

Mansfield District Council

Mansfield District Retail & Leisure Study 2011

Executive Summary



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Introduction

- 1.1 In March 2011 Roger Tym & Partners (RTP) were appointed by Mansfield District Council to undertake a retail and leisure study for the District, to form a key part of the evidence base for the Council's emerging Core Strategy, part of the Mansfield District Local Development Framework (LDF). The study will build on the previous retail study for the District, which was completed in 2005. Since then there have been a number of changes in shopping provision within and surrounding the District, as well as the ongoing economic downturn, which has significantly impacted on consumer spending. Accordingly it is an appropriate time to update and refresh the retail evidence base for the District. This study is critically important in providing the Council with advice and guidance on the performance of the Mansfield town centre, as well as the supporting network of district centres, and the qualitative and quantitative need for additional retail and leisure floorspace over the Core Strategy period to 2026.
- 1.2 The study focuses on all 'town centre' uses as defined in government's Planning Policy Statement 4 (PPS4), which includes retail, leisure and entertainment facilities, offices, and arts, culture and tourism development. We have prepared this study in association with Innes England, who have provided input on the commercial office market in the District, as well as operator demand for retail and leisure premises in the District. The study has also been prepared with input from officers at Mansfield District Council.
- 1.3 The main purpose of the study is to update retail and leisure capacity forecasts for the District, paying attention only to the town centre of Mansfield, and the three district centres of Mansfield Woodhouse, Market Warsop and Oak Tree. The study is supported by a household telephone survey into shopping patterns of residents in Mansfield District and the surrounding area, which was undertaken in April 2011.
- 1.4 This document provides an **executive summary** of the findings of the study.

National planning context

- 1.5 National planning guidance which informs the outputs of the study is set out in Planning Policy Statement 12 (PPS12) – 'Local Spatial Planning', and PPS4 – 'Planning for Sustainable Economic Growth'. PPS12 states that in order for a local planning authority's Core Strategy to be 'sound', it must be justified, effective and consistent with national policy. 'Justified' means that the document must be founded on robust and credible evidence base; 'effective' means that the document must be deliverable, flexible and able to be monitored. This study will thus contribute to the evidence base of the Council's Core Strategy and other LDF documents.
- 1.6 Planning Policy Statement 4: Planning for Sustainable Economic Growth (PPS4) was published in December 2009 and replaces previous guidance contained in Planning Policy Guidance Note 4: Industrial, commercial development and small firms (PPG4, 1992) and in Planning Policy Statement 6: Planning for Town Centres (PPS6, 2005).
- 1.7 The Government's overarching objective as set out in paragraph 9 of PPS4 is to achieve 'sustainable economic growth' by:

- building prosperous communities by improving the economic performance of cities, towns, regions, sub regions and local areas;
 - reducing the gap in economic growth rates between regions, promoting regeneration and tackling deprivation;
 - delivering more sustainable patterns of development;
 - promoting the vitality and viability of town and other centres as important places for communities; and
 - raising the quality of life and the environment in rural areas by promoting thriving, inclusive and locally distinctive rural communities.
- 1.8 Policy EC1.3 states that at a local level the evidence should be informed by regional assessments and should assess the detailed need for all main town centre uses (EC1.3b), identify any deficiencies within the provision of local convenience shopping (EC1.3c) and assess the capacity of existing centres to accommodate new town centre development (EC1.3e).
- 1.9 Policy EC1.4 details what should be considered when assessing the need for retail and leisure development at the local level. The main change from the superseded PPS6 is that local authorities should take into account both quantitative and qualitative need for additional retail and leisure floorspace (EC1.4a). There is no weighting in favour of either quantitative or qualitative need (as there was in PPS6) but, in deprived areas that lack a range of services, additional weight can be awarded to meeting such deficiencies in selecting sites (EC1.4b).
- 1.10 Policies EC3, EC4 and EC5 of PPS4 are plan making policies regarding town and other centres. Regional Planning Bodies (RPBs) and Local Planning Authorities (LPAs) are required to:
- Set out a strategy for the management and growth of centres over the plan period (Policy EC3).
 - Promote competitive town centre environments and provide consumer choice (Policy EC4).
 - Identify a range of sites to accommodate identified need (Policy EC5).

Local planning context

- 1.11 The Mansfield Local Plan was adopted in 1998, and will form the statutory development plan for the District until the Council's Local Development Framework, which is currently under preparation, is finalised. The Plan has the broad overall aim of seeking to maintain and enhance Mansfield's role as a sub-regional centre for North Nottinghamshire and adjacent areas.
- 1.12 The Local Plan confirms that the retail hierarchy of the District is headed by Mansfield town centre, supported by three district centres - two based on the historic town centres of Mansfield Woodhouse and Market Warsop, plus the purpose-built centre at Oak Tree. There are also a number of local centres and neighbourhood shopping parades. The Local

Plan sets out a number of policies covering retail development in the District, including allocating sites for development within and on the edge of the Mansfield town centre.

Economic context

- 1.13 The study has been prepared during a period of economic downturn in the UK, in marked contrast to the previous study which was prepared during an economically strong period for the country. The current sustained downturn in the economy and recent period of recession has had clear changes on the retail landscape in the UK, with a number of high profile retailers entering administration, and discount-end retailers increasing in representation. The downturn also affects consumer spending, with a greater reluctance to spend amongst consumers on non-essential goods. As a result, the forecast levels of spending growth are, at least for the short term, subdued. The economic downturn has also resulted in investors being more cautious. However, there are signs that some momentum is returning to the market – in particular there is continued development activity by foodstore operators, and there is evidence of this taking place in Mansfield District.
- 1.14 A further trend which affects centres such as Mansfield is the continuing polarisation by retailers towards larger schemes in larger centres which is driven by a number of factors. Retailers recognise that greater efficiency can be achieved by having a strategic network of large stores offering a full range, rather than having a large network of smaller stores, and are therefore increasingly seeking to serve larger population catchments from larger stores. It is also driven by consumers, who are becoming more discerning and are increasingly prepared to travel further.
- 1.15 An additional consideration in respect of the economic context of the study is the increasing role of online shopping. UK internet retail sales have increased at a rapid pace in recent years. The increase in e-retail is due to lower prices than those in stores, and shoppers are able to search out bargains including second-hand goods. In February 2010, shoppers spent a total of £4.9bn online, equivalent to £79 per person, 20 per cent higher than the previous year. Therefore, whilst sales in traditional High Streets have suffered as a result of the economic downturn, online sales have consistently increased.
- 1.16 Current forecasts from Experian suggest that online shopping on convenience goods is likely to increase throughout the study period, but in the case of comparison goods, peak between the years of 2015 and 2017, and then marginally decrease throughout the rest of the study period (which runs to 2026). The outputs of this study specifically take into account this anticipated growth of online shopping.

Local area context

- 1.17 As identified previously, the previous retail study for Mansfield District was published in 2005. Since then there have been a number of changes in policy and nationwide retail trends, as reviewed above. However there have also been a number of changes to retail provision within and surrounding Mansfield District, which are likely to have affected shopping patterns. In addition, there are a number of planned developments in the town and wider sub-region which will further affect current shopping patterns over the course of the Council's LDF period.

- 1.18 The main changes in comparison (non-food) goods retail provision which have taken place in the District are the completion of a large Tesco Extra foodstore at Chesterfield Road South, Mansfield, which includes a substantial amount of comparison goods floorspace. Over the course of the study period to 2026, a number of more substantial changes are expected to come forward in the District, including the redevelopment of the Stockwell Gate/bus station and White Hart areas of Mansfield town centre. Outside the District, major enhancements to the shopping offer in Nottingham are expected, which will provide competition for expenditure for residents in Mansfield District.
- 1.19 In terms of convenience (food) goods, the aforementioned construction of the Tesco Extra in Mansfield represents the main change in provision. In addition, Morrisons have increased their presence in the District by acquiring the former Co-Operative store in Mansfield Woodhouse. Major convenience goods developments are also planned for the near future, including an enlarged, replacement Sainsbury's store at Nottingham Road in Mansfield, which will also include the development of an Aldi foodstore. An extension to Tesco Extra at Oak Tree district centre is underway, and Tesco have also applied for planning permission for a new foodstore in Market Warsop district centre.

Performance of town & district centres

- 1.20 A key requirement of the study was to provide an updated assessment of the performance of Mansfield town centre, and the district centres of Mansfield Woodhouse, Market Warsop and Oak Tree. Our analysis of the retail performance of the study centres is based upon examination of a range of 'performance indicators', as set out at Annex D of PPS4.

Mansfield Town Centre

- 1.21 We consider Mansfield to exhibit generally positive signs of vitality and viability, and is performing its role and function as a sub-regional shopping centre effectively. The retail mix of the centre is strong, and the presence of retailers such as Primark, Debenhams, Marks & Spencer and Topshop in the town centre appears to be attracting high levels of footfall to the town centre. There is no indication that the opening of a large amount of retail warehouse floorspace to the east of the town centre over recent years has had a significant adverse impact on the vitality and viability of the centre as a whole, although further development of this nature should be resisted, in order to focus demand and investment in the town centre. A number of new retailers have been attracted to the town in recent years, and other retailers have increased their presence in the town. This suggests that Mansfield remains a viable trading destination for retailers in the context of the current economic downturn, which is a positive reflection on the overall 'health' of the town centre.
- 1.22 In terms of comparison goods shopping, Mansfield is generally strong and there is good representation from the majority of comparison goods sectors in the town centre. There is a need for more middle to higher-order clothing retailers to be represented in the town, to balance the current leaning towards the lower-middle end of the market. There is a small area of niche independent, middle-upmarket retailers developing on Church Street and White Hart Street, and this should be further encouraged and developed.
- 1.23 The town centre would also benefit from the provision of a 'metro' style supermarket to replace the Tesco store at Stockwell Gate which closed in 2007 – there is currently no

supermarket serving the needs of those who live and work in the town centre. The service sector is generally strongly represented, although the centre would benefit from more cafes and restaurants. The latter is seen as particularly important, as Mansfield's 'evening economy' is currently too heavily orientated towards drinking establishments. The presence of more restaurants in the centre would encourage 'dwell time' in the centre outside of retail hours. The key development sites which are expected to come forward in the centre over the study period should therefore seek to accommodate these deficiencies in the convenience and service offer.

- 1.24 The centre has an above average vacancy rate at present and this needs to be monitored carefully in future years. It appears that the vacancy rate in the town centre has recently increased. The vacancy rate is noticeably high on the western end of West Gate, Leeming Street and White Hart Street. Positively, vacancy rates in the prime retail areas are low.
- 1.25 The environmental quality of the centre is reasonable in the most part, and the key areas of concern (Stockwell Gate / White Hart Street) are those which benefit from either planning consent for their redevelopment, or adopted planning guidance to steer their future development. The Council should, in tandem with this, seek the modernisation of the Four Seasons centre, both internally and externally, to update its current dated appearance. Environmental quality is particularly strong in the conservation areas, and the improvements to the pedestrian environment which have taken place throughout much of the centre greatly enhance its vitality and viability.
- 1.26 There are clear, long-standing opportunities for further developing and enhancing the retail offer in Mansfield town centre, and it is important that the two main opportunity sites – Stockwell Gate (South) and White Hart Street – are brought forward early in the study period to enable Mansfield to react to the planned enhancements to the retail offer in Nottingham.

Mansfield Woodhouse District Centre

- 1.27 Mansfield Woodhouse is an attractive district centre, and exhibits positive signs of vitality and viability when assessed against PPS4 indicators. The retail mix reflects that of many district and local centres, with an emphasis on food shopping and meeting the day-to-day services needs of local residents. There are some qualitative gaps in the retail offer – for example there is no greengrocer's – but generally the centre has sufficient diversity of uses to meet most local residents' day-to-day needs.
- 1.28 The presence of the Morrisons foodstore immediately adjacent to the centre is likely to be instrumental in the vitality and viability of the centre, particularly given the strong links the store has with the rest of the retail offer. This store appears well supported but does have a tired appearance, particularly internally, and there is only limited product choice available compared to many of Morrisons' more modern stores.
- 1.29 There have been a number of new retailers who have commenced trading in the centre over the last year, suggesting Mansfield Woodhouse represents a viable trading destination. Station Street has a number of vacant units and take-up of these units should be monitored closely. This part of the district centre does not significantly contribute to the

vitality and viability of the centre to a great extent at present, and there may be a case for tightening the boundaries of the district centre to reflect this.

Market Warsop District Centre

- 1.30 Market Warsop appears to be adequately performing the role and function of a district centre, and exhibits largely positive signs of vitality and viability. There is a strong retail mix in the centre, with a range of convenience, comparison and services goods, and we consider that most residents' day-to-day shopping needs are likely to be met by the current offer. There have been a number of examples of recent investment by retailers in the centre.
- 1.31 The recent proposals by Tesco represent further investor confidence in the centre, and will deliver (if permitted) a larger foodstore to serve the needs of residents in the town, given that the existing Nisa and Co-Operative foodstores are relatively small outlets. However, the vitality and viability of the centre would likely be compromised if either the Nisa or Co-Operative stores were to cease trading.

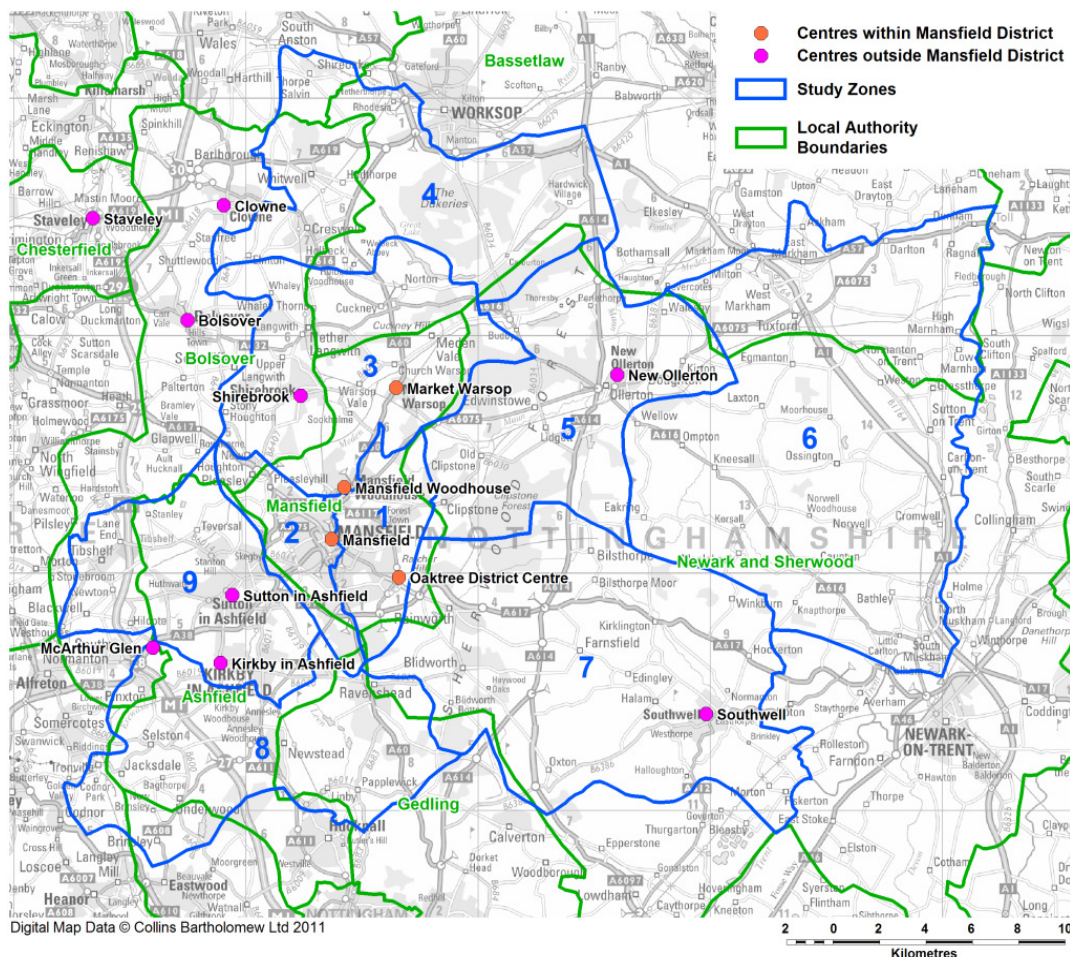
Oak Tree District Centre

- 1.32 Oak Tree District centre functions differently to the district centres of Mansfield Woodhouse and Market Warsop in that it is not a historic centre, rather one which was purpose-built in the 1990s, providing a large foodstore to meet shopping needs of the surrounding residential area. Aside from the Tesco Extra foodstore (which is currently being extended), the only other facilities available in the centre apart from Tesco and Argos are the Oak Tree Leisure Centre, and a tanning salon, a medical centre and a public house.

Current and future study area spending

- 1.33 Figure 1 below defines the 'Mansfield Study Area' (MSA) which forms the basis of our study assessment. The MSA places Mansfield at the centre, and extends over a wide area which forms a realistic catchment area from which Mansfield can be expected to draw trade. The MSA is divided up into nine survey Zones. The Mansfield urban area extends over three of the nine survey Zones.

Figure 1 — Mansfield Study Area



- 1.34 The population for the MSA is estimated to be 305,689 persons in 2009, the base year for the MapInfo data. The population of the MSA is expected to increase to 318,886 persons by 2016; 329,840 persons by 2021, and 340,136 persons by 2026. This represents a population growth of 34,447 persons between 2009 and 2026.
- 1.35 In order to calculate the amount of floorspace which is required for the District to plan for in its Local Development Framework, it is necessary to have a clear understanding of the population of the overall MSA which falls within Mansfield District. We term this the 'Mansfield District Council Area' (MDCA), and the population of this area is equivalent to the total population of MSA Zones 1 and 2, plus 57.2 per cent of the population of Zone 3. The population of the MDCA is expected to increase from 99,703 persons in 2009 to 107,870 persons by 2026, a growth in population of 8,167 persons (**Table 2**).

Table 2 — Population of MSA and MDCA, 2008-2026

	Population of MSA	Population of MDCA*
2009 (population base year, actual)	305,689	99,703
2011 (study base year, estimated)	309,094	100,400
2016 (estimated)	318,886	102,691
2021 (estimated)	329,840	105,380
2026 (estimated)	340,136	107,870
Growth in population, 2009-2026	34,447	8,167

*Zones 1, 2, and 57.2% of population of Zone 3.

Source: Table 1, Appendix 5

- 1.36 Reflecting the requirements of the study brief, we forecast expenditure growth in the catchment area over the period to 2026. We advise that longer-term forecasts, particularly post-2021, should be treated as indicative and subject to regular review throughout the Core Strategy period. The base year of the study is 2011, and expenditure growth (and subsequently quantitative need) is projected for the following interval periods:
- 2011-2016;
 - 2016-2021; and
 - 2021-2026
- 1.37 Having allowed for ‘Special Forms of Trading’ discounts (principally online shopping, but also including mail order and markets) the total ‘pot’ of comparison goods expenditure available to residents of the MSA is £671.50m in the base year of the study, 2011. The residual expenditure, having allowed for SFT, then increases to £801.64m in 2016, £994.07m in 2021 and £1,192.60m in 2026. This represents a growth in comparison goods expenditure of £521.10m across the MSA between 2011 and 2026. In the MDCA area, having allowed for SFT, expenditure on comparison goods is expected to increase from £214.93m in 2011 to £372.53m by 2026, a growth of £157.60m.
- 1.38 The total ‘pot’ of convenience goods expenditure available to residents of the MSA is £508.34m in the 2011 study base year. The residual expenditure, having again allowed for SFT, increases to £527.65m in 2016, £556.11m in 2021 and £587.77m in 2026. This represents a total growth in expenditure of £79.43m. For the MDCA, the amount of available expenditure on convenience goods, having made allowance for SFT discount, increases from £163.88m in 2011 to £168.63m in 2016, £176.31m in 2021 and £184.96m in 2026, a growth of £21.08m between 2011 and 2026.

Current patterns of retail spending in the MSA

- 1.39 Our assessment of current patterns of retail spending in the MSA is based on a telephone survey of 901 households which were undertaken by NEMS Market Research in April 2011. The MSA was split into nine survey Zones (as shown in Figure 1), in order for an accurate picture of localised shopping patterns to be established.

1.40 The survey questionnaire sought to establish:

- patterns of convenience (food) goods spending;
- for main food shopping, the reasons why residents chose to undertake their main food shop at the store specified, whether the trip was linked with visits to other shops, leisure or service outlets, and the mode of transport used to access these destinations were also asked'
- patterns of comparison (non-food) goods spending, based on the locations of the last two purchases of clothes and shoes; furniture, carpets and soft furnishings; DIY and decorating goods; electrical goods; health & beauty items; recreational goods; and other non-food items (such as books, CDs and jewellery);
- the proportion of the household's spending on food and non-food goods that is accounted for by online shopping.
- patterns of visits to leisure destinations such as restaurants, cinema, theatre and ten-pin bowling

Comparison goods shopping patterns

- 1.41 The results of the household survey indicate that of the £671.50m comparison goods expenditure which is available to the MSA, £433.48m is spent within the MSA. Dividing £433.48m by £671.50m produces a **comparison goods retention rate of 64.6 per cent** – so almost two-thirds of all expenditure available in the MSA for comparison goods spending is spent at stores within the MSA. For the Zones which fall within Mansfield District, the level of expenditure retention is considerably higher than this aggregate rate.
- 1.42 Of the £433.48m which is retained within the MSA, the expenditure is distributed between a wide number of stores and destinations. In **Table 3** below we summarise the top 5 most popular destinations for comparison goods spending within the MSA, based on the findings of the household survey.

Table 3— Main comparison shopping destinations in MSA

Retail centre	Expenditure from MSA £m	Proportion of total expenditure available to MSA %
1. Mansfield town centre	191.68	28.55%
2. Sutton-in-Ashfield town centre / retail parks	76.67	11.42%
3. Mansfield retail parks	60.15	8.96%
4. Oak Tree district centre, Mansfield	22.47	3.35%
5. East Midlands Designer Outlet, South Normanton	18.81	2.80%

Source: Table 5, Appendix 5. Figure for Mansfield retail parks is combined turnover of retail parks in survey Zones 1 and 2.

- 1.43 As would be expected Mansfield town centre, as the only higher-order shopping destination within the MSA, attracts the highest turnover of any centre. The town centre attracts £191.68m of spending from the MSA, equivalent to 29 per cent of the total expenditure 'pot'

of £671.50m. A further £60.15m is spent at retail parks and freestanding retail warehouse stores in survey Zones 1 and 2.

- 1.44 As stated above, there is a total of £671.50m available to the MSA, of which £433.48m is spent at stores and destinations within the MSA. The remaining £238.02m— 35.5 per cent of the total – ‘leaks’ to destinations outside the MSA. The most popular comparison goods shopping destinations outside the MSA are shown in **Table 4**.

Table 4 – Main destinations for comparison goods expenditure leakage from MSA

Retail centre	Expenditure ‘leaked’ from MSA £m	Proportion of total expenditure available to MSA %
1. Nottingham <i>including Bulwell / Arnold</i>	70.67	10.52%
2. Alfreton <i>including Somercotes</i>	22.15	3.30%
3. Hucknall	19.68	2.93%
4. Sheffield <i>including Meadowhall</i>	19.51	2.91%
5. Giltbrook Retail Park, Giltbrook	18.41	2.74%

- 1.45 We consider that Mansfield town centre is adequately performing its role and function as a sub-regional comparison shopping destination. Of the nine Zones which make up the MSA, the town centre attracts a market share upwards of 40 per cent from three Zones, and a market share of between 10 and 39 per cent from a further four Zones. The Zones where it does not attract a strong market share are those with better links to a competing shopping destination such as Retford, Newark or Worksop. Patronage is particularly strong from the Zones which wholly or partially fall within Mansfield District (Zones 1 to 3 inclusive).
- 1.46 There is little evidence to suggest that other destinations within the District are competing with the town centre for expenditure. The main retail parks in Mansfield fall within Zone 2, and in this Zone (as well as Zone 5) they attract a sufficient market share to act as centres of subsidiary influence. However Mansfield town centre attracts a market share of almost 50 per cent from Zone 2, and 34 per cent from Zone 5, suggesting the retail parks complement rather than compete with the town centre to a large extent
- 1.47 The district centres do not attract significant market shares for comparison goods spending, however this is to be expected given that they perform a function largely restricted to convenience goods shopping and day-to-day services. We consider that the current patterns of spending support the retail hierarchy which is in place within the District and point to a strong performance of Mansfield town centre.

Convenience goods shopping patterns

- 1.48 The results of the household survey indicate that of the total ‘pot’ of convenience goods expenditure of £508.34m, £384.54m is retained within the MSA. Therefore the MSA achieves a **convenience goods retention rate of 75.7 per cent** – so just over three-quarters of available expenditure on convenience goods is spent within the MSA.
- 1.49 The retention rate for convenience goods is 11 percentage points higher than the comparison goods retention rate of 64.7 per cent discussed above. This reflects the fact

that convenience food shopping is a more localised activity – people are generally less willing to travel as far to undertake food shopping as for non-food shopping – and also suggests that much of the MSA is adequately served by foodstores. The most popular convenience shopping destinations are shown in **Table 5**.

Table 5 – Most popular convenience shopping destinations in MSA

Foodstore	Expenditure from study area £m	Proportion of total expenditure available to study area %
1. Asda, Old Mill Lane, Forest Town, Mansfield	57.04	11.22%
2. Asda, Priestic Road, Sutton-in-Ashfield	50.82	10.00%
3. Tesco Extra, Oak Tree DC, Mansfield	48.93	9.63%
4. Tesco Extra, Chesterfield Road Seth, Mansfield	35.38	6.96%
5. Morrisons, Sutton Road, Mansfield	34.02	6.69%
6. Morrisons, Woodhouse Centre, Mansfield W'house	28.15	5.54%
7. Sainsbury's, Nottingham Road, Mansfield	25.93	5.10%

1.50 The remaining £123.79m is spent at foodstores outside the MSA. However, none of these foodstores attract significant amounts of trade from residents of Mansfield District.

1.51 It is apparent from the results of the household survey that Mansfield is a self-sustaining centre in terms of convenience goods shopping. The three Zones which cover the Mansfield urban area each have a retention rate upwards of 96 per cent, meaning that very few people are travelling outside the MSA to undertake their convenience goods shopping. Analysis of shopping patterns of residents in these Zones reveals the top three food shopping destinations in each of the three Mansfield Zones are foodstores within Mansfield itself, suggesting that there is a good range of stores available from residents to choose from and that people do not need to travel outside the District to undertake their food shopping.

1.52 Mansfield also plays an important role in meeting some of the convenience shopping needs of the wider MSA. In particular, residents in Zones 5 (New Ollerton) and 7 (Southwell) look towards Mansfield for their convenience goods shopping, as from each of these Zones, a foodstore in Mansfield attracts a market share of more than 30 per cent. Therefore, Zones 1 to 3 inclusive, plus Zones 5 and 7 represent Mansfield's main catchment area in terms of convenience shopping.

1.53 The household survey therefore indicates that current convenience shopping patterns in Mansfield District are generally sustainable and there is only very limited 'leakage' of expenditure outside the boundaries of Zones 1 to 3.

Quantitative need for additional retail floorspace

1.54 The assessment of quantitative need adopts the widely respected step by step methodology, which is consistent with CLG's practice guidance. The floorspace requirements for convenience and comparison goods take into account population and

expenditure growth in Mansfield District, and also make allowance for 'claims' on expenditure, principally extant planning commitments, and improvements in sales densities of existing retailers. Allowance is also made, where appropriate, for 'over-trading' of existing floorspace.

- 1.55 In calculating the amount of net additional retail floorspace which will be required, two scenario forecasts are undertaken for both comparison and convenience goods projections. The 'static retention' scenario assumes that current shopping patterns identified in the household survey will remain unchanged throughout the study period to 2026. The 'increasing retention' scenario is based on destinations in the District attracting an increasing market share over the period to 2026, reflecting the planned improvements to the retail offer in Mansfield town centre. The study forecasts the following comparison goods floorspace requirements for these two scenarios (**Table 6**):

Table 6 – Summary of comparison goods capacity in Mansfield District to 2026 (static and increasing retention)

	2016 (sq.m net)	2021 (sq.m net)	2026 (sq.m net)
Static Retention (Rounded)	2,865 (2,900)	12,138 (12,100)	19,837 (19,900)
Increasing Retention (Rounded)	5,045 (5,000)	15,453 (15,500)	25,322 (25,300)

Figures are cumulative. Source: Tables 6a and 6b, Appendix 5.

- 1.56 The convenience goods floorspace requirements are summarised at **Table 7**. Again, a 'static' and 'increasing' retention scenario is shown.

Table 7 – Summary of convenience goods capacity in Mansfield District to 2026 (static and increasing retention)

	2016 (sq.m net)	2021 (sq.m net)	2026 (sq.m net)
Static Retention (Table 9a, Appendix 5)	-2,002	-1,200	-259
Increasing Retention (Table 9b, Appendix 5)	-1,513	-274	926

Figures are cumulative. Source: Tables 9a and 9b, Appendix 5.

- 1.57 The exact amount of floorspace required for both comparison and convenience goods will to an extent be dictated by the nature of the development which comes forward at Stockwell Gate South. For the purposes of our assessment, we have assumed that 50 per cent of the permitted A1 retail floorspace at Stockwell Gate South will come forward for comparison goods, and 50 per cent for convenience goods, and the figures shown in Tables 6 and 7 above reflect this assumption.

- 1.58 Table 6 shows that a substantial requirement for additional comparison goods floorspace is likely to come forward in the District. In the short-term the requirement will be relatively limited, with between 2,900 and 5,000 sq.m net required until 2016. However by 2021 this requirement increases to between 12,100 and 15,500 sq.m net; and by 2026, the requirement is between 19,800 and 25,300 sq.m net. Should Stockwell Gate South be a predominantly comparison goods-led scheme, these requirements will need to be revised downwards.
- 1.59 There is over-provision of convenience goods floorspace in the District at present, when taking into account the extant planning commitments for new floorspace development. If allowance is made for a new foodstore at Stockwell Gate South, and having taken into account the extant planning commitments, Table 6 shows that there is no quantitative requirement for additional convenience goods floorspace in the District until 2026, at which point a foodstore of up to approximately 1,000 sq.m net is required. However, if there is no convenience goods provision at Stockwell Gate South, provision should be made for a small foodstore (up to 800 sq.m net) by 2021 or a medium sized foodstore (up to 2,000 sq.m net convenience goods floorspace) by 2026. Prior to this point there is no quantitative requirement for additional convenience goods floorspace.

Qualitative need for additional retail facilities

- 1.60 PPS4 awards equal weight to both quantitative and qualitative needs. Therefore, there is less focus on a specific floorspace output and there is more flexibility to plan for different levels of growth if supported by qualitative factors. When assessing qualitative need, local planning authorities should assess whether there is distribution of shopping services sufficient to allow genuine choice to meet the needs of the whole community. It also states that local planning authorities should take into account the degree to which shops may be overtrading and whether there is a need to increase competition and retail mix.

Gaps in provision

- 1.61 There is therefore a need for Mansfield to broaden the quality of its retail offer, and in particular to target more middle-upper retailers. For example, the centre would benefit from the attraction of a higher end department store such as House of Fraser, and fashion retailers such as Monsoon, Zara and H&M. There may also be a case for provision of larger units in order to address the relative lack of choice.
- 1.62 In terms of convenience goods provision, we have identified that there is a clear lack of foodstore provision in the town centre following the closure of Tesco. The Council should seek to address this qualitative deficiency during the course of the study period, and it is considered that there are suitable opportunity sites within the centre. There may be scope for additional provision of 'deep discount' retail facilities on the northern side of Mansfield, to serve Mansfield Woodhouse and Market Warsop, providing that no significant adverse impact would arise on these centres.
- 1.63 In terms of restaurants and cafes, it is clear that in order for Mansfield to effectively function as a higher-order centre throughout the day – i.e. outside of retail trading hours – it needs to develop its 'dwell time' economy. The current offer is geared towards bars, pubs and nightclubs, which means in the early evening, there is currently little reason to visit the town

centre. The provision of additional middle-market restaurant facilities such as Pizza Express or Zizzi would help to remedy this.

Consumer choice and competition

- 1.64 In respect of comparison goods shopping, Mansfield has a reasonable comparison goods line-up. The independent retail sector in the town centre does not appear particularly defined, and there may be a case for promotion of an independent shopping 'quarter' in the town centre. There is a cluster of specialist independent retailers emerging in the Church Street / White Hart Street area, and this should be promoted as an alternative to the major retailers in the primary shopping area.
- 1.65 In terms of convenience goods shopping, we have identified above that Mansfield town centre benefits from poor consumer choice at present, and this should be the focus of improvement in the study period. Elsewhere, consumer choice is considered to be adequate.

Overtrading

- 1.66 Evidence from the household survey indicates that a number of foodstores in Mansfield District are over-trading at present, and this is factored in to our capacity assessments. It is recommended that the Council undertake further analysis of qualitative factors of over-trading, considering factors such as the length of queues at checkouts, the number of checkouts which are open, and whether shelves are having to be restocked during trading hours. There is no indication comparison goods floorspace is over-trading in the District at present.

Location-specific needs

- 1.67 CLG's practice guidance refers to location specific needs and specifically states that the Indices of Multiple Deprivation (IMD) provide useful measures of deprivation. Furthermore, PPS4 affords more weight to qualitative deficiencies in deprived areas. There are particular concentrations of deprivation in central Mansfield, and covering the urban area to the west and east of the town centre. Therefore, it is important that in these areas there is sufficient coverage of facilities to meet day to day needs.
- 1.68 Both west and east of the town centre, there is a relative paucity of small supermarkets which are capable of meeting top-up shopping needs. On this basis, proposals of a suitable scale which will improve local provision in areas of deficiency should be considered positively. In addition, because central Mansfield is readily accessible for many residents in these areas of higher deprivation, we consider this further supports the case for improved foodstore provision in Mansfield town centre.

Quality of provision

- 1.69 The PPS4 practice guidance states that the quality of provision is highly subjective. The key issues include the age, condition and layout of existing facilities and whether the facilities meet operators' requirements or consumer expectations. There is a need for centres to be 'fit for purpose' and capable of meeting the needs of the enlarged residential populations which will be using them over the Plan period.

- 1.70 Quality of provision in the District is considered reasonable, although there is scope for improvement. There is a need for larger unit sizes in Mansfield town centre in order to meet the demands of modern comparison goods retailers, and premises in some secondary areas of the town centre would benefit from modernisation. In respect of convenience goods, the quality of provision can be considered adequate at present, although the Morrisons store at Mansfield Woodhouse would benefit from modernisation and expansion in order to broaden the range of goods which can be sold, and reduce the over-trading which is taking place.

Scope for commercial leisure provision and commercial office floorspace

- 1.71 There will be a need for additional food & drink leisure floorspace in the District over the course of the study period. We expect this to be in the region of 3,500 sq.m net. This should primarily be directed towards Mansfield town centre, but applications to enhance the leisure offer in the district centres should also be considered positively. There are opportunities within a number of the extant planning permissions for development in Mansfield town centre to accommodate an element of leisure floorspace.
- 1.72 We consider that there is a clear need for more restaurants in Mansfield town centre to enhance the evening economy. There is also likely to be need arising for additional cinema facilities over the course of the study period, and it is recommended that any future provision in this respect is located in Mansfield town centre.
- 1.73 The office market remains subdued, reflecting the trend seen in many parts of the country. Current levels of enquiries indicate that demand is strongest for relatively small, modern premises, and Mansfield should ensure that there is sufficient provision of such accommodation in order to capitalise when improvements in the market come forward.

Strategic recommendations

- 1.74 The study concludes by setting out a number of strategic recommendations for the District, which the Council may wish to take forward in their Core Strategy.

Suggested retail hierarchy for the District

- 1.75 The current centre hierarchy is headed by Mansfield town centre. This is supported by three district centres – Mansfield Woodhouse, Market Warsop and Oak Tree. The former two of these are ‘traditional’ district centres, with a range of shops and services to meet local day to day needs of communities. Oak Tree is different in that it is centred on a large, purpose built foodstore, with relatively little in the way of complementary services and facilities.
- 1.76 There is clearly no question that Mansfield town centre should remain the highest order centre in the District – our assessment has shown that it is performing its role as a sub-regional shopping centre well, and with the anticipated further development in the town centre, there is no reason to suggest that its role and function will change over the course of the study period. Mansfield Woodhouse and Market Warsop clearly cater for a more local, day-to-day need, but in the context of this role they are also performing reasonably. Each of the centres has at least one supermarket, and a range of other complimentary facilities. We are satisfied that Mansfield

Woodhouse and Market Warsop fulfil their current retail hierarchy allocations as district centres successfully.

1.77 Oak Tree has a more limited range of facilities, and we do not consider that there is a strong case for Oak Tree to be classified as a district centre – it essentially operates as a standalone foodstore, with a small range of complementary facilities. The current offer does not offer sufficient breadth of facilities to meet many people's day to day needs (aside from food shopping), and residents must accordingly travel further afield. Our recommendation is therefore that Oak Tree is removed from the retail hierarchy of Mansfield District.

1.78 On this basis we suggest the following retail hierarchy for the District:

- Sub-regional town centre: **Mansfield**
- District centres: **Mansfield Woodhouse, Market Warsop**
- Local centres: as per Local Plan

1.79 If the Council wishes for Oak Tree to remain a second-tier district centre, there is likely to be merit in also including the Sandlands Way (Forest Town) local centre in this tier, given that it offers a greater range of services and facilities compared to Oak Tree

Distribution of comparison goods floorspace

1.80 The focus for additional comparison goods floorspace should be Mansfield town centre, with a smaller allocation to support the further development of district centres as required. The allocation of the majority of floorspace to Mansfield town centre reflects the Local Plan, East Midlands Regional Plan and emerging Core Strategy ambitions for the town to act as a shopping destination of sub-regional significance. The provision of additional floorspace will allow the town centre to maintain and expand its current influence over the MSA, in light of competition from centres such as Nottingham.

1.81 We have set out a number of options for the distribution of comparison goods floorspace, which reflect the options available to the Council in terms of including Oak Tree (and/or Sandlands Way) in the centre hierarchy. Our recommended strategy for the distribution of comparison goods floorspace is that:

- Mansfield town centre should seek to accommodate between 2,300 and 4,000 sq.m net comparison goods floorspace by 2016, increasing to between 9,700 and 12,400 sq.m net by 2021 and between 15,900 and 20,300 sq.m net by 2026.
- The district centres (Mansfield Woodhouse / Market Warsop) should seek to both accommodate up to 500 sq.m net by 2016, then each between 1,200 and 1,500 sq.m net by 2021 and 2,000 and 2,500 sq.m net by 2026.

Opportunity sites

1.82 There are a number of opportunity sites in Mansfield town centre which can contribute to accommodating the floorspace requirement set out above. It should be noted that this requirement takes into account the extant planning commitments for the redevelopment of Stockwell Gate South, and therefore represents the amount of floorspace which is required over and above this.

1.83 There are three types of opportunity sites within Mansfield town centre:

- **Sites with planning consent:** following the recent lapse in planning permission of the White Hart Street, the only site with extant planning permission for redevelopment is **Stockwell Gate South**. We expect this site to come forward for retail / mixed-use floorspace.
- **Identified opportunities:** this is the **Stockwell Gate North** site identified in the 'City Centre for Mansfield' masterplan, as well as the **White Hart Street** site, which offers clear redevelopment potential despite the recent lapse of planning consent.
- **Possible further opportunities:** these are sites identified by RTP which also offer potential to improve the retail offer of the town centre over the course of the study period. The two main opportunity sites are the **Four Seasons Shopping Centre**, for which the scope for internal redevelopment to provide larger units should be investigated. The **Beale's Department Store** site on Stockwell Gate also has potential as a longer term further opportunity.

- 1.84 We have not allocated any sites for convenience goods floorspace, on account of the limited quantitative need arising for these uses.

Town centre boundaries and primary shopping frontages

- 1.85 The existing Local Plan-defined town centre boundary is quite extensive. The Local Plan also defines a 'Sub-Regional Centre' boundary, which more accurately reflects the retail and typical town centre uses within the centre. Moving forward, it is recommended that for the avoidance of doubt, a single town centre boundary is adopted in the Council's Core Strategy, which is focused on town centre uses as defined in PPS4.
- 1.86 It is considered that there is scope for contraction of the town centre boundary, as well as limited contraction of the Sub-Regional centre boundary, in order to concentrate development activity in the 'traditional' shopping area. The main areas of contraction relate to the St Peter's Retail Park, and the area of light industry/residential on the eastern side of the town centre.
- 1.87 The current allocation of the retail park within the town centre boundary would mean that any applications for additional floorspace provision at this location (in the form of new units or mezzanine floorspace in existing units for example) would not need to satisfy the requirements of PPS4 in terms of demonstrating compliance with the sequential approach, and, significantly, would not be required to demonstrate no adverse impact on the town centre would arise. On this basis it is considered that in order to protect the vitality and viability of Mansfield town centre, St Peter's Retail Park should be removed from the town centre boundary.
- 1.88 In terms of primary and secondary shopping areas, we consider that the existing Local Plan allocations remain largely accurate. However we would recommend the inclusion of the north side of Clumber Street (between its junctions with Regent Street and Chesterfield Road South) to take into account the Wilkinson's store which has been developed subsequent to the publication of the Local Plan.
- 1.89 The allocation of primary and secondary shopping frontages will need to be revisited during the study period in order to make adjustment for the planned new developments at Stockwell Gate (north and south) and White Hart Street, which will need to be allocated as primary or secondary retail frontage as appropriate.

- 1.90 For Mansfield Woodhouse, it is considered that the current district centre boundary for Mansfield Woodhouse remains appropriate, as it effectively covers the linear, dispersed nature of the centre. For Market Warsop, Local Plan allocation WC4 on Sherwood Street has subsequently been developed as residential dwellings and we recommend this parcel of land is removed from the district centre boundary.

Impact test threshold

- 1.91 PPS4 allows local planning authorities to set, through their Local Development Frameworks, a threshold, above which applications for development in edge or out-of-centre locations are required to demonstrate what the impact of the proposed development would be. For applications on the edge / outside of Mansfield town centre, we are satisfied that the PPS4 recommended threshold of **2,500 sq.m gross** (approximately 1,750 sq.m net) should be adopted.
- 1.92 The district centres operate with much lower turnovers than Mansfield town centre, and therefore any impact of new floorspace would be proportionately higher in terms of trade diversion. Therefore, if the application is likely to draw trade from the established district centres as well as the town centre, an impact threshold of **500 sq.m net** is recommended.

The scope and location of additional leisure provision

- 1.93 The focus on improving the leisure offer in the District should reflect the following priorities:
- In the **short term**, attract more restaurant operators to the town centre, in order to counter the current over-provision of drinking establishments. Applications for such developments in the district centres should also be supported.
 - In the **longer term**, examine the feasibility of bringing forward a cinema development to meet this qualitative shortfall and the likely need for additional facilities which is likely to arise over the study period.

The scope and location of commercial office provision

- 1.94 Our assessment has indicated that the commercial office market in the District is relatively limited, and in the short term, demand for new commercial office provision in the District can be expected to be subdued. However, Innes England anticipates that there is scope for a return to some 'Design & Build' activity, and Mansfield District needs to be in a position to capitalise in any return of confidence to the market. In order to improve the vitality and viability of Mansfield town centre, any significant B1 development should be direct towards the town centre in the first instance. The Council may wish for a separate employment land appraisal to be undertaken to accurately establish the quantum of B1 floorspace which the town centre can accommodate, and the most suitable opportunity sites.

