Other Town Centre Uses

7.1 Need for Additional Commercial Leisure Uses

Existing Expenditure on Leisure Services

- 7.1.1 The approach taken by consultants to the assessment of quantitative need in the leisure sector is less well developed than in the retail sector. Furthermore, property development in the leisure sector has historically been very market-led, and it is only since the publication of PPS6 in March 2005 – and the subsequent publication of PPS4 in December 2009 – that leisure was brought into the range of uses covered by the sequential approach. Nevertheless, Experian⁴⁰ has published information on leisure services spending in a number of categories. Using these data, we have been able to undertake a broad assessment of quantitative need in the commercial leisure sector.
- 7.1.2 Zonal per capita expenditure data for leisure services were supplied by Experian for the year 2011, as set out in the top row of Table 10 in Volume 3. These data were then rolled forward to the base year using Experian's estimated growth rates for spending on leisure services for the period 2011 to 2013⁴¹. Volume 3 Table 10 shows that the per capita spend on leisure services in 2013, varies from a low of £1,553 in Zone 7 to a high of £2,252 in Zone 8.
- 7.1.3 The total expenditure pot for leisure services in the 2013 and each of the forecast years is derived from the products of the total population in each zone (Volume 3 Table 1) and the per capita expenditure on leisure services (Volume 3 Table 10), and is as set out in Volume 3 Table 11. In total, £459.7m of leisure services expenditure is available to residents of the catchment area in 2013.
- 7.1.4 A breakdown of the total leisure services spend for the six different categories of leisure services defined by Experian – accommodation services; cultural services; games of chance; hairdressing & personal grooming establishments; recreational and sporting establishments; and restaurants, cafés etc – was achieved on the basis of Experian expenditure data in relation to the six aforementioned categories, as shown in the final column of figures in Volume 3 Table 11, and summarised in Table 7.1 below.

Table 7.1 Leisure Services Spend of Residents of OCA at 2013

Description	% of Total Leisure Services Spend	Total Expenditure (£m)
Accommodation services	7.1%	32.5
Cultural services	15.9%	73.2
Games of chance	9.2%	42.5
Hairdressing salons and personal grooming establishments	4.8%	21.9
Recreational and sporting services per Person	6.3%	28.9
Restaurants, cafés etc per Person	56.7%	260.8
Leisure Services Total	100%	459.7

⁴⁰ Experian MMG3 (2012)

⁴¹ Figure 1, Retail Planner Briefing Note 10.1, Experian, September 2012

- 7.1.5 'Restaurants, cafés etc' accounts for well over half of the total spend on leisure services. 'Cultural services' and 'games of chance' are the second and third highest categories and these account for 15.9 per cent and 9.2 per cent of spending on leisure services, respectively. However, it should be noted that commercially oriented property developments account for only a small portion of spend within each category.
- 7.1.6 For example, spending in cinemas, museums and theatres accounts for just 23 per cent of the total expenditure on cultural services⁴², and bingo stakes account for just 7 per cent of expenditure on games of chance⁴³. In addition, spending on food and drinks in restaurants, cafés, pubs, bars and other commercial establishments amounts to only 68 per cent of the spending within the 'restaurants, cafés etc' category⁴⁴.

Forecast Growth in Expenditure and Forecast Growth in Retained Expenditure

- 7.1.7 The next step in the assessment of leisure need is to calculate the growth in leisure spend for residents of the OCA in the period 2011 to 2031, using the forecasts provided by Experian⁴⁵ in September 2012, which are summarised for each of the forecast periods in Table 7.2 below.

Table 7.2 Leisure Services Expenditure Growth Per Capita for each Forecast Period, 2011 – 2031

Period	Growth Rate per annum
2011-2012	0.7%
2012-2013	-0.5%
2013-2014	0.7%
2014-2015	1.6%
2015-2019	1.9%
2019-2031	1.7%

- 7.1.8 Volume 3 Table 11 shows that the total expenditure on leisure services of residents of the OCA is projected to grow from £459.7m in 2013, to £489.4m by 2016, to £560.7m by 2021, and more indicatively, to £713.6m by 2031. Projected growth in spending on leisure services from 2013, therefore, amounts to £29.6m in the period up to 2016, rising to £101.0m and £253.9m in the longer term periods to 2021 and 2031, respectively.
- 7.1.9 Applying the 2013 year leisure services spend shares to the total expenditure pot (Volume 3 Table 11), around 57 per cent of the growth in leisure spending can be expected to be absorbed by restaurants/cafés, pubs/bars and take-away outlets, equating to £275.7m by 2016, £315.9m by 2021, and £402.2m by 2031 (see 'restaurants, etc' row and the 'Total' column in Table 11). In contrast, the expenditure growth that would be absorbed by 'cultural services' would amount to just £90.1m by 2021 (i.e. 16 per cent of the total growth in leisure expenditure by 2021), whilst growth in expenditure on 'games of chance' would amount to just

⁴² The remaining spend on cultural services is accounted for by TV/DVD/video/internet licences, subscriptions and rental etc., social subscriptions, photographic processing and a plethora of other items, which together account for over 76 per cent of the spending on cultural services.

⁴³ The remaining spend on games of chance is accounted for by spending on football/pools stakes, lotteries, bookmakers and other betting stakes.

⁴⁴ The remaining spend on restaurants, cafés and the like is accounted for by spending on take-aways, snacks and other catering services.

⁴⁵ Figure 1, Retail Planner Briefing Note 10.1, Experian, September 2012.

£52.3m by 2021. However, commercial facilities such as cinemas and bingo halls will absorb only a proportion of the expenditure growth on 'cultural services' and 'games of chance', respectively, and spending in restaurants, cafés, pubs and bars will absorb only a proportion of the expenditure growth on 'restaurants, cafés and the like'.

Conversion of Surplus Expenditure to Additional Commercial Leisure Capacity

Food and drink establishments

- 7.1.10 Volume 3 Table 13b sets out our quantitative assessment of capacity for additional food and drink establishments in Burton and Uttoxeter. Row A of Volume 3 Table 13b shows the growth in retained expenditure on food and drink in restaurants/cafés and pubs/bars within these areas, assuming a constant retention level of 41.2 per cent.
- 7.1.11 However, not all of the growth in retained expenditure will be available to support the development of new restaurants/cafés and pubs/bars in Burton and Uttoxeter. In the same way that an allowance is made in the retail sector for existing operators to improve their turnover efficiency, it is reasonable to assume that some of the growth in available food and drink expenditure will be absorbed by existing operators to allow them to grow their businesses. Unlike in the retail sector, however, there is a dearth of published advice on what proportion of expenditure growth in the food and drink sector should be ring-fenced for existing operators. In the absence of firm guidance, we have therefore allocated 40 per cent of the growth in food and drink expenditure to existing restaurateurs and pub/bar operators (Row F of Volume 3 Table 13b).
- 7.1.12 The £20.6m of 'residual' expenditure capacity arising in the period up to 2021 (Row H of Volume 3 Table 13b) would be sufficient to support a range of new, good-quality restaurants, pubs/bars and smaller casual dining pubs or restaurants.

Cinemas

- 7.1.13 In Volume 3 Table 14b, we consider the expenditure potentially available to support the development of additional cinema provision in Burton and Uttoxeter. Our assessment assumes that the retention level within the Burton and Uttoxeter will remain at 66 per cent.
- 7.1.14 Data from Dodona, and our own research, suggests that the average multiplex screen accounts for an annual spend of around £300k in ticket revenue, whereas an independent screen accounts for some £150k per annum in ticket revenue. Thus, the £1.9m increase in cinema expenditure arising in Burton and Uttoxeter by 2021 (Row H of Volume 3 Table 14b), is theoretically sufficient to support the development of approximately six screens in a multiplex format, or potentially several independent screens (although the scope for this level of independent cinema provision in East Staffordshire is likely to be limited).
- 7.1.15 It is not sufficient, however, to simply convert the potential expenditure pot in cinema revenue to a notional 'requirement' for screens. Cinema operators make decisions based on 'screen density' – that is, the existing cinema screen provision within appropriate drive-time isochrones, taking account of population levels (or the number of screens available per 100,000 people). The latest information that we have access to indicates that the average travel time to a cinema is around 18 minutes⁴⁶. We have therefore analysed cinema provision within an 18-minute drive-time of Burton and Uttoxeter. The findings are reproduced in Table 7.3.

⁴⁶ Source: Caviar

- 7.1.16 There are currently four cinemas within the 18-minute drive-time of Burton, namely a 9 screen Cineworld multiplex cinema, a single screen independent cinema at The Brewhouse, a single screen at Barton Marina, and a five screen Odeon in Swadlincote. There is a 3 screen cinema in Uttoxeter, which is part of the CineBowl complex which also includes ten-pin bowling alley and ice rink.
- 7.1.17 The plans at Appendix 5 show the 18 minute drive-times from Burton and Uttoxeter. Table 7.3 reveals that the population within an 18-minute drive-time of Burton Town Centre is approximately 210,000 persons⁴⁷ and that the screen density within an 18-minute drive-time of Burton Town Centre is 7.2 screens per 100,000 population, which is above both the Midlands average of 5.6, and the UK average 6.1 screens per 100,000 population, respectively⁴⁸.
- 7.1.18 An 18 minute drivetime catchment population from Uttoxeter town centre is around 82,000. The screen density for this catchment is 3.7 per 100,000 persons, which is again below Midland and UK averages.

Table 7.3 Cinema Screen Density Within an 18-minute Drive-time of Burton and Uttoxeter Town Centres

Burton					
No of Cinemas Within 18 Minute Drive-time	No of Screens Within 18 Minute Drive-time	Actual Popn Within 18 Minute Drive-time	Screen Density (i.e. screens per 100,000 people)	Midlands Average Screen Density	UK Average Screen Density
4	16	209,690	7.2	5.6	6.1
Uttoxeter					
No of Cinemas Within 18 Minute Drive-time	No of Screens Within 18 Minute Drive-time	Actual Popn Within 18 Minute Drive-time	Screen Density (i.e. screens per 100,000 people)	Midlands Average Screen Density	UK Average Screen Density
1	3	82,019	3.7	5.6	6.1

- 7.1.19 Cinema provision within an 18-minute drive-time of Burton is considered to be good, and therefore there is no qualitative or quantitative need to actively seek new provision here. Although in Uttoxeter the evidence shows that cinema provision is below the regional and national averages, we do not consider that there is any acute deficiency and would not expect there to be market demand for significant further cinema provision in or around the town..

Bingo

- 7.1.20 We have similarly examined the existing spatial distribution of bingo clubs in East Staffordshire and the surrounding area. The quantitative expenditure capacity potentially available to support new bingo facilities in Burton or Uttoxeter is presented in Volume 3 Table 15b. We have assumed that the current retention rate achieved by existing bingo facilities

⁴⁷ 2011 Census; source: Experian

⁴⁸ Midlands and UK average screen density figures are sourced from the BFI Statistical Yearbook 2012

within these two towns is 48.0 per cent, which is the retention rate achieved by bingo clubs, casinos and bookmakers in Burton and Uttoxeter Town Centres derived from the results of the telephone survey of households⁴⁹. Our quantitative capacity assessment tests a scenario whereby the expenditure retention level is kept constant at 48 per cent.

- 7.1.21 Currently there is only one major Bingo Hall in the OCA, the Mecca Bingo on Guild Street in Burton. A number of commercial bingo clubs are additionally located in the surrounding urban areas just outside of the OCA, in Derby, Coalville and Tamworth. In general terms, however, East Staffordshire is not well served by the existing provision of bingo clubs.
- 7.1.22 In quantitative terms, the additional £0.7m in bingo expenditure arising in the catchment area by 2031, as identified in Volume 3 Table 15b, may be not be sufficient to support a new Gala or Mecca-type club (which generate average annual net stakes of around £1.5m per branch). However, there may be capacity for a smaller operator such as Beacon Bingo. Again, market testing would be required to establish whether operators of neighbourhood or national bingo clubs would consider locating in East Staffordshire.

Family entertainment facilities

- 7.1.23 Burton currently lacks family entertainment venues such as bowling alleys and roller/ice skating rinks. However, Uttoxeter does have the Cinebowl which has an 8-lane bowling alley and an ice rink. In the wider OCA there are two outdoor activity centres – Conkers and National Forest Adventure Farm. Both of these centres can be described as family attractions. They offer a range of attractions and activities, such as forest walks, assault courses and pedal go-karts, all of which are suitable for children. There is also Ashcroft Park near Uttoxeter which has a range of outdoor activities such as paintballing and quad biking. Despite being predominantly for adults, Ashcroft does run children's parties.
- 7.1.24 Outside of the OCA, there are bowling alleys in nearby Derby, Tamworth and Stafford. Other family entertainment attractions just outside the OCA include the SnowDome in Tamworth and the Silver Blades Ice Rink in Cannock.
- 7.1.25 We have not been able to assess the quantitative capacity for family entertainment facilities in East Staffordshire. The 'recreational and sporting services' category covers spending on common leisure uses such as ice-skating, bowling and swimming. However, the leisure expenditure data supplied by Experian does not provide sufficient information to enable us to determine the amount of expenditure that is available for the specific recreation and sporting services referred to above.
- 7.1.26 Nevertheless, we consider that there is a qualitative requirement for the development of a family entertainment facility in East Staffordshire to help improve the leisure offer readily accessible to families within the OCA. Burton in particular would benefit from such a facility to help develop its evening economy.

Gyms

- 7.1.27 The Business in Sport and Leisure (BISL) handbook 2009 states that around 12 per cent of the UK population is a gym member. Using a 10 minute drivetime population the estimated catchment population for Burton and Uttoxeter is 77,642 and 22,561 persons respectively⁵⁰. Therefore, assuming gym membership to be in line with national averages, we can assume

⁴⁹ Our survey questioned respondents on where they spend most money on bingo, casino and bookmakers, rather than bingo facilities in isolation. We have therefore used the market share of bingo clubs, casinos and bookmakers within Burton and Uttoxeter Town Centres as a proxy for the market share of the catchment area's bingo clubs.

⁵⁰ Census Year 2011: Source Experian

there are 9,317 gym members within 10 minutes' drive of Burton and 2,707 within 10 minutes' drive of Uttoxeter. As detailed in Table 7.4 below, there are five main health and fitness facilities within a 10-minute drivetime from Burton (as far as we are aware, all of those listed in Table 7.4 offer gym facilities), suggesting that, on average, each facility has 1,863 members. For Uttoxeter there is only one main fitness facility within a 10-minute catchment, indicating an average of 2,707 members per facility.

Table 7.4 Gyms within an 18-minute Drivetime of Burton and Uttoxeter Town Centres

Name	Location
Burton	
Meadowside Leisure Centre	High Street, Burton-on-Trent
The Workout	Wetmore Road, Burton-on-Trent
Bannatyne Health Club	Eighth Avenue, Centrum East Retail Park, Burton-on-Trent
DW Sport Fitness Club	Unit 11, Middleway Park, Burton upon Trent
Unique Physique	The Maltsters, Wetmore Road, Burton upon Trent
Uttoxeter	
Uttoxeter Leisure Centre	Oldfields Road, Uttoxeter

- 7.1.28 The BISL handbook states that at March 2008 there were 5,755 private fitness facilities in the UK and 7.2 million of the population held a private membership, meaning an average private health club has 1,251 members. We therefore assume 1,251 to be a reasonable benchmark membership for any given gym.
- 7.1.29 With five gyms, we calculate that the Burton area can reasonably accommodate 6,255 gym members; the calculated membership figure for the Burton area of 9,317 therefore indicates that there may be no surplus capacity at existing gyms in the area.
- 7.1.30 In the Uttoxeter area there is one gym suggesting that the area can accommodate 1,251 members. As the calculated membership for the Uttoxeter area is 2,707, again there appears to be no surplus capacity in the area.
- 7.1.31 In both areas gyms appear to be operating to capacity levels based on current provision. The results of the household survey as discussed previously identified reasonable strong levels of gym patronage in Burton, and therefore there may be a need for some additional provision in the longer term to serve residents of Burton and Uttoxeter.

Summary of Scope for Additional Commercial Leisure Facilities

- 7.1.32 The leisure services expenditure available to residents of the OCA is predicted to grow by £29.6m in the period between 2013 and 2016, rising to £101.0m and to £174.1m in the longer term periods to 2021 and 2031, respectively. On the basis of current spending levels, some 57 per cent of this spending growth will go to eating and drinking establishments (restaurants, cafés, take-away outlets and pubs/bars), 16 per cent will go on cultural services, around some 9 per cent will be spent on games of chance (bingo, lottery, bookmakers and betting stakes) and 6 per cent will be spent on recreational and sporting services.

- 7.1.33 How this growth might be expended locally, however, depends very much on what opportunities the market supplies – thus, current spending patterns can only provide a guide to what might happen in the future. Capturing a sizeable proportion of this growth in expenditure – as well as clawing back expenditure currently lost to leisure destinations outside the OCA, through the provision of a wider and more appealing choice of restaurants, cafés and pubs/bars – will be vital to the future health of Burton and Uttoxeter Town Centres. The development of leisure facilities such as a cinema, bingo hall or roller/ice-skating rink in Burton would further support the growth of an evening economy in the centre, as well as enhance access to such facilities across East Staffordshire.
- 7.1.34 We have undertaken a broad assessment of the scope – in quantitative terms – for additional commercial leisure facilities, which takes into account how current patterns of spending might change if significant improvements to East Staffordshire’s leisure offer were to take place. Our conclusions are summarised in Table 7.5 below.

Table 7.5 Summary of Scope for Additional Commercial Leisure Facilities in the Burton and Uttoxeter

Leisure Sub-Category	Residual Expenditure Available at 2021	Capacity for Additional Facilities
Restaurants, cafés, pubs and bars	£20.6m	Scope for additional food and drink floorspace by 2031
Cinemas	£1.1m	An independent cinema, or six screens in a multiplex format
Bingo halls	£0.3m	Smaller bingo operator
Family entertainment	-	Qualitative need for a family leisure facility such as an ice-skating rink, independent bowling alley or a small-scale facility (for example, a climbing wall)
Gym	-	Some capacity in the area for additional gyms

- 7.1.35 In our assessment, there appears to be scope for a range of new commercial leisure facilities in East Staffordshire, most notably a mix of restaurants, pubs and bars. Whilst the potential to attract a major bowling facility or bingo club appears to be more limited – in quantitative expenditure capacity terms – East Staffordshire may be viewed more favourably as a potential location for additional leisure provision by neighbourhood bingo clubs and independent bowling alleys, or operators of other leisure facilities, such as roller/ice-skating rinks.
- 7.1.36 As we have stressed, the approach to the assessment of quantitative need in the leisure sector is less well developed than in the retail sector and so the quantitative ‘needs’ that we have identified should be treated as an indicative guide. Furthermore, the leisure sector is dynamic, changing and operator-led. Thus, if an investor feels capable of attracting customers by diverting spending from other facilities, the planning system does not seek to prevent additional development, provided such development meets the tests in the NPPF.

7.2 Scope for Additional Office Uses

- 7.2.1 This section of our report reviews the office market in Burton Town Centre, with particular attention to employment land demand and supply.

- 7.2.2 We have not considered Uttoxeter in this section as it does not have a prominent office market, and has no stand-alone offices of any size or prominence. In addition, it is not on the A38 axis from Birmingham, through Lichfield to Derby, that generally forms part of Burton's zone of competition.
- 7.2.3 The purpose of the review is to understand what has happened with the office market in the recent past, to clarify what the present demand for employment land is, and to make recommendations for future office space in Burton.
- 7.2.4 To do this we firstly outline the position in Burton now, and then summarise and compare the main findings from the East Staffordshire Office Market Report (Jones Lang LaSalle, 2009) and the Employment Land Review Update (GVA, 2013).
- 7.2.5 Following the findings, the report concludes with recommendations for the future of office space in Burton.

Burton Town Centre Now

- 7.2.6 The town centre has not historically accommodated a large amount of office development, and it is not seen as an attractive location for new developments of this nature. This is set to continue, partly due to the advantages of locating development on the edge of the town centre and beyond, closer to the strategic transport links the area offers.

Current vacancy

- 7.2.7 Within the town centre boundary there are several vacant properties. The vacancies are primarily focussed around the High Street area, particularly the northern end. There are also a few properties in the Horniglow Street/Bridge Street area close to the northern end of the High Street. Away from the High Street there are two vacant properties: one on New Street and the other on Manor Drive.
- 7.2.8 The stock of vacant space consists of Georgian properties – some listed – typically with ground floor retail/shop use and available office space over first and second floors. There are also a couple of properties of lesser architectural value that have office space throughout the entire building. Many of these properties have been acquired vacant and have not had tenants for the past five years. In terms of cost, there is a range between £40 per sq.m and £160 per sq.m. The total floor-space available in within the town centre boundary is 1,347 sq.m.
- 7.2.9 Surrounding the town centre boundary, there is a wider array of vacant properties. Notable sites that offer a selection of floorspace include:
- Anglesey House
 - Errisberg House
 - Gretton House
 - Burton Enterprise Centre.

Recent Delivery

- 7.2.10 Recent data from the Valuation Office states that over the period 2006 to 2012 a further 5,000 sq.m of (net additional) office floorspace has been added to the borough.

- 7.2.11 This is not far from the per annum target given in the (now revoked) Regional Spatial Strategy and endorsed by the 2009 study we discuss below. With the recession in light, the delivery of 5,000 sq. m of net additional stock could be considered very good progress.
- 7.2.12 However most of this floorspace has been developed outside the town centre. There is no evidence that market demand, and the delivery of new town centre floorspace, has shifted since the 2009 office market report. What market demand exists still favours out-of-town, highly accessible (by road) sites. Centrum 100 is a good example of this shift towards the A38 corridor (see Table 7.6).

Burton Town Centre in the Future

- 7.2.13 The Council's main employment evidence is set out in two reports. First the East Staffordshire Office Market Report (2009 – mentioned above) and the more up to date 2013 Employment Land Review.
- 7.2.14 At the outset, we note that neither of these documents have been specifically written to address the town centre office market. The Office Market Report concludes that the office market in the borough is dominated by out-of-town demand/supply, and the 2013 report makes very limited references to the town centre and instead focuses mostly on the borough as a whole. Also, as we discuss below, the 2013 Employment Land Review preferred scenario suggests no growth in office space over the plan period; the only positive requirement being to accommodate 'churn'. This is a borough-wide conclusion and so must translate into no new space being promoted either in town or out-of-town.

East Staffordshire Office Market Report (2009)

- 7.2.15 The last time the office market was considered in detail in East Staffordshire was in 2009. In 2009, Jones Lang LaSalle (JLL) and Regeneris Consulting published the East Staffordshire Office Market Report. Of the study's five objectives, there are two pertinent ones for this report: an overview of the office market in the short-term and an assessment of long-term market potential for growth; and, an assessment of Burton Town Centre's ability to accommodate 30,000 sq. m of office development in the period to 2026.

Market Issues in Burton

- 7.2.16 Burton has benefitted economically in the past because of the availability of labour, land and good road access, which suits the distribution industry. For office space, Burton has not had the same incentives. However, it has benefitted from its brewing heritage, as it is a centre for headquarters and administration for brewing and hospitality based companies.
- 7.2.17 Furthermore, evidence from 'InStaffs', a monitor of all supply and demand for employment premises in the sub-regional area, found that:
- East Staffordshire is not perceived as an area for office employment in the wider economy;
 - Even with limited office stock, vacancies are still high, and increasing and
 - It is the older stock that is struggling to let – the new offices are letting well.
- 7.2.18 Nevertheless, Burton has been successful in attracting professional and business services to its business parks. While these are of high quality, they are not essentially from any specific sector and thus difficult to target. The Office Market Report makes clear that rather than targeting a specific sector, Burton should keep offering what occupiers want so it can continue

to grow its generic professional employer sector. The report broadly concludes that new, modern office space with good accessibility (and parking) is most in demand.

Office Demand and Supply

- 7.2.19 For estimating future demand, the study developed a number of different scenarios to test. These ranged from 7,700 sq.m up to 85,000 sq.m of new space between 2006 and 2026.
- 7.2.20 However, the study proceeded to rely on the now former RS targets which suggested 30,000 sq.m (gross) of new floorspace should be accommodated in or around Burton Town Centre over the twenty year period 2006-26.
- 7.2.21 While the amount of development proposed was broadly in line with the RS the distribution of this new space was not. The RS encouraged the provision of new office space in (or on the edge of) the main regional town centres. So the 30,000 sq.m was supposed to be accommodated in or around Burton.
- 7.2.22 However the analysis suggested that there was insufficient demand to accommodate this space in the town centre. The report noted that almost all office development had occurred on out-of-centre sites, and this was also where the planned supply pipeline was located. As the established office market in Burton is on the edge of town, the development of offices in the town centre would probably face significant challenges.
- 7.2.23 So, contrary to the thrust of the RS, the 2009 study endorsed the continued provision of out-of-centre office sites to accommodate the borough's demand for new space. It concluded that the best sites for office development in Burton are in the business parks by the A38 junctions, and these sites (Centrum East, Mercia Business Park and Eastern Avenue) should easily meet the RS requirement to 2026. In 2009 they had the advantage of being in the hands of developers, being ready for construction and already recognised functioning office locations.
- 7.2.24 Aside from the urban areas, JLL looked into the business parks bordering the A38; for example, Barton Business Park and adjacent sites, and the Land South of Branston. JLL claim that these sites could accommodate the 30,000 sq.m if necessary.

Employment Land Review Update

- 7.2.25 The JLL report was the last time anyone sought to estimate the demand for new office space in East Staffordshire in any detail. However, in 2013 East Staffordshire Council commissioned GVA to undertake a new borough-wide Employment Land Review.
- 7.2.26 The purpose of the study was to update the 2009 study so that it took into account the changes in national policy (NPPF) and the issues relating to the changing economic climate.
- 7.2.27 In line with the 2004 ODPM Guidance covering Employment Land Reviews, this study provided new, up-to-date evidence of the demand for new office space in the main centres in East Staffordshire, as well as the out-of-centre market.
- 7.2.28 GVA's evidence found uncertainty in the office market, particularly with how the sector will change in the future. This is not surprising given the recession which has clouded the future of the sector, and only the very brave would give a firm view of longer term market prospects.
- 7.2.29 What take-up is evident is locally generated and mostly small, so future growth prospects for the borough as a whole are very modest.
- 7.2.30 In summary the study reports that:

- The regional office market remains dominated by Birmingham City Centre, with all other locations such as Burton considered to be secondary.
 - East Staffordshire serves a local office market with little strategic footloose demand.
 - What local demand exists is focused primarily at Centrum 100 and within Burton Town Centre.
 - Demand is focused on smaller units sized between 2,000 and 3,000 sq.ft.
 - Transactional evidence supports the assumption that the majority of office market activity is of a smaller scale, with the majority of transactions being in premises sized below 2,000 sq.ft.
- 7.2.31 Behind the growth in Burton, it is claimed that demand in the town centre is likely linked to the amenity associated with the location, although not linked to strategic drivers such as mainline rail connectivity. At Centrum, the growth is linked to the strategic road infrastructure and connectivity in the area.
- 7.2.32 But the study is very cautious about the strength of the future market because East Staffordshire has failed to capture footloose demand. As we note below, the ELR actually concludes that no provision should be made for a growth in the net additional office floorspace stock in Burton or elsewhere in East Staffordshire over the plan period. The analysis also suggests a large amount of today's stock can be lost from the supply.
- 7.2.33 The study estimates that of the total stock of space within the borough, over 35,000 sq.m is vacant with a further 2,500 sq.m of stock not yet built but being marketed. Most of this vacant space is in or around Burton Town Centre.
- 7.2.34 The amount of vacant space is likely to be an underestimate of the true level of vacancy; while the stock figure is taken from taxation records (so we have some confidence in its reliability) the availability is derived from a commercial source and relies on agents actively marketing property. Smaller, local quality stock is not always picked up by such sources, and to form a robust opinion site surveys are needed.
- 7.2.35 Taking this analysis forward, the ELR suggests that at least 20 per cent of the existing built stock is vacant; this is well in excess of any measure of a 'healthy' and balanced market. Between 5 per cent and 10 per cent vacant space is generally considered healthy, and in the economic circumstances we would feel a 10 per cent vacancy rate to be tolerable.
- 7.2.36 An 'unhealthy' level of vacant space is a reflection of a weak occupier market – there is more space today that local firms wish to occupy. This is picked up in both 2009 and 2013 studies. But it is also a major hindrance to future developer activity because it suppresses values and undermines market confidence. The ELR notes that most of this space has been marketed for a number of years.
- 7.2.37 It is also worth noting that this 20 per cent vacancy rate is before any allowance is made for additional space in the planning pipeline. The study identified around 20 ha of new land in the planning pipeline which, if developed to a 60 per cent plot ratio, could accommodate a further 120,000 sq.m of new stock.
- 7.2.38 Given the fact that a high level of vacant space could undermine investor confidence in providing new, high quality and more fit for purpose space, the Council needs to carefully consider its approach to managing the existing stock.

How Much New Office Land or Floorspace?

- 7.2.39 A key question for any employment land evidence is how much new land or floorspace the development plan should promote. Related to this is how much, and what type, and can the area afford to lose space to alternative uses such as housing. Building on this, we should be able to identify a more detailed town centre policy.
- 7.2.40 However in East Staffordshire the ELR does not provide this level of analysis or advice. There are no recommendations made about the provision of space in the town centre and no guidance to control the potential loss of sites to alternative uses. One reason for this may be that the study finds that the borough is already oversupplied with floorspace, both existing stock and also planned new pipeline.
- 7.2.41 We have already noted above the 20 per cent+ vacancy rate, most of which is in Burton Town Centre. This suggests some 'correction' in today's stock of space is needed, with at least 10 per cent of the current stock capable of being lost to alternative uses.
- 7.2.42 While the study suggests a modest amount of new land is justified, the analysis shows that almost all the 10ha of 'demand' carried into the 'preferred scenario' is to accommodate 'churn' as opposed to job growth. So any new space developed can be offset by losses over the life of the plan.
- 7.2.43 So with this in mind there are no positive recommendations to make about the future of the town centre office stock.

Conclusions for Burton Town Centre

- 7.2.44 The ELR presents the Council with a key policy dilemma. There is no quantitative grounds to secure any additional office floorspace anywhere within the Borough, including Burton Town Centre. The net additional requirement for new office space in the preferred scenario is almost zero over the life of the plan. So any new space developed can be lost from the supply elsewhere. Nor is there a pressing justification to protect the stock of office space today. With a 20 per cent vacancy rate the borough can afford to release at least 10 per cent of current stock to other uses without any measurable detriment to the supply of space.
- 7.2.45 It therefore follows that the Council does not need to proactively promote new office space as part of any new development scheme which is not already committed. Even some of the committed schemes (which total nearly 20ha according to the ELR) are not required.
- 7.2.46 This conclusion is of course quantitative, building on the analysis in the ELR. There are sound qualitative grounds to promote new space and protect older space. Most noticeably for the town centre there are sound reasons to promote and protect office space in the town centre. The town centre is accessible and office space is needed to deliver goods and services to the local population. If a viable supply of space is to be secured, the Council needs to develop clear criteria which protects the most important space while allowing surplus (unviable, poor quality) space to be lost

Table 7.6 Key Employment Sites in Burton Town Centre and Periphery

Site	Location	Overview	Vacancy
Molson Coors	High Street, Burton Town Centre.	Headquarters for the Molson Coors Brewing Company. The Employment Land Review seeks to diversify this site for a mix of uses, and alternative office accommodation will be built within the curtilage of other Coors sites.	No vacancy.
Eastgate Business Park	Located on Eastern Avenue, north-east of the town centre, between the A5121 (Derby Road) and the A38.	The park offers a mix of employment uses from two storey offices to distribution warehousing.	There are three vacancies: Unit C4 Beeches Park; Eastgate Business Centre; Unit 6, Impact House. The total vacant floorspace is 3,817 sq.ft.
Centrum 100	Centrum 100 is located contiguous to the A38, south-west of the town centre.	Centrum is a successful 200 acre (80 hectares) mixed-use site. The site has attracted household names. Current occupiers include the Spirit Group, Punch Taverns and InterContinental Hotels, as well as Coors Tradeteam, and Holland and Barrett.	There are four vacancies: Unit 10, Barberry Court; Studio 2, Waterside Court; Gretton House, Waterside Court; Studio 1, Waterside Court. The total vacant floorspace is 4,184 sq.ft.
Yeoman Business Estate/Granary Wharf Business Park	North-west of the town centre close to the A5121 and A511.	The area has a number of smaller industrial estates and business parks that make up the Great Northern Business Park area.	There are six vacancies clustered around Wharf Road: 6 Whetmore Road; Former Burton Despatch, Glensyl Way; 9 Wharf Road; C3/D2 Whetmore Road; Unit B3 Whetmore Road. The total vacant floorspace is 12,236 sq.ft.

8 Local Floorspace Threshold for Impact Assessments

8.1 Introduction

8.1.1 Paragraph 26 of the NPPF states that when assessing applications for retail, leisure and office development that is not within an existing centre and not in accordance with an up-to-date Local Plan, LPAs should require an impact assessment if the development is over a proportionate locally set floorspace threshold, or exceeds 2,500 sq.m in the absence of a local floorspace threshold. This should include an assessment of:

- the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
- the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made.

8.1.2 In this section, we consider whether it is necessary to set a local floorspace threshold in East Staffordshire – primarily for the assessment of retail proposals – and if so, what the threshold should be. The NPPF provides no further guidance on this matter, and so we refer to paragraph 7.4 of the PPS4 Practice Guidance which remains in force at the time of writing.

8.1.3 The Practice Guidance states that, when setting a local floorspace threshold, '*important considerations are likely to include the scale of known proposals relative to town centres; the existing vitality and viability of town centres; the cumulative effects of recent developments; the likely effects on a town centre strategy and the impact on any other planned investment*'.

8.1.4 In particular, we assess the size of retail planning applications submitted to the Council over the recent years, taking into account:

- existing floorspace in centres;
- typical unit size in centres;
- the gross floorspace proposed in planning applications for retail development; and
- the frequency of proposals for different quantities of floorspace.

8.2 Scale of Proposals Relative to Town Centres

Existing Floorspace in Centres

8.2.1 The existing gross convenience and comparison retail floorspace in Burton and Uttoxeter Town Centres is summarised in Tables 8.1 and 8.2 below. Table 8.1 shows that the total retail floorspace in Burton amounts to around 78,790 sq.m gross, of which some 20,180 sq.m is convenience retail floorspace and 58,610 sq.m is comparison retail floorspace.

8.2.2 Proposals for schemes comprising around 2,000 sq.m of gross convenience retail floorspace or 5,900 sq.m of gross comparison retail floorspace would equate to 10 per cent of the total gross convenience or comparison retail floorspace in Burton Town Centre respectively, and so we consider that schemes of around this size or larger should therefore be considered large in the context of Burton.

Table 8.1 Gross Retail Floorspace in Burton Town Centre

	Total Floorspace (sq.m)	10% of Total Floorspace (sq.m)
Convenience	20,180	2,018
Comparison	58,610	5,861
Total Retail	78,790	7,879

- 8.2.3 As shown in Table 8.2, Uttoxeter Town Centre contains significantly less retail floorspace than Burton. A scheme containing around 200 sq.m of gross convenience retail floorspace or 1,300 sq.m of gross comparison retail floorspace may be considered large in relation to Uttoxeter, on the basis that this would represent about 10 per cent of the existing convenience or comparison retail floorspace in the centre.

Table 8.2 Gross Retail Floorspace in Uttoxeter Town Centre

	Total Floorspace (sq.m)	10% of Total Floorspace (sq.m)
Convenience	2,290	229
Comparison	13,190	1,319
Total Retail	15,480	1,548

Typical Unit Size in Centres

- 8.2.4 Tables 8.3 and 8.4 below show that the retail property in both Burton and Uttoxeter Town Centres is dominated by small units. Indeed, over 50 per cent of the convenience retail units and over 60 per cent of the comparison retail units in Burton have a gross floorspace of 250 sq.m or less. Across Burton there are just seven retail units (three convenience and four comparison) with a gross floorspace of more than 2,500 sq.m. In between there is a spread of convenience and comparison retail units of different sizes ranging from 250 sq.m to 2,000 sq.m.
- 8.2.5 In Uttoxeter the dominance of smaller units is even more pronounced, with 83 per cent of the convenience and comparison retail units across the centre having a gross floorspace of 250 sq.m or less. The largest convenience retail unit in Uttoxeter is between 750 and 1,000 sq.m gross, and there is just one comparison retail unit with a gross floorspace of between 2,000 and 2,500 sq.m.
- 8.2.6 Based on the size of existing units, proposals for around 1,500 sq.m gross or more of convenience retail floorspace, or around 750 sq.m gross or more of comparison retail floorspace, may be considered large in Burton. In Uttoxeter, we consider that proposals for around 750 sq.m gross or more of convenience or comparison retail floorspace may be considered large and could justify an impact assessment.

Table 8.3 Gross Retail Unit Size in Burton Town Centre

Floorspace	Convenience Units		Comparison Units		Total	
	Number of Units	Percentage of Total	Number of Units	Percentage of Total	Number of Units	Percentage of Total
0 to 250 sq.m	8	53%	90	63%	98	62%
250 to 500 sq.m	1	7%	22	15%	23	15%
500 to 750 sq.m	-	-	9	6%	9	6%
750 to 1,000 sq.m	1	7%	6	4%	7	4%
1,000 to 1,250 sq.m	-	-	5	4%	5	3%
1,250 to 1,500 sq.m	1	7%	1	1%	2	1%
1,500 to 2,000 sq.m	1	7%	5	4%	6	4%
2,000 to 2,500 sq.m	-	-	-	-	-	-
2,500 sq.m and over	3	20%	4	3%	7	4%
Total	15	100%	142	100%	157	100%

Table 8.4 Gross Retail Unit Size in Uttoxeter Town Centre

Floorspace	Convenience Units		Comparison Units		Total	
	Number of Units	Percentage of Total	Number of Units	Percentage of Total	Number of Units	Percentage of Total
0 to 250 sq.m	10	83%	52	83%	62	83%
250 to 500 sq.m	1	8%	6	10%	7	9%
500 to 750 sq.m	-	-	3	5%	3	4%
750 to 1,000 sq.m	1	8%	-	-	1	1%
1,000 to 1,250 sq.m	-	-	-	-	-	-
1,250 to 1,500 sq.m	-	-	1	2%	1	1%
1,500 to 2,000 sq.m	-	-	-	-	-	-
2,000 to 2,500 sq.m	-	-	1	2%	1	1%
2,500 sq.m and over	-	-	-	-	-	-
Total	12	100%	63	100%	75	100%

Planning Applications for Retail Development

- 8.2.7 The Council has provided a list of all planning applications for retail development submitted over the last five years. This information is useful when considering whether to set a local impact assessment threshold, as it provides an indication of the general scale of recent retail proposals in the study area (whether approved or not).
- 8.2.8 If there has been very little pressure for large scale retail development, and proposals that have come forward have been for a very modest level of floorspace, then it may be appropriate to consider setting a lower impact assessment threshold. Otherwise very few, if any, proposals will be subject to this requirement and therefore the potential solus and cumulative impacts of successive retail (or other town centre use) developments in edge or out-of-centre locations will not be assessed. Conversely, if the majority of applications have been for substantial new retail floorspace in the study area, then this could justify applying the default threshold or even setting a higher limit.
- 8.2.9 The information from the Council shows that there have been some significant planning applications for retail development (or retail as part of a mixed use scheme) in both Burton and Uttoxeter over recent years. The largest applications in Burton were for a new Tesco

store at Hawkins Lane and an extension to Coopers Square Shopping Centre (both over 10,000 sq.m gross). These are followed by the application to extend the Octagon Centre, which proposed to add over 4,000 sq.m of retail floorspace. Aside from these, other applications for retail floorspace in Burton have been generally small scale and for less than 700 sq.m gross retail floorspace.

- 8.2.10 The largest proposals in Uttoxeter were for the proposed mixed use development at the former cattle market site (over 5,000 sq.m gross retail floorspace), followed by the mixed use redevelopment of the former JCB site which includes over 4,000 sq.m gross retail floorspace. Aside from these substantial applications there have been no other notable retail applications in Uttoxeter.
- 8.2.11 There have been generally very few applications for retail schemes in and around Burton and Uttoxeter, but the proposals which have come forward have been significant in floorspace terms. Nevertheless, we consider that there is a need to protect and enhance both centres, which are showing signs of decline and have experienced slippage in the national retail rankings. Thus, it may be necessary to consider a reduced threshold to ensure the Council is able to resist inappropriate development and safeguard the future of its principal town centres..

8.3 Local Floorspace Threshold – Summary

- 8.3.1 Burton is significantly larger than Uttoxeter in terms of gross retail floorspace, although both centres are generally dominated by smaller units. As expected, Burton contains a higher proportion of larger retail premises (over 2,500 sq.m) although this still only accounts for 4 per cent of all town centre units. The majority of the existing retail units in each town centre provide less than 1,000 sq.m of gross floorspace, and units occupied by comparison retailers in both centres are particularly small-scale, with the vast majority being units with less than 500 sq.m of gross floorspace.
- 8.3.2 Although proposals for retail development in both towns have been small in number, those which have emerged over recent years have been significant in floorspace terms. Most of the significant retail applications submitted over recent years (with the exception of the two shopping centre extensions) have been for convenience retail (either alone or as part of a mixed use scheme), and so there appears to be a degree of pressure for larger floorplate units to accommodate this use.
- 8.3.3 We consider that the two most important factors to take into account here are the size of existing units in each centre, and the ability of the Council to safeguard the vitality and viability of Burton and Uttoxeter, by resisting inappropriate development. The latter is particularly important given the signs of weakness and decline we have identified through the health checks of each centre, in particular Uttoxeter.
- 8.3.4 With this in mind, and having assessed a range of local factors and taking into account the size and role of both centres, we recommend that the Council should adopt the local floorspace thresholds set out below. These should apply to any planning applications for retail development (including extensions) where the amount of floorspace proposed is above the stated thresholds:
- **Burton** – 1,500 sq.m gross or more of convenience retail floorspace, and 750 sq.m gross or more of comparison retail floorspace.
 - **Uttoxeter** – 750 sq.m gross or more of convenience retail floorspace, and 500 sq.m gross or more of comparison retail floorspace.
- 8.3.5 In our view proposals equal to or above these thresholds would be considered 'large' relative to existing provision and the size of units in each centre. These thresholds have also been set

at a level that is likely to 'capture' the majority of retail schemes that may realistically come forward and that could potentially result in significant adverse impacts on the main town centres.

9 Summary of Findings and Recommendations

9.1 Introduction

- 9.1.1 The purpose of this Retail and Leisure Study is to provide a robust evidence base on the capacity for additional retail and commercial leisure development in East Staffordshire in the period to 2031. The study is supported by a new household survey of shopping patterns, and accurately reflects current circumstances, the latest available data inputs/assumptions, and changes to national planning policy. The study also considers the scope for additional office development with reference to the recently completed ELR, and assesses the need for a local floorspace threshold for impact assessments.
- 9.1.2 In this section of our report we summarise the principal findings from the research and analysis that has informed the study, and set out our recommendations in terms of future planning policy and meeting identified needs.

9.2 Summary of Performance Analysis

Burton

- 9.2.1 Burton is reasonably healthy overall, although there are some signs of weakness and potential indicators of decline that should be closely monitored. Burton has experienced some slippage in the national retail rankings since our last study, and while this is not in itself an acute cause for concern given the prevailing economic conditions, we note that over the same period some of the other comparator centres – in particular Derby – have improved their ranking and have managed to resist decline more effectively than Burton.
- 9.2.2 Burton continues to boast a fairly strong town centre offer, and is well provided for in terms of both convenience and comparison retail facilities and service uses. The town centre has a very good array of national comparison sector multiples, complemented by a range of independent operators.
- 9.2.3 Over recent years there have been a number of proposals to expand and improve the retail offer in Burton, notably the extensions of Coopers Square and the Octagon Centre, as well as the redevelopment of Burton Rugby Club. None of these schemes have come forward, although they remain the best opportunities for further retail development in the town, and if implemented will no doubt help Burton to make up some of the ground it has lost over recent years.

Uttoxeter

- 9.2.4 Although Uttoxeter remains an essentially attractive market town, with a good quality public realm throughout and generally well maintained historic buildings, the general health of the centre appears to be in decline. Uttoxeter Town Centre's position in the national retail rankings has slipped significantly over recent years, and this is coupled with a disappointing level of current published retailer requirements, low footfall, and an alarming increase unit vacancy.
- 9.2.5 Convenience retail provision in Uttoxeter Town Centre is quite limited and geared towards a local shopper base, and we consider that there is scope for improvement in this sector. The centre contains only a few national multiple comparison operators, and although this is not untypical for centres of the size and function of Uttoxeter Town Centre, the centre does have significantly below-average representation in the key fashion sub-sectors.
- 9.2.6 In summary, we are concerned about the direction Uttoxeter Town Centre has been travelling in over recent years, and consider that steps should be taken to bolster the retail offer in the

centre to prevent further slippage and to stem the significant rise in unit vacancy. There are a number of schemes progressing in Uttoxeter Town Centre – such as the cattle market and JCB schemes – that will undoubtedly help reverse this decline and provide a much needed boost in investment and interest in Uttoxeter, as well as address some of the deficiencies outlined above.

9.3 Summary of Current Shopping Patterns

Comparison Goods

- 9.3.1 Overall, 61.3 per cent of the comparison goods expenditure available to residents of the study area is retained by town centres, retail parks and freestanding stores located in the study area. The main comparison retail destination within the study area is Burton Town Centre, which secures £246.3m of the residents' comparison goods expenditure.
- 9.3.2 Over a third of the total comparison goods expenditure available within the study area therefore 'leaks' to destinations beyond the study area. Short-distance leakage to Derby, Stoke-on-Trent and Tamworth accounts for 22 per cent of residents' comparison goods expenditure.
- 9.3.3 Burton Town Centre achieves a comparison goods market share of 40 per cent in four of the eight zones. It also achieves a market share of at least 15 per cent in three other zones. This indicates that Burton plays a key role in terms of comparison retailing across the study area.
- 9.3.4 Uttoxeter Town Centre's comparison goods market share in excess reaches a maximum of 30.5 per cent in its own zone (Zone 1), but Uttoxeter achieves a material market share, of 14.9 per cent, in only one other zone (neighbouring Zone 2). This evidence indicates that the attraction of Uttoxeter in terms of comparison goods retailing is fairly localised.

Convenience Goods

- 9.3.5 Overall, 81 per cent of the convenience goods expenditure available to residents of the study area is retained by town, village and other centres, retail parks and freestanding stores located in the study area. Thus, as might be expected, there is less strategic leakage than in the comparison sector, because convenience shopping is generally undertaken on a more localised basis.
- 9.3.6 The highest individual convenience market shares within the study area are achieved by Tesco in Uttoxeter, Tesco in Ashby-de-la-Zouch and Morrisons in Burton. There are no parts of the study area where there is an acute localised deficiency in convenience goods provision. The residents located in the more rural areas in Zones 3 and 8, are served by a more limited local food and grocery offer and they have to travel for their food and grocery shopping. There are no town centres located within these areas, but the residents of Zones 3 and 8 are within easy travelling distance of existing convenience retail provision in the immediate surrounding areas.

Leisure Services and Cultural Activities

Burton Town Centre

- 9.3.7 Burton Town Centre performs reasonably well in both the 'restaurants and cafés' and 'pubs, bars and nightclubs' categories, where the most localised patterns of trips might normally be expected. This highlights that there is good provision of such facilities in the town centre.
- 9.3.8 Burton also performs relatively well in terms of cinemas and health and fitness centres, being the most popular destination for such facilities in the study area. As is the case with all of the town centres in the study area, the role of Burton in providing leisure facilities such as family

entertainment, and cultural facilities like theatres, concerts, art galleries and museums, is very limited. The majority of such visits are to destinations outside of the study area.

Uttoxeter Town Centre

- 9.3.9 The household survey findings demonstrate the relatively localised appeal of Uttoxeter Town Centre in the study area context in the ‘restaurants and cafés’, ‘cinemas’, ‘family entertainment’ and ‘pubs, bars and nightclubs’ categories. The town centre is able to attract expenditure from Uttoxeter residents, but is not attracting expenditure from the wider area.
- 9.3.10 As is the case with all of the town centres in the study area, the presence of cultural facilities such as theatres, concert halls, art galleries and museums is very limited in Uttoxeter. The majority of visits to such facilities are to destinations outside of the study area.

9.4 Summary of Quantitative Need for Retail Floorspace

- 9.4.1 The quantitative need for additional comparison goods retail floorspace under the constant retention rate scenario is summarised in Table 9.1 below:

Table 9.1 Quantitative Need in the Comparison Goods Sector

Period	Floorspace Requirements (sq.m net)
	Constant Retention
2013-16	-9,856
2016-21	7,212
2021-26	11,184
2026-31	12,546
2013-31	21,086

- 9.4.2 Table 9.1 shows that the Council should work towards a total requirement for up to 7,200 sq.m of additional comparison sales area floorspace in the 2016 to 2021 period, rising to 21,100 sq.m in the period up to 2031. Our performance analysis concluded that Burton, and to a greater extent Uttoxeter, were both showing signs of weakness and could be vulnerable to further competition from new out-of-centre retail floorspace. The Council should therefore seek to direct any new comparison retail facilities to town centre locations – in accordance with the thrust of national planning policy – rather than permitting large-scale retail development in out-of-centre locations which could further undermine the vitality and viability of defined centres.

9.4.3 The quantitative need for additional convenience goods retail floorspace under the constant and rising retention rate scenarios is summarised in Table 9.2 below:

Table 9.2 Quantitative Need in the Convenience Goods Sector

Period	Floorspace Requirements (sq.m net)	
	Scenario 1 Constant Retention	Scenario 2 Rising Retention
2013-16	-3,454	-2,352
2016-21	1,858	2,671
2021-26	1,969	2,479
2026-31	1,944	2,940
2013-31	2,317	5,766

9.4.4 Table 9.2 shows that the quantitative need in the period up to 2016 is negative under Scenario 1, with very limited scope for further floorspace beyond this period to 2031. We do not advocate this scenario because the floorspace requirements arising under it reflect a perpetuation of the current aggregate retention rate in the OCA, which at 81 per cent is too low, in our assessment. Under the rising retention scenario the quantitative need up to 2016 is also negative, but there is scope for approximately 2,700 sq.m of additional convenience sales area floorspace across the OCA in the period to 2021, rising to approximately 5,750 sq.m by 2031.

9.4.5 We consider it important to note that the capacity figures identified for further comparison and convenience retail floorspace in this report are provided as guidelines, and do not represent maximum limits on the quantum of retail floorspace that can be developed in East Staffordshire in the period to 2031. Our figures are necessarily based on current data inputs and forecasts in relation to population projections, per capita expenditure growth, and so on. These variables could change over time, and should be continually monitored by the Council and taken into account in future retail study updates.

9.5 Summary of Qualitative Retail Needs

9.5.1 We have identified a particular qualitative need for:

- The provision of a department store in Burton. This is the most obvious deficiency in the centre, and would help underpin the role and function of Burton as the main retail centre in East Staffordshire.
- Additional modern retail units in Burton to accommodate the requirements of 'high street' comparison operators. Burton already contains a good range of comparison multiples and independents, yet the centre has been losing ground in the face of increased competition from nearby centres such as Derby. In order to arrest this decline and bolster the performance of the centre, it is important to ensure that Burton remains competitive and is able to offer the appropriate type of floorspace required to maintain operator interest and attract new occupiers.
- In the case of Uttoxeter – which appears to be struggling – we have identified a general qualitative need for improved comparison and convenience provision. The town centre is currently lacking a large format foodstore, and has significantly below-average representation in the key fashion sub-sectors which are important in terms of the attractiveness of a centre to shoppers.

9.6 Summary of Need for Other Town Centre Uses

Commercial Leisure

- 9.6.1 The leisure services expenditure available to residents of the OCA is predicted to grow by £29.6m in the period between 2013 and 2016, rising to £101.0m and to £174.1m in the longer term periods to 2021 and 2031, respectively. On the basis of current spending levels, some 57 per cent of this spending growth will go to eating and drinking establishments (restaurants, cafés, take-away outlets and pubs/bars), 16 per cent will go on cultural services, around some 9 per cent will be spent on games of chance (bingo, lottery, bookmakers and betting stakes) and 6 per cent will be spent on recreational and sporting services.
- 9.6.2 How this growth might be expended locally, however, depends very much on what opportunities the market supplies – thus, current spending patterns can only provide a guide to what might happen in the future. We have undertaken a broad assessment of the scope – in quantitative terms – for additional commercial leisure facilities, which takes into account how current patterns of spending might change if significant improvements to East Staffordshire’s leisure offer were to take place. Our conclusions are summarised in Table 9.3 below.

Table 9.3 Summary of Scope for Additional Commercial Leisure Facilities in the Burton and Uttoxeter

Leisure Sub-Category	Residual Expenditure Available at 2021	Capacity for Additional Facilities
Restaurants, cafés, pubs and bars	£20.6m	Scope for additional food and drink floorspace by 2031
Cinemas	£1.1m	An independent cinema, or six screens in a multiplex format
Bingo halls	£0.3m	Smaller bingo operator
Family entertainment	-	Qualitative need for a family leisure facility such as an ice-skating rink, independent bowling alley or a small-scale facility (for example, a climbing wall)
Gym	-	Some capacity in the area for additional gyms

Offices

- 9.6.3 There is no quantitative grounds to secure any additional office floorspace anywhere within the Borough, including Burton Town Centre. The net additional requirement for new office space in the preferred scenario set out in the 2013 ELR is almost zero over the life of the plan. Any new space developed can be lost from the supply elsewhere, while there is no pressing justification to protect the stock of office space today. With a 20 per cent vacancy rate the borough can afford to release at least 10 per cent of current stock to other uses without any measurable detriment to the supply of space.
- 9.6.4 It therefore follows that the Council does not need to proactively promote new office space as part of any new development scheme which is not already committed. Even some of the committed schemes (which total nearly 20ha according to the ELR) are may be surplus to requirements.
- 9.6.5 Nevertheless, there are sound qualitative grounds to promote new space and protect older space. Most noticeably for Burton Town Centre there are genuine reasons to promote and

protect office space in the town centre. The town centre is accessible and office space is needed to deliver goods and services to the local population. If a viable supply of space is to be secured, the Council needs to develop clear criteria which protects the most important space while allowing surplus space to be lost.

9.7 Local Floorspace Threshold for Impact Assessment

9.7.1 Having assessed a range of local factors, and taking into account the size and role of both centres, we recommend that the Council should adopt the local floorspace thresholds set out below. These should apply to any planning applications for retail development (including extensions) where the amount of floorspace proposed is above the stated thresholds:

- **Burton** – 1,500 sq.m gross or more of convenience retail floorspace, and 750 sq.m gross or more of comparison retail floorspace.
- **Uttoxeter** – 750 sq.m gross or more of convenience retail floorspace, and 500 sq.m gross or more of comparison retail floorspace.

9.7.2 We consider that proposals equal to or above these thresholds would be considered 'large' relative to existing provision and the size of units in each centre. These thresholds have also been set at a level that is likely to 'capture' the majority of retail schemes that may realistically come forward and that could potentially result in significant adverse impacts on the main town centres.

9.8 Recommendations and Opportunities

9.8.1 In this report we have assessed the current performance of Burton and Uttoxeter Town Centres, and have undertaken a comprehensive and robust assessment of future quantitative and qualitative requirements for additional retail and commercial leisure floorspace across the Borough in the period to 2031. We have also considered the scope for additional office development, and have made recommendations in terms of a local floorspace threshold for the assessing impact to assist with the determination of future planning applications for retail development that are not within a defined centre or in accordance with an up-to-date plan.

Floorspace Requirements and Retention Levels

9.8.2 To reiterate, the capacity figures identified – as well as the indicative proportion share shown below that should be directed towards the various locations in the Borough – are provided as guidelines only and do not represent maximum limits on the quantum of retail floorspace that can be developed in East Staffordshire in the period to 2031. Should proposals over and above the identified requirements come forward, then these will need to be assessed against the wider policies and objectives of the development plan and national planning policy. Each proposal will need to be assessed on its own merits, and it is not appropriate for the retail study to set a prescriptive 'cap' on future retail or commercial leisure development.

9.8.3 Proposals that meet specific qualitative needs, or that deliver other wider benefits even where there is little or no quantitative capacity, can still be approved provided there are no overriding negative impacts that would outweigh the benefits of doing so. Any new applications for retail floorspace on the edge of, or outside, the defined town centre boundaries in any of the centres in the Borough should demonstrate that there are no sequentially preferable sites available, and that no significant adverse impacts will arise on existing defined centres, reflecting guidance in the NPPF.

9.8.4 We are also aware that the Council may work towards a higher employment-led population growth scenario, and if realised this could have implications for retail floorspace capacity in the future. We therefore recommend that this is closely monitored and the retail study is kept up-to-date.

Comparison Retail

- 9.8.5 The comparison floorspace requirements identified in our study are relatively modest, and in the short term period to 2016, the identified comparison retail floorspace requirement is negative. Thereafter, we have identified sufficient expenditure availability to support in the region of 7,200 sq.m of additional comparison sales area floorspace in the 2016 to 2021 period, rising to approximately 21,100 sq.m in the period up to 2031.
- 9.8.6 In the comparison sector, centres and stores within the catchment area currently retain some 61 per cent the available comparison expenditure which we consider to be a relatively healthy level of aggregate expenditure retention (albeit a slight reduction from our last study when the comparison retention level for the OCA was 67 per cent), given the competition from nearby higher order centres. We therefore recommend that the Council's aspiration should be to at least maintain the retention rate at its current level of 61 per cent. This does not mean 'doing nothing', given the increasing competition posed by centres outside of the Borough, and there will be a need to enhance the retail offer within East Staffordshire in both quantitative and qualitative terms in order to maintain the existing retention rate.
- 9.8.7 Our assessment of how the comparison retail floorspace requirements should be apportioned across the Borough is summarised below. This is based on a number of factors, such as the emerging Local Plan spatial strategy (which seeks to direct the majority of development towards Burton), the physical opportunities and constraints in each centre, the qualitative needs identified through this study, and the realistic market demand for floorspace in each location, together with our own professional judgment. We have also made an allowance for some of the identified floorspace requirement to be met in locations that fall within the OCA, but outside of East Staffordshire.
- 9.8.8 Additional comparison sales area floorspace requirements arising in the period 2016 to 2021:
- **Burton:** around 5,100 sq.m (55,000 sq.ft).
 - **Uttoxeter:** around 1,400 sq.m (15,000 sq.ft).
 - **Other locations in East Staffordshire:** 360 sq.m (3,875 sq.ft)
 - **Other locations in the OCA:** 360 sq.m (3,875 sq.ft).
 - **Total (all locations within the OCA):** 7,220 sq.m (77,700 sq.ft).
- 9.8.9 Additional comparison sales area floorspace requirements arising in the period 2013 to 2031:
- **Burton:** around 14,800 sq.m (160,000 sq.ft).
 - **Uttoxeter:** around 4,200 sq.m (45,200 sq.ft).
 - **Other locations in East Staffordshire:** 1,050 sq.m (11,300 sq.ft).
 - **Other locations in the OCA:** 1,050 sq.m (11,300 sq.ft).
 - **Total (all locations within the OCA):** 21,100 sq.m (227,100 sq.ft).
- 9.8.10 As shown above, we consider that approximately 70 per cent of the identified comparison retail floorspace requirements should be directed towards Burton Town Centre, to reflect the dominant role of the centre in East Staffordshire and its function as the principal town in the Borough. A further 20 per cent of the identified capacity should be focussed toward Uttoxeter, and 5 per cent dispersed across other locations within East Staffordshire to meet local needs (particularly in the 'strategic villages' of Tutbury, Barton under Needwood, Rolleston and

Rocester). We would also anticipate that new commercial leisure provision would follow a similar pattern. We have allowed a further 5 per cent of the identified comparison floorspace requirement to be met in the parts of the OCA outside East Staffordshire, in particular Ashby and Swadlincote, as this level is broadly in line with the current market shares achieved by these centres.

Convenience Retail

- 9.8.11 In the short term period to 2016 the identified convenience retail floorspace requirement across the OCA is negative. Thereafter, floorspace requirements in the convenience retail sector post 2016 are even more modest. Under the constant retention scenario there is very little scope to accommodate further convenience floorspace in the OCA, with a requirement for just 2,300 sq.m in the period to 2031. However, we consider that there is scope for improvement and recommend that the Council should plan to increase the convenience retail retention level to 85 per cent by 2016, 87 per cent by 2021, and increasing to 90 per cent by 2031.
- 9.8.12 The Council should seek to increase the overall level of convenience expenditure retention, because food shopping should be undertaken on as localised a basis as possible. Under our rising retention rate scenario, there is scope for approximately 2,700 sq.m of additional convenience sales area floorspace across the OCA in the period to 2021. In the longer term period to 2031, there is a requirement for approximately 5,750 sq.m of convenience sales area floorspace across the OCA, in addition to the current foodstore commitments in Uttoxeter and Burton. We would expect approximately 70 per cent of this requirement to arise within East Staffordshire (i.e. 1,890 sq.m between 2016 and 2021, and 4,025 sq.m in the period to 2031), with the remainder going to other locations within the OCA but outside the borough. This split is broadly in line with the market shares achieved by existing footstores outside East Staffordshire but within the study area.
- 9.8.13 Thus, even working towards an increased retention scenario, the scope for additional convenience floorspace both within East Staffordshire and the OCA as a whole is extremely limited, and it would be spurious to divide this up between different centres. Furthermore, convenience retail need should be met on a localised basis. For these reasons, we consider that it would not be appropriate to assess how the identified convenience retail floorspace requirement should be split up across the Borough, and instead recommend that the Council carefully weighs up the merits of any convenience retail proposal that come forward in accordance with the guidance set out in the NPPF and the relevant policies and objectives in the development plan.

Burton Town Centre

- 9.8.14 We have concluded that although the vitality and viability of Burton Town Centre is generally good, the centre is showing some signs of weakness which the Council should seek to address. Burton appears to be losing ground to nearby competing centres such as Derby, and although there have been schemes in the pipeline which if implemented could help bolster Burton's position, these have failed to come forward.
- 9.8.15 The existing commitments to expand the Octagon and Coopers Square Shopping Centres, together with the proposed redevelopment of Burton Rugby Club, remain the best opportunities to improve the town centre retail offer and these schemes should be encouraged and welcomed. In particular, the extension of Coopers Square was intended to facilitate a new Debenhams department store, which would have addressed a long-term qualitative deficiency in the centre. We have been told that the new owners still intend to progress with this, although at present the timescales for doing so are unknown. We are also aware that the Rugby Club site may instead come forward for residential use. Should this happen then this opportunity to provide larger format retail units in the centre would be lost, although we do note that residential use would increase the resident population within walking distance of the

town centre and could help bolster the vitality and viability of Burton through increased footfall and local spend.

- 9.8.16 Another opportunity in Burton that should be explored further is the Council owned Bargates site. This site extends to approximately 2.83 hectares, and comprises land which was formerly occupied by the Riverside Shopping Centre (now demolished and cleared), a public park on the Trent riverside and an area of open space adjacent to Burton Bridge. The Council adopted an SPD in relation to the site in November 2010, which included a preferred option that would deliver a mix of small retail units (approximately 1,200 sq.m), business/office suites, housing and a hotel at the site. Although the site is slightly peripheral to the core retail area in Burton, it is within the key centre boundary and is location in a prominent gateway location.

Uttoxeter Town Centre

- 9.8.17 We have expressed concern over the general health of Uttoxeter, which appears to be in decline. Although Uttoxeter is generally attractive and benefits from a high quality public realm, its position in the national retail rankings has slipped significantly over recent years and there has been an alarming increase unit vacancy since our last study. Convenience retail provision in the centre is quite limited and could be improved, and the comparison goods offer is deficient in some key areas.
- 9.8.18 The Council should therefore take steps to bolster the retail offer in the centre to prevent further slippage and to stem the significant rise in unit vacancy. The best opportunities to address these issues and accommodate new retail floorspace are the existing proposals at the Cattlemarket and JCB sites. These schemes will undoubtedly help reverse this decline and provide a much needed boost to the town centre retail offer. We have also identified The Maltings as another potential redevelopment opportunity in the town centre. The existing shopping centre is dated and many units are vacant. The site could be reconfigured to provide new floorspace that is better suited to modern operators.