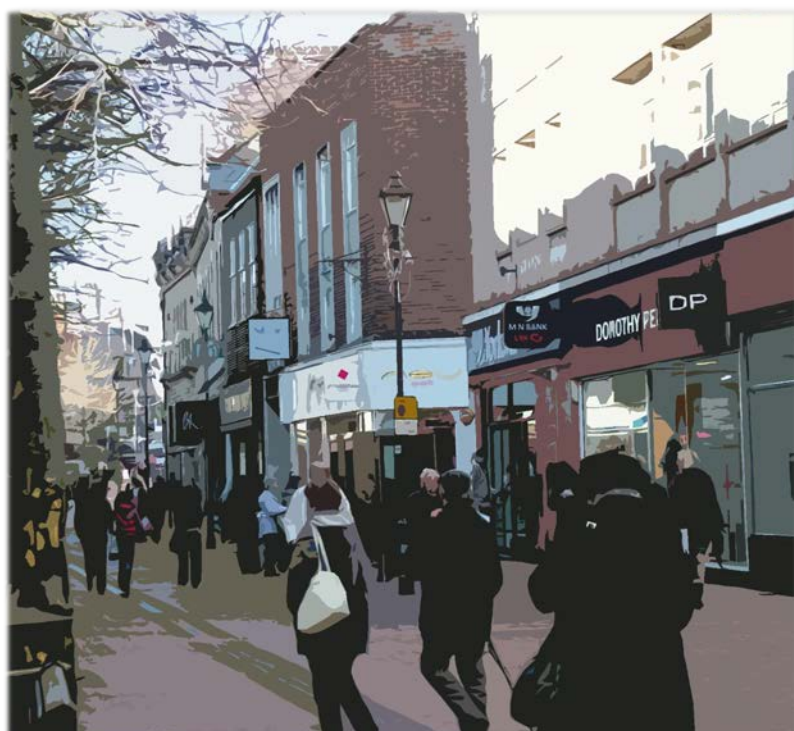


Mansfield District Council

Local Plan Consultation Draft

Retail and Leisure Technical Paper



November 2015

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Mansfield
District Council



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1 Executive summary

This paper sets out the background to how our preferred option for retail and leisure floorspace targets were established. Technical papers relating to housing numbers and distribution, strategic green infrastructure, and employment are also available.

1.1 This paper will form a key source of evidence in the generation of retail and leisure floorspace targets within the emerging Mansfield District Local Plan. It will help us understand the floorspace requirements in the district for existing and future residents.

1.2 Alongside new housing and new employment development, making sure that there is enough land for new retail and leisure floorspace is also important for economic growth. In addition to its social benefits, a vibrant town centre can help the district to retain and grow existing businesses, as well as attract new investment.

1.3 The paper has investigated evidence which looks at the population of the Mansfield catchment area, current spending and shopping habits and expected changes in the economy. This information has been used to indicate a likely capacity for development during the timeline of the Local Plan.

1.4 The paper has established that the most realistic floorspace targets for retail and food and drink leisure uses over the plan period are as shown below.

Table 1.1 Retail and leisure floorspace targets (2014-2031) (sqm net)

Type of floorspace	Mansfield town centre	Mansfield Woodhouse district centre	Market Warsop district centre
Comparison retail	24,000	600	600
Convenience retail	3,700	100	100
Food and drink leisure	2,900	80	80

1.5 Accounting for development that has been permitted since the evidence was provided gives the following adjusted targets. These should be treated as minimum figures.

Table 1.2 Adjusted retail and leisure floorspace targets (2014-2031) (sqm net)

Type of floorspace	Mansfield town centre	Mansfield Woodhouse district centre	Market Warsop district centre
Comparison retail	24,000	600	600
Convenience retail	3,700	100	100
Food and drink leisure	2,200	60	60



2 Introduction

What is the purpose of this paper?

2.1 This paper sets out the technical evidence we have used to assess how much retail and leisure floorspace may be required in the district over the years 2014-31.

2.2 The paper builds upon two earlier pieces of work – the Mansfield Retail and Leisure Study carried out in 2011 by consultants Roger Tym and Partners (RTP) (the 2011 Study), and an addendum to that study carried out by Peter Brett Associates (PBA) in 2014 (the 2014 Addendum). A previous retail study was completed by GVA Grimley in 2005.

2.3 This paper uses the terms convenience retail and comparison retail. Both fall within Class A1 of the Use Classes Order⁽¹⁾ but are defined separately:

- Comparison goods are items that you tend to shop around for; these can include shoes, clothes, books, electrical items, household goods etc.
- Convenience goods are items that you need on a day to day basis, such as food. Supermarkets fall into this category.

2.4 Leisure uses referred to in this paper relate to food and drink leisure within the following use classes:

- Restaurants and cafes (A3)
- Drinking establishments (A4)
- Hot food takeaways (A5)

Why has it been prepared?

2.5 There are several reasons:

- A local plan must show how much retail and leisure development is likely to occur and how it will plan for it accordingly. This demonstrates what is and is not considered acceptable when the district council considers planning applications, and helps give certainty to landowners, developers and local communities. This paper explains how we arrived at the targets in our local plan.
- The overall requirement allows us to look at how many sites may need allocating, and where. When allocating sites we can take a view on what may be the most suitable locations based on promoting a sustainable pattern of development.
- Working out how much land we need to allocate informs the infrastructure required to support new development.
- It's a national policy requirement - paragraph 161 of the National Planning Policy Framework (NPPF) directs that Local Authorities should assess the need for floor space for economic development over the plan period. This includes retail and leisure development.

¹ The Town and Country Planning (Use Classes) Order 1987 (as amended) puts uses of land and buildings into various categories known as Use Classes. It is generally the case that planning permission is needed in order to change from one class to another, although there are exceptions.

What is the current strategy for retail and leisure?

2.6 Our existing method of distribution of retail development is set out in the Mansfield District Local Plan 1998 which the emerging plan is set to replace. Retail development is focused upon Mansfield town centre in the first instance (unless a small convenience store) and then to lower centres within the defined retail hierarchy. The current strategy restricts growth elsewhere unless it can meet certain criteria.

2.7 There were also a number of land allocations within the 1998 Local Plan, some of which have yet to see development. The allocations were located within Mansfield town centre and the district centres at Mansfield Woodhouse, Market Warsop and Oak Tree.

Why are we proposing to change the existing strategy?

2.8 We are now in the process of replacing the 1998 Local Plan, and as part of this we have the opportunity to look at how the existing strategy is working, and whether it needs to be modified to better serve the needs of Mansfield district. As part of this we have considered the available evidence on possible retail growth based on projected changes in: population, spending levels and trends, and forms of trading (such as Internet trading), as well as committed development and the plans of competing towns and cities.



3 Context

3.1 This section of the paper sets out the context within which we need to establish retail and leisure targets. It covers:

- key national retail trends
- recent developments within or close to the area
- retail ranking
- information on the shopping habits of the Mansfield catchment area, and
- the policy background that we must work within.

Retail trends

3.2 The table below sets out some of the key national retail trends which are likely to have an effect on Mansfield district during the plan period.

Table 3.1 Key national trends

Trend	What it means	Implications
Polarisation to higher order centres	The preference of retailers to concentrate trading activities in larger schemes, within larger centres. The trend has been driven by the economic downturn, online shopping and a shrewder customer base. This leads to a concentration of comparison goods expenditure in a smaller number of large centres. Within the East Midlands, Nottingham, Leicester and Derby are the centres where many retailers seek to focus their trading presence.	Many retailers will seek to downsize their portfolios, particularly in smaller centres, because they can operate more efficiently with a smaller network of stores combined with a strong online presence. Vulnerable centres may be required to refocus their role and function away from solely being shopping destinations to incorporate a much broader retail, leisure, culture and residential offer.
Growth of the convenience goods sector (The sector has traditionally been dominated by the big four- (Asda, Morrisons, Tesco and Sainsbury's) and increasingly, higher quality operators (Waitrose, Marks & Spencer) and discount retailers (Aldi, Lidl). The discount retailers are becoming increasingly important forces in the convenience goods market and are expected to continue to take market share from the big four supermarket operators in future years).	The sector has often benefited from floorspace becoming available in town and city centres as a result of comparison goods retailers (such as Woolworths) entering administration. Operators are increasingly moving away from opening larger-format stores towards establishing a network of smaller top up convenience goods shopping facilities (referred to as c-stores), often located in town centres, or district / neighbourhood parades, reflecting customers' changing shopping patterns away from bulk weekly (or less frequent) shopping trips to more frequent, lower-spend visits to smaller stores in locations convenient to their home, work or commute.	The proportion of convenience goods floorspace which will be accounted for by smaller stores and discount retailers is likely to increase. Industry body IGD predicts that the convenience goods market will grow by 29% between 2012 and 2017, and the main retail operators are responding quickly by opening new stores.
Growth in commercial leisure	Most commentators predict that commercial leisure, such as cafes, bars, restaurants and cinemas, will constitute a growing share of town centre floorspace.	There is scope for town centres to capitalise on this, redefining their function as destinations.

Trend	What it means	Implications
		This could have positive implications on the performance of town centres as residents and visitors undertake linked trips and spend more time in the town centres. The development of a strong commercial leisure offer can help increase footfall outside of retail hours.
<p>Increase in online shopping</p> <p>(Online shopping is perceived to offer a number of significant advantages over traditional, high street-format shopping including lower prices, wider choices and the ability for customers to find bargains).</p>	<p>While unfavourable economic conditions are forcing many retailers to scale back on physical retail space, their online operations allow them to reach a wider customer base. However, the competition is not as simple as 'online shopping versus the high street' as new technologies promote integration between the two shopping channels.</p> <p>Internet sales have been rising much more rapidly than general retail sales in recent years. Experian however consider that at the turn of the next decade, growth in online shopping is expected to plateau.</p>	<p>Forecast growth in online spending does not equate to a redundant future for bricks and mortar stores. There is a role for physical outlets to act as showrooms for online retailers. A physical presence on the high street improves the visibility of businesses; indeed 12 out of the top 20 e-commerce businesses in the UK have a physical presence on the high street.</p>
<p>Growth in the click & collect online shopping</p>	<p>This relatively new trend looks set to play an increasing role. The click & collect concept is such that a customer orders and pays for a desired product online, and then collects the product from the nearest large branch of the retailer in question. This approach is being rolled out by a number of retailers – examples of retailers trading in Mansfield town centre who already offer this service include Debenhams, Topshop / Topman, River Island, Boots and Wilkinson. Like showrooming, it is also a trend where the physical outlet of the store can still be used to drive footfall.</p> <p>Recent research by the British Retail Consortium indicates that 60% of click & collect transactions result in an additional purchase in the store. There is, therefore, a role for bricks and mortar stores.</p>	<p>The role and function of high streets, particularly those outside the higher-order shopping centres, are likely to need to consider uses beyond that of traditional retail activity in order to remain vital and viable.</p>

Source: Mansfield Retail and Leisure Study – 2014 Addendum (PBA, 2014).

3.3 In light of the above trends, Mansfield will need to adapt to the changes in shopping habits in order to remain vibrant. The town centre will need to move away from being a shopping destination and start to offer a broader range of retail, leisure, cultural and civic services. Place marketing to sell the offer of the town centre will become of increasing importance.

Local area context

3.4 There have been a number of changes to retail provision within and surrounding Mansfield district which are likely to have affected shopping patterns since the 2005 retail study was carried out. In addition, planned developments in the town and wider sub-region may further affect current shopping patterns over the course of the council's local plan period.

**Table 3.2 Recent and planned changes to retail provision**

Comparison retail floorspace	Convenience retail floorspace
<p>No major comparison goods retail developments have come forward in Mansfield since the GVA Grimley retail study was carried out in 2005, and whilst there have been some significant developments completed elsewhere in the wider sub-region, RTP would not expect these to have a major influence over shopping patterns of residents in Mansfield.</p> <p>Potential future trade draws include:</p> <ul style="list-style-type: none"> ● Extension / redevelopment of Broadmarsh Centre, Nottingham ● Extension of Victoria Centre, Nottingham ● Possible Sevenstone (new retail quarter) development, Sheffield ● Potterdyke development, Newark <p>If the developments come forward, Mansfield town centre will have to work hard to maintain current patronage from residents, in light of a potentially more attractive offer elsewhere.</p> <p>Sites (such as Stockwell Gate and White Hart) identified in the Local Plan and subsequent planning policy publications provide the opportunity for Mansfield to react to these competing development pressures.</p> <p>The following floorspace was committed (had planning permission) at the time of the 2014 Addendum:</p> <ul style="list-style-type: none"> ● Stockwell Gate South (1,390 sqm) 	<p>Mansfield has seen the construction of the following significant convenience stores since 2005:</p> <ul style="list-style-type: none"> ● A new Tesco Extra foodstore to the northwest of the town centre ● Morrisons acquisition of the former Cooperative store in Mansfield Woodhouse, resulting in increased trade draw ● Extension of Tesco Extra store at Oak Tree ● Redevelopment of a larger Sainsbury's store and development of an Aldi discount foodstore on Nottingham Road, Mansfield ● Development of a Farmfoods store on site of the former Flamingo PH <p>Elsewhere, there have been recent openings such as Tesco Extra stores in Chesterfield and Clay Cross, although these are unlikely to have had a significant impact on shopping patterns as convenience goods shopping is a relatively localised activity.</p> <p>The following floorspace was committed in Mansfield district at the time of the 2014 Addendum:</p> <ul style="list-style-type: none"> ● Stockwell Gate South (1,390 sqm) ● Burns Lane, Market Warsop (891 sqm)
Source: Mansfield Retail and Leisure Study – 2014 Addendum (PBA, 2014).	

Retail ranking

3.5 According to the Management Horizons Europe 2008 UK Shopping Index Mansfield town centre has a retail offer equivalent to a Sub-Regional centre. However, in 2008, Mansfield's position in the Index had declined over the preceding decade, indicating that the retail offer in the town has remained relatively static whereas other similarly-ranked centres have shown improvement. More recent rankings by Experian have shown Mansfield town centre to be improving.

3.6 Nottingham is by some distance the highest ranked nearby centre, and is ranked within the top ten UK shopping destinations. To the north of the district, both Sheffield city centre and the Meadowhall shopping centre are also placed within the top 40 UK shopping destinations. There are therefore three destinations close to the district which are highly ranked within the Index due to their strong retail offer.

Health of Mansfield town centre

3.7 As stated in the 2011 Study, Mansfield town centre exhibits generally positive signs of vitality and viability (or 'health'), reflective of what would be expected of a sub-regional shopping destination.

3.8 There are a range of established anchor stores, such as Debenhams, Primark and Marks & Spencer. Primark is the newest of these anchor stores, and represents a positive addition to the overall offer.

3.9 The retail offer is centred on the Four Seasons Shopping Centre, a purpose built, covered shopping mall. The larger units in the centre are fit for purpose, however the smaller units are only able to accommodate limited product ranges for the national multiple retailers which occupy space there.

3.10 Elsewhere in the town centre, there is strong retail offer on the eastern end of Westgate, focused on the Marks & Spencer and New Look stores. The western end of Westgate has a poorer quality retail mix as units are smaller, and vacancy rates are higher. The current vacancy rate in the town centre is higher than the UK average and this needs to be monitored carefully. Vacancy rates in the prime retail area are low however.

3.11 The market plays an important role in attracting footfall to the town centre, and the pedestrianised market place is considered fit for purpose in this respect.

3.12 Comparison goods shopping provision is generally strong, but would benefit from more middle/upper-middle retailers. In relation to convenience shopping provision, the town centre currently lacks a supermarket (with the exception of the foodhall in Marks & Spencer), and this should be addressed during the study period, as it represents a key qualitative shortfall.

Improving the health of the town centre - in partnership:

3.13 There are three multi-agency groups that each aim to improve different aspects of Mansfield town centre. These groups and their roles are as follows:

Table 3.3 Multi-agency teams active in Mansfield town centre

Team	Role
Mansfield Town Team	This small group is made up of representatives from the Mansfield BID (Business Improvement District), Mansfield District Council, Nottinghamshire County Council, Four Seasons Shopping Centre, local businesses and Mansfield 2020 and is a task and finish group focused on identifying projects and potential funding streams that will help increase the attractiveness of the town centre.
Mansfield Partnership Against Crime (MPAC) (Partnership Plus)	MPAC brings organisations such as Mansfield District Council, the Police, Nottinghamshire County Council, Office of the Police and Crime Commissioner, Nottinghamshire Fire & Rescue Service, Mansfield and Ashfield Clinical Commissioning Group, Nottinghamshire Probation Trust, Mansfield BID, and voluntary sector organisations including Victim Support and Mansfield Community and Voluntary Services together to deal with issues such as alcohol-related crime, anti-social behaviour, burglary, domestic abuse, personal safety and vehicle crime. There is a Partnership Plus area focused upon the town centre and parts of the Portland and Woodlands wards.
Purple Flag Steering Group	This small group is made up of officers from Mansfield District Council, Mansfield BID and Nottinghamshire Police, and is focused upon maintaining Purple Flag accreditation for the town centre's



Team	Role
	evening economy. They are tasked with determining action plans for each of the 5 themes of assessment to ensure that the town centre meets the required standards.

Monitoring the health of the town centre:

3.14 Each year, the Planning Policy team produces a Retail Update report (please visit http://www.mansfield.gov.uk/planningpolicy_info). This monitors retail development across the district and includes a section on Mansfield town centre which acts as a 'health check'.

Mansfield catchment area

3.15 In establishing retail and leisure provision in Mansfield district it is useful to understand the catchment area that supports our retailing centres.

3.16 The catchment area (referred to as the study area within the 2011 Study and the 2014 Addendum) places Mansfield at the centre, and extends over a wide geographical area shown in the map at Appendix 1 'Mansfield catchment area' and the table below. This forms a realistic area from which Mansfield can be expected to draw trade.

3.17 The 2014 Addendum found that the population of the catchment area was 312,570 in 2014 with a total of £843.07m available to spend on comparison goods. Of this, £744.43m was spent in stores and £98.64m was spent via special forms of trading (SFT), such as the Internet.

3.18 In relation to convenience goods, the catchment area had a total of £591.71m available to spend. This was split between in-store shopping (£576.33m) and SFT (£15.38m). The amount available for spending on food and drink related leisure activity in 2014 was £248.79m.

3.19 In order to get an accurate picture of where this money is spent, the area was divided into nine survey zones for further analysis. The catchment area and zones used in the 2014 Addendum were unchanged from those used in the 2011 Study (and the preceding retail study from 2005).

Table 3.4 Mansfield catchment area

Zone	Zone name	Main centres	Predominant administrative area
1	Mansfield East	None	Mansfield
2	Mansfield Central & West	Mansfield town centre, Pleasley	Mansfield
3	Warsop & Shirebrook	Mansfield Woodhouse district centre, Market Warsop district centre, Meden Vale, Shirebrook, Langwith/Whaley	Mansfield
4	South of Worksop	Creswell, Whitwell	Bolsover*

Zone	Zone name	Main centres	Predominant administrative area
5	New Ollerton	New Ollerton, Clipstone, Edwinstowe	Newark & Sherwood
6	Rural East Nottinghamshire	Tuxford	Newark & Sherwood
7	Southwell	Blidworth, Bilsthorpe, Rainworth, Southwell	Newark & Sherwood
8	South Ashfield	Jacksdale, Newstead, Ravenshead, Selston, Underwood	Ashfield
9	Kirkby & Sutton	Kirkby-in-Ashfield, Sutton-in-Ashfield, Huthwaite, Tibshelf	Ashfield
Source: Table 4.1, Mansfield Retail Study 2011. *covers a smaller administrative area than Bassetlaw, but contains the majority of the zone's population			

3.20 A household telephone survey was carried out on a sample population within each zone in order to learn more about residents' shopping habits. It found that:

Table 3.5 Shopping habits

In relation to comparison retail...	In relation to convenience retail...	In relation to leisure...
<p>65% of total available comparison expenditure is retained by destinations within the catchment area.</p> <p>The following destinations account for the greatest proportion of comparison goods spending:</p> <ul style="list-style-type: none"> ● Mansfield town centre (29%) ● Sutton-in-Ashfield town centre and retail parks (11%) ● Mansfield retail parks (9%) ● Oak Tree District Centre, Mansfield (3%) ● East Midlands Designer Outlet, South Normanton (3%) <p>45% of total available comparison goods expenditure is spent in Mansfield district.</p> <p>The 35% comparison goods expenditure that 'leaks' out of the catchment area goes to:</p> <ul style="list-style-type: none"> ● Nottingham (including Bulwell / Arnold) (11%) ● Alfreton (including Somercotes) (3%) 	<p>76% of total available convenience (food) expenditure is retained by centres and stores within the catchment area (reflecting that food shopping is a more localised activity and that there is a good network of stores available).</p> <p>Three foodstores each attracted 10% + of total available convenience goods expenditure from residents in the catchment area:</p> <ul style="list-style-type: none"> ● Asda, Forest Town, Mansfield (11%) ● Asda, Sutton-in-Ashfield (10%) ● Tesco Extra, Oak Tree, Mansfield (10%) <p>A further four foodstores attract between 5 - 10% of total available convenience goods expenditure:</p> <ul style="list-style-type: none"> ● Tesco Extra, Chesterfield Road South, Mansfield (7%); ● Morrisons, Mansfield (7%); ● Morrisons, Mansfield Woodhouse (6%); and ● Sainsbury's, Mansfield (5%) <p>There is some limited leakage of convenience goods expenditure to foodstores in Hucknall, Alfreton, and Clay Cross.</p>	<p>Destinations in Mansfield district account for 40% of total available leisure expenditure.</p> <p>Mansfield town centre scores poorly in terms of its attractiveness as a restaurant destination as it does not attract a market share higher than 30% from any single zone.</p> <p>Nottingham city centre attracts strong market shares from many survey zones.</p> <p>Mansfield town centre is significantly more popular as a destination for pub and bar-orientated leisure activity, and is overly-skewed towards this type of activity.</p>



In relation to comparison retail...	In relation to convenience retail...	In relation to leisure...
<ul style="list-style-type: none"> • Hucknall (3%) • Sheffield (including Meadowhall) (3%) • Giltbrook Retail Park, Giltbrook (including Ikea) (3%) • Worksop (3%) • Plus limited expenditure leakage to other areas. 	<p>In the Mansfield zones, virtually no residents travelled outside the catchment area, with retention rates of 97%, 96% and 98% for zones 1, 2 and 3 respectively.</p> <p>Overall, foodstores in Mansfield district account for 51% of total available convenience goods spending available to the catchment area.</p>	
Source: Mansfield Retail and Leisure Study 2011 and the 2014 Addendum.		

Policy context

3.21 The Government published the National Planning Policy Framework (NPPF) in March 2012. This document replaced previous Planning Policy Statements (PPS), Planning Policy Guidance (PPG) and a number of circulars and now forms national planning policy. Below is a summary how the NPPF influences retail and leisure planning.

National Planning Policy Framework (NPPF):

3.22 The NPPF makes it clear that there should be a presumption in favour of sustainable development. For plan-making this means that "local planning authorities should positively seek opportunities to meet the development needs of their area" ...and "local plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change" (paragraph 14).

3.23 Paragraph 17 sets out 12 core planning principles that 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. Local planning authorities (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.

3.24 Paragraphs 23 to 27 of the NPPF pay particular attention to retail and promote a 'town centre first' approach.

3.25 When preparing Local Plans, LPAs should:

- recognise town centres as the heart of their communities and pursue policies to support their success;
- define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;

- allocate a range of suitable sites to meet the scale and type of development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;
- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

Decision-making:

3.26 Paragraphs 24 to 27 of the NPPF explain the principal tests which LPAs should apply to applications for retail development that fall outside defined town centre locations. Applications for town centre uses (such as retail) need to demonstrate that 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).

3.27 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. This is to assess the impact of the proposal on existing, committed, and planned investment in defined centres within an appropriate catchment area, as well as the impact on town centre vitality and viability. 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:

3.28 Paragraphs 150 to 185 of the NPPF discuss plan-making, with paragraphs 150 to 157 focusing on the role of local plans. Paragraph 150 of the NPPF states "local plans are the key to delivering sustainable development that reflects the vision and aspirations of local communities" and that "planning decisions must be taken in accordance with the development plan, unless material considerations indicate otherwise".

3.29 The NPPF advises that local plans should be aspirational but realistic, and should set out "opportunities for development and clear policies on what will or will not be permitted and where" as well as "the strategic priorities for the area", including for the provision of retail, leisure and other commercial development.



Evidence base:

3.30 The NPPF identifies a requirement for LPAs to use a proportionate evidence base, and states that local plans must be based on "adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area" (paragraph 158).

3.31 As such, in relation to retail matters, the evidence base should assess, amongst other things (paragraph 161):

- 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 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.

National Planning Practice Guidance (NPPG):

3.32 The Government published the National Planning Practice Guidance (NPPG) in March 2014 in order to provide further guidance on and support to the policies contained within the NPPF.

3.33 Issues related to town centre uses are set out in the section entitled Ensuring the vitality of town centres. This section states that a positive vision or strategy for town centres, articulated through the Local Plan, is key to ensuring successful town centres, which enable sustainable economic growth and provide a wider range of social and environmental benefits. It also states that any strategy should be based on evidence of the current state of town centres and opportunities to meet development needs and support their viability and vitality. Strategies should also identify changes in the hierarchy of town centres, including where a town centre is in decline.

3.34 The NPPG also provides further guidance in terms of the interpretation of the NPPF's sequential and impact tests.

4 Retail and leisure floorspace targets

How much floorspace are we currently planning for?

4.1 The Mansfield Retail and Leisure Study 2011 stated that the council would need to identify enough land for the following floorspace targets in order to meet the district's needs from 2011 to 2026:

- Comparison retail floorspace (A1): A maximum of 25,300 Sq metres net sales area
- Convenience retail floorspace (A1): A maximum of 1,000 Sq metres net sales area
- Leisure floorspace (A3, A4, A5): A maximum of 3,500 Sq metres net sales area.

4.2 Since this target was set the following floorspace has been developed (as at 1 April 2015):

- 1,110 sqm comparison retail (A1)
- 328 sqm convenience retail (A1)
- 422 sqm leisure (combination of A3 and A5).

Table 4.1 Existing floorspace targets and balance remaining

Type	Comparison retail (A1)	Convenience retail (A1)	Leisure (A3 / A4 / A5)
Target (2011 - 2026)	25,300	1,000	3,500
Floorspace developed	1,110	328	422
Balance remaining	24,190	672	3,078

Is this figure still our best estimate?

4.3 No. We have taken the opportunity to review the evidence on how much retail and leisure floorspace is needed as we now have more up to date information on how population levels and retail trends are likely to change over the plan period.

4.4 Another reason for updating the study was that a report written by Colliers International early in 2014 to appraise one of the town centre regeneration sites implied that as time had moved on, many of the growth figures applied in 2011 were no longer realistic.

4.5 The conclusions of the Colliers report stated that due to the level of retail demand for Mansfield, a major retail-led development is not currently viewed as an option for the Stockwell Gate North site. Other forms of mixed use development were considered as more viable options for that site.

How do we establish a new figure?

4.6 The evidence base explains the methodology for establishing our floorspace requirements. This is simplified below.



Table 4.2 Process for establishing our floorspace requirement

Step	Task	How?
1 - Assess the scale of population and expenditure growth between 2012 (the year from which Experian population and expenditure data is sourced) and 2031 (the end year for the study), and make allowances for Special Forms of Trading retail activity	Establish the catchment area	See 'Mansfield catchment area'.
	Using population forecasts, find out how the catchment area is expected to change in size over the study period.	The 2014 Addendum uses 2012-based population projections, (bespoke for each of the nine survey zones which make up the catchment area), provided by Experian. In summary, the population is expected to increase by 31,912 persons over the period between 2014 and 2031. Please see Appendix 2 'Data tables' for more information.
	Forecast the expenditure growth across the catchment area over the study period.	The 2014 Addendum uses 2012-based per capita spending on comparison and convenience goods, provided by Experian for each of the catchment area zones. In order to calculate how much per capita spending is likely to increase over the course of the study period, expenditure growth rates, sourced from Experian's Retail Planner Briefing Note 12 (October 2014), were applied to the base year figures. This identifies a comparison goods expenditure growth rate of 3.1% per annum between 2016 and 2021, which increases slightly to 3.3% per annum from 2021 to 2031. For convenience goods expenditure, a growth rate of 0.5% was applied for 2015-2016, 0.4% for 2016-2017 and 0.6% per annum applied for the period 2017-31. Leisure expenditure growth rates were also taken from the Experian Retail Planner Briefing Note 12, October 2014. The resulting figures can be seen in Appendix 2 'Data tables'.
	Forecast the expenditure likely to be spent on Special Forms of Trading (SFT) such as the Internet, and deduct from total expenditure growth.	SFT needs to be identified and then removed from the 'pot' as it acts as a claim on the amount of expenditure which is available to support physical retail outlets. It is then possible to calculate the residual expenditure that is available to entirely support physical retail developments. The 2014 Addendum used adjusted data from the Experian Retail Planner Briefing Note 12 which makes allowance for 'store-picked' online transactions (whereby the customer orders a product online, but it is processed by the nearest local branch of the retailer). The growth rates applied vary over the study period, and can be found in Table 4.2 of the 2014 Addendum. The resulting figures appear in Appendix 2 'Data tables'.
2 - Assess existing retail supply and market shares (assess the provision of existing retail floorspace, and the shopping patterns of residents within the catchment area through the results of an empirical household survey, in order to establish the turnover attracted to each centre/store, and the proportion of expenditure which is 'retained' within the catchment area)	Undertake a household survey.	This was done in 2011. Please see Appendix 6 of the 2011 Retail and Leisure Study http://www.mansfield.gov.uk/CHttpHandler.ashx?id=4888&p=0 . Equilibrium in shopping patterns between the period of the household survey (in support of the 2011 Study) and the 2014 Addendum has been assumed.
	Calculate the study area spending by applying the market share data from the household telephone survey to the overall 'pot' of expenditure.	The analysis of the survey results is summarised in Table 3.5 'Shopping habits'. For more detailed information please see the relevant section in the 2011 Retail Study.
3 - Make allowance for other 'claims' on growth in retained expenditure (in addition to SFT in Step 1)	Make an allowance for committed developments (either schemes under construction or extant permissions that would result in additional retail floorspace)	In order to provide an accurate indication of the amount of surplus expenditure it was necessary to deduct the turnovers of retail commitments at the time of the 2011 household survey, as no new survey was undertaken for the 2014 Addendum. The turnover of the comparison goods commitments that were included in the 2014 Addendum would equate to £16.71m in 2017. They were:

Step	Task	How?
		<ul style="list-style-type: none"> ● Former Queens Head PH, Mansfield Town Centre (site has now been redeveloped) ● Sainsbury's, Nottingham Road, Mansfield (store is now trading. Turnover is net additional from that achieved by the now-closed existing store.) ● Aldi, Nottingham Road, Mansfield (store is now trading). ● Extension to Tesco Extra, Oak Tree District Centre (floorspace is now trading). ● Stockwell Gate South (outline permission) <p>These commitments have been 'carried over' from the 2011 Study. There were no new comparison floorspace commitments.</p> <p>The turnover of the convenience goods commitments that were included in the 2014 Addendum would equate to £43.92m in 2017. They were:</p> <ul style="list-style-type: none"> ● Sainsbury's, Nottingham Road, Mansfield ● Aldi, Nottingham Road, Mansfield ● Extension to Tesco Extra, Oak Tree District Centre ● Redevelopment of The Flamingo PH, Oak Tree Lane (store is now trading) ● Stockwell Gate South <p>Again, these commitments have been 'carried over' from the 2011 Study. There was one new convenience floorspace commitment at Burns Lane, Market Warsop.</p> <p>Leisure floorspace commitments would have a turnover of £9.05m in 2017. They were:</p> <ul style="list-style-type: none"> ● 3 no. A3 units, Mansfield Leisure Park, Mansfield ● Nottingham Road Methodist Church, Mansfield ● Titchfield Park, Nottingham
	Make allowance for sales density growth (the growth in turnover for existing retailers within existing floorspace)	This is based on the assumption that existing stores within the catchment area will trade at increasingly efficient levels of turnover per sqm over the course of the study period. A growth figure of 1.7% is used for comparison goods, and 0.6% for convenience (2016 onwards). The figure is zero prior to 2016 due to low forecasts of expenditure growth. A rate of 0.5% is used for leisure.
4 - Consider whether over-trading of existing floorspace represents an additional source of quantitative need.	Make allowance for over-trading / under-trading.	<p>Over-trading refers to the performance of centres and stores within a catchment when related to benchmark turnovers (for example, a centre of comparable size, or the turnover of a particular store based on applying company average sales densities to the floorspace of that store).</p> <p>It was considered that in terms of comparison goods the centres/stores in the study area are performing well. In terms of convenience goods there is over-trading equal to £39.24m allowed for within the calculations. This is explained in paragraphs 5.5.2 and 5.5.3 of the 2014 Addendum, and 6.15 - 6.20 of the 2011 Study.</p>
5 - Assess quantitative need	Calculate the initial residual expenditure pot that is potentially available for new retail floorspace and apply an estimated sales density (turnover per sqm) to convert this expenditure to a	<p>The amount of money that is likely to be available to support new development is shown in Appendix 2 'Data tables'</p> <p>For comparison goods a turnover of £5,000 per sqm in 2014 was used, rising (in line with the sales efficiency growth rate used) to £6,438 in 2031.</p>



Step	Task	How?
	quantitative need for additional floorspace.	<p>For convenience floorspace a turnover of £12,500 per sqm in 2014 was used, rising (again in line with the sales efficiency growth rate used) to £13,074 in 2031.</p> <p>For leisure floorspace a turnover of £6,500 per sqm in 2014 was used, rising to £7,005 in 2031.</p> <p>The amount of additional floorspace required under each scenario that was tested is shown in 5 'Setting the retail and leisure targets for the Local Plan'.</p>
6 - Develop alternative scenarios for calculating growth in residual expenditure, based on increases or decreases in the projected expenditure retention level.	Assess alternative policy scenarios, and / or the sensitivity testing of key assumptions.	<p>Reflecting the approach set out in the 2011 Study, two scenarios for retail floorspace were established.</p> <ul style="list-style-type: none"> • A constant market share (or static retention) capacity forecast (which assumes current patterns of shopping will remain unchanged over the study period), and • an increasing market share (or increasing retention) forecast (which assumes that if a suitable comparison goods-led scheme comes forward in Mansfield town centre, there will be an increase in the amount of expenditure retained in the catchment area and thus a greater amount of surplus expenditure available to support new comparison goods retail floorspace). <p>Alternative scenarios were also modelled to identify the capacity forecasts which arise if the Stockwell Gate South permission either lapses, or is developed entirely as comparison goods floorspace. The first of these also removed the commitment for the supermarket at Burns Lane, Market Warsop, as this permission was set to expire in December 2014. (To date this has not been renewed).</p> <p>These scenarios are detailed further in 'Scenario testing'.</p> <p>There was just one (baseline) figure given for leisure floorspace.</p>
SOURCE: Mansfield Retail and Leisure Study 2014 Addendum, Peter Brett Associates & Mansfield Retail and Leisure Study 2011, Roger Tym and Partners.		

Scenario testing

4.7 The 2011 Study identified different scenarios for both the comparison and convenience retail floorspace requirements. These were updated and carried forward in the 2014 Addendum.

Comparison:

The **static retention** requirement assumes that current patterns of comparison goods shopping (where 46% of expenditure is spent (or retained) in Mansfield district) remain unchanged throughout the study period. This is the baseline position.

The **increasing retention** scenario assumes a modest uplift in the retention rate of centres and stores within the district from the current retention rate of 46% to 49% by the end of the study period. This increase in the amount of expenditure retention was based on the assumption that new comparison goods retail development would come forward on opportunity sites in Mansfield town centre, which would in turn increase the attractiveness of the shopping destination, and reduce the number of residents who travel outside the area to undertake their comparison goods shopping.

Comparison - alternative scenarios:

4.8 There are two alternative scenarios which were tested in both the 2011 Study and the 2014 Addendum:

Alternative scenario 1 assumes that the Stockwell Gate South permission is not implemented. Again, the increasing retention scenario assumes that a major new comparison goods-led development will come forward in Mansfield town centre early in the plan period.

Alternative scenario 2 assumes that all of the permitted floorspace at Stockwell Gate South comes forward for comparison goods floorspace. Under this scenario, the commitment acts as a greater 'claim' on expenditure, and therefore the capacity figures reduce.

Convenience:

The **static retention** scenario assumes that current patterns of shopping will remain unchanged, with foodstores in Mansfield district continuing to account for 51% of total available spending for the remainder of the study period. This is the baseline position.



The **increasing retention** scenario allows for a limited uplift in this figure to 54% on account of the fact that, at the time of the study, there were a number of extant commitments for new convenience goods floorspace which, if all developed, have potential to improve the district-wide retention rate.

Convenience - alternative scenarios:

4.9 An alternative scenario was also modelled for convenience floorspace.

The **alternative scenario** identifies the capacity forecast which arises if the permissions for convenience floorspace at Stockwell Gate South and Burns Lane, Market Warsop lapse.

4.10 This scenario shows that if no foodstore is forthcoming on the Stockwell Gate South site, and the foodstore permission in Market Warsop lapses, the council will need to plan for additional provision earlier in its plan period.

4.11 Since the 2014 Addendum was produced the permission in Market Warsop has lapsed. Therefore the floorspace that was accounted for (891 sqm net) will need to be added on to both the 'standard' static and increasing retention requirements.

Leisure:

4.12 Just one scenario was modelled for leisure floorspace. This is the baseline position and assumes that the current spending pattern (40% retention rate) will continue over the study period.

4.13 As stated in the evidence base, food and drink spending is much more mobile than shopping due to the trend for people to travel long distances to socialise and as there are no constraints connected with transporting goods to the home.

4.14 The figures need to be considered in the context of the fact that people tend to spend more on food and drink when they are visiting destinations – on a day trip, for example. Therefore it is unlikely that a catchment area would retain close to 100 per cent of its expenditure.

Conclusion

4.15 This section has explained the methodology used to determine the retail and leisure floorspace targets and detailed the different scenarios that were modelled. It has also briefly explained the findings of a study that was carried out by Colliers International on the potential options for Stockwell Gate North, one of the council's key development opportunity sites.

4.16 **IMPORTANT:** This method is not capable of giving us a 100% accurate picture of what may happen as we can't predict the future. In practice, the amount of floorspace will be dependent on a huge range of factors, not least the performance of the national and local economy, and our ability to provide new sites and infrastructure and attract investment to the area. The static

retention approach will therefore give us a benchmark or 'do nothing' scenario which allows us to understand what the level of demand for floorspace may be if the shopping and spending trends remain consistent with the 2011 Household Survey. This should therefore be seen as a minimum figure and the sort of level which if we fail to plan for may mean forcing shoppers, and investment to go elsewhere.



5 Setting the retail and leisure targets for the Local Plan

5.1 This section provides the floorspace figures that are derived from each of the scenarios explained in 'Scenario testing'.

Comparison retail

5.2 The 2014 Addendum gives a number of different floorspace figures for comparison retail floorspace, as explained in the 'Scenario testing' section above. These are set out below.

Table 5.1 Comparison goods floorspace requirements

Scenario	2014	2017	2021	2026	2031
Static retention (at 46%)	-1,800	1,700	5,900	14,600	25,200
Increasing retention (at 46% - 49%)	-1,800	4,800	10,000	21,000	32,700

Source: Tables CM7a, and CM7b of Appendix B to the Retail and Leisure Study Addendum. Negative figures denote over-supply. Figures in italics are indicative. Figures are cumulative.

5.3 The static retention figures are the baseline floorspace requirements and are based on the assumption that the level of expenditure retention within the Mansfield catchment area will remain static throughout the study period (i.e. shopping patterns will remain the same).

5.4 The increasing retention figures are based on the delivery of a new comparison goods-led scheme in a centrally-located position in Mansfield town centre, and the assumption that this will attract sufficient quality tenants to reduce expenditure leakage from outside the catchment area. Peter Brett Associates recommend that whilst there is a suitable site within Mansfield town centre to accommodate such a development (Stockwell Gate North), if the aspiration of the council is for this site to be developed for alternative uses, then the static retention figures should be taken forward in the Local Plan.

5.5 Due to the findings of the Colliers report (briefly explained in 'Is this figure still our best estimate?') it is considered unlikely that a retail-led development will come forward on the Stockwell Gate North site in the short to medium term. A development of a leisure-led mixed use scheme with some complementary retail is more likely and as such it is recommended that the Local Plan includes the static retention figures rather than the higher, increasing retention figures.

Alternative scenarios:

Table 5.2 Alternative comparison goods floorspace requirements

Alternative scenario		2014	2017	2021	2026	2031
If the Stockwell Gate South commitment lapses	Static retention (at 46%)	-1,800	3,000	7,300	15,900	26,600
	Increasing retention (at 46% - 49%)	-1,800	6,100	11,400	22,400	34,000

Alternative scenario		2014	2017	2021	2026	2031
If all Stockwell Gate South floorspace is comparison	Static retention (at 46%)	-1,800	100	4,300	13,000	23,600
	Increasing retention (at 46% - 49%)	-1,800	3,200	8,500	19,500	31,000
Source: Tables CM8a, CM8b, CM9a and CM9b of Appendix B to the Retail and Leisure Study Addendum. Negative figures denote over□supply. Figures in italics are indicative. Figures are cumulative.						

5.6 These figures were provided in order to build in some flexibility to the evidence base as the Stockwell Gate South site was close to its expiry date. However an application (2015/0273/ST) was submitted in mid 2015 to renew the permission.

Qualitative considerations:

5.7 It is stated in the 2014 Addendum that the most successful town centres will be the ones that adapt to the changes in shopping habits, and which move away from solely being shopping destinations to those which offer a broad range of retail, leisure, cultural and civic services. As such it will be important to ensure mixed uses are developed on new town centre sites.

5.8 There will also be an important role for niche retail destinations, which are able to compete with advances in online / mobile technology because they offer an experience based on excellent customer service and a unique retail offer. PBA therefore expect that place marketing and 'selling' the offer of a town centre will become of increasing importance.

Convenience retail

5.9 The 2014 Addendum gives a number of different floorspace figures for convenience retail floorspace, as explained in the 'Scenario testing' section. These are set out below.

Table 5.3 Convenience goods floorspace requirements

Scenario	2014	2017	2021	2026	2031
Static retention (at 51%)	1,500	-100	500	1,400	2,300
Increasing retention (at 51% - 54%)	1,500	1,300	2,000	2,900	3,900
Source: Tables CV7a and CV7b of Appendix B to the Retail and Leisure Study Addendum. Negative figures denote over□supply. Figures in italics are indicative. Figures are cumulative. *Note: requirements decrease from 2014 to 2017 as a number of commitments for new retail floorspace are not expected to commence trading until 2017.					

5.10 The static retention figures are the baseline floorspace requirements and are based on the assumption that the level of expenditure retention within the Mansfield catchment area will remain static throughout the study period (i.e. shopping patterns will remain the same).

5.11 The increasing retention scenario allows for a limited uplift in this figure to 54%.



Alternative scenario:

Table 5.4 Alternative convenience goods floorspace requirements

Alternative scenario		2014	2017	2021	2026	2031
If the Stockwell Gate South and Burns Lane commitments lapse	Static retention (at 51%)	1,500	1,800	2,400	3,200	4,200
	Increasing retention (at 51% - 54%)	1,500	3,200	3,800	4,800	5,800
Source: Tables CV8a and CV8b Appendix B to the Retail and Leisure Study Addendum. Figures in italics are indicative. Figures are cumulative.						

5.12 These figures were provided in order to build in some flexibility to the evidence base as the Stockwell Gate South and Burns Lane commitments were close to expiry.

5.13 As mentioned previously, the permission for 891 sqm convenience floorspace at Burns Lane, Market Warsop has now lapsed. Therefore the floorspace will need to be added on to both of the standard static and increasing retention requirements shown in Table 5.3 above. A new application has been received for Stockwell Gate South.

Qualitative considerations:

5.14 It is recommended in the 2014 Addendum that any additional provision should be concentrated in Mansfield town centre in the first instance, as there is currently no supermarket provision in the town centre following the closure of the Tesco at Stockwell Gate (with the exception of limited provision in the Marks & Spencer store). A supermarket in the town centre would further enhance the attractiveness of the town centre as a retail destination (i.e. It would give residents another reason to visit, with likely linked-trips benefits for other retailers), and the strong accessibility of the town centre by public transport means that provision would be readily accessible by residents in deprived areas to the east and west of the town centre.

5.15 Although this report deals with the position as at 01/04/2015, the council have recently granted planning permission for an out of centre Aldi convenience store (2014/0621/NT) which met the sequential test, and there are a number of other similar proposals under consideration. As such it is considered that the higher, increasing retention scenario is the most appropriate.

5.16 Furthermore, the 2011 Study included this scenario on the basis that planned improvements to the Tesco Extra and Sainsbury’s stores and a new Aldi store (which have now been completed), would be likely to create a modest improvement in the retention rate. Given these (and other) stores will have considerably improved their respective retail offers, PBA consider that it is appropriate to assume that they may have improved the retention rate.

5.17 Any further out of centre applications will continue to be determined on their ability to meet the sequential and impact tests, and on their merits.

Food and drink leisure

5.18 The 2014 Addendum provides a baseline figure for the amount of leisure floorspace required over the plan period.

Table 5.5 Food and drink leisure floorspace requirements

Scenario	2014	2017	2021	2026	2031
Static retention (at 40%)	-1,400	-400	400	1,700	3,100
Tables L1 to L5 of Appendix C of the Retail and Leisure Study Addendum. Negative figures denote over-supply. Figures in italics are indicative. Figures are cumulative.					

Qualitative considerations:

5.19 The 2014 Addendum states that although there is no requirement for additional food and drink leisure floorspace in the district in the short or medium terms, there is a qualitative need to improve the leisure offer of Mansfield town centre. Whilst there is a strong provision of pubs and bars, there is a deficiency of mid-market restaurants, which limits the attractiveness of the town centre outside of retail trading hours. Applications which seek to provide improved provision in this respect, and assist in diversifying the range of food & drink options available in the town centre, should be considered favourably.

5.20 The 2011 Study identified that there is a qualitative requirement for additional cinema provision to serve the growing population of the district over the course of the study period, and that any additional provision should also be directed to Mansfield town centre. A combined cinema/restaurant development would represent a significant enhancement of the vitality and viability of the town centre, and improve its attractiveness outside of retail trading hours. This was not updated as part of the 2014 Addendum work, although this recommendation continues to be supported.

Land availability and distribution of floorspace

5.21 The 2011 Study set out scenarios in relation to the distribution of comparison goods floorspace requirements. The recommendations were that Mansfield town centre would accommodate 80% of the identified comparison goods floorspace requirements, with the remaining amount distributed between the district centres.

5.22 Since then we have undertaken a review of potential capacity of the district centres, and identified that there would be little scope for 20% of the district's comparison goods needs to be easily accommodated within or on the edge of existing district centres. Therefore, reflecting the emphasis placed by the NPPF that local planning authorities must be able to demonstrate that they can meet development requirements, the distribution was adjusted in the 2014 Addendum. This recommends that the vast majority of the identified requirement (95%) is accommodated in Mansfield town centre, with residual allocations of 2.5% to each of Mansfield Woodhouse and Market Warsop district centres.



5.23 Therefore, using the static retention and increasing retention scenarios and the distribution levels set out in the 2014 Addendum, the council should seek to provide the following floorspace in Mansfield town centre over the plan period to 2031: (figures are rounded)

- Between 24,000 sqm net and 31,000 sqm net comparison goods floorspace;
- Between 2,200 sqm net and 3,700 sqm net convenience goods floorspace; and
- Around 2,900 sqm net A3, A4 and A5 commercial leisure floorspace.

5.24 In addition, the council should seek to provide the following floorspace in each of Mansfield Woodhouse and Market Warsop district centres over the Plan period to 2031:

- Between 600 sqm net and 800 sqm net comparison goods floorspace;
- Between 60 sqm net and 100 sqm net convenience goods floorspace;
- Around 80 sqm net A3, A4 and A5 commercial leisure floorspace.

Conclusions

5.25 This section of the paper has looked at what the council's requirements are for comparison retail, convenience retail and food and drink leisure floorspace over the plan period. It has also considered where the required floorspace should be directed, in order to inform the emerging local plan.

5.26 As mentioned in the last section, it is intended that the local plan will allocate enough land to meet the static retention (lower) figures for comparison and leisure floorspace, and the increasing retention (higher) figures for convenience floorspace in order that the district's retail and leisure development requirements can be met.

5.27 This leads to the following minimum targets:

Table 5.6 Retail and leisure floorspace targets (2014-2031) (sqm net)

Type of floorspace	Mansfield town centre	Mansfield Woodhouse district centre	Market Warsop district centre
Comparison retail	24,000	600	600
Convenience retail	3,700	100	100
Food and drink leisure	2,900	80	80

5.28 However, it is recommended that any development proposals which would increase the total amount of floorspace over minimum figure but are within or well-located to an existing centre should be considered on their individual merits, providing they are of a scale appropriate to the role and function of the centre.

6 Next Steps

6.1 The next steps in translating the figures above into the Local Plan is to take off any floorspace that has been implemented or committed since the the 2014 Addendum was published. We also need to add on the 891 sqm that was accounted for at Burns Lane, Market Warsop which has now lapsed.

6.2 The table below gives the new floorspace targets for 2014-2031 and the balance that remains to be allocated through the Local Plan.

Table 6.1 New floorspace targets and balance remaining (sqm net)

Type	Comparison retail (A1)	Convenience retail (A1)	Leisure (A3 / A4 / A5)
Target (2014 - 2031)	25,200	3,900	3,100
Floorspace developed (-)	-	-	62 (2014/0294/ST) 23 (2014/0376/ST)
Floorspace committed (-)	-	500 (2010/0089/ST)* 400 (2014/0587/ST)	500 (2010/0089/ST)* 182 (2014/0452/ST)**
Floorspace lapsed (+)	-	891 (2011/0487/NT)	-
Balance remaining to allocate	25,200	3,891 (3,900)	2333 (2,300)
<p>* Please note that this was granted on 17/04/13, however due to an undetermined judicial review was not included as a commitment in the 2014 Addendum. The permission allows for a neighbourhood parade of up to 1,000 sqm.</p> <p>**Please note that this permission allows either A1, A2, A3 and A5 floorspace. It has been added as a leisure commitment as 2 of the 4 uses are leisure.</p>			

6.3 The following table breaks the requirement down per centre, having re-applied the distribution ratio highlighted in 'Land availability and distribution of floorspace'. Figures are rounded. These are the figures that will inform the allocations within the Local Plan.

Table 6.2 Adjusted retail and leisure floorspace targets (2014-2031) (sqm net)

Type of floorspace	Mansfield town centre	Mansfield Woodhouse district centre	Market Warsop district centre
Comparison retail	24,000	600	600
Convenience retail	3,700	100	100
Food and drink leisure	2,200	60	60

One: Mansfield catchment area

The map displays the Mansfield District, which is divided into nine numbered study areas, each color-coded: 1 (Mansfield East, pink), 2 (Mansfield Central & West, green), 3 (Warsop & Shirebrook, light green), 4 (South of Worksop, purple), 5 (New Ollerton, red), 6 (Rural East Nottinghamshire, blue), 7 (Southwell, teal), 8 (South Ashfield, orange), and 9 (Kirkby & Sutton, dark blue). Black dots indicate centres within the Mansfield District, including Staveley, Bolsover, Shirebrook, Market Warsop, Mansfield Woodhouse, Mansfield, Oaktree District Centre, Sutton-in-Ashfield, McArthur Glen, and Kirkby-in-Ashfield. A thick black line outlines the Mansfield Local Authority boundary. The map also shows surrounding districts like Southwell, Newark and Sherwood, and parts of Nottingham, Derby, and Lincolnshire. A legend in the bottom right corner explains the symbols and colors used. A small table in the bottom left corner lists postal codes for various sectors within the district.

Legend:

- Centres within Mansfield District
- ★ Centres outside Mansfield District
- ▭ Mansfield Local Authority
- ▭ Local Authority Boundaries

Study Areas

1. Mansfield East
2. Mansfield Central & West
3. Warsop & Shirebrook
4. South of Worksop
5. New Ollerton
6. Rural East Nottinghamshire
7. Southwell
8. South Ashfield
9. Kirkby & Sutton

Postal Sectors

Sector	Postal Sectors
1	MN12 2, MN12 3, MN12 4, MN12 5, MN12 6
2	MN10 1, MN10 2, MN10 3, MN10 4, MN10 5
3	MN10 6, MN10 7, MN10 8, MN10 9
4	MN11 1, MN11 2
5	MN13 1, MN13 2
6	MN14 1, MN14 2, MN14 3, MN14 4
7	MN15 1, MN15 2, MN15 3, MN15 4, MN15 5
8	MN16 1, MN16 2, MN16 3, MN16 4, MN16 5
9	MN17 1, MN17 2, MN17 3, MN17 4, MN17 5

Date	11/20/14
Scale	1:216,000 @ A4
Drawn By	HE
Checked By	JG
Revision Number	01

This plan shows the town centre and district centres within Mansfield district, and other surrounding town centres. A better quality image is available within the Mansfield Retail and Leisure Study – 2014 Addendum at

<http://www.mansfield.gov.uk/article/5808/Evidence-to-support-the-Local-Plan>



Appendix 2 Data tables

Table 2.1 Population forecasts for Mansfield catchment area to 2031

	2014	2017	2021	2026	2031	Change
Population of Mansfield catchment area (2012-based)	312,570	318,154	326,172	335,781	344,482	31,912
SOURCE: Mansfield Retail and Leisure Study 2014 Addendum, Peter Brett Associates						

Table 2.2 Expenditure forecasts*

	2014	2017	2021	2026	2031	Change
a. Comparison expenditure available	£843.07m	£975.35m	£1,129.70m	£1,367.55m	£1,649.78m	£806.71m
b. Spending on Special Forms of Trading, e.g. Internet shopping	£98.64m	£136.55m	£179.62m	£217.44m	£255.72m	£157.08m
c. Residual comparison goods expenditure (a - b)	£744.43m	£838.80m	£950.08m	£1,150.11m	£1,394.06m	£649.64m
a. Convenience expenditure available	£591.71m	£604.66m	£634.87m	£673.30m	£711.59m	£119.88m
b. Spending on SFT	£15.38m	£19.95m	£27.93m	£33.67m	£39.85m	£24.46m
c. Residual convenience goods expenditure (a - b)	£576.33m	£584.71m	£606.93m	£639.64m	£671.75m	£95.42m
Leisure expenditure available (food & drink)	£248.79m	£269.24m	£288.35m	£316.56m	£346.33m	£97.54m
SOURCE: Mansfield Retail and Leisure Study 2014 Addendum, Peter Brett Associates						
*figures may not sum due to rounding						

Table 2.3 Expenditure available for NEW retail floorspace

	2014	2017	2021	2026	2031
Residual expenditure pot that is potentially available for new comparison retail floorspace (baseline)	£-9.16m	£8.69m	£33.33m	£89.32m	£162.22m
Residual expenditure pot that is potentially available for new comparison retail floorspace (increased growth)	£-9.16m	£25.07m	£56.63m	£129.03m	£210.35m
Residual expenditure pot that is potentially available for new convenience retail floorspace (baseline)	£18.99m	£-1.29m	£5.95m	£17.44m	£30.38m
Residual expenditure pot that is potentially available for new convenience retail floorspace (increased growth)	£18.99m	£16.60m	£24.53m	£37.02m	£50.94m
Residual expenditure pot that is potentially available for new leisure floorspace (baseline)	£-8.91m	£-2.40m	£3.00m	£11.40m	£21.43m
SOURCE: Mansfield Retail and Leisure Study 2014 Addendum, Peter Brett Associates					