

## Mansfield District Council

# Mansfield District Retail & Leisure Study 2011

## Main Report



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## APPENDICES

Appendix	Name	Prepared by
1	Local policy review	Mansfield District Council
2	Retail Update 2011 (contains Retail Monitoring Report and Town Centre Health Check)	Mansfield District Council
3	Framework for monitoring PPS4 indicators	RTP
4	Study area maps	RTP
5	Quantitative need data tables	RTP
6	Household survey results	NEMS Market Research

# 1 INTRODUCTION AND TERMS OF REFERENCE

- 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 on certain matters, which are identified below.
- 1.3 The study brief confirms that 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. Our study remit does not extend to reviewing the local centres in the District.
- 1.4 The study is required to achieve the following objectives:
  - (1) Establish the extent to which current retail provision in the District satisfies the level and nature of consumer demand.
  - (2) Estimate the scale and nature of any changes in this position as a result of potential increases in population; changes in retail expenditure; changing forms of retail provision; and possible increases or decreases in the trade draw from competing centres.
  - (3) Identify the scale and nature of additional retail provision over the period to 2016, 2021 and 2026.
  - (4) Provide recommendations about retail and town centre planning policy, to inform the Council's LDF.
- 1.5 Building on these objectives, the study must complete six main tasks:
  - (a) Assessment of retail and town centre policy context (with input from Mansfield District Council officers);
  - (b) Provide a review of current and possible future retail and town centre trends, and the impact of these on the District;

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- (c) Assessment of competing centres in the sub-region;
  - (d) Provide 'health checks' of centres within the District (with input from Mansfield District Council officers) based on key indicators set out in PPS4.
  - (e) Produce capacity assessments, including identifying deficiencies in retail provision and local convenience shopping, the capacity of centres within the hierarchy to accommodate development, and the locations where growth should be focussed.
  - (f) Set out recommendations in respect of future forward planning and development policy, and recommendations in respect of an appropriate monitoring framework.
- 1.6 Our assessment has been supported by a household survey of shopping patterns of residents of Mansfield District and the surrounding sub-region, which was undertaken by NEMS Market Research during April 2011. Further details of this are set out at **Section 5** of this study.
- 1.7 The remainder of this report is set out as follows:
- **Section 2** sets out the national and local **planning policy context** for the study and wider changes in shopping patterns including the role of online shopping. It also contextualises the study by reviewing major changes in shopping provision which have taken place since the previous retail study, and planned developments which may influence shopping patterns of residents in the District over the course of the study period.
  - **Section 3** sets out a review of **the performance of Mansfield town centre and the three district centres**, assessed against indicators set out in PPS4 and based on 'health check' assessments prepared by council officers, and supplemented through our own assessments of the centres.
  - **Section 4** sets out the **current and expected future levels of spending** on comparison (non-food) and convenience (food) shopping within the area surveyed for the household survey, which we have termed the Mansfield Study Area (MSA).
  - **Section 5** sets out the findings of the **household survey** into current patterns of retail spending in the MSA.
  - **Section 6** sets out the **quantitative need** for additional comparison and convenience goods retail floorspace in Mansfield District to 2026.
  - **Section 7** considers the **qualitative need** for comparison and convenience goods retail floorspace.
  - **Section 8** reviews current patterns of leisure spending in the MSA, and identifies the quantitative and qualitative need for additional **leisure facilities**, as well as providing an assessment of **commercial office** provision in the District.
  - **Section 9** draws together the findings of the preceding sections to set out a series of strategic **recommendations** to inform the Council's Core Strategy, addressing the requirements of the brief set out above.
  - **Section 10** sets out our **conclusions**.

1.8 The study is supported by the following appendices:

- **Appendix 1** sets out a review of relevant local planning policy documents.
- **Appendix 2** is Mansfield District Council's Retail Update (RU) 2011, which comprises the Retail Monitoring Report (RMR) and a Town Centre Health Check (TCHC). All of the information in this appendix has been prepared by the Council.
- **Appendix 3** sets out a framework for the Council to monitor the performance of its centres throughout the rest of the study period.
- **Appendix 4** sets out comparison goods market shares maps of the centres in the District, based on the findings of the household survey.
- **Appendix 5** sets out detailed tabulations of shopping patterns and quantitative need, which should be read in conjunction with Sections 4 to 8 of the main report
- **Appendix 6** contains full tabulations of the household telephone survey into shopping patterns undertaken by NEMS Market Research





## 2 STUDY CONTEXT

- 2.1 In this section we briefly summarise the national and local planning policy context relevant to this study. We then proceed to review the recent trends which have taken place since the Council's previous retail study was undertaken in 2005.

### National planning policy context

#### PPS12: Local Spatial Planning

- 2.2 PPS12 (2008) includes the test of 'soundness'. To be 'sound' a core strategy should be justified, effective and consistent with national policy.

**'Justified'** means that the document must be:

- founded on a robust and credible evidence base
- the most appropriate strategy when considered against the reasonable alternatives.

**'Effective'** means that the document must be:

- deliverable
- flexible
- able to be monitored

- 2.3 Thus, the PPS12 places emphasis on the need for DPDs to:

*'...demonstrate that the plan is the most appropriate, when considered against reasonable alternatives' (paragraph 4.38 of PPS12, our emphasis); and*

*'...show how the vision, objectives and strategy for the area will be delivered and by whom, and when' (paragraph 4.45 of PPS12, our emphasis).*

#### PPS4: Planning for Sustainable Economic Growth

- 2.4 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).

- 2.5 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.

- 2.6 All 'policies' in PPS4 are pre-fixed by the letters EC. Policy EC1 of PPS4 confirms the requirement to use evidence to plan positively and that local planning authorities 'ensure

that the volume and detail of the evidence is proportionate to the importance of the issue' (EC1.1b).

- 2.7 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).
- 2.8 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).
- 2.9 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).
- 2.10 Policy EC9 emphasises the need for monitoring.
- 2.11 Policy EC13 governs the determination of planning applications affecting shops and services in local centres and villages.
- 2.12 Policies EC14, EC15, EC16 and EC17 provide guidance on how to determine planning applications for town centre uses. The policies focus on how to respond to applications that are not in accordance with an up-to-date development plan or within a centre.
- 2.13 Policies in PPS4 are referred to where relevant in the remainder of this study.

*Practice guidance on need, impact and the sequential approach*

- 2.14 A document titled 'Practice guidance on need, impact and the sequential approach' has been published by the Department of Communities and Local Government (CLG) to accompany PPS4 (subsequently referred to in this study as the 'practice guidance'). This guidance does not constitute a statement of Government policy. However, its contents are likely to be a consideration when retail aspects of emerging development plan documents are examined in public.
- 2.15 When assessing the need for retail and leisure developments, local planning authorities are advised to (paragraph 2.4):

- Take account of the quantitative and qualitative need for different types of retail and leisure developments.
- In deprived areas, which lack access to a range of services and facilities, give additional weight to meeting these qualitative deficiencies.
- When assessing quantitative need, have regard to relevant market information and economic data.
- When assessing qualitative need, assess whether there is provision and distribution of shopping and other services which allow genuine choice to meet the needs of the whole community; and take into account the degree to which shops may be overtrading and whether there is a need to increase competition and retail mix.

2.16 The guidance provides detailed advice on how to produce an evidence base for retail and leisure developments. This study takes into account the principles set out in the practice guidance, referring its specific guidance throughout the report.

*Mansfield District Local Plan (November 1998)*

- 2.17 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 majority of Local Plan policies have been 'saved', including all but two policies relating to retail. The two 'unsaved' retail policies refer to specific sites which are no longer relevant.
- 2.18 The plan notes that Mansfield town is the largest settlement in the district by some margin, with a population of just under 70,000 persons at the time of the 1991 census. Mansfield Woodhouse had a population of a further 18,000, with Warsop Parish home to a further 13,000 people. Although clearly out of date, this gives an indication of the role and function of the different centres within the District. Policy DPS2 confirms that future growth will be concentrated within and adjoining the main urban areas of Mansfield, Mansfield Woodhouse and Warsop.
- 2.19 At the time of the publication of the Local Plan, the extant national planning policy guidance was Planning Policy Guidance 6 (PPG6). This was replaced with Planning Policy Statement 6 (PPS6) in 2005, and more recently PPS4 in 2009, as discussed above. There have been some changes in national retail policy since the publication of the Local Plan therefore, although the general thrust of policies - which give priority to enhancing the vitality and viability of town centres over other locations - are largely unchanged.
- 2.20 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. Growth should be in a sustainable manner, and according with the economic needs of the District.
- 2.21 The Local Plan confirms that the retail hierarchy of the District is headed by Mansfield town centre. The town centre is supported by three District centres - two based on the historic town centres of Mansfield Woodhouse and Market Warsop, plus a third centred on the (then) new foodstore at Oak Tree. There are also a number of local centres and neighbourhood shopping parades.

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- 2.22 The Plan identifies that in addition to the district centres, there are freestanding foodstores at Sutton Road (operated by Morrisons) and Nottingham Road (operated by Sainsbury's). These remain trading, and there have been two large new foodstores constructed in the town subsequent to the publication of the Local Plan (Asda at Forest Town and Tesco Extra at Chesterfield Road South).
  - 2.23 Policy R1 of the Plan supports the development of retail facilities within the Mansfield Sub-Regional Centre (the town centre boundary as defined by the Nottinghamshire Structure Plan, which is now not a material planning consideration), stating that 'retail development, offices and other central area facilities' will be supported where they sustain and enhance the vitality and viability of the centre. In the rest of the town centre (i.e. outside the Structure Plan boundary), a range of wider uses are supported, including industry and housing. Retail development is encouraged providing linkages with the primary shopping areas are strong.
  - 2.24 The supporting text to the policy suggests that Mansfield has not grown or expanded its retail function in the same way as competing centres, when compared to centres such as Nottingham, Chesterfield and Newark. The development of Meadowhall near Sheffield is also identified as having affected retail competition in the area. However the Plan identifies the location of sites in Mansfield town centre to enable Mansfield to compete with these centres.
  - 2.25 Policy R2 supports the development of retail and other central area facilities which would sustain and enhance the vitality and viability of the district centres. The supporting text notes that the arrival of the Co-Operative foodstore in Mansfield Woodhouse in the 1980s significantly improved the turnover of the centre and the Plan states it is of 'major importance' that shopping in Mansfield Woodhouse continues to grow. Market Warsop district centre is identified as suffering a decline as a result of the closure of local collieries reducing local residents' disposable income. There was investment in the centre in the 1990s with the development of a Kwik Save foodstore (subsequently occupied by Somerfield and now Nisa). The Plan also supports the development of a limited amount of non-food floorspace at Oak Tree district centre.
  - 2.26 Policy R5 allocates land at Portland Sidings, south of Mansfield town centre, for retail warehouse development, with floorspace to exceed no more than 12,000 sq.m, and no unit smaller than 929 sq.m. The units are for bulky goods use only. The site has subsequently been developed and is now fully trading as the Portland Retail Park.
  - 2.27 Policy R6 resists development outside the defined centres unless there are no suitable locations within or on the edge of defined centres, and the vitality and viability of any centre would not be undermined. Policy R7 sets out the criteria which applications for retail development must satisfy to secure planning permission.
  - 2.28 Chapter 12 of the Plan sets out specific policies for development in Central Areas, and for Mansfield town centre, sets out a number of objectives, including reducing unemployment, assisting in economic diversification by growing the service sector, extend the quality and range of shopping facilities, and improve accessibility to and the environment of the town centre. The chapter sets out a range of policies to guide retail and other development in the town centre, including large site allocations at Stockwell Gate (the bus station, former

Tesco store and multi-storey car park) and 2.4ha of land at White Hart Street. These allocations remain the Council's priorities for development in the town centre, and no redevelopment has yet come forward, although planning consent exists for the redevelopment of part of the Stockwell Gate site. A number of smaller site allocations (under 1ha) are also identified in the Plan.

- 2.29 The Local Plan is accompanied by a proposals map, which defines the extent of the boundaries of Mansfield town centre, and the district centres of Mansfield Woodhouse, Market Warsop and Oak Tree. In addition, the following primary and secondary shopping streets in Mansfield town centre are identified:

Primary shopping areas:	Secondary shopping areas:
<ul style="list-style-type: none"> <li>• Four Seasons shopping centre</li> <li>• West Gate (part)</li> </ul>	<ul style="list-style-type: none"> <li>• Rosemary Centre, Walkden Street</li> <li>• West Gate (part)</li> <li>• Stockwell Gate</li> <li>• Market Place</li> <li>• Market Street</li> <li>• Queen Street</li> <li>• Church Street</li> <li>• Regent Street (part)</li> <li>• Leeming Street (part)</li> <li>• Clumber Street (part)</li> </ul>

- 2.30 In Section 9 of this study we provide recommendations on whether these designations (and that of the wider town centre boundary) remain salient.
- 2.31 There are a range of supporting local documents which are also of relevance to this study, including supplementary planning documents and interim planning guidance. A full review of these documents, prepared by Mansfield District Council, is provided at **Appendix 1**.

## Economic context

- 2.32 In this section we set the context of the retail study in light of the current economic downturn and current retail trends and shopping behaviour.

### *Downturn in the Economy*

- 2.33 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 subdued, particularly for the short term.
- 2.34 The economic downturn has also resulted in investors being more cautious. Developers are looking to play competing centres against each other to secure the best deal for their outlet or scheme. Nationally, many planned large new retail developments have been

suspended until the economy returns to stability. For example, we are aware of schemes in Oxford, Bradford, Sheffield and Guildford which have been put on hold.

- 2.35 An additional significant implication of the economic downturn has been reduced house building rates across the country. The effect of this slowdown is that we expect population growth, in the short term at least, to be more muted than previously forecast. This is reflected in the base year population forecasts used in this study. The short term slowdown in population growth will have implications for the quantitative need for additional retail floorspace in the catchment area, and in particular the timing of when this need is likely to arise.
- 2.36 However, there are some signs that momentum is returning to the retail market. In recent months, proposals for the expansion of the Broadmarsh and Victoria shopping centres in Nottingham – a centre which can be expected to influence the shopping patterns of residents in Mansfield District – have been announced. There is also considerable development activity by foodstore operators, which has continued throughout the economic downturn. There is evidence of this within Mansfield District, with Sainsbury's recently obtaining planning consent for a relocated and enlarged foodstore on Nottingham Road, Mansfield, which will be developed alongside a new Aldi store. There has also been a planning application submitted by Tesco for a new foodstore on the edge of Market Warsop district centre, and, just outside the district, planning consent has recently been granted for a new Tesco foodstore in Shirebrook, an area which traditionally looks towards Mansfield for its shopping needs. We return to discuss this below.
- 2.37 PPS4 states that assessment of need should be based on realistic inputs into forecasting, and accordingly this study takes into account the likely length of the downturn, based on the most up-to-date forecasts of population and expenditure growth.

#### *Polarisation Trend in the UK*

- 2.38 A significant and long term trend 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.
- 2.39 There is therefore a concentration of comparison goods expenditure in a smaller number of larger centres. Indeed, CB Richard Ellis estimates that half the population currently shops in just 70 or so major locations, down from 200 locations 30 years ago<sup>1</sup>. This concentration of retailing in larger centres is likely to threaten some medium and smaller towns.

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<sup>1</sup> Source: CB Richard Ellis, *UK Retail Briefing*, September 2008.



- 2.40 The growth of the dominant foodstores and decline in unit numbers poses similar challenges for small town centres and district/local centres which rely on their convenience/service base. A clear picture is emerging of a network of large dominant superstores, and corresponding decline/diversification in the traditional smaller centre. Again, CB Richard Ellis suggest that *‘half the population now shop for main groceries in less than 1,000 of the country’s 10,000+ main grocery stores: the majority located out-of-town<sup>2</sup>’*.

### **Trends in key retail sectors**

#### **Clothing & Footwear**

- 2.41 Clothing and footwear is the second largest area of town centre retail spending in the UK after food and grocery. The sector remains relatively strong, despite a number of high profile administrations. However, recent research has indicated that price remains the second highest loyalty driver in the sector (behind range of goods<sup>3</sup>), suggesting that the pressures on disposable income remain pertinent to the sector.
- 2.42 Clothing & footwear retailers have benefited from a raft of new shopping centre space and town centre rejuvenation over the last few years. At the same time, as they are seeking to expand and complement their town centre portfolios, town centres do remain the biggest sales channel for the sector. Some clothing retailers continue to open new trading floorspace despite the economic downturn, or upgrade existing retail floorspace (for example, in Mansfield, New Look have moved from a small store to occupy the much larger former Woolworths store); however others such as Arcadia Group (which owns Burton, Dorothy Perkins, Evans and Top Shop) are seeking to reduce presence in centres as leases expire. Lower-middle market clothing retailers such as New Look and H&M continue to trade successfully.
- 2.43 Forecasts for the sector over the study period indicate that growth will continue, but it is likely to be directed towards ‘value retailers’ and ‘premium players’, rather than the middle market. In 2000, 28 per cent of consumers shopped in ‘value’ retailers. By 2010, this had increased to 57 per cent. However, ‘premium players’ look set to play an increasingly important role in the sector – since the onset of the recession, the number of shoppers regularly buying at premium stores such as Crew Clothing and White Stuff has increased by 6.2 per cent (equivalent to an extra 3.2 million adults)<sup>4</sup>.

#### **Bulky Goods**

- 2.44 The poor performance of the DIY sector in recent years has been well-documented and is set to continue in the short-term. New store openings by DIY store operators are relatively

<sup>2</sup> Source: CB Richard Ellis, *UK Retail Briefing*, Issue 2, 2007.

<sup>3</sup> Verdict Research ‘How Britain Shops: Clothing’, 2011

<sup>4</sup> Barclays Corporate (with Verdict Consulting), ‘Current and Future Opportunities for the UK Clothing Industry’, 2011

limited. The Focus DIY chain, which has almost 200 stores across the UK, entered administration in May 2011, reflecting the ongoing difficulties in this sector.

### *Department Stores*

- 2.45 There has been a lot of new shopping centre space available for department stores during the last few years. This new space, coupled with the big players revamping existing stores, has led to department stores increasing their share of town centre sales from 7.4% in 2002 to 7.8% in 2007. However, expansion plans of many department stores were subsequently put on hold on account of the recession, and only now are beginning to come back on stream, and the retailers with higher operating margins remain reluctant to open new space.
- 2.46 Driven by market saturation for full line department stores in many areas, major department store operators are now willing to take on smaller format stores. For example, John Lewis are trialling a number of 'John Lewis At Home' stores, which typically operate from retail park locations, and focus solely on the home furnishings element of a full-line John Lewis department store.
- 2.47 Despite the economic downturn, department stores continue to open new stores, typically in areas where there is a gap in the market. John Lewis have recently signed to open new stores in Birmingham and Leeds city centres, and Stratford (East London), whilst Debenhams have opened stores in Wakefield and Newbury. Within the District, Primark have fairly recently opened a store in the Four Seasons Shopping Centre in Mansfield, reflecting a nationwide continued programme of expansion for the company.

### *Electricals*

- 2.48 Major electrical specialists such as Currys have been withdrawing from town centres as they concentrate on Internet operations and relocating out-of-town, where they can be accommodated in larger-format stores. Town centre electrical stores are now smaller, and often have a greater focus on home entertainment goods, such as cameras, personal computers and audio and video equipment; and personal music players. DSGi, the owners of Currys and PC World, have in some cases sought to combine the retail offer of two standalone stores into one unit, usually branded 'Currys Megastore' (as has taken place in Mansfield). The company has also undertaken a rebranding and modernisation of many of their stores.
- 2.49 This shift to out-of-centre locations, together with the reduction in electrical store numbers and the increase of electrical items sales online, has resulted in the amount of space occupied by them in town centres falling by 3.9% over the five years to 2009. At the same time, sales densities have increased due to the arrival in town centres of higher density retailers, who operate from smaller stores and sell higher value products.
- 2.50 The substantial investment in DSGi in their stores has been triggered by the arrival of a new competitor in this sector in the form of BestBuy. An established name in the US, BestBuy recently opened a number of UK stores, including in Derby and Nottingham. However, the presence of BestBuy in the UK retail market has been short-lived, and it was confirmed in November 2011 that all UK BestBuy stores would imminently cease operations, following poor trading performance since their launch.



- 2.51 The poor performance of BestBuy is a clear indicator that the electricals sector is not immune from the economic downturn. As noted above, DSGi are choosing not to renew the leases of many of their town centre Currys Digital stores once they have expired, and the Comet chain continues to struggle with poor performance in the UK.

### *Convenience Sector*

- 2.52 Large foodstores (those with a net selling space of at least 25,000 sq.ft / 2,300 sq. m) have been the primary driver of growth in the convenience sector. Growth in floorspace of large foodstores has continued throughout the economic downturn, with typically a 3-4 per cent increase in floorspace per year. Floorspace in smaller stores (supermarkets, Co-Ops and convenience stores less than 25,000 sq.ft net) has shown marginal decline, whilst the floorspace in food specialists (such as butchers, bakers and greengrocers) has reduced by between 2 and 3 per cent per year. A summary of these trends is provided in **Table 2.1**. Publications by the New Economics Foundation have highlighted the decline in small, specialist retailers, identifying that between 1994 and 2002, the number of independent businesses selling food, tobacco and beverages fell by almost 30,000.

**Table 2.1 — Convenience floorspace in the UK by retailer type, 2000-2010**

Sector	Superstores	Smaller stores	Food specialists
Total floorspace, 2000 (sq.ft net)	45,760,000	57,924,000	22,166,000
Total floorspace, 2005 (sq.ft net)	54,608,000	57,010,000	18,267,000
Total floorspace, 2010 (sq.ft net)	65,528,000	54,358,000	16,526,000

Source: Verdict Research UK Food & Grocery Retailers 2010, page 59

- 2.53 The convenience sector appears to have been largely unaffected by the economic downturn, and indeed has often been the beneficiary of floorspace becoming available in town and city centres as a result of comparison goods retailers entering administration. For example, Iceland acquired 57 former Woolworths stores in early 2009, with Tesco also acquiring a number of stores to be converted into 'Metro'/'Express' format stores. However, Verdict Research considers that expenditure growth in the convenience sector is likely to slow down in the short term:

*'Growth in expenditure on food & grocery products has slowed significantly in 2010 and in the short term it is set to be subdued comparative to the sector's recent performance. Competitive pressures in the sector are set to intensify which, coupled with emerging consumer trends towards online and convenience retailing, is forcing a strategic rethink for retailers. They will need to adjust strategies and propositions to ensure returns are maximised as new market dynamics emerge.'*

(Verdict Research UK Food & Grocery Retailers 2010, page 2)

- 2.54 Asda acquired the Netto chain of supermarkets in 2010, and plans to convert all acquired Netto stores over to Asda branding during 2011 and 2012. The first of the new format 'Asda

Supermarket' stores opened in Worksop in May 2011. Stores in Mansfield District have already been converted to the Asda Supermarket format. At the higher end of the grocery market, Waitrose are currently embarking on a sustained programme of store openings outside its traditional southern heartland.

- 2.55 Operators are also continuing to open larger format stores – we have noted above the recent planning consent for a new Sainsbury's store in Mansfield and a Tesco in Shirebrook as two examples of this. Operators are also investing heavily in smaller 'Express' format stores in town and city centre locations. For example, in the year ending 2010/11, Tesco added 155 Express stores to its store portfolio, compared to 37 'Extra'/large format Tesco stores. Verdict expects the trend towards smaller, more flexible format to continue in the short term:

*'In responding to emerging consumer trends it is also imperative that grocers pursue balanced and flexible space expansion. While grocers continue to face hurdles and narrowing opportunities for new outlets in out-of-town locations, each of the Big Four has aggressive expansion plans in the pipeline, not least Tesco (2.4 million sq ft in 2010/11) and Sainsbury (2.5 million sq ft in the two years to March 2011). However, as the race for space intensifies, format flexibility will be essential. Indeed, we expect smaller formats will increasingly form the focus of expansion plans. Expansion plans will be focused on convenience stores to capitalise on emerging consumer shopping habits. Moreover, compared to larger stores, convenience stores have less stringent planning laws.'*

(Verdict Research UK Food & Grocery Retailers 2010, page 3)

- 2.56 The major foodstore operators are increasingly seeking to diversify into non-food markets. Furthermore, out-of-centre space is cheaper than comparable space in town centres, making it easier for out-of-centre superstores to compete on price, while adjacent parking makes them much more convenient for bulkier household goods. The expansion of foodstore operators' non-food offers via their out-of-centre superstores – thereby providing a convenient one-stop shop for most food and non-food needs - represents a significant threat to high street retailers. Both Tesco and Asda, in addition to their supermarkets, operate a number of standalone non-food stores ('Tesco Home Plus' and 'Asda Living' respectively) which tend to occupy space at purpose-built out-of-town retail parks.

### *E-tail*

- 2.57 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.
- 2.58 At the same time, the internet is becoming more complex and competitive, and retailers must adapt to this retailing climate. The growth of Marketplace websites is changing the dynamics of the market and further intensifying competition. While unfavourable economic conditions are forcing retailers to scale back on physical retail space, their online operations allow them to reach a much wider customer base. There has also been recent growth in

the 'Click & Collect' method of online shopping — whereby a customer orders and pays for the desired product online, and then collects it from the nearest large branch of the retailer. This approach is currently being rolled out by retailers including Tesco, Sainsbury's, Asda, Next, House of Fraser and John Lewis, amongst others.

- 2.59 The growing number of high street clothing and footwear retailers who have established an online presence, are likely to continue to benefit from broadening their offers to rival both the depth and breadth of those in store. There is evidence to suggest that the online clothing sector remains buoyant despite the economic downturn. In February 2010, it was reported that online shopping in this sector posted a 34 per cent year-on-year increase.
- 2.60 In January 2011 the Interactive Media in Retail Group (IMRG) revealed that consumers in the UK spent £58.8bn online during 2010, an increase of 18 per cent on the previous year. In the busiest month for online (and general retail) spending, December, an equivalent of £111 per person was spent online, an increase from £89 per person the previous year. The IMRG forecasts that a further 18 per cent growth in online spending will take place during 2011.
- 2.61 **Table 2.2** shows the year-on-year growth in key online sectors between December 2008 and December 2009, and also between December 2009 and December 2010. It shows that whilst growth in some sectors such as electricals and gifts may be levelling out, other sectors such as clothing and beers, wines & spirits are continuing to post extremely strong levels of online growth.

**Table 2.2 — Growth in online spending in key sectors, 2008-2010**

Sector	Change in online spending, December 2008 to December 2009	Change in online spending, December 2009 to December 2010
Beers, wines and spirits	+21%	+36%
Clothing, footwear and accessories	+18%	+40%
Electricals	+39%	+8%
Gifts	+70%	+22%
Health and beauty	+39%	+19%

Source: IMRG Press Releases, 22 January 2010 and 21 January 2011, via [www.imrg.org](http://www.imrg.org).

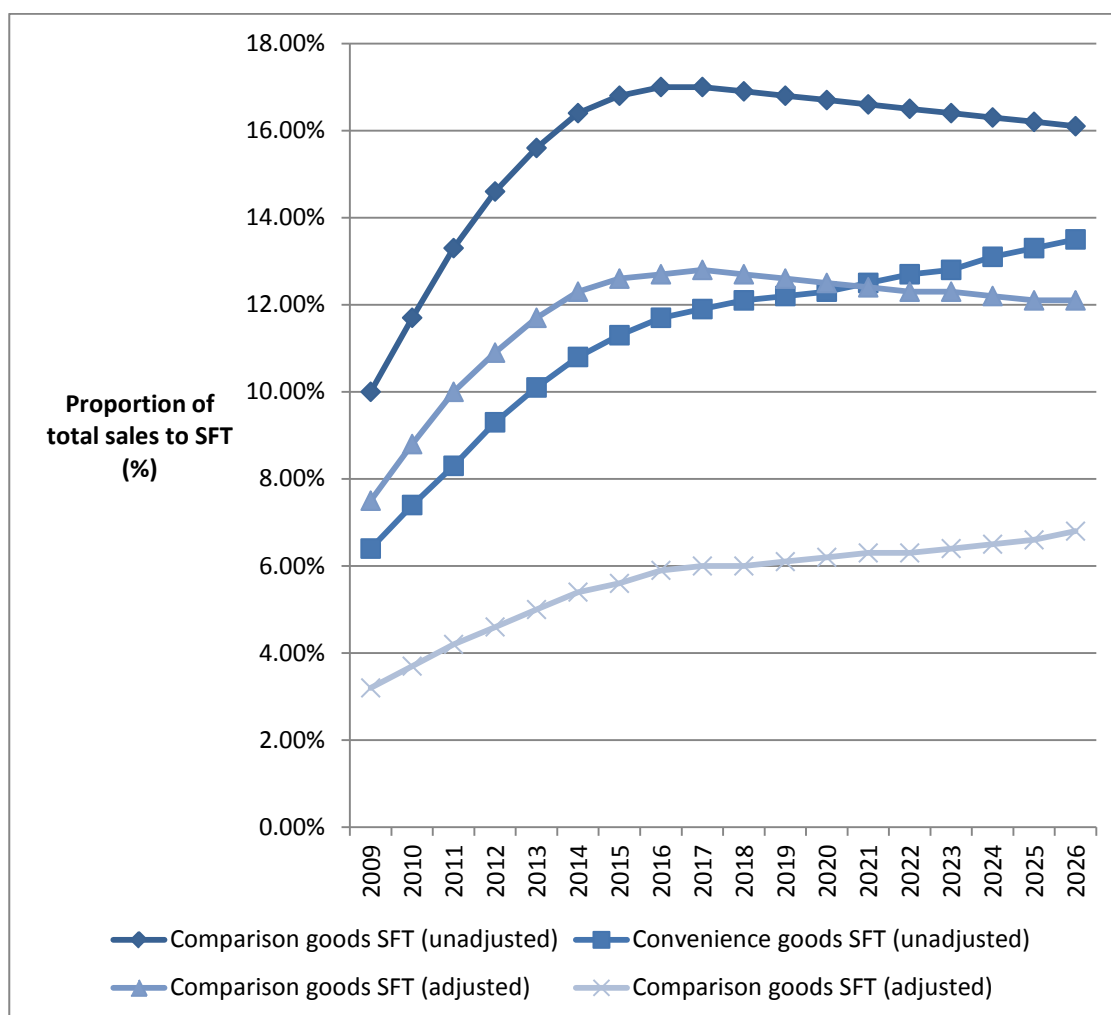
- 2.62 Current forecasts from Experian<sup>5</sup> suggest that online shopping on convenience goods is likely to increase throughout the study period, but in the case of comparison goods, peak at 17.0 per cent between the years of 2016 and 2017, and then marginally decrease throughout the rest of the study period. In the period to 2017, Experian consider that non-

<sup>5</sup> The most recent forecasts from Experian are set out in Experian Retail Planner 9, September 2011. We have used this document as the reference point for all Experian forecasts mentioned in this study.

store retailing will increase at a faster pace than total retail sales. Experian comments that *‘Our assumption that after 2018 internet shopping grows in line with total retail sales reflects the maturing of the market as the number of computer-literate adults reaches saturation point’*. The outputs of this study specifically take into account this anticipated growth of online shopping, and, based on Experian guidance, we remove the proportion of total expenditure which is expected to be diverted towards online shopping before presenting the final quantitative floorspace requirements for the District.

- 2.63 **Figure 2.3** shows the growth in online spending on convenience and comparison goods throughout the course of the study period, based on forecasts provided by Experian. Experian advise however that *‘The calculation of how demand for retail floorspace will be affected by the rapid expansion of SFT remains a key issue. While it is undeniable that the challenge to traditional store-based shopping is growing, two factors temper the threat.*
- ***Since the non-store retailing figures include supermarkets and other retailers that source internet goods sales from store space, the share of non-store retailing is over-stated from the point of view of those interested in physical retail outlets, particularly for convenience goods.***
  - *Even if non-store retailing outpaces store-based shopping as assumed over the next few years, **store-based shopping** is still expected to continue to expand at an annual **average** of over 2% per annum in per capita terms from 2014 to 2028 (see figure 1a of the main report the relevant extract of which appears below).*’ (Experian emphasis in bold).
- 2.64 Reflecting the first bullet point in the above paragraph, Experian also present adjusted comparison and convenience goods forecasts, which remove internet goods sourced from physical store space. This is, broadly speaking, 50 per cent of the total convenience goods SFT forecast and 25 per cent of the total comparison goods forecast. This is also shown in Figure 2.3 below. We use the adjusted convenience goods rates as the basis of our quantitative capacity assessment for the amount of comparison and convenience goods floorspace which is expected to be required in the District.
- 2.65 However, based on these uncertainties, we recommend that updated forecasts of internet spending should be taken into account in any update to the findings of this report which the Council undertakes over the Core Strategy period.

**Figure 2.3 — Forecast of non-store retailing (Special Forms of Trading) market share to 2026**



Source: Experian Retail Planner 9, September 2011, Appendix 3

\*Special Forms of Trading \*\*adjusted SFT includes internet, mail order and markets.

## Local area context

- 2.66 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. 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.

### *Recent and planned comparison goods developments*

2.67 **Table 2.4** sets out the recent (post-2005) and planned comparison goods developments within and surrounding Mansfield District.

**Table 2.4 – recent and planned comparison goods retail developments**

	Completed	Planned
Within Mansfield District	<ul style="list-style-type: none"> <li>• Tesco Extra, Chesterfield Road South, Mansfield (includes comparison goods element)</li> </ul>	<ul style="list-style-type: none"> <li>• Redevelopment of Stockwell Gate / bus station, Mansfield town centre</li> <li>• Other development opportunities within/on edge of Mansfield town centre which may come forward for retail</li> </ul>
Within wider sub-region	<ul style="list-style-type: none"> <li>• Redevelopment / extension of Eagle Centre, Derby (now Westfield Derby)</li> <li>• Construction of Dobbies Garden Centre, near Clowne</li> <li>• Construction of new B&amp;Q store, Chesterfield</li> </ul>	<ul style="list-style-type: none"> <li>• Extension / redevelopment of Broadmarsh Centre, Nottingham</li> <li>• Extension of Victoria Centre, Nottingham</li> <li>• Possible Sevenstone (new retail quarter) development, Sheffield</li> <li>• Potterdyke development, Newark</li> </ul>

2.68 Table 2.4 shows that no major comparison goods retail developments have come forward in Mansfield subsequent to the previous retail study, and therefore it is likely that shopping patterns in the area have become relatively entrenched. Whilst there have been some significant comparison goods shopping developments completed elsewhere in the wider sub-region, we would not expect these to have a major influence over shopping patterns of residents in Mansfield. However over the course of the study period, there are likely to be developments which will result in adjustments to current shopping patterns, and which have more potential to draw trade from residents in Mansfield District.

2.69 The Council in particular needs to be mindful of the large expansion of comparison goods shopping floorspace which is set to come forward in Nottingham city centre. In early 2011, proposals for the upgrading and expansion of the Broadmarsh and Victoria Shopping Centres were put forward by the centres' owners (Westfield and Capital Shopping Centres respectively<sup>6</sup>). Both developments are subject to planning consent being granted by Nottingham City Council.

2.70 The Broadmarsh plans involve increasing the size of the floorspace of the centre from 37,000 sq.m (the current size) to 102,000 sq.m. It is understood that Marks & Spencer and Debenhams will form the anchor tenants to the scheme, both of which will move from

<sup>6</sup> In November 2011, Capital Shopping Centres acquired full ownership of the Broadmarsh Shopping Centre from Westfield. At the time of finalisation of this study the implications of this on the delivery of the upgrading / expansion of the two shopping centres are not known.

outdated smaller premises elsewhere in the city centre. The proposed development will include extending the centre southwards towards the rail station (on the site of the current multi-storey car park and bus station), and will be developed as a series of “blocks” containing different retail and office uses, with open-air linkages through to the rest of the city centre.

- 2.71 The owners of the Victoria Centre are seeking to expand floorspace by almost 50,000 sq.m net, developing the area north of the shopping centre currently occupied by the car park and Victoria Bus Station. The proposals aim to deliver a new department store, 50 new retail stores, a 10-screen cinema, new family restaurants, replacement parking and bus station, and public realm improvements.
- 2.72 Should both of these developments secure planning permission they will represent a significant improvement in the retail offer of Nottingham, which has remained relatively unchanged in recent years. Both developments would be readily accessible from Mansfield (particularly given the proximity of the rail station to Broadmarsh, and the use of the Victoria Bus Station as the terminus of services from Mansfield). 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. The opportunity sites identified in the Local Plan and subsequent planning policy publications provide the opportunity for Mansfield to react to these competing development pressures.
- 2.73 Mansfield town centre draws trade from a wide catchment area (which we discuss further later in the report), and therefore must be in a position to react in order to continue to secure trade from the parts of its catchment which also benefit from strong links to other centres such as Nottingham.
- 2.74 Elsewhere surrounding the District, we expect the much-delayed new retail quarter in Sheffield to come forward during the early part of the study period, which, depending on the quality of the retail, may also exert an influence over shopping patterns of residents in parts of the District. The smaller-scale development in Newark-on-Trent town centre may draw trade from some parts of Nottinghamshire east of Mansfield which are equidistant between the two towns, although would not be expected to draw significant trade from the District itself.
- 2.75 **Table 2.5** sets out the development in convenience goods retail provision which have taken place since 2005, and those which can be expected to further amend shopping patterns over the course of the LDF period.



*Recent and planned convenience goods developments*

**Table 2.5 – recent and planned convenience goods retail developments**

	Completed	Planned
Within Mansfield District	<ul style="list-style-type: none"> <li>• New Tesco Extra foodstore, Chesterfield Road South, Mansfield</li> <li>• Acquisition of Co-Operative store at Mansfield Woodhouse by Morrisons</li> </ul>	<ul style="list-style-type: none"> <li>• New Sainsbury's / Aldi foodstores, Nottingham Road, Mansfield</li> <li>• Extension to Tesco Extra store at Oak Tree district centre (under construction)</li> <li>• New Tesco store, Market Warsop (awaiting planning consent)</li> </ul>
Within wider sub-region	<ul style="list-style-type: none"> <li>• Extension to Tesco, Worksop</li> <li>• New Tesco Extra stores in Chesterfield and Clay Cross</li> </ul>	<ul style="list-style-type: none"> <li>• New Tesco store, Shirebrook</li> <li>• New Morrisons store, Kirkby-in-Ashfield town centre</li> <li>• New Tesco store, Sutton-in-Ashfield (awaiting planning consent)</li> <li>• New Asda store, Newark-on-Trent</li> <li>• Conversion of Netto stores to Asda</li> </ul>

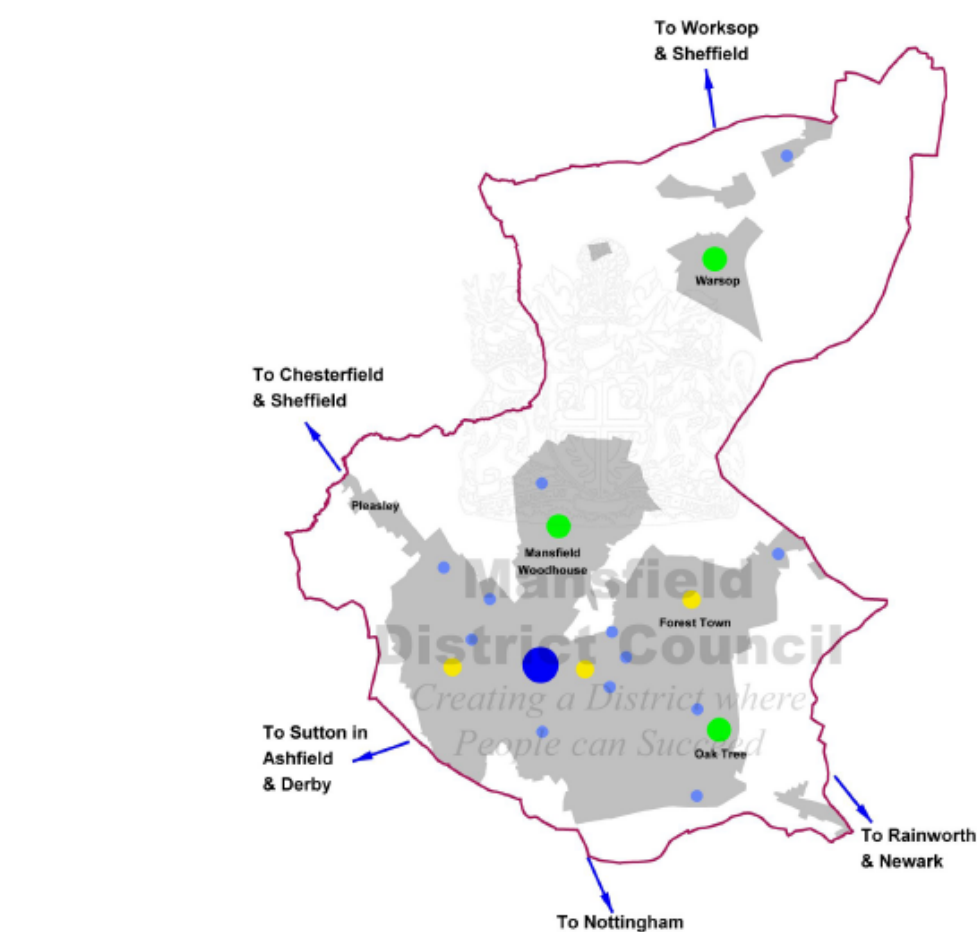
- 2.76 Convenience goods shopping is a relatively localised activity, and does not need to be considered on a sub-regional scale as comparison goods shopping does. Table 2.5 shows that Mansfield has benefited from the construction of a large new Tesco Extra foodstore to the north of the town centre subsequent to the previous retail study. In addition, Morrisons have acquired the former Co-Operative store in Mansfield Woodhouse, which can be expected to have result in increased trade draw to this store. Elsewhere, there have been recent openings of further Tesco Extra stores in Chesterfield and Clay Cross, although we do not expect these to have significant impact on shopping patterns.
- 2.77 Table 2.5 also shows that there are a number of outstanding planning permissions for retail floorspace in the District which are awaiting either implementation or determination. The most significant recent planning permission is for the redevelopment of the current Sainsbury's store on Nottingham Road, Mansfield, to form a larger foodstore, which will be constructed on an adjacent former industrial site, with the current site of the foodstore given over to car parking and the development of an Aldi discount foodstore.
- 2.78 The study takes into account convenience and comparison goods extant planning permissions which fall within the study area used as the basis of this assessment. A full schedule of these permissions, and their likely turnover, is set out in Section 7.
- 2.79 The changes set out in Tables 2.4 and 2.5 ensure that the Council should regularly refresh its retail evidence base over the course of the LDF to ensure that an up-to-date assessment of shopping patterns and requirement for additional floorspace is available.



### 3 PERFORMANCE OF TOWN AND DISTRICT CENTRES

- 3.1 In this section we review the current performance of the higher order centres in Mansfield District. Our analysis extends to the centres which form the top two tiers of the District's retail hierarchy – the sub-regional centre of **Mansfield Town Centre**, plus the District centres of **Mansfield Woodhouse**, **Market Warsop** and **Oak Tree**. These centres are supported by a network of local centres and neighbourhood shopping parades. The retail hierarchy was established through the 1998 Local Plan.
- 3.2 **Figure 3.1** shows the location of Mansfield town centre, and the district, local and neighbourhood centres within context of the District boundary.

**Figure 3.1 – Mansfield District Retail Hierarchy**



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- Sub Regional Centre: Mansfield Town Centre
- District Centres: Mansfield Woodhouse, Market Warsop, Oak Tree
- Local Centres
- Neighbourhood Parades

Source: adapted from Mansfield District Council Retail Update, 2011

3.3 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. We consider the following indicators<sup>7</sup>:

- Indicator A1: Diversity of main town centres
- Indicator A2: Retail floorspace in edge-of-centre or out-of-centre locations
- Indicator A3: Potential for capacity for growth or change of centres in the network
- Indicator A4: Retailer representation and intentions to change representation
- Indicator A5: Shopping rents
- Indicator A6: Proportion of vacant street level property
- Indicator A7: Commercial yields on non-domestic property
- Indicator A9: Pedestrian flows (footfall)
- Indicator A10: Accessibility
- Indicator A11: Customers and residents’ views and behaviour
- Indicator A12: Perception of safety and occurrence of crime
- Indicator A13: State of the town centre environmental quality.

3.4 This section of the report offers a summary of the performance of the town and district centres. Our findings are informed by Mansfield District Council’s ‘Retail Update 2011’ (RU) report, which is reproduced as **Appendix 2** to this study for ease of reference. The RU comprises of a Retail Monitoring Report (RMR) and a Town Centre Health Check (TCHC) for Mansfield town centre. The document was prepared by officers at the Council and published in May 2011. The findings of the RU are supplemented with our own site visits to the centres in April and May 2011, and input from Innes England on commercial matters.

### Performance of centres in UK retail rankings

3.5 Management Horizons Europe’s ‘UK Shopping Index’ ranks the performance of all major retail centres in the UK, and as such offers a useful benchmark with which to compare the performance of a number of centres. Centres are ranked in one of nine location grades, ranging from ‘Major City’ to ‘Minor Local’<sup>8</sup>. The Index includes all major city, town and district centres in the UK, as well as other significant destinations such as retail parks and

<sup>7</sup> It is not possible to provide commentary on PPS4 Indicator A8 (‘Land values and length of time key sites have remained undeveloped’) as this information is not readily available within the public domain.

<sup>8</sup> The MHE Index allocates each centre within a tier, reflecting the level of retail provision within the town. The nine tiers which comprise the Index are (highest to lowest), ‘Major City’ (highest ranking centre is London West End, 1<sup>st</sup>); ‘Major Regional’ (Reading, 12<sup>th</sup>); ‘Regional’ (Derby, 58<sup>th</sup>); ‘Sub-Regional’ (Aylesbury, 117<sup>th</sup>); ‘Major District’ (Cwmbran, 218<sup>th</sup>); ‘District’ (Guernsey, St Peter Port, 367<sup>th</sup>); ‘Minor District’ (Enfield Retail Park, 581<sup>st</sup>); ‘Local’ (Dover, Whitfield, 1,207<sup>th</sup>); and ‘Minor Local’ (Chelmsford, Moulsham, 2,247<sup>th</sup>). The MHE Index is one of a number of databases on centres’ retail performance which are published.

outlet centres. The performance of centres in the Index is influenced by a number of factors, including the presence of multiple retailers in a centre.

- 3.6 **Table 3.2** below shows the performance of the town and district centres in Mansfield District, and also, for reference, the performance of surrounding higher order centres. Where available, we have also shown the performance of the centres in the most recent Index (2008) alongside the preceding 2003/04 and 2000/01 Indexes, which makes for useful time-series comparison. It should be noted that the Index was significantly expanded in 2008 to include a larger number of 'local' and 'minor local' centres, and therefore historic data for centres at these tiers are not available.
- 3.7 The MHE Index also ranks centres in respect of their fashion retail offer, as this is a key driver of pedestrian footfall in centres. The 'fashion market position' ranges from 'Luxury' through to 'Value'<sup>9</sup>. As a general rule, higher order centres have a broader range of fashion offer and therefore fall within the 'Middle' or 'Upper-Middle' categories, whilst smaller centres' fashion retail offer is concentrated towards the 'lower' and 'value' end; as such retailers typically locate in a larger number of centres. This is an important indicator, as fashion retail is a key driver of footfall in centres.

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<sup>9</sup> Highest ranking 'Luxury' centre is London – Knightsbridge (22<sup>nd</sup>). Highest ranking 'Value' centre is Bletchley (110<sup>th</sup>).

**Table 3.2 – Retail rankings performance of Mansfield District centres and competing retail destinations**

Centre	MHE Index position 2008	Location grade	Market position	MHE Index position 2003/04	MHE Index position 2000/01	Fashion Market Position 2008
<b>Town and district centres in Mansfield District</b>						
Mansfield	128	Sub-Regional	Middle	105	114	Middle
Mansfield Woodhouse DC	3,321	Minor Local	Middle	-	-	-
Market Warsop DC	2,356	Minor Local	Middle	-	-	-
Oak Tree DC	1,716	Local	Middle	-	-	-
Forest Town LC	2,247	Minor Local	Lower	-	-	-
<b>Nearby centres</b>						
Nottingham city centre	7	Major City	Middle	4	2	Upper-Middle
Sheffield city centre	33	Major Regional	Middle	25	26	Middle
Sheffield Meadowhall	40	Major Regional	Middle	31	33	Middle
Chesterfield	145	Sub-Regional	Middle	122	180	Lower
Newark	183	Sub-Regional	Middle	187	231	Lower
Worksop	271	Major District	Lower	231	261	Lower
Retford	405	District	Lower	317	347	Lower
Sutton in Ashfield	499	District	Lower	404	388	Lower
Alfreton	612	Minor District	Middle	452	438	Value
Hucknall	629	Minor District	Middle	546	614	Value

Source: Management Horizons Europe 2008 UK Shopping Index, and preceding publications  
DC = District Centre LC = Local Centre (Mansfield District only)

- 3.8 Table 3.2 shows that Mansfield town centre is currently ranked in 128<sup>th</sup> position. The Index scores Mansfield as having a retail offer equivalent to a Sub-Regional centre, suggesting that the retail offer in Mansfield is in line with the role and function of the centre as defined in the East Midlands Regional Plan. However Mansfield's position in the Index has declined over the past decade, indicating that the retail offer in the town has remained relatively static whereas other similarly-ranked centres have shown improvement.
- 3.9 The quality of the retail offer is classed as 'middle' order, suggesting there is a good mix of representation from lower, middle and upper-middle retailers in the town. The 'fashion market position' for Mansfield is also 'middle'.
- 3.10 Nottingham is by some distance the highest ranked nearby centre, and is ranked within the top ten UK shopping destinations. We expect Nottingham to exert a significant trade draw over residents of Mansfield District. In addition, it can be seen from Table 3.2 that the quality of the fashion retail offer is strong, reflecting the trends discussed above.
- 3.11 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 owing to their strong retail offer.

- 3.12 Chesterfield and Newark, which lie to the west and east of the District respectively, are both classed as sub-regional centres by MHE, although both are ranked lower than Mansfield, and both have a poorer quality fashion retail offer. Other centres which surround Mansfield District are placed lower in the Index, with Worksop classed as a 'Major District' centre, and ranked 271<sup>st</sup>, and Retford and Sutton-in-Ashfield both ranked as 'District' centres and classed in 405<sup>th</sup> and 499<sup>th</sup> position respectively. The retail offer in Alfreton (612<sup>th</sup>) and Hucknall (629<sup>th</sup>) is more limited, with these centres classed as 'Minor District' centres.
- 3.13 The district centres are ranked lower in the Index, with Oak Tree the highest ranked centre on account of the fact the retailers at this location are national multiples, compared to Mansfield Woodhouse – the lowest ranking district centre – which has limited national multiple retailer representation. Although not classed as such by the Local Plan, Forest Town is also ranked in the Index at 2,247<sup>th</sup> position (above Market Warsop and Mansfield Woodhouse, likely to be on account of the high proportion of national retailers at this location such as Asda and KFC). The Index also ranks a number of smaller shopping parades in the town, although these are not shown in Table 3.2 as they are not the focus of this study.

### Application of PPS4 indicators to Mansfield Town Centre

- 3.14 Mansfield town centre is the main retail and leisure destination in the District, and performs the function of a sub-regional shopping centre. The retail offer in the town centre is extensive, including a wide range of national multiple retailers. Independent retailers occupy space in secondary parts of the centre. The main retail offer is concentrated in the Four Seasons Shopping Centre, a purpose-built 1970s development. The imposing railway viaduct which runs through the heart of the town centre enhances the uniqueness of the town centre, although also serves to divide the centre.
- 3.15 Below we set out our assessment of the vitality and viability of Mansfield town centre, based on the findings of the RU<sup>10</sup> and supplemented with our own anecdotal comments based on our visits to the centre in April and May 2011.

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<sup>10</sup> As noted previously the RU comprises the Retail Monitoring Report (RMR) and Town Centre Health Check (TCHC). Prior to 2011 these were published separately by the Council. The 2011 RU brings the two documents together as the Retail Update 2011.

PPS4 Indicator	Comments
Diversity of main town centres (A1)	<ul style="list-style-type: none"> <li>The RU identifies that 44 per cent of units in Mansfield town centre are given over to A1 retail uses, with 13 per cent in A2 use. 14 per cent of units in the centre are vacant. These figures include St Peter's Retail Park.</li> <li>When compared to Experian national average data, Mansfield town centre has slightly below average convenience floorspace (7.95 per cent of floorspace, compared to a UK average of 9.51 per cent in 2009). Comparison goods representation is also slightly below the 2009 UK average, at 41.92 per cent. Service sector representation was found to be in line with UK averages<sup>11</sup>.</li> <li>87 per cent of units within the primary shopping area are given over to A1 use, which is a positive indicator of the vitality of the centre.</li> <li>Comparison goods floorspace has decreased by almost 10,000 sq.m, and convenience goods floorspace has decreased by 3,500 sq.m, partly reflecting the closure of the town centre Tesco store<sup>12</sup>. Services uses have increased by 1,500 sq.m. These decreases reflect an increase in the amount of vacant floorspace in the town centre, which now stands above the UK average. This is discussed in further detail below.</li> </ul>
Retail floorspace in edge or out-of-centre locations (A2)	<ul style="list-style-type: none"> <li>There is a significant quantum of edge and out-of-centre floorspace in Mansfield.</li> <li>The <b>Portland Retail Park</b> includes representation from Comet, Dreams, Maplin, Pets at Home, SCS and Staples, whilst the <b>St Peters Retail Park</b> contains larger-format 'High Street' retailer representation from retailers such as Boots, Home Bargains, Laura Ashley, Next and TK Maxx. There is also a cluster of bulky goods retail warehouses on <b>Baums Lane</b>, consisting of a 2,800 sq.m net B&amp;Q DIY store, plus smaller units operated by Halfords and Topps Tiles. In addition there is a 1,700 sq.m net Wickes DIY store located on Chesterfield Road South.</li> <li>With the exception of Wickes most of the comparison goods retail warehouse floorspace is clustered in an area to the east of the town centre.</li> <li>In terms of foodstores, there are a number of large foodstores in out-of-centre locations. The largest foodstore is the relatively new Tesco Extra at Chesterfield Road South (5,120 sq.m net), and there is also a large Asda (4,268 sq.m net) at Forest Town. There is also representation from Morrisons at Sutton Road (3,609 sq.m net) and Sainsbury's at Nottingham Road (2,787 sq.m net), which has recently been granted planning consent for redevelopment to form a larger foodstore.</li> </ul>

<sup>11</sup> Since the publication of the UK averages in 2009 which have been used as the benchmark for the Council's RU, Experian have revised forecasts on UK average floorspace figures. Reflecting the increasing trend for foodstores to trade from town centre locations, in September 2010 the UK average for convenience goods floorspace in town and city centres was 17.49 per cent; comparison goods 47.53 per cent of floorspace; services 22.94 per cent of floorspace; vacant 11.06 per cent floorspace.

<sup>12</sup> Subsequent to the completion of the survey by the Council, we understand that this store is now trading as B&M Bargains.

<p>Potential for capacity for growth or change of centre (A3)</p>	<ul style="list-style-type: none"> <li>• Mansfield town centre is the highest order centre in the District, and was identified in the East Midlands Regional Plan as a sub-regional retail centre. This study will provide an update to the quantum of comparison goods floorspace required for the District over the period to 2026, and it is expected that the majority of this requirement will be directed to Mansfield town centre.</li> <li>• There are several areas of land within and adjacent to the town centre which have been identified by the Council as having potential for retail development, as summarised in the local policy review set out at Appendix 1.</li> <li>• Within the town centre, the most prominent redevelopment site is the former Tesco store on Stockwell Gate and adjacent bus station/car park. The recent confirmation of funding to support a relocated bus station is expected to release this area for retail floorspace over the course of the study period. Outline planning consent has been granted for the redevelopment of the site.</li> <li>• The White Hart area and former Courtalds Factory sites which are on the edge of the town centre are also identified by the Council as being suitable for retail development. Planning permission for the redevelopment of the White Hart area has recently lapsed, however. The White Hart area is also covered by SPD guidance.</li> <li>• Both of these sites were allocated in the Local Plan but are yet to come forward for town centre uses. It is considered these sites should be the focus for improving the retail and leisure offer in the town centre over the course of the study period, to enable Mansfield to maintain market share and effectively compete with the anticipated improvements to the retail offer in Nottingham.</li> <li>• Further discussion of this indicator is set out in Innes England's commercial assessment below.</li> </ul>
<p>Retailer representation and intentions to change representation (A4)</p>	<p><b>Current representation</b></p> <ul style="list-style-type: none"> <li>• There is no supermarket in Mansfield town centre, following the closure of the Tesco store in 2007. Whilst there is a foodhall in Marks &amp; Spencer, plus Iceland and Heron frozen food shops, these are not sufficient to meet many people's grocery shopping needs, and the town centre would benefit from a 'Metro'-style supermarket to complement the existing offer and provide greater customer choice.</li> <li>• Representation from comparison goods retailers is strong, and the Four Seasons centre has a solid tenant mix, although most of the stores are small and slightly outmoded. Four Seasons is anchored by a Debenhams department store. There is also a small Marks &amp; Spencer store on West Gate, along with a BHS store. The town is therefore well provided for in terms of department stores.</li> <li>• Other retailers present in the centre include Topshop, Topman and River Island. The fashion retail offer has been strengthened through the opening of a Primark store which commenced trading in 2008. Republic has also recently commenced trading from the Four Seasons centre, and New Look has relocated to larger premises, indicating investor confidence in the centre.</li> <li>• The majority of clothes stores trading in the centre are at the middle and lower-end of the retail spectrum, and certain middle-market stores such as</li> </ul>



	<p>H&amp;M and Zara are not represented.</p> <ul style="list-style-type: none"> <li>Other comparison goods retailers present include Wilkinson, WHSmith and HMV.</li> <li>In the secondary areas of the centre, such as Church Street and its junction with White Hart Street, there are a number of higher-end retailers, including gift shop Eyrie Gallery (Photo M3, below) and clothes shop Eqvvs (front cover).</li> <li>Services retail representation appears generally good, although the centre has a lack of mid-market restaurants such as Pizza Express/ASK to encourage evening dwell-time in the town centre. The food and drink offer in the town centre is heavily orientated towards the 'pub and club' sector at present, with only limited restaurant representation.</li> </ul> <p><b>Intentions to change representation</b></p> <ul style="list-style-type: none"> <li>The FOCUS Commercial Property Database showed 13 retailer requirements for Mansfield in March 2011. The number of retailer requirements has declined significantly since between 2003 and 2006, when there were approximately 40 retailer requirements. This drop in requirements mirrors trends elsewhere in the country as a result of the economic downturn, but might also point to a shortage of suitable modern premises for retailers to occupy.</li> <li>Further indication of retailer demand is set out in Innes England's commercial assessment below.</li> </ul>
Shopping rents (A5)	<ul style="list-style-type: none"> <li>Mansfield town centre commanded a prime (Zone A<sup>13</sup>) rent of £929 per sq.m in 2010, and prime rents have decreased from a peak of £1,346 per sq.m in 2006-2007<sup>14</sup>. None of the benchmark centres in the sub-region have witnessed similar falls, and in most nearby centres such as Chesterfield, Newark and Sheffield, prime rents have either slightly increased or remained static.</li> <li>The benchmark against Chesterfield is noteworthy as whilst Mansfield has historically commanded a higher prime rent than Chesterfield, it has now dropped some way below.</li> <li>The recent trends in this indicator suggest a decline in the attractiveness of Mansfield as a retail destination, and this indicator must be monitored closely over the course of the study period.</li> </ul>
Proportion of vacant street level property (A6) <sup>15</sup>	<ul style="list-style-type: none"> <li>The stock of occupied retail floorspace in Mansfield town centre has declined over the past three years, from approximately 69,000 sq.m in 2008, to 57,900 sq.m in 2010. There has been an increase in the amount of vacant floorspace of just under 10,000 sq.m.</li> <li>Currently there are 73 vacant units in the town centre, out of a total of 523 units. This represents a vacancy rate of 13.9 per cent, above the current<sup>16</sup> UK average of 12.7 per cent. Over 50 per cent of the vacant units were</li> </ul>

<sup>13</sup> 'Zone A' rent refers to first six metres of a shop's depth

<sup>14</sup> Source: Colliers CRE (cited in RU)

<sup>15</sup> The figures set out in this section do not take into account the letting of the former Tesco store at Stockwell Gate, Mansfield, to B&M Bargains in July 2011. The survey work was undertaken prior to this by MDC.

<sup>16</sup> Experian, September 2010



	<p>formerly in A1 retail use.</p> <ul style="list-style-type: none"> <li>The vacancy rate is much higher in secondary areas of the centre (14 per cent of units) than the primary shopping area (8 per cent of units vacant). The RU reports a reduction in the primary shopping area vacancy rate from 12 per cent in 2010.</li> <li>The aggregate increase in vacant floorspace across the centre represents cause for concern and should be monitored closely.</li> <li>Most of the vacant units are relatively small, sub-300 sq.m premises, which are likely to have limited market appeal, apart from to smaller-scale/local businesses. The former Tesco store on Stockwell Gate (4,801 sq.m) has recently been let to B&amp;M Bargains, removing the largest vacant unit in the town centre from the market. There are only 2 vacant units over 400 sq.m, having made allowance for the B&amp;M Bargains letting.</li> <li>Site visits to the centre in April and May 2011 affirm that the primary shopping area has very few vacant units. However there are concentrations of vacant units along West Gate (west of the Four Seasons Centre entrance) and Leeming Street (south of Toot Hill Lane junction) (see photos M1 and M2, below), as well as Church Street (east of the railway line). Each of these are secondary areas of the centre, but, with the exception of Church Street, benefit from close proximity to anchor stores in the town centre.</li> </ul>
Commercial yields (A7)	<ul style="list-style-type: none"> <li>GVA Grimley identify a prime retail yield of 6.5 per cent in Mansfield in 2010, and historic trend data from the Valuation Office Agency indicates that Mansfield's yield has reduced gradually over the past decade from 7.5 per cent in 2001. This is a positive reflection on the town centre, as the lower the yield, the higher the confidence of the return on capital to the investor. Although recent data availability is limited, it appears that Mansfield has managed to maintain a steady yield of 6.5 per cent throughout the economic downturn.</li> <li>It is considered that a yield performance of 6.5 per cent represents a reasonable performance for a sub-regional centre such as Mansfield.</li> </ul>
Pedestrian footfall (A9)	<ul style="list-style-type: none"> <li>Mansfield District Council collects pedestrian flow data from automatic counters on West Gate. These indicate that average footfall in the prime shopping area is up 9.4 per cent on the previous year, considerably outperforming the UK-wide reported increase of 1.3 per cent. Conversely, separate footfall data from the Four Seasons centre points to declining footfall between 2009/10 and 2010/11.</li> <li>At the time of our visit to the centre the primary shopping area (as defined by the Local Plan) was very busy. West Gate and the Four Seasons centre were noted to deliver healthy levels of footfall, with slightly weaker footfall along Stockwell Gate.</li> <li>Secondary areas of the centre suffered from varying levels of footfall. The Market Place is not classed as primary shopping frontage by the Local Plan, but the presence of the market clearly attracts strong levels of pedestrian activity into this area. Most other secondary areas are quieter, with the quietest parts of the centre generally correlating with where vacancy rates are highest, as discussed above.</li> </ul>
Accessibility (A10)	<ul style="list-style-type: none"> <li>Strong accessibility to a centre by a choice means of transport is important in attracting residents and visitors to a centre. There is a good network of car parks serving the town centre, which provide a total of 3,584 spaces. There are also a number of short-stay on-street parking bays provided at</li> </ul>

	<p>various approaches to the town centre.</p> <ul style="list-style-type: none"> <li>• Mansfield rail station is approximately ten minutes walk from the town centre and has half-hourly connections to Nottingham, Hucknall, Sutton-in-Ashfield and Kirkby-in-Ashfield, with one service an hour running north to Shirebrook, Creswell, Whitwell and Worksop.</li> <li>• There are strong bus connections to the surrounding urban areas, as well as Nottingham and Derby. The dated and inefficient bus station at Stockwell Gate will be replaced by a new purpose-built facility close to the rail station, following confirmation of funding from the Department of Transport in February 2011. There are also a number of bus stops to the north side of the town centre, on Leeming Street.</li> </ul>
Customers and residents' views and behaviour (A11)	<ul style="list-style-type: none"> <li>• The household survey asked questions to assess respondents' satisfaction with Mansfield town centre and the district centres. A total of 47 per cent of respondents to the survey stated that they visited Mansfield town regularly for shopping.</li> <li>• Respondents were asked "what improvements, if any, could be made to Mansfield town centre?"; the most popular responses were as follows: <ul style="list-style-type: none"> <li>• Improved market (23.9%)</li> <li>• No improvements needed (23.2%)</li> <li>• More choice of shops (23.1%)</li> <li>• Cheaper parking (11.9%)</li> <li>• Fewer empty shops (7.4%)</li> </ul> </li> <li>• A full breakdown of the responses is provided at Q31a of Appendix 6.</li> <li>• The Council has also undertaken a survey of businesses in the town centre. This identified that: <ul style="list-style-type: none"> <li>• the majority of respondents consider the range of shops and services in the town centre to be 'adequate' (39%)</li> <li>• 48% consider the foodstore provision in the centre to be poor</li> <li>• 61% consider car parking to be poor</li> <li>• 13% consider the shopping environment to be good, and 57% consider it to be average.</li> <li>• 35% consider the pedestrian environment to be good, and 39% consider it to be average</li> <li>• 39% consider security in the town centre to be good</li> <li>• Only 9% considered the entertainment/leisure offer of the town centre to be good; 56% considered it to be average.</li> <li>• When asked what improvements they would like to see in the town centre, the most popular responses were the provision of a foodstore in the town centre; more specialist markets; increased choice/range of shops; more parking, and greater promotion/ marketing of the town centre.</li> </ul> </li> </ul>
Perception of safety/crime (A12)	<ul style="list-style-type: none"> <li>• During the time of our visit no significant issues in terms of this indicator were noted. In daylight the centre feels safe, and no major instances of anti-social behaviour were observed.</li> <li>• Section 5.13 of the RU presents a detailed assessment of crime and safety in the town centre.</li> </ul>
Environmental quality (A13)	<ul style="list-style-type: none"> <li>• Mansfield is for the most part an attractive town centre, which has benefited from a sustained programme of investment in its public realm to improve the shopping environment. The majority of the centre is</li> </ul>

	<p>pedestrianised.</p> <ul style="list-style-type: none"> <li>• There are three areas which are designated as conservation areas – Bridge Street, Market Place and West Gate.</li> <li>• The RU lists a number of improvements in the physical appearance of the town centre which have taken place in recent years, including introducing three pieces of public art, and improving the appearance of vacant units.</li> <li>• Streets which benefit from particularly strong environmental quality are those to the eastern side of the Market Place, such as Market Street, Church Street, Toot Hill Lane (west of the railway line), and Bridge Street. In these areas, the strong quality of the buildings, the recent investment in the public realm, and the setting of the railway arches, makes for an attractive pedestrian environment.</li> <li>• There are some areas of poor environmental quality in this part of the town centre, and, as noted above, parts of the White Hart area (particularly around the junction with Dame Flogan Street) are largely vacant, with some building boarded up and falling into dereliction. Priority should be given to improving these.</li> <li>• As this area forms part of the White Hart Local Plan allocation and SPD, it is expected that significant improvements to the environmental quality of this area will come forward.</li> <li>• The western side of the town centre does not generally offer the same level of environmental quality, although there has been investment in creating a strong entry point into the town centre at the junction of West Gate and Chesterfield Road South.</li> <li>• Stockwell Gate and the bus station areas also suffer from poor environmental quality. The Beale's department store appears an outdated development, and further along Stockwell Gate the former Tesco store, adjacent multi-storey car park and bus station negatively impact on the town centre environmental quality. The Council has recognised this for some time, reflected in the Local Plan allocation and recent successful application for the bus station relocation, and therefore we would expect this area to be improved over the course of the study period.</li> <li>• The Four Seasons Centre, whilst having a good tenant mix, suffers from a dated internal appearance, with low ceilings and poor quality fit-out. Many of the units are also very small for modern retailers' needs.</li> <li>• The Rosemary Centre, which is a small shopping parade immediately west of the bus station, also looks dated and outmoded, and is also cut off from much of the retail offer. However the units in this development are reasonably large and it is considered that an external modernisation of this building would greatly improve its appearance.</li> </ul>
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#### *Assessment of commercial performance of Mansfield town centre (Innes England)*

- 3.16 In addition to our own assessment of the vitality and viability of Mansfield town centre, Innes England have undertaken an analysis of the commercial performance of the town centre, based on their extensive knowledge of the local market. This sought to assess local demand, and the barriers which are preventing retailers from committing to Mansfield town centre.
- 3.17 To establish potential retailer demand, IE undertook a process using the industry-leading retail website and databases generated both internally and externally. The website –

ShopProperty – is a leading tool for the marketing of shop units. Dependant on the week, the number of hits for retail property are between 100,000 and 150,000. ShopProperty has six listed requirements for Mansfield, totalling a maximum of 8,800 sq.ft. No requirements were listed for Mansfield Woodhouse or Market Warsop.

- 3.18 Of those six listed requirements, one had been satisfied, and one retailer feedback that Mansfield was a secondary requirement and they would be seeking to satisfy requirements for major centres such as Nottingham and Sheffield first.
- 3.19 In addition, a targeted approach to retailers and property agents was undertaken to seek interest in the three centres. Of the responses, the leisure responses generated interest from a pub group seeking existing public houses, and a group seeking 1 acre prominent sites for development. An indication of a potential requirement for 60/80 bed budget style Hotel was also received.
- 3.20 Responses from the Food Retailers highlighted the following requirements.
  - One retailer with a requirement of 15,000 – 25,000 sq.ft net sales area (1,400 to 2,300 sq.m net)
  - One retailer with a requirement of 40,000 sq.ft net sales area (3,700 sq.m net)
  - One retailer with a requirement of 30,000 sq.ft net sales area (2,800 sq.m net), for North Mansfield, owing to the expected housing growth north of the town.
- 3.21 Turning to more traditional high street demand a further nine requirements were identified from the approaches generating a maximum of 65,000 sq ft space required.
- 3.22 IE's assessment concluded that the market reality for Mansfield is that further retail requirements could and would be expected if an actual opportunity was presented to the market. However, the opportunity would need to identify the site and the anchor tenants that had committed to the development.
- 3.23 Anchor tenants and major retail brands are necessary to increase the attractiveness of the development and the retail centre to the widest possible range of retailers.
- 3.24 We understand that MDC have recently approached the market on Stockwell Gate North for a retail led scheme of up to 4.25 hectares. One of the requirements is that the Development partner commences speculative development. Speculative development on this scale would still require an element of pre-letting to anchor tenants and attractive retailers.
- 3.25 Having discussed the availability of units in Mansfield with the marketing agents the feedback is very similar to a number of High Streets across the country where it is hard work to secure new tenants. One common theme is the amount of out of town retail is not helpful. Sainsbury's and the leisure / retail adjacent on Nottingham Road, together with Portland Retail Park have a number of traditional out of town operators. St. Peters Retail Park is closer to the town centre but has a number of tenants that might otherwise be in the High Street rather than traditional bulky goods retailers. A recent example is Next who have recently vacated the Four Seasons Shopping Centre and remain in the St. Peters Retail Park. The situation can only be addressed by ensuring that the planning consents

are not widened any further to allow more High Street style operators who require Open A1 non food planning.

- 3.26 The retail park floorspace in Mansfield is located closer to the town centre than in many other centres, and therefore fewer retailers will be willing to support two stores.
- 3.27 With regard to the Four Seasons Shopping Centre, the rents achieved in today's market conditions are some 20 per cent below those secured in the peak. Reviewing the barriers to attracting further retailers the agent could not highlight one overriding reason, but did raise the issue that retailers are focusing on the top retail centres with the stronger demographics in the first instance when seeking further expansion. This reflects the trends that we have set out in Section 2 of this study.
- 3.28 In response to a question on the potential to extend the Centre, the agent confirmed the potential had been looked at some years ago but in the current market conditions it was unlikely they would be actively considering an extension.

#### *Summary of vitality and viability of Mansfield town centre*

- 3.29 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. Innes England's assessment indicates that there remains demand for town centre space from retail and leisure operators, as well as demand for foodstore provision elsewhere in the town. It is expected that if a suitable development opportunity were to come forward in the town centre (such as the Stockwell Gate sites), retailer demand would increase correspondingly.
- 3.30 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.
- 3.31 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.

- 3.32 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. Leeming Street benefits from strong access to the primary shopping area but appears more given over to leisure (bars/pubs) than retail uses. This may be an area which the Council seeks to introduce more cafes and restaurants into. Positively, vacancy rates in the prime retail areas are low.
- 3.33 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.
- 3.34 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. The recent lapse in planning permission for the redevelopment of the White Hart area is unfortunate, however this area should remain a clear focus for redevelopment in the short term.

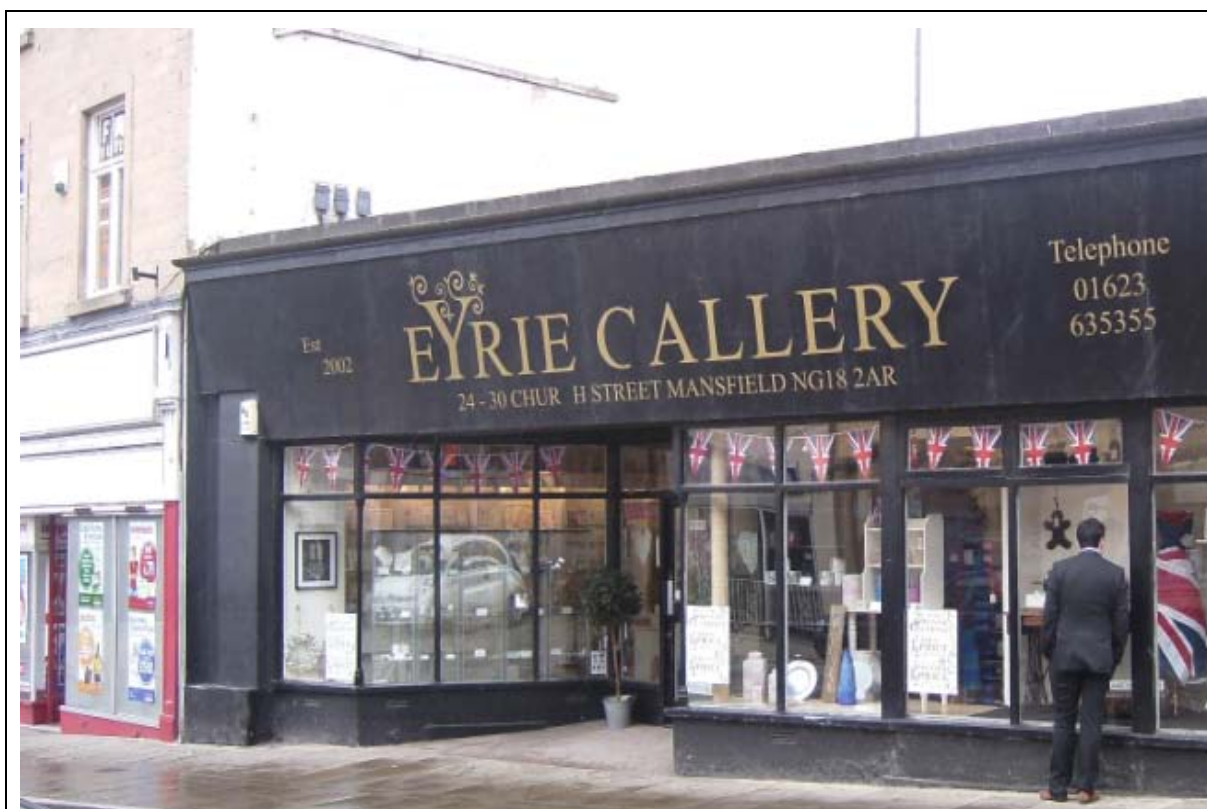




**Photo M1** - Vacant former retail and leisure units on Leeming Street (south of Clumber Street junction)



**Photo M2** - Vacant retail units on West Gate (west of Four Seasons Shopping Centre)



**Photo M3** - Example of high-end independent retailer on Church Street



**Photo M4** - Recent retail development on Clumber Street



## Application of PPS4 indicators to Mansfield Woodhouse District centre

- 3.35 We now turn our attention to assessing the vitality and viability of the three district centres. In setting out our findings, we again draw on the RU, although the amount of information available on the district centres is more limited.
- 3.36 Mansfield Woodhouse is a small, historic district centre located north of the town centre. It now forms part of the wider Mansfield urban area as a result of coalescence of the two centres, although the centre successfully manages to retain its own identity.

PPS4 Indicator	Comments
Diversity of main town centres (A1)	<ul style="list-style-type: none"> <li>Mansfield Woodhouse has a retail offer which is largely focused on convenience goods and services. Representation from comparison goods retailers is relatively limited although there are a number of small, specialist retailers trading in the centre, including a number of florists, a card and gift shop, and an angling centre.</li> <li>The convenience offer includes a medium sized foodstore (Morrisons), a Farmfoods frozen food store, an independent butcher and a newsagent.</li> <li>We expect that comparison goods retail representation to be below the UK average, although this is not an uncommon trend in smaller district and local centres.</li> <li>The services offer is strong and includes a NatWest bank, Yorkshire Building Society, two betting offices, a number of take-aways, estate agents, travel agents (within Morrisons), a post office, library, and a large number of hairdressers/beauty salons.</li> <li>Data in the RU suggests that 43 per cent of units in the centre are given over to A1 retail use, compared to 59 per cent in Market Warsop. A further 11 per cent of floorspace is in A2 use, and 15 per cent of floorspace is vacant.</li> </ul>
Retail floorspace in edge or out-of-centre locations (A2)	<ul style="list-style-type: none"> <li>The catchment of the retail warehouse stores listed above in respect of Indicator A2 for Mansfield also extends to cover Mansfield Woodhouse. In addition there is a further concentration of bulky goods retail activity at Old Mill Lane, Mansfield Woodhouse. This includes a 1,500 sq.m net B&amp;Q DIY store, a 1,100 sq.m United Carpets and Beds store, and a small unit split between three different bulky goods retailers. There are also a number of trade counters in the Old Mill Lane area.</li> <li>There is no edge or out-of-centre floorspace convenience retail floorspace in Mansfield Woodhouse.</li> </ul>
Potential for capacity for growth or change of centre (A3)	<ul style="list-style-type: none"> <li>Mansfield Woodhouse is a linear centre split between several concentrations of retail activity. Whilst there are Local Plan allocations for centre expansion, they are limited in size.</li> <li>Of the two main Local Plan sites which do have potential for outward expansion of the centre, one (site MW15) has been redeveloped as a police station with housing to the rear, whilst the second (MW14) is expected to come forward for residential development, although no work has yet commenced.</li> <li>The only remaining opportunity site for retail purposes is the car park adjacent to the anchor Morrisons foodstore, although any redevelopment of this site would need to maintain a large amount of car parking provision.</li> <li>We expect Mansfield Woodhouse to reinforce its current role as a second-</li> </ul>

	tier District centre over the course of the study period.
Retailer representation and intentions to change representation (A4)	<ul style="list-style-type: none"> <li>As a district centre, retailer representation in Mansfield Woodhouse is more orientated towards independent retailers.</li> <li>There is representation in the centre from national multiple retail and service operators such as Morrisons, Farmfoods, Nisa, Ladbroke's, Lloyds Pharmacy, Rowlands Pharmacy, NatWest bank and Bairstow Eves estate agents.</li> <li>The Morrisons store forms the anchor to the retail offer in the centre. It is a medium-sized foodstore which was previously operated by Co-Operative. The store appeared popular and well-supported at the time of our visit. The store internally however appears somewhat dated and cramped. There is also a small Farmfoods store adjacent to Morrisons, and, at the western end of the centre, a small Nisa store for top-up shopping.</li> <li>The RU also identifies that five new retailers (all independent retailers) commenced trading in the district centre in 2010, which indicates that there is reasonable demand for premises in the centre.</li> <li>No retailer requirements are published for Mansfield Woodhouse. We would expect demand from national retailers to be limited, but there appears to be stronger demand from the independent sector.</li> <li>Innes England have identified that there is a retailer with an outstanding requirement for a 25,000 sq.ft net sales (2,300 sq.m net) requirement for the Mansfield Woodhouse area. We are not aware of any sites which could accommodate a requirement of this size within or on the edge of the district centre.</li> <li>Innes England indicated there was also interest in the site in the district centre now occupied by the police station from a discount food operator; however the site was too small for a development to be commercially viable.</li> </ul>
Shopping rents (A5)	<ul style="list-style-type: none"> <li>No information is available from the FOCUS Commercial Property Database in respect of this indicator.</li> </ul>
Proportion of vacant street level property (A6)	<ul style="list-style-type: none"> <li>The RU identifies a total of 13 vacant units in Mansfield Woodhouse, although only five of these are A1 retail units. As would be expected the majority of vacant units are relatively small, under 100 sq.m. The largest vacant unit in the centre is a 170 sq.m A2 unit on High Street.</li> <li>Although it is not possible to compare vacancy rates to UK averages, given that 15 per cent of total floorspace in the centre is currently vacant, this indicator should be closely monitored.</li> <li>At the time of our visit it was observed that vacancy rates in the 'prime' area of the district centre – in the vicinity of Morrisons and the Market Place – were low. There were however a number of vacant units to the west of this area, along Station Road. The retail offer in this part of the centre is more dispersed, and footfall is lower.</li> </ul>
Commercial yields (A7)	<ul style="list-style-type: none"> <li>No information is available in respect of this indicator for Mansfield Woodhouse.</li> </ul>
Pedestrian footfall (A9)	<ul style="list-style-type: none"> <li>The 'prime' retail area in Mansfield Woodhouse, which was observed to be focussed on the relatively compact area stretching between the Church Street/ High Street junction and the Greyhound Inn on High Street, has good levels of pedestrian activity. This area contains most of Mansfield Woodhouse's key footfall attractors such the Morrisons and Farmfoods supermarkets, NatWest bank, and the library. The main car park serving</li> </ul>

	<p>the centre (adjacent to Morrisons) is also close to this part of the centre.</p> <ul style="list-style-type: none"> <li>Beyond this core area, pedestrian flows diminish, as the number of retail outlets reduces and becomes interspersed with residential and other uses. There was noted to be some increase in footfall around the post office further west along Station Street.</li> </ul>
Accessibility (A10)	<ul style="list-style-type: none"> <li>Mansfield Woodhouse is an accessible centre, located a short distance west of the A60 which links Mansfield town centre with Market Warsop. There are two main car parks serving the centre – a 100-space car park adjacent to Mansfield Woodhouse rail station, and a large car park more centrally located adjacent to Morrisons (although this is time-limited).</li> <li>The centre is served by a number of bus routes, with service 1 linking Mansfield Woodhouse with Mansfield town centre and Huthwaite running every ten minutes in peak hours.</li> <li>Mansfield Woodhouse rail station lies a short distance to the west of the centre, and provides half-hourly direct services to Mansfield Town, Kirkby in Ashfield, Sutton in Ashfield, Hucknall and Nottingham. There is a requirement for better signage directing visitors to the centre when arriving by train.</li> </ul>
Customers and residents' views and behaviour (A11)	<ul style="list-style-type: none"> <li>Question 31 of the household survey into shopping patterns of residents in the local area which was undertaken in support of this study asked residents if they visited Mansfield Woodhouse regularly for shopping. 10.53 per cent of residents stated that they did.</li> <li>For those residents who visit Mansfield Woodhouse regularly for shopping, the survey asked what improvements could be made to the centre. The most popular answers were: <ul style="list-style-type: none"> <li>No improvements needed (65% of respondents)</li> <li>More choice of shops (12% of respondents)</li> <li>More parking provision (10% of respondents)</li> <li>More clothes and fashion shops (7% of respondents)</li> <li>Provision of more toilets (3% of respondents)</li> </ul> </li> </ul>
Perception of safety/crime (A12)	<ul style="list-style-type: none"> <li>The centre feels extremely safe and there was no evidence of any anti-social behaviour.</li> </ul>
Environmental quality (A13)	<ul style="list-style-type: none"> <li>The centre is attractive and well-maintained throughout. Buildings are generally of strong architectural merit, particularly in the core of the centre. There may be scope for further enhancement of the Market Place area.</li> <li>The entire district centre falls within a conservation area and recent additions to the centre – such as the police station and adjacent housing, and the new buildings north of the Market Place – make a positive contribution.</li> <li>Many of the retailers in the centre do not remove grills from the front of their premises during trading hours, particularly along Station Street. This can lend the centre an air of the quieter parts of the centre feeling 'closed for business'.</li> </ul>

### *Summary of vitality and viability of Mansfield Woodhouse District centre*

- 3.37 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.

- 3.38 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.
- 3.39 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. We would expect demand from national retailers to be limited however.
- 3.40 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.

### Application of PPS4 indicators to Market Warsop District centre

- 3.41 Market Warsop lies approximately three miles to the north of the Mansfield urban area, and is a small market town with a traditional historic centre. It is the only centre in Mansfield District which sits outside the built-up urban area of Mansfield. The retail offer and role and function of the centre are equivalent to a district centre which meets local residents' day-to-day needs.

PPS4 Indicator	Comments
Diversity of main town centres (A1)	<ul style="list-style-type: none"> <li>There is a good diversity of uses in Market Warsop, particularly when taking into account the limited size of the centre. Most notable is the relatively strong representation in the comparison goods sector in the context of the size of the centre. This includes two hardware stores, florists, cards and gift shops, two pharmacies, a carpets and flooring store, and mobile phones store. There is limited representation of clothing goods retailers.</li> <li>Convenience goods diversity of uses is also reasonable. The centre is anchored by two foodstores, a small Co-Operative and a slightly larger Nisa Local, which acquired the premises following Somerfield's acquisition by the Co-Operative Group. The Nisa store does not appear to have benefited from much investment however, and internally appears dated.</li> <li>There are emerging plans for a third supermarket, to be operated by Tesco, to be constructed on the edge of the town centre. In addition to the foodstores there are independent bakers and butchers in the centre, and a Bargain Booze off licence.</li> <li>Services representation appears to be more limited when compared to Mansfield Woodhouse. However the centre includes a branch of Lloyds TSB bank, an agency branch of Santander, two estate agents, a café and a number of hairdressers and beauty salons.</li> </ul>
Retail floorspace in edge	<ul style="list-style-type: none"> <li>We are not aware of any current edge or out-of-centre retail floorspace in</li> </ul>

or out-of-centre locations (A2)	Market Warsop. However, as noted above, there are emerging proposals for the development of a new Tesco foodstore on the edge of Market Warsop district centre. We discuss this in further detail below. The store does not have planning consent at the time of preparation of the study.
Potential for capacity for growth or change of centre (A3)	<ul style="list-style-type: none"> <li>The centre is relatively constrained by surrounding residential areas, and there are few opportunities for outward expansion of the centre. The Local Plan identifies one site for town centre expansion, an allotment site to the rear of Church Street. However, this has subsequently been developed for housing.</li> <li>Tesco have identified an opportunity site to the north of the district centre boundary, bounded by Church Street to the west and Burns Lane to the east. The site includes the Bingo Hall on Church Street, and land to the rear, which is currently occupied by a number of employment units which have ceased trading. The site is outside the district centre boundary, and if the application was to obtain planning consent, it is likely that there would be a case for extending the boundary of the centre accordingly.</li> <li>We understand that the Council wishes to maintain the role and function of Market Warsop as a district centre throughout the study period, and the centre appears in sufficient health that it is performing this role and function adequately.</li> </ul>
Retailer representation and intentions to change representation (A4)	<ul style="list-style-type: none"> <li>The centre contains representation from a small number of national multiple retailers, including Nisa, Co-Operative, Bargain Booze, Rowlands Pharmacy (two branches), Lloyds TSB bank and Tote Sport betting office. The majority of representation comprises of local independent retailers, as is typical with most district centres.</li> <li>There are no published requirements for Market Warsop in the FOCUS Commercial Property Database; however the recent application by Tesco for planning permission for a new foodstore would indicate that the centre is a viable trading destination. In 2010, a total of eight new businesses (all independent) commenced trading in the centre, further supporting this view.</li> <li>Innes England's commercial assessment of the centre has also pointed to limited retailer demand at present.</li> <li>More recently, a new Rowlands Pharmacy has moved to a new, larger store in Church Street, close to the health centre. This is a further example of retailer confidence in the town centre.</li> </ul>
Shopping rents (A5)	<ul style="list-style-type: none"> <li>Innes England indicate that a typical retail outlet in the district centre commands rents of between £4,000 and £12,000 per annum, depending on unit size.</li> </ul>
Proportion of vacant street level property (A6)	<ul style="list-style-type: none"> <li>The RU identifies a total of seven vacant units in the district centre, equivalent to 8 per cent of all units. The majority of vacant units are retail premises, with one formerly in A5 use. Most are small but there is a 192 sq.m vacant retail unit at 35 Sherwood Street. This is not particularly well connected to the main shopping area.</li> <li>There is no particular concentration of vacant units within the centre; they are spread throughout.</li> </ul>
Commercial yields (A7)	<ul style="list-style-type: none"> <li>No information is available in respect of this indicator for Market Warsop.</li> </ul>
Pedestrian footfall (A9)	<ul style="list-style-type: none"> <li>Pedestrian footfall in the district centre is strongest at the intersection of Church Street, High Street, Sherwood Street and Burns Lane, centred on</li> </ul>

	<p>the two foodstores. High Street and Sherwood Street benefit from good levels of pedestrian activity throughout, whilst Church Street and Burns Lane, beyond the Nisa store, are noticeably quieter, owing to the more limited retail presence on these streets.</p> <ul style="list-style-type: none"> <li>There are currently limited levels of pedestrian footfall between the Tesco application site and the rest of the centre. Should the Tesco store secure planning consent, it would be expected that the centre of axis within the centre might shift eastwards towards this store.</li> </ul>
Accessibility (A10)	<ul style="list-style-type: none"> <li>There are three main public car parks which serve the centre, adjacent to the library (17 spaces), on High Street (34 spaces) and on Clumber Street (43 spaces). The centre might benefit from the provision of additional parking spaces, and if the Tesco application is permitted, it should be sought that car parking is free to use for all visitors to the centre, not just those to the store. The centre is also served by public transport, with bus routes 11/12 running every 15 minutes to Mansfield bus station, with service 11 extending to Meden Vale and service 12 to Shirebrook. There are also infrequent bus connections with Worksop and Retford.</li> </ul>
Customers and residents' views and behaviour (A11)	<ul style="list-style-type: none"> <li>Only 2.5 per cent of residents contacted in the household survey of shopping patterns stated they visit Market Warsop regularly for shopping. Of those who do, almost 50 per cent stated that they did not consider any further improvements to the centre were needed, whilst 12 per cent expressed a wish for more shops in the centre.</li> </ul>
Perception of safety/crime (A12)	<ul style="list-style-type: none"> <li>As with the other centres in the District, no issues of concern were identified in this respect during our visit to the centre.</li> </ul>
Environmental quality (A13)	<ul style="list-style-type: none"> <li>The centre has reasonable environmental quality, although the location of the shopping area on a crossroads ensures that there are high levels of vehicular traffic flow through the centre.</li> <li>The centre does not benefit from the same strong aesthetic appearance of Mansfield Woodhouse and the design and form of the buildings has less continuity, but there are no buildings which give an overly negative contribution to the centre.</li> <li>The majority of the centre forms part of a conservation area, which extends further north beyond the district centre boundaries along Church Street. The bingo hall on Church Street is an art deco building and we understand the Tesco application is seeking to retain the historic frontage.</li> </ul>

### *Summary of vitality and viability of Market Warsop district centre*

- 3.42 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.
- 3.43 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 proposed Tesco store is outside the defined district centre boundary, and there are limited pedestrian flows between the application site and district centre at present. It will be

essential that strong linkages via both Church Street and Burns Lane are implemented in order for the rest of the centre to benefit from the development, and for the trading impact on the Nisa and Co-Operative stores (which are both within the district centre boundary) to be minimised. 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**

- 3.44 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. Whilst there has been some peripheral growth around this foodstore (operated by Tesco Extra) for example the development of the Argos catalogue store, there is not the breadth of retail and service choice available for the centre to be reviewed in the same manner as above (i.e. assessed against PPS4 indicators). 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.
- 3.45 Indeed, many of the functions of a typical district centre are provided solely by the Tesco store. The store offers a wide range of convenience goods, and has a pharmacy, photo processing facilities, a cash machine and in-store café. There are also a wide range of non-food goods including clothing, electrical goods, CDs, DVDs and books. Many of the shopping needs of local residents are likely to be met by this store alone. The store is currently undergoing an extension which will enhance this range of goods further.





## 4 CURRENT AND FUTURE STUDY AREA SPENDING

- 4.1 In this section we define the study area which has been used as the basis of our assessment of retail capacity, and consider the current and expected population, and the growth in spending on comparison and convenience goods which can be expected to take place.

### Study area definition

- 4.2 In **Table 4.1** below we set out the study area which forms the basis of our assessment – we term this the ‘Mansfield Study Area’ (MSA). 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. For continuity, the boundaries and numbering of these survey Zones are unchanged from those used in the preceding GVA Grimley Retail Study (2005)<sup>17</sup>.
- 4.3 The MSA extends some way beyond the boundary of Mansfield District, which geographically covers a relatively small area. The MSA extends westwards to include Sutton-in-Ashfield and the East Midlands Designer Outlet development at South Normanton; northwards to include the eastern parts of Bolsover District and the rural area south of Worksop; east as far as Newark-on-Trent, and southwards as far as Southwell and the northern fringes of Hucknall. In terms of administrative areas, the MSA takes in Mansfield District in its entirety, plus the majority of Ashfield District (excluding Hucknall), much of the rural part of Newark & Sherwood District, and parts of Bolsover, Gedling and Bassetlaw.
- 4.4 The Mansfield urban area extends over three of the nine survey Zones. This allows a finer grain of analysis of shopping patterns of residents in the District to be undertaken.
- 4.5 The MSA is therefore divided as follows:
- **Zone 1 - Mansfield East** – covers the urban area of Mansfield east of the town centre and the A60 which runs north-south through Mansfield. Includes the residential suburbs of Forest Town and Oak Tree, and the Oak Tree district centre.
  - **Zone 2 – Mansfield Central & West** – covers Mansfield town centre and the urban area west of the A60. Zone 2 also includes the village of Pleasley.
  - **Zone 3 – Warsop & Shirebrook** – covers the northern fringes of Mansfield, including the district centre of Mansfield Woodhouse, and the semi-rural area to the north of the town, including the district centre of Market Warsop, and the centres of Shirebrook and Langwith (in Bolsover District).

<sup>17</sup> The GVAG Retail Study used a wider catchment area of 12 survey Zones, compared to the 9 used in this study. We have removed Zones 10, 11 and 12 of the GVAG catchment area as the results of the household survey undertaken in support of that study identified only limited expenditure flows to Mansfield from these areas. Retail studies for adjacent authorities undertaken by RTP have confirmed these shopping patterns.

- **Zone 4 – South of Worksop** – covers the largely rural area south of Worksop, most of which forms the rural area of Bassetlaw District. The Zone also includes the village of Creswell (in Bolsover District), plus small parts of Rotherham MBC.
- **Zone 5 – New Ollerton** – covers the rural area east of Mansfield, much of which is covered by Sherwood Forest. The main town in this Zone is New Ollerton, alongside the smaller centres of Clipstone and Edwinstowe.
- **Zone 6 – Rural East Nottinghamshire** – covers a wide rural area north of Newark-on-Trent and east of New Ollerton.
- **Zone 7 – Southwell** - wide, largely rural east of Mansfield and west of Newark-on-Trent, including the small centres of Southwell, Blidworth, Rainworth and Bilsthorpe.
- **Zone 8 – South Ashfield** – covers the semi-rural area between Hucknall and Nottingham to the south and Kirkby-in-Ashfield to the north. The Zone includes a number of small settlements such as Selston, Jacksdale, Underwood, Newstead and Ravenshead. The majority of the Zone falls within Ashfield District and Gedling Borough.
- **Zone 9 – Kirkby & Sutton** – covers the towns of Kirkby-in-Ashfield and Sutton-in-Ashfield, to the west of Mansfield.

4.6 **Table 4.1** summarises the population of each of these Zones, and also identifies the local planning authority area which covers each Zone. In cases where there is more than one administrative area, the local planning authority which covers either the majority of that area, or the main centres of population, is used. This is an important consideration, as it influences the level of population growth which is assigned to that Zone for the purposes of the retail capacity assessment.

**Table 4.1 — Mansfield Study Area Zones**

Zone	Zone name	Main centre(s)	Predominant administrative area	Population, 2009
1	<b>Mansfield East</b>	• Oak Tree DC	Mansfield	50,009
2	<b>Mansfield Central &amp; West</b>	• Mansfield TC. • Pleasley	Mansfield	29,290
3	<b>Warsop &amp; Shirebrook</b>	• Mansfield Woodhouse DC. • Market Warsop DC • Meden Vale • Shirebrook • Langwith/Whaley	Mansfield	35,671
4	<b>South of Worksop</b>	• Creswell • Whitwell	Bolsover*	14,823
5	<b>New Ollerton</b>	• New Ollerton • Clipstone • Edwinstowe	Newark & Sherwood	21,485
6	<b>Rural East Nottinghamshire</b>	• Tuxford	Newark & Sherwood	12,178
7	<b>Southwell</b>	• Blidworth • Bilsthorpe • Rainworth • Southwell	Newark & Sherwood	28,305
8	<b>South Ashfield</b>	• Jacksdale • Newstead • Ravenshead • Selston • Underwood	Ashfield	40,890
9	<b>Kirkby &amp; Sutton</b>	• Kirkby-in-Ashfield / Stanton Hill • Sutton-in-Ashfield • Huthwaite • Tibshelf	Ashfield	73,038

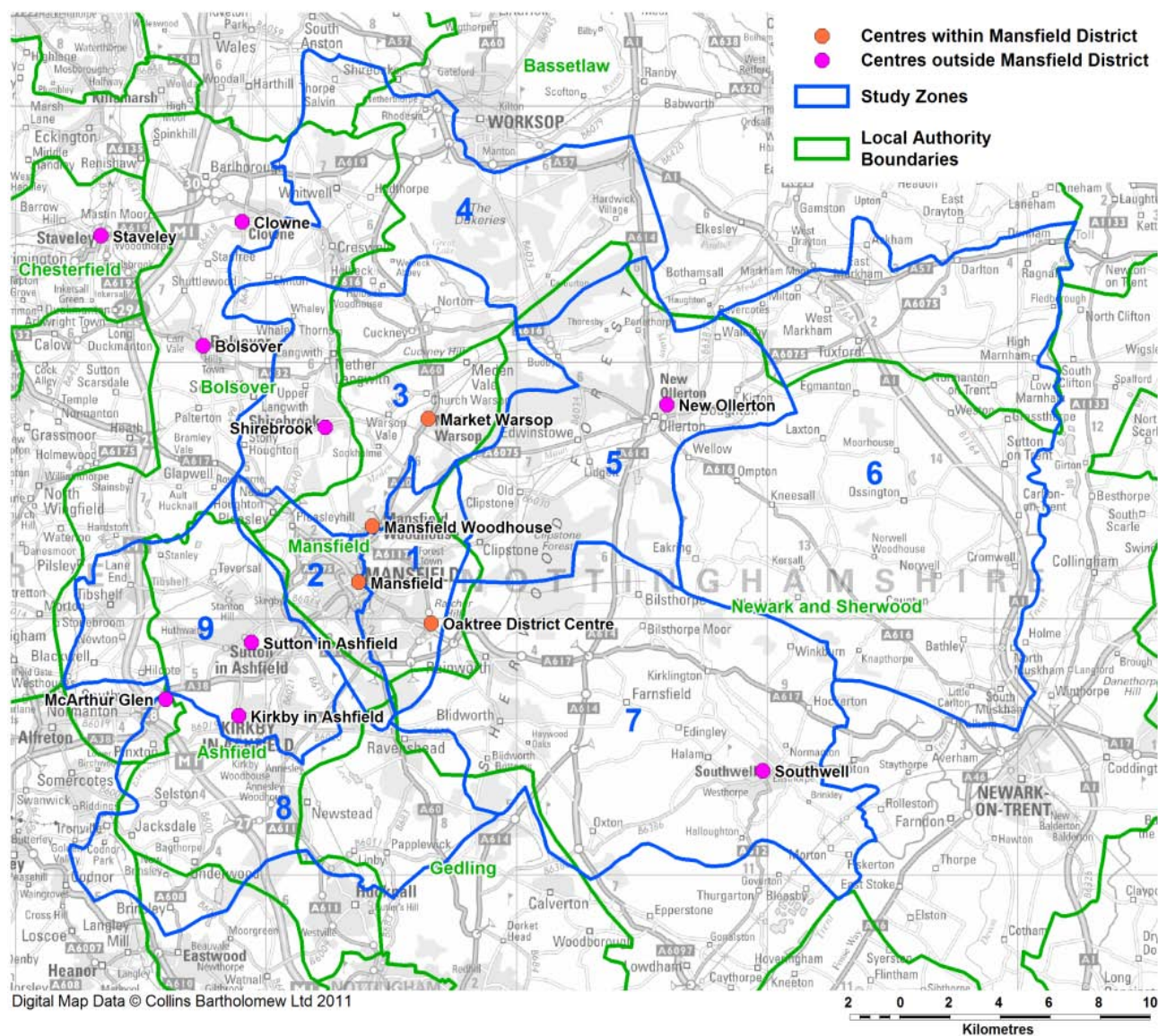
Population source: MapInfo bespoke zonal population forecasts (2009-based) (Source: Table 1, Appendix 5)

DC = District Centre • TC = Town Centre

\*covers a smaller administrative area than Bassetlaw but contains majority of Zone population.

4.7 **Figure 4.2** shows a map of the boundaries of the nine Zones described above<sup>18</sup>.

**Figure 4.2 — Map of Mansfield MSA Zones**



## Existing and future population of the MSA

4.8 In Table 4.1 above we have indicated the population for the nine survey Zones in 2009, the most recent year for which bespoke zonal population (provided by MapInfo) is available. In **Table 4.3** below, we have rolled these bespoke populations forward to 2011, the base year of the study, using the Office of National Statistics Sub-National Population Projections<sup>19</sup>

<sup>18</sup> A larger version of this map is reproduced in **Appendix 3** to the study.

<sup>19</sup> As published in May 2010. Full details on the projections and methodology are available at <http://www.statistics.gov.uk/snpp/>



(SNPP) for the relevant corresponding district, as set out in the final column of Table 4.1 above (so for example, in Zones 1 to 3, the majority of the Zones fall within Mansfield District, and so the SNPP growth rate for Mansfield District is applied to the bespoke 2009 population).

- 4.9 In addition to the summary at Table 4.3 a full breakdown of zonal population is provided at **Table 1 of Appendix 5**, which contains detailed data on population and expenditure growth in each of the MSA Zones.
- 4.10 The population for the MSA is estimated to be 305,689 persons in 2009, the base year for the MapInfo data. Applying SNPP forecasts, it is estimated that this increases to 309,094 persons in 2011, the base year for the study.
- 4.11 Table 4.3 also shows the projected increase in population in each of the nine Zones throughout the study period. It can be seen that 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.
- 4.12 As stated above, the zonal boundaries do not directly correlate with the administrative boundaries of each District, and therefore in cases where there is boundary overlap, the growth rate applied to the Zone is for the administrative authority which covers the main population centres in that District. A schedule of which growth rates have been applied to each Zone is shown at **Table 4.1**.
- 4.13 Mansfield District covers Zones 1 and 2 almost in their entirety. In addition, a large part of Zone 3 also falls within Mansfield District – however the Zone also includes the eastern part of Bolsover District, and small parts of Bassetlaw and Newark & Sherwood. Information from MapInfo indicates that residents in Mansfield District account for 20,404 of the 35,671 persons (2009) in this Zone, equivalent to 57.2 per cent of the total Zone population. The majority of the remainder falls within Bolsover District.
- 4.14 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 growth in the MDCA is also summarised in Table 4.3 and Table 1 of Appendix 5. It can be seen that 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.
- 4.15 Therefore just under 25 per cent of the growth of the MSA (34,447 persons) over the period to 2026 is expected to come from within Mansfield District (8,167 persons).

**Table 4.3 — Population of MSA and MDCA, 2008-2026**

	Population of MSA	Population of MDCA*
<b>2009</b> (population base year, actual)	305,689	99,703
<b>2011</b> (study base year, estimated)	309,094	100,400
<b>2016</b> (estimated)	318,886	102,691
<b>2021</b> (estimated)	329,840	105,380
<b>2026</b> (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

## Expenditure data inputs

- 4.16 This section of the report now progresses to consider the inputs into forecasting expenditure growth across the MSA over the study period to 2026.
- 4.17 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

### *National Trends in Expenditure*

- 4.18 Current forecasts of expenditure trends anticipate muted short-term growth prospects, as the collapse in investment since autumn 2007 and the need to restore government finances, significantly constrain economic growth and consumer spending. Recent rises in unemployment are expected to impact upon consumption growth in the short and medium term periods. Along with tighter lending conditions, higher unemployment is forecast to be a legacy of the current recession. The forecasters therefore expect that the boom conditions of the past decade are unlikely to be repeated in the short to medium term as consumers tighten their purses as a result of the global recession and correction in the housing market.
- 4.19 Consequently the most recent expenditure growth rates forecast by Experian in September 2011 and Pitney Bowes Business Insight/Oxford Economics (PBBI/OE) in September 2010 are relatively low for the next few years. Over the medium and long term periods, however, there is more uncertainty – for example PBBI/OE anticipate a much faster recovery in



comparison goods expenditure growth than Experian, but PBBI/OE's convenience forecast over the medium term is demonstrably more conservative than suggested by Experian.

- 4.20 Owing to the uncertainties of the data providers, the per capita comparison and convenience goods expenditure growth rates that we have adopted for the twelve year period from 2009 to 2021 are the midpoints of the estimates and forecasts provided by Experian and PBBI/OE. Whilst Experian's forecasts for growth in per capita expenditure extend up to 2028, PBBI/OE does not provide any forecasts for growth in per capita expenditure beyond 2021 and so for the period beyond 2021 we rely on Experian forecasts.

### Comparison goods spending in the MSA and MDCA

- 4.21 In this section we establish the total expenditure which is available to residents of the nine Zones which collectively make up the MSA to spend on comparison goods. The expenditure is set out in the base year for which spending data is available (2009), the base year for the study (2011), and is then projected forward to 2016, 2021 and 2026.<sup>20</sup>

#### *Stage 1 – Baseline per capita expenditure data*

- 4.22 Expenditure spend per person on comparison goods in the MSA is shown at **Table 2a** of **Appendix 5**. The data is set out by Zone, and is supplied by MapInfo for the year 2009.
- 4.23 Table 2a (Appendix 5) shows that per capita spending across the MSA averages at £2,431 in 2009. The lowest per capita spend is £2,192, in Zone 3 (Warsop and Shirebrook), and the highest is £2,768 in Zone 6 (Rural East Nottinghamshire). There is a substantial difference in spending power across the MSA of £576 between the most and least affluent parts therefore.

#### *Stage 2 - Project per Capita Data to Forecast Years*

- 4.24 As noted above we have adopted a midpoint approach to forecasting comparison goods expenditure growth over the study period. The growth rates we have used are set out in **Table 4.4**, which shows the growth rates for the study periods for the two forecasters (Experian and Oxford Economics/PBBI), and, derived from this, the RTP mid-point growth rate figure used for the purposes of the study.

<sup>20</sup> Please note that figures set out in this section and at Appendix 5 may not add due to rounding.

**Table 4.4 — Comparison goods expenditure growth rates, 2009-2026**

Interval period	Experian annual average growth rate forecast	Oxford Economics annual average growth rate forecast	RTP annual average growth rate (rate used for study)
2009 to 2011	0.30%	0.20%	0.25%
2011 to 2016	2.54%	4.64%	3.59%
2016 to 2021	3.00%	4.24%	3.62%
2021 to 2026	3.00%	n/a	3.00%

Data sources: Experian Retail Planner 9 (September 2011) Table 1 and PBI Retail Expenditure Guide 2011/12 (September 2011) Table 3.2. Over the period 2023-2026 we assume that the per capita expenditure growth will be as forecast for the year 2022. RTP figure is the midpoint of Experian and Oxford Economics expenditure growth forecasts from 2009 to 2021 inclusive. Experian expenditure growth forecasts from 2022 up to 2026 inclusive.

### *Stage 3 - Calculate Total Spending in Base and Forecast Years*

- 4.25 **Table 3a of Appendix 5** progresses to calculate the overall 'pot' of available comparison goods expenditure by multiplying the zonal populations set out in Table 1 to the per capita expenditure set out in Table 2.
- 4.26 From Table 3a (Appendix 5) it can be seen that there is a total of £746.11m of comparison goods expenditure available within the MSA at 2011, and this is expected to increase to £918.26m by 2016, £1,134.78m by 2021 and £1,356.77m by 2026.

### *Stage 4 - Deductions for Special Forms of Trading ('SFT')*

- 4.27 It is also necessary to make allowance for one of the 'claims' on the total 'pot' of available expenditure, which is the proportion of expenditure which is diverted towards 'Special Forms of Trading' (SFT) such as online shopping, mail order and market spending. The majority of SFT spending is directed towards online shopping. This reduces the amount of expenditure which is available to support 'bricks and mortar' comparison goods shopping in a particular area. In excluding SFT, we have relied on advice set out in Experian's Retail Planner Briefing Note 9<sup>21</sup> (September 2011), which advises that SFT is likely to account for the shares of total retailing over the period to 2026 set out in **Table 4.5**.
- 4.28 As discussed in Section 2 of the study, in the baseline SFT forecasts prepared by Experian, no allowance is made for 'store picked' online shopping. This is where supermarkets and other retailers source internet goods from store space. Therefore the share of non-store retailing is over-stated in the baseline forecasts. In order to make allowance for this, Experian also provide "adjusted" comparison and convenience SFT forecasts. Experian apply a deduction of approximately 25 per cent to its baseline SFT forecasts in order to

<sup>21</sup> Experian are established forecasters of trading patterns, and are widely used in evidence base studies. We consider their forecasting to be robust. Other forecasts may be available.

forecast the “adjusted” comparison goods SFT rate. This is summarised in Table 4.5. We use the “adjusted” forecasts as the basis of our capacity forecasts for this study, for both comparison and convenience goods.

- 4.29 As discussed in Section 2 of the study, it can be seen from Table 4.5 that SFT, according to the Experian forecasts, is expected to peak at the 2016 interval period, and then reduce by 0.9 per cent over the remainder of the study period 2016 to 2026.

**Table 4.5 — Proportion of comparison goods expenditure diverted to ‘Special Forms of Trading’, 2011-2026**

Year	Comparison goods SFT discount (unadjusted)	Comparison goods SFT discount (adjusted)*
2011	13.3%	10.0%
2016	17.0%	12.7%
2021	16.6%	12.4%
2026	16.1%	12.1%

Source: Experian Retail Planner 9, September 2011, Appendix 3

\*adjusted forecast takes into account store-picked online comparison goods shopping.

### Stage 5 – Residual Spending Growth

- 4.30 Having allowed for the SFT discounts shown above, Table 3a of Appendix 5 shows that the total ‘pot’ of comparison goods expenditure available to residents of the MSA is reduced to £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.
- 4.31 The increase in comparison goods expenditure, taking into account SFT, across the MSA to 2026 is summarised at **Table 4.6**.

**Table 4.6 — Residual expenditure available for comparison goods spending in MSA, 2011-2026**

	2011	2016	2021	2026
Total available expenditure £m	746.11	918.26	1,134.78	1,356.77
Diversion to SFT £m	74.61	116.62	140.71	164.17
Residual expenditure £m	<b>671.50</b>	<b>801.64</b>	<b>994.07</b>	<b>1,192.60</b>

Source: Table 3a, Appendix 5. Figures may not add due to rounding.

- 4.32 It is also possible to calculate the total expenditure available in the MDCA – this is the sum of the total expenditure of Zones 1 and 2 of the MSA, plus 57.2 per cent of the expenditure of Zone 3. This is shown in the final column of Table 3a of Appendix 5, and is also summarised at **Table 4.7** below. It can be seen that 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.

**Table 4.7 — Residual expenditure available for comparison goods spending, MDCA area only, 2011-2026**

	2011 (£m)	2016 (£m)	2021 (£m)	2026 (£m)
Total available expenditure	238.81	291.34	357.15	423.82
Diversion to SFT	23.88	37.00	44.29	51.28
Residual expenditure	<b>214.93</b>	<b>254.34</b>	<b>312.86</b>	<b>372.53</b>

Source: Table 3a, Appendix 5. Figures may not add due to rounding.

## Convenience goods spending in the MSA and MDCA

- 4.33 We now progress to consider current and forecast expenditure growth in the convenience sector. The methodology for forecasting growth in convenience spending reflects that set out above for the comparison goods sector.

### *Stage 1 – Baseline per capita expenditure data*

- 4.34 Expenditure spend per person on convenience goods in the MSA is shown at **Table 2b** of **Appendix 5**. The data is set out by Zone, and is supplied by MapInfo for the year 2009.
- 4.35 The average per capita spending on convenience goods at 2009 is £1,716. The lowest spend is in Zone 3 at £1,620; the highest is in Zone 6 at £1,843. The difference in average spending between the most and least affluent areas of the MSA is £223.

### *Stage 2 - Project per Capita Data to Forecast Years*

- 4.36 In forecasting convenience goods expenditure growth, we have again adopted a midpoint approach to forecasting expenditure growth over the study period. Our rationale for adopting this approach is set out above. The convenience goods expenditure growth rates used are shown in **Table 4.8**, which shows the original Experian and Oxford Economics forecasts and our midpoint figure used

**Table 4.8 — Convenience goods expenditure growth rates, 2008-2026**

Interval period	Experian annual average growth rate forecast	Oxford Economics annual average growth rate forecast	RTP annual average growth rate (rate used for study)
2009 to 2011	0.25%	0.35%	0.30%
2011 to 2016	0.32%	0.64%	0.48%
2016 to 2021	0.56%	0.36%	0.46%
2021 to 2026	0.60%	n/a	0.60%

Data sources: Experian Retail Planner 9 (September 2011) Table 1 and PBDI Retail Expenditure Guide 2011/12 (September 2011) Table 3.2.. Over the period 2023-2026 we assume that the per capita expenditure growth will be as forecast for the year 2022. RTP figure is the midpoint of Experian and Oxford Economics expenditure growth forecasts from 2009 to 2021 inclusive. Experian expenditure growth forecasts from 2022 up to 2026 inclusive.

- 4.37 It can be seen from Table 4.8 that throughout the study period to 2026, convenience goods expenditure growth is expected to be low, with each of the interval periods showing expenditure growth of under 1.0 per cent per annum (and under 0.5 per cent per annum until 2021). As stated previously, these forecasts should be subject to regular review throughout the Council's plan period.

#### *Stage 3 - Calculate Total Spending in Base and Forecast Years*

- 4.38 **Table 3b of Appendix 5** progresses to calculate the overall 'pot' of available convenience goods expenditure by multiplying the zonal populations set out in Table 1 (Appendix 5) to the per capita expenditure set out in Table 2b (Appendix 5). Table 3b (Appendix 5) shows that there is currently £530.62m of convenience goods expenditure available to the MSA, and this is expected to increase to £560.73m by 2016, £593.50m by 2021 and £630.65m by 2026.

#### *Stage 4 - Deductions for Special Forms of Trading*

- 4.39 As with comparison goods, it is necessary to make allowance for 'special forms of trading'. The convenience goods SFT discounts are shown at **Table 4.9**. As with comparison goods, we use the "adjusted" Experian forecasts for the purposes of this assessment, which take into account the proportion of non-store retailing which is sourced from physical store space (that is, when a customer places an order online, and the stock is taken from the shelves of that retailer's nearest large branch — an approach followed by Asda, Sainsbury's and Tesco). For convenience goods, Experian apply a reduction of 50 per cent to the baseline convenience SFT discounts to make allowance for this.

**Table 4.9 — Proportion of convenience goods expenditure diverted to ‘Special Forms of Trading’, 2011-2026**

Year	Convenience goods SFT discount (unadjusted)	Convenience goods SFT discount (adjusted)*
2011	8.3%	4.2%
2016	11.7%	5.9%
2021	12.5%	6.3%
2026	13.5%	6.8%

Source: Experian Retail Planner 9, September 2011, Appendix 3

\*adjusted forecast takes into account store-picked online comparison goods shopping.

- 4.40 Table 4.9 shows that whereas comparison goods SFT discount is expected to peak at the middle of the study period, convenience goods discount is anticipated to increase throughout the duration of study period. Table 4.9 shows that the adjusted convenience goods SFT rate increases by 2.6 percentage points between 2011 and 2026.

#### *Stage 5 – Residual Spending Growth*

- 4.41 Having made allowance for SFT, Table 3b of Appendix 5 shows that the total ‘pot’ of convenience goods expenditure available to residents of the MSA is reduced by £22.29m to £508.34m in the 2011 study base year. The residual expenditure, having 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.
- 4.42 The increase in convenience goods expenditure, taking into account SFT, across the MSA to 2026 is summarised at **Table 4.10**.

**Table 4.10 — Residual expenditure available for convenience goods spending in MSA, 2011-2026**

	2011	2016	2021	2026
Total available expenditure £m	530.62	560.73	593.50	630.65
Diversion to SFT £m	22.29	33.08	37.39	42.88
Residual expenditure £m	<b>508.34</b>	<b>527.65</b>	<b>556.11</b>	<b>587.77</b>

Source: Table 3b, Appendix 5. Figures may not add due to rounding.

- 4.43 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. This is summarised in **Table 4.11**.

**Table 4.11 — Residual expenditure available for convenience goods spending in MCDA only, 2011-2026**

	2011	2016	2021	2026
Total available expenditure £m	171.06	179.20	188.16	198.46
Diversion to SFT £m	7.18	10.57	11.85	13.50
Residual expenditure £m	<b>163.88</b>	<b>168.63</b>	<b>176.31</b>	<b>184.96</b>

Source: Table 3b, Appendix 5. Figures may not add due to rounding.





## 5 CURRENT PATTERNS OF RETAIL SPENDING IN THE MSA

- 5.1 In this section we set out the current patterns of spending on comparison (non-food) goods and convenience (food) goods in the Mansfield Study Area (MSA), based on the findings of the household telephone survey of shopping patterns undertaken across the MSA in April 2011.
- 5.2 This section of the report should be read in conjunction with **Tables 4 to 8** inclusive of **Appendix 5** to the study, which sets out a full summary of market shares and spending attracted to each of the main shopping destinations within and outside the MSA.

### Household Survey Methodology

- 5.3 Our assessment of current patterns of retail spending in the MSA is based on a telephone survey of 900 households which were undertaken by NEMS Market Research in April 2011. The MSA was split into nine survey Zones, in order for an accurate picture of localised shopping patterns to be established. The household survey Zones reflect those set out in the previous chapter at **Figure 4.2**, and the boundaries of the Zones are unchanged from Zones 1 to 9 of the previous retail study undertaken for the District.
- 5.4 Reflecting the best practice guidance which accompanies PPS4, 100 interviews were successfully conducted in each Zone. Paragraph 1.21 of Appendix 6 (the full household survey results) affirms that each Zone had 100 interviews undertaken<sup>22</sup>, and provides the postcode sectors which make up each of the Zones.
- 5.5 Respondents were contacted at a variety of times (during the day, in the evening and at the weekend), and all respondents were verified to be the main shopper in the household.
- 5.6 The NEMS report attached separately to this study (as **Appendix 6**) contains the household survey data in full and also contains full explanation of the statistical reliability of the survey sample.
- 5.7 The survey questionnaire sought to establish the following:
- patterns of convenience goods spending, based on:
    - the shop where the household spends most money on food and groceries, and the amount spent per week;
    - the shop where the household undertakes most 'top-up' food and groceries purchases, and the amount spent per week;
    - spending on food and groceries in small shops, for those who named supermarkets in answer to the above two questions
  - 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,

<sup>22</sup> 101 interviews were undertaken by NEMS in Zone 5.

leisure or service outlets, and the mode of transport used to access these destinations were also asked.

- patterns of comparison goods spending, based on the locations of the last two purchases of:
  - clothes and shoes, as well as the reasons for choosing this location and mode of transport used to access this destination;
  - furniture, carpets and soft household furnishings;
  - DIY and decorating goods;
  - Electrical items;
  - Health & beauty or chemist items;
  - Recreational goods (e.g. sports equipment, bicycles, toys);
  - Other non-food items (e.g. books, CDs, 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

- 5.8 The composite pattern of spending for comparison goods was achieved on the basis of MapInfo expenditure data in relation to the seven categories of spend, broken down as shown in **Table 5.1**.

**Table 5.1 — Percentage weighting for comparison goods sub-categories**

Comparison goods spend	Proportion of spend
Clothing and footwear	22.90%
Furniture, carpets and soft furnishings	10.97%
DIY and decorating goods	14.36%
Electrical items & domestic appliances	8.93%
Health & beauty, chemist goods	13.25%
Recreational goods	20.42%
Other non-food items	9.17%
<b>All comparison goods</b>	<b>100.00%</b>

Source: MapInfo

- 5.9 Full tabulations of comparison goods spending patterns are set out at **Tables 4 and 5 of Appendix 5** to this study. This shows the market shares which each principal centre in the MSA attracts from each of the nine survey Zones, as well as the market shares attracted to each of the main shopping destinations outside the MSA.

- 5.10 In the previous chapter, we identified that there is a total of £671.50m of comparison goods expenditure available to residents in the MSA in the study base year of 2011, having made allowance for SFT discount. The amount of this total 'pot' of expenditure which is retained by centres and stores within the MSA can be established by reviewing the total amount in the row 'Total catchment area spending' in Table 5 of Appendix 5. This shows that of the £671.50m, £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.
- 5.11 We consider that given the rural nature of much of the MSA, and the presence of major shopping destinations such as Nottingham and Sheffield close to the boundaries of the MSA, this is a strong performance. Indeed, it can be seen that for the Zones which fall within Mansfield District, the level of expenditure retention is considerably higher than this aggregate rate – we return to discuss this below.

*Most popular comparison goods shopping destinations in the MSA*

- 5.12 Of the £433.48m which is retained within the MSA, the expenditure is distributed between a wide number of stores and destinations. In **Table 5.2** below we summarise the most popular destinations for comparison goods spending in the MSA, based on the findings of the household survey. These are derived from **Table 5** of **Appendix 5**.

**Table 5.2 — Main comparison shopping destinations in the MSA**

Retail centre	Expenditure from MSA £m	Proportion of total expenditure available to MSA %
Mansfield town centre	191.68	28.55%
Sutton-in-Ashfield town centre / retail parks	76.67	11.42%
Mansfield retail parks	60.15	8.96%
Oak Tree district centre, Mansfield	22.47	3.35%
East Midlands Designer Outlet, South Normanton	18.81	2.80%
Asda, Old Mill Lane, Forest Town, Mansfield	12.17	1.81%
Mansfield Woodhouse district centre	11.67	1.74%
Shirebrook town centre	11.11	1.66%
Tesco Extra, Chesterfield Road South, Mansfield	5.41	0.81%
New Ollerton town centre / foodstores	3.65	0.54%
<b>Total for main shopping destinations</b>	<b>413.79</b>	<b>61.62%</b>
Other destinations in MSA	19.69	2.93%
<b>Sub-total for MSA</b>	<b>433.48</b>	<b>64.55%</b>
Destinations outside MSA	238.02	35.45%
<b>Overall total</b>	<b>671.50</b>	<b>100.00%</b>

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

- 5.13 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.
- 5.14 Oak Tree district centre attracts £22.47m of spending from the MSA, much more than would be expected of a typical district centre. The presence of a large Tesco Extra foodstore at this centre, plus an Argos catalogue showroom, is the likely reason for this high turnover. The turnover of Mansfield Woodhouse district centre (£11.67m) is considered to be more in line with a reasonably strong performing district centre turnover.
- 5.15 As well as the established town and district centres, Table 5.2 indicates that the Asda foodstore at Forest Town and the town's second Tesco Extra store at Chesterfield Road South also both attract significant comparison goods turnovers. Asda and Tesco are the two grocery retailers who devote the most space in large store to non-food goods sales, and therefore these trends are not surprising.

- 5.16 If the blue-highlighted figures are summed, it can be seen that of the ten most popular comparison shopping destinations, those in Mansfield District account for £303.55m, equivalent to 45 per cent of the total comparison goods expenditure available to the MSA.
- 5.17 Aside from Mansfield, the only other main centre to attract substantial trade from the MSA is Sutton-in-Ashfield, which draws £76.67m of spending<sup>23</sup>, equivalent to 11 per cent of total available expenditure. The small town centres of Shirebrook and New Ollerton, which have a limited comparison goods offer, attract turnovers of £11.11m and £3.65m respectively.
- 5.18 In Table 5 of Appendix 5, the turnovers between the different components are also presented in disaggregated form. For example, Table 5.2 above shows the combined turnover of the retail parks/warehouses in Mansfield is £65.08m. Table 5 of Appendix 5 indicates that this combined turnover is split between £18.80m in Zone 1 and £41.35m in Zone 2. Within Zone 2, the main retail park turnovers can also be seen - Portland Retail Park (£21.41m) and St Peter's Retail Park (£19.94m).
- 5.19 The ten destinations shown above account for £413.79m of the £433.48m which is retained in the MSA - equivalent to 95 per cent of all retained expenditure. The remaining 5 per cent is distributed between smaller centres and destinations throughout the MSA, with each attracting a relatively low turnover. The distribution of all spending within the MSA is shown at Table 5 of Appendix 5 to the study.

*Leakage of comparison goods expenditure*

- 5.20 As reviewed 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 5.3**.

<sup>23</sup> This is the combined turnover of Sutton-in-Ashfield town centre and freestanding retail warehouse stores in the town.



**Table 5.3 – Main destinations for comparison goods expenditure leakage from MSA**

Retail centre	Expenditure 'leaked' from MSA £m	Proportion of total expenditure available to MSA %
Nottingham <i>including Bulwell / Arnold</i>	70.67	10.52%
Alfreton <i>including Somercotes</i>	22.15	3.30%
Hucknall	19.68	2.93%
Sheffield <i>including Meadowhall</i>	19.51	2.91%
Giltbrook Retail Park, Giltbrook	18.41	2.74%
Worksop	17.94	2.67%
Chesterfield	15.50	2.31%
Retford	11.00	1.64%
Derby	9.41	1.40%
Newark-on-Trent	8.57	1.28%
Other destinations outside MSA	25.19	3.75%
<b>Total outside MSA</b>	<b>238.02</b>	<b>35.45%</b>

Source: Table 5, Appendix 5. Notes: Figures are combined for town centres, main foodstores and retail parks in each destination. MSA = Mansfield Study Area.

- 5.21 Table 5.3 above shows that Nottingham is the most popular comparison shopping destination outside the MSA and in total the city centre, suburban town centres and retail parks in Nottingham attract £70.67m of spending from the MSA, equivalent to 10.52 per cent of total expenditure available to the MSA. Given the strong retail offer in Nottingham, as well as the proximity of the city to the MSA, this represents a relatively limited aggregate trade draw, and one which suggests that centres within the MSA are trading efficiently.
- 5.22 Alfreton, Sheffield and Hucknall each attract approximately 3 per cent of comparison goods spending, with Alfreton close to the western boundary of the MSA, and Hucknall just outside the boundary of the MSA to the south. A further £18.41m of spending flows to Giltbrook Retail Park near Eastwood, on account of its strong tenant mix which includes IKEA. Worksop attracts £17.94m of spending, almost entirely from Zone 4, whilst Retford's £11.00m turnover is largely sourced from Zone 6.
- 5.23 It is interesting to note that despite the recent enhancements to its retail offer, Derby is not a popular shopping destination for residents of the MSA, attracting a turnover of £9.41m, just 1.4 per cent of the total.
- 5.24 Of the destinations listed in Table 5.3, the only destination which draws a substantial amount of expenditure from the Mansfield District area (i.e. survey Zones 1 to 3 inclusive) is Nottingham, with Meadowhall (Sheffield) also popular with residents in Zone 3 to the north of Mansfield. The other destinations shown above draw expenditure from Zones 4-9 of the MSA, which fall outside the boundaries of Mansfield District.

### *Comparison goods retention rates by Zone*

- 5.25 As would be expected given the mix of urban and rural areas which defines the MSA, there is fluctuation across the MSA in terms of the proportion of comparison goods market shares which are retained by the Zones (that is, the level of spending which is spent within the MSA Zones, compared to that which flows outside the Zones) This can be reviewed by considering the row titled '**total catchment area market share**' in **Table 4** of **Appendix 5**. This shows the market share which is collectively retained by all centres and stores within the MSA on a zonal basis. The comparison goods retention rates for each Zone are summarised in **Table 5.4** below.

**Table 5.4 – Comparison goods retention rates by Zone**

Zone number	Zone name	Zonal comparison goods retention rate %
1	Mansfield East	84.04
2	Mansfield Central & West	83.27
3	Warsop & Shirebrook	83.40
4	South of Worksop	11.77
5	New Ollerton	79.94
6	Rural East Nottinghamshire	14.19
7	Southwell	84.13
8	South Ashfield	26.31
9	Kirkby & Sutton	66.08

Source: Table 4, Appendix 5. Notes: Zones in Mansfield District shown in blue

- 5.26 Table 5.4 above shows that in each of the three Zones which cover Mansfield District, over 80 per cent of expenditure available is retained by centres and stores within the MSA. The remainder is spent at destinations further afield. We consider these performances to be strong, and indicate that in these Zones, the majority of residents' comparison shopping needs are being met without the need to travel further afield.
- 5.27 Elsewhere within the MSA, there is considerable variation in the retention rate. Zone 7 (Southwell) has the highest retention rate of any of the MSA Zones, at 84.13 per cent. Retention rates are also high in Zone 5 (New Ollerton). Other MSA Zones, particularly Zones 4, 6 and 8, have much lower retention rates. This is because much of the population in these Zones is closer to a higher-order centre outside the catchment boundary – Worksop in the case of Zone 4; Newark / Lincoln in the case of Zone 6, and Nottingham in the case of Zone 8 – than to Mansfield.

### *Localised comparison goods retention rate*

- 5.28 It is also important to review the **localised** comparison goods retention rate. This is the proportion of expenditure on comparison goods available to residents in a specific Zone which is spent in stores/town centres within that Zone. Again, this can be expected to fluctuate depending on the characteristics of the Zones, with some being urban and others rural, however it is an important tool in identifying deficiencies at the local level. The

localised rate can be observed from reviewing the 'sub-total, survey Zone' rows for each survey Zone within **Table 4** of **Appendix 5**.

5.29 The localised retention rates by Zone are summarised in **Table 5.5** below.

**Table 5.5 – Comparison goods localised retention rates by Zone**

Zone number	Zone name	Localised comparison goods retention rate %
1	Mansfield East	14.09%
2	Mansfield Central & West	65.28%
3	Warsop & Shirebrook	15.76%
4	South of Worksop	4.19%
5	New Ollerton	7.53%
6	Rural East Nottinghamshire	2.88%
7	Southwell	3.89%
8	South Ashfield	4.45%
9	Kirkby & Sutton	31.50%

Source: Table 4, Appendix 5. Notes: Zones in Mansfield District shown in blue

- 5.30 Table 5.5 shows that the highest localised retention rate for the MSA is Zone 2, which achieves a localised retention rate of 65.28 per cent. This means that in this Zone, almost two thirds of residents of Mansfield undertake their comparison goods shopping in Mansfield town centre and the town's main retail parks, which fall within this survey Zone.
- 5.31 There are more limited comparison goods shopping facilities in the other Mansfield Zones – Zone 3, which includes the small town centre of Shirebrook and district centres of Mansfield Woodhouse and Market Warsop – has a localised retention rate of 15.76 per cent, and Zone 1, which includes the Oak Tree district centre, has a localised retention rate of 14.09 per cent. These lower localised retention rates simply reflect the more limited choice of comparison goods shopping facilities in these Zones, and should not be considered cause for concern.
- 5.32 In the rural parts of the MSA, the localised retention rates are much lower, reflecting the lack of higher-order shopping destinations in these Zones. Zones 4 to 8 inclusive all have a localised retention rate under 10 per cent.
- 5.33 Despite containing two town centres, the localised retention rate for Zone 9 (Kirkby & Sutton) is relatively low at 31.5 per cent, suggesting that there are gaps in the comparison goods offer in these centres.

#### *Most popular comparison shopping destinations by Zone*

- 5.34 Based on the findings and comments above, **Table 5.6** shows the principle comparison shopping destinations for each of the nine survey Zones. This establishes the most popular locations where residents in each Zone undertake their comparison goods shopping.

**Table 5.6 – Most popular comparison goods shopping destinations by Zone**

Zone	Most popular comparison shopping destination	Second most popular comparison shopping destination	Third most popular comparison shopping destination
1	Mansfield TC (51%)	Nottingham (10%)	Mansfield RPs* (8%)
2	Mansfield TC (50%)	Mansfield RPs* (10%)	Nottingham (9%)
3	Mansfield TC (42%)	Mansfield W'house (11%)	Nottingham (7%)
4	Worksop (50%)	Sheffield (24%)**	Mansfield TC (4%)
5	Mansfield TC (34%)	Mansfield RPs* (10%)	Nottingham (7%)
6	Retford (29%)	Newark (19%)	Lincoln (14%)
7	Mansfield TC (33%)	Oak Tree DC (14%)	Sutton-in-Ashfield (10%)
8	Nottingham (34%)	Hucknall (20%)	Mansfield TC (11%)
9	Sutton-in-Ashfield (30%)	Mansfield TC (15%)	Alfreton (11%)

Source: Table 4, Appendix 5.

Notes: RP = Retail Park; TC = Town Centre; DC = District centre.

\*comprises of Portland Retail Park and St Peter's Retail Park, Mansfield. \*\*includes Meadowhall.

Zones in Mansfield District shown in blue

- 5.35 It can be seen from Table 5.6 that **Mansfield town centre** attracts trade from the majority of the MSA. For each of the Zones within Mansfield District (Zones 1 to 3 inclusive) the town centre is the most popular shopping destination, and attracts upwards of 50 per cent of spending from residents in Zones 1 and 2, plus a 42 per cent market share from Zone 3. Mansfield town centre is also the most popular shopping destination from residents in Zone 5 (New Ollerton), from which it attracts a market share of 34 per cent, and Zone 7 (Southwell), from which a market share of 33 per cent is attracted.
- 5.36 In addition, Mansfield town centre is the second-most popular comparison goods shopping destination for residents in Zone 9, and the third-most popular for Zones 4 and 8, although from these latter two Zones the market share of the town centre is relatively low.
- 5.37 Therefore there is only one of the nine survey Zones where Mansfield town centre does not feature in the top three most popular shopping destinations, which is Zone 6. This is the furthest part of the study area from Mansfield, and much of the area is closer to Retford and Newark, both of which have established comparison goods shopping offers (although the offer in Retford is more limited compared to Mansfield), as well as Lincoln.
- 5.38 In Zones 1 and 2, the main competition for spending comes from **Nottingham**, and the **retail parks in Mansfield** (Portland and St Peter's), which attract a combined 8 per cent market share from Zone 1, and 10 per cent from their 'local' Zone, Zone 2. **Nottingham** attracts similar market shares from both Zones, and also a 7 per cent market share from Zone 3. However, the market shares attracted to these locations are relatively small when compared to the dominance of Mansfield town centre over shopping patterns in these Zones.
- 5.39 Given their more limited comparison goods offer compared to higher order centres, the **district centres in Mansfield** do not feature prominently in Table 5.6. However it can be seen that Mansfield Woodhouse is the second most popular shopping destination in its

'local' Zone, Zone 3, and Oak Tree is the second-most popular destination for residents in Zone 7 (Southwell), suggesting that some residents prefer to undertake their comparison shopping at this location (which is easily accessible on the south side of Mansfield for residents in this Zone) rather than travelling further into Mansfield town centre.

- 5.40 Residents in Zone 4 look north for their comparison shopping needs, and Worksop attracts a 50 per cent market share from this Zone, followed by Sheffield with 26 per cent. Although Mansfield town centre is the third most popular comparison goods shopping destination, it only attracts a 4 per cent market share.
- 5.41 The trends shown above are supported by maps at **Appendix 4** of this study, which show the comparison goods market shares attracted to Mansfield town centre, the Mansfield retail parks, Oak Tree and Mansfield Woodhouse district centres, and a selection of competing centres outside the MSA.

Drawing together the comments set out above, **Table 5.7** below sets out an analysis of the dominant centres (where the comparison goods market share exceeds 40 per cent) and centres of subsidiary influence (which are defined on the basis of having comparison goods market shares of between 10 and 39 per cent) for the MSA.

**Table 5.7 – Dominant comparison goods shopping destinations and centres of subsidiary influence**

Zone	Dominant centre (market share of 40%+)	Centre of subsidiary influence (market share of 10-39%)
1 Mansfield East	Mansfield town centre	Nottingham
2 Mansfield Central & West	Mansfield town centre	Mansfield retail parks*
3 Warsop & Shirebrook	Mansfield town centre	Mansfield Woodhouse DC
4 South of Worksop	Worksop	Sheffield**
5 New Ollerton	-	Mansfield town centre Mansfield retail parks*
6 Rural East Nottinghamshire	-	Retford Newark-on-Trent Lincoln
7 Southwell	-	Mansfield town centre Oak Tree district centre Sutton-in-Ashfield
8 South Ashfield	-	Nottingham Hucknall Mansfield town centre
9 Kirkby & Sutton	-	Sutton-in-Ashfield Mansfield town centre Alfreton

Source: Table 4, Appendix 5. Notes: DC = District centre. \*comprises of Portland Retail Park and St Peter's Retail Park, Mansfield. \*\*includes Meadowhall. Zones in Mansfield District shown in blue

- 5.42 The analysis shows that:

- Mansfield is performing a strong role as a sub-regional shopping destination. The town centre is the dominant centre in all three Zones which wholly or partially comprise Mansfield District.
- Mansfield town centre is also a centre of subsidiary influence for Zones 5, 7, 8 and 9, indicating that the town centre draws trade from a wide catchment area.
- Mansfield faces strong competition for expenditure in Zone 9, where Sutton-in-Ashfield and Alferton town centres attract similar market shares.
- In Zones 1 to 3, the dominance of Mansfield town centre is such that there is only one centre of subsidiary influence. In the case of Zones 2 and 3, the centre of subsidiary influence is also within Mansfield District, whilst some residents of Zone 1 look towards Nottingham.
- Mansfield Woodhouse attracts sufficient market share to act as a centre of subsidiary influence in its 'local' Zone, Zone 3. Market Warsop does not attract a significant market share from this Zone.
- In the rest of the MSA outside the Mansfield Zones, shopping patterns are more dispersed, and with the exception of Zone 4, there are either two or three centres of subsidiary influence, and in the case of Zones 5, 6, 7, 8 and 9, no dominant shopping destination which accounts for the majority of comparison goods spending.
- Areas north of Mansfield do not look to Mansfield for their shopping needs, but instead towards Worksop, which is the dominant centre for Zone 4, achieving a market share of 50 per cent, and Sheffield / Meadowhall. Similarly, residents in Zone 6 look northwards to Retford and east to Newark, rather than to Mansfield, to undertake their comparison goods shopping.

#### *Summary of comparison goods shopping patterns*

- 5.43 From the analysis above it is apparent 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 four Zones, and a market share of between 10 and 39 per cent from a further three 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).
- 5.44 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.
- 5.45 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. The Oak Tree district centre is



something of an anomaly, as it contains two large multiple retailers (Tesco Extra and Argos), which explains its strong trade draw from residents in Zone 7 for example. It is positive to note that Mansfield Woodhouse attracts sufficient market share to act as a centre of subsidiary influence from Zone 3, but its trade draw extends no wider than this. Market Warsop does not attract a substantial comparison goods turnover from residents in its local Zone, Zone 3.

- 5.46 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, which is clearly functioning as a popular comparison shopping destination for much of the MSA, without facing too much internal competition from the retail parks.

### Convenience goods shopping patterns

- 5.47 In this section we review the findings of the household survey in respect of convenience goods shopping patterns. The structure of the section follows that set out above for comparison goods, and questions on convenience goods shopping habits were also ascertained through the household telephone survey of shopping patterns undertaken by NEMS Market Research in April 2011.
- 5.48 The composite pattern of spending for convenience goods was achieved on the basis of the mean weekly household spend findings, as set out at **Table 5.8**.

**Table 5.8 – Mean household spend on convenience goods in the study area**

Convenience goods spend	Mean household spend per week	Percentage weighting
Main food and groceries shopping	£74.53	79.41%
Top-up food and groceries shopping	£13.69	14.59%
Small local shops	£5.63	6.00%
<b>All convenience goods</b>	<b>£93.85</b>	<b>100.0%</b>

Source: weighted Household Survey results (Appendix B of Appendix 6). Based on mean weighted responses, adjusted to main food and groceries shopping spend.

- 5.49 Full tabulations of convenience goods market shares and pending patterns are set out at **Tables 7 and 8 of Appendix 5** to this study. This shows the market shares which each of the main foodstores in the MSA attracts from each of the nine survey Zones, as well as the market shares attracted to foodstores outside the MSA.

### Convenience goods expenditure available to the study area

- 5.50 We have shown in Chapter 4 that total convenience goods expenditure in the MSA amounts to £508.34m in the study base year of 2011, having made allowance for special forms of trading discount such as online shopping. **Table 3b of Appendix 5** shows that expenditure is forecast to increase to £527.65m by 2016, £556.11m by 2021 and £587.77m

by 2026. Within Mansfield District<sup>24</sup>, the amount of convenience goods expenditure is set to increase from £163.88m in 2011 to £184.96m by 2026.

- 5.51 **Tables 7 and 8 of Appendix 5** show the market shares (Table 7, Appendix 5) and amount of spending (Table 8, Appendix 5) which each foodstore within the MSA attracts. The row 'total catchment area spending' in Table 8 of Appendix 5 indicates 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.
- 5.52 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. Table 8 shows that the retention rates for Mansfield District are higher than the aggregate 75.7 per cent; we return to discuss this below.

#### *Most popular convenience shopping destinations*

- 5.53 **Table 5.9** sets out the most popular individual convenience shopping destinations in the MSA, based on the findings of the household survey.

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<sup>24</sup> Expenditure in Zones 1 and 2 plus 57% of expenditure in Zone 3.

**Table 5.9 – Most popular convenience shopping destinations in MSA**

Foodstore	Expenditure from study area £m	Proportion of total expenditure available to study area %
Asda, Old Mill Lane, Forest Town, Mansfield	57.04	11.22%
Asda, Priestic Road, Sutton-in-Ashfield	50.82	10.00%
Tesco Extra, Oak Tree DC, Mansfield	48.93	9.63%
Tesco Extra, Chesterfield Road Seth, Mansfield	35.38	6.96%
Morrisons, Sutton Road, Mansfield	34.02	6.69%
Morrisons, Woodhouse Centre, Mansfield W'house	28.15	5.54%
Sainsbury's, Nottingham Road, Mansfield	25.93	5.10%
Tesco, Forest Road, New Ollerton	10.96	2.16%
Sainsbury's, High Grounds Road, Worksop	9.86	1.94%
Aldi, Station Road, Sutton-in-Ashfield	7.70	1.51%
<b>Total for main shopping destinations</b>	<b>308.79</b>	<b>60.74%</b>
Other destinations in MSA	75.75	14.90%
<b>Sub-total for MSA</b>	<b>384.54</b>	<b>75.65%</b>
Destinations outside MSA	123.79	24.35%
<b>Overall total</b>	<b>508.34</b>	<b>100.00%</b>

Source: Table 8, Appendix 5 Foodstores within Mansfield District shown in blue. Figures may not add due to rounding. DC = District Centre

- 5.54 Table 5.9 shows that the most popular foodstore in the MSA is the Asda store at Forest Town, which attracts a turnover of £57.04m from residents in the MSA, and accounts for 11.22 per cent of the total convenience goods expenditure available to the MSA. Two other foodstores attract large turnovers of around £50m – Asda in Sutton and the Tesco store at Oak Tree district centre.
- 5.55 Following this there is a second-tier of foodstores which attract lower, yet still substantial turnovers, of between £25m and £35m. Mansfield's second Tesco Extra store at Chesterfield Road South, plus the two Morrisons stores at Sutton Road and Mansfield Woodhouse, and the Sainsbury's store at Nottingham Road, all fall within this category. Therefore, each of the large foodstores within Mansfield attracts a turnover upwards of £25m from the MSA, and each accounts for between 5 and 11 per cent of available convenience goods expenditure.
- 5.56 If the turnovers of all the main foodstores in Mansfield District (highlighted blue in Table 5.9) is summed, a combined turnover of £229.45m is achieved, which represents 45 per cent of the total convenience expenditure available to the MSA (£508.34m), and 60 per cent of the retained expenditure (£384.54m).

- 5.57 The remaining stores in Table 5.9 attract lower turnovers. The Tesco store in New Ollerton is smaller than the company's stores in Mansfield, and has a more limited catchment area from which to draw trade. Sainsbury's in Worksop only just falls inside the study area, and in practice would have a much higher turnover if trade from the Worksop urban area (which is outside the MSA boundary) was included.
- 5.58 The total turnover of the ten most popular foodstores in the MSA is £308.79m, 61 per cent of the total expenditure available to the MSA, and 80 per cent of the retained expenditure. The remaining 20 per cent of retained expenditure is distributed between a large number of other stores across the MSA, and **Tables 7 and 8 of Appendix 5** shows the main foodstores which attract spending broken down by Zone. We return to discuss this below.

*Leakage of convenience goods expenditure*

- 5.59 We have set out above that there is a total convenience goods expenditure 'pot' of £508.34m available to the MSA, and of this, £384.54m is spent at foodstores within the MSA, the principal destinations for which are shown above. The remaining £123.79m is spent at foodstores outside the MSA, with the main destinations for this set out in **Table 5.10**.

**Table 5.10 – Main destinations for convenience goods expenditure leakage from study area**

Foodstore	Expenditure from study area £m	Proportion of total expenditure available to study area %
Tesco Extra, Ashgate Road, Hucknall	16.57	3.26%
Tesco, Hall Street, Alferton	15.06	2.96%
Tesco Express, Annesley Road, Hucknall	10.03	1.97%
Tesco Extra, Bridge Street North, Clay Cross	6.87	1.35%
Morrisons, Derby Road, Eastwood	4.87	0.96%
Morrisons, Idle Valley Road, Retford	4.71	0.93%
Morrisons, Leen Drive, Bulwell	4.62	0.91%
Asda, Wharf Road, East Retford	4.36	0.86%
Sainsbury's, Nottingham Road, Ripley	2.91	0.57%
Aldi, Ashgate Road, Hucknall	3.58	0.70%
Other destinations outside MSA	50.22	9.87%
<b>Total outside MSA</b>	<b>123.79</b>	<b>24.35%</b>

Source: Table 9, Appendix 5. Figures may not add due to rounding.

- 5.60 Table 5.10 above shows that two Tesco stores just outside the MSA – the Tesco Extra at Hucknall, and the smaller Tesco store in Alferton town centre – both attract high levels of expenditure from the MSA, and these two stores have the 7<sup>th</sup> and 8<sup>th</sup> highest turnovers of any store listed in the household survey responses. However, the trade draw for these stores is very limited – the Hucknall store draws virtually all of its trade from Zone 8, whilst

the Alferton store attracts the majority from Zone 9. None of the stores listed in Table 5.10 draw a substantial amount of trade from the Mansfield Zones. The popularity of the destinations in Table 5.10 is largely a reflection of the boundaries of the MSA, which has a number of large centres just outside the boundaries.

#### *Convenience goods retention by Zone*

- 5.61 The convenience good zonal retention rate refers to the proportion of available convenience goods expenditure on a zonal basis which is collectively retained by the foodstores in the MSA. The retention rate can be observed from reviewing the row 'Total MSA market share' in **Table 7** of **Appendix 5**.
- 5.62 We note above that none of the main destinations for expenditure leakage draw trade from the Mansfield Zones (Zones 1 to 3 inclusive) and Table 7 (Appendix 5) indicates that these Zones have very high levels of expenditure retention. It can be seen from Table 7 (Appendix 5) that in Zone 1 for example, 97.49 per cent of convenience goods expenditure is collectively retained by stores within the nine Zones which make up the MSA. For Zone 2 this figure is 96.32 per cent, and for Zone 3 the figure is 98.38 per cent, which is the highest rate of all the survey Zones. Therefore very few residents in Mansfield are travelling outside the MSA for their food shopping, suggesting that food shopping needs are adequately being met by stores within the MSA. This represents a strong performance as virtually all residents are undertaking their shopping locally.
- 5.63 Zone 5 (New Ollerton) and Zone 7 (Southwell) also have retention rate upwards of 90 per cent which can be considered a very strong performance. Many residents in these two Zones also look towards stores in Mansfield for undertaking their food shopping.
- 5.64 Other parts of the MSA have lower retention rates, and in three of the nine survey Zones, the retention rate is below 50 per cent. In the case of Zone 8 (South Ashfield), just 22 per cent of expenditure is retained, as most residents shop outside the MSA in Hucknall and Bulwell.
- 5.65 The zonal retention rates are summarised in **Table 5.11**.

**Table 5.11 - Convenience goods retention rates by Zone**

Zone number	Zone name	Zonal convenience goods retention rate %
1	Mansfield East	97.49%
2	Mansfield Central & West	96.32%
3	Warsop & Shirebrook	98.38%
4	South of Worksop	45.76%
5	New Ollerton	92.56%
6	Rural East Nottinghamshire	47.74%
7	Southwell	97.97%
8	South Ashfield	21.98%
9	Kirkby & Sutton	70.58%

Source: Table 7, Appendix 5. Zones within Mansfield District shown in blue

### *Convenience goods localised retention rate*

- 5.66 The **localised** convenience goods retention rate – which is the proportion of expenditure on convenience goods available to residents in a specific Zone which is spent in stores/town centres within that Zone, shows considerable variation. The rate can be observed from reviewing the ‘sub-total for survey Zone’ rows within **Table 7** of **Appendix 5**. The localised retention rates by Zone are summarised in **Table 5.12** below.
- 5.67 The localised rate is important as it shows where people’s food shopping needs are not being adequately met at the local level, forcing them to travel further to undertake their food shopping.

**Table 5.12 - Convenience goods localised retention rates by Zone**

Zone number	Zone name	Zonal convenience goods localised retention rate %
1	Mansfield East	58.08%
2	Mansfield Central & West	73.74%
3	Warsop & Shirebrook	48.28%
4	South of Worksop	42.53%
5	New Ollerton	29.27%
6	Rural East Nottinghamshire	12.57%
7	Southwell	12.50%
8	South Ashfield	5.68%
9	Kirkby & Sutton	52.80%

Source: Table 7, Appendix 5. Zones within Mansfield District shown in blue

- 5.68 Table 5.12 shows that the Zone with the highest localised retention rate is Zone 2 (Mansfield Central and West), with 73.74 per cent. Therefore in this Zone, 73.74 per cent of residents who live in this Zone also undertake their food shopping in this Zone, suggesting that the majority of residents are satisfied with the convenience foodstore provision in their immediate area. The relatively high localised retention rate in this Zone is unsurprising given that the Zone contains three of Mansfield’s six main supermarkets. Zone 1 (Mansfield East) has the second highest localised retention rate of 58.08 per cent – this Zone contains two main supermarkets which serve Mansfield. Clearly there is likely to be some ‘cross-pollination’ of shopping patterns – some residents in Zone 2 will travel to foodstores in Zone 1, and vice versa. Therefore, the trends shown in Table 5.12 should be considered with this point in mind. Zone 3, which includes the smaller Morrisons store at Mansfield Woodhouse, has a slightly lower localised retention rate of 48.28 per cent.
- 5.69 The rural parts of the MSA have lower localised retention rates. We identified previously that Zone 7 has a high catchment-wide retention rate (97.97 per cent) but Table 5.12 shows that the localised retention rate is just 12.5 per cent. Therefore, residents in this Zone are travelling outside their local Zone (which is rural and contains no large supermarkets) to elsewhere in the MSA – principally to stores in Mansfield – in order to undertake their shopping.



- 5.70 Figures for Zone 4 are skewed slightly by the inclusion of Sainsbury's at Worksop, which just falls within the survey Zone boundary even though the rest of Worksop does not. The lowest localised retention rate is Zone 8 (South Ashfield), where just 5.68 per cent of expenditure is spent locally (again, on account of it being a rural area). However as we have seen this part of the MSA looks towards stores in Bulwell and Hucknall rather than Mansfield for its food shopping.
- 5.71 Given the high amount of catchment area retention shown in Table 5.11, we do not consider the fluctuations in the localised retention rate in Zones 1 to 3 to be cause for concern – they simply reflect the fact that residents in Mansfield are prepared to travel to the store of their particular choice within the town to undertake their food shopping.

*Main convenience shopping destinations by Zone*

- 5.72 **Table 5.13** shows the most popular food shopping destinations for each of the nine survey Zones.

**Table 5.13 – most popular convenience shopping destination by survey Zone**

Zone	Most popular convenience shopping destination	Second most popular convenience shopping destination	Third most popular convenience shopping destination
1	Tesco Extra, Oak Tree District centre (26%)	Asda, Forest Town (23%)	Tesco Extra, Chesterfield Road South (13%)
2	Tesco Extra, Chesterfield Road South (25%)	Sainsbury's, Nottingham Road (20%)	Morrisons, Sutton Road (18%)
3	Morrisons, Mansfield Woodhouse (39%)	Asda, Forest Town (22%)	Tesco Extra, Chesterfield Road South (11%)
4	Sainsbury's, Worksop (40%)	Tesco, Worksop (15%)	Tesco, Clowne (6%)
5	Asda, Forest Town, Mansfield (37%)	Tesco, New Ollerton (16%)	Tesco Extra, Oak Tree District centre, Mansfield (9%)
6	Tesco, New Ollerton (24%)	Asda, East Retford (20%)	Morrisons, Retford (17%)
7	Tesco Extra, Oak Tree District centre, Mansfield (39%)	Asda, Forest Town, Mansfield (14%)	Morrisons, Sutton Road, Mansfield (8%)
8	Tesco Extra, Hucknall (23%)	Tesco Express, Hucknall (14%)	Morrisons, Bulwell (6%)
9	Asda, Sutton (36%)	Tesco, Alfreton (10%)	Morrisons, Sutton Road, Mansfield (9%)

Source: Table 7, Appendix 5. Foodstores within Mansfield District shown in blue

- 5.73 Table 5.13 confirms the popularity of foodstores in Mansfield for residents in the MSA. It shows that Mansfield is self-contained as a convenience shopping destination – the three most popular foodstores in the Mansfield Zones are all within the Mansfield urban area. In Zone 1, these stores account for a combined market share of 62 per cent; in Zone 2 this figure is 63 per cent, and in Zone 3, 72 per cent. The trends shown in Table 5.13 confirm that residents in Mansfield are well provided for in terms of foodstores, and residents do not need to travel further afield to meet their main food shopping needs.
- 5.74 The popularity of foodstores in Mansfield across other parts of the MSA is also apparent. Foodstores in Mansfield are the three most popular destinations for residents in Zone 7 (attracting a combined market share of 61 per cent). Residents in this Zone have to travel

some distance to Mansfield for their shopping, suggesting there may be a shortfall of foodstores within the Zone itself.

- 5.75 Mansfield stores also account for two of the three most popular destinations for residents in Zone 5. Mansfield stores do not feature in the top three most popular destinations for residents in Zones 4, 6 or 8.

*Overlapping convenience goods catchments*

- 5.76 Drawing together the findings set out above, in **Table 5.14** we present a review of the 'dominant' convenience stores in each of the survey Zones (stores which attract a market share of over 30 per cent), and stores of subsidiary influence (which attract a market share of between 10 and 30 per cent).

**Table 5.14 – Dominant comparison goods shopping destinations and centres of subsidiary influence**

Zone	Dominant foodstore (market share of 30%+)	Foodstore of subsidiary influence (market share of 10-29%)
1 Mansfield East	-	Tesco Extra, Oak Tree Asda, Forest Town Tesco Extra, C'field Road
2 Mansfield Central & West	-	Tesco Extra, C'field Road Sainsbury's, N'ham Road Morrisons, Sutton Road
3 Warsop & Shirebrook	Morrisons, Mansfield Woodhouse	Asda, Forest Town Tesco Extra, C'field Road
4 South of Worksop	Sainsbury's, Worksop	Tesco, Worksop
5 New Ollerton	Asda, Forest Town	Tesco, New Ollerton
6 Rural East Nottinghamshire	-	Tesco, New Ollerton Asda, East Retford Morrisons, Retford
7 Southwell	Tesco Extra, Oak Tree	Asda, Forest Town
8 South Ashfield	-	Tesco Extra, Hucknall Tesco Express, Hucknall
9 Kirkby & Sutton	Asda, Sutton	Tesco, Alfreton

Source: Table 7, Appendix 5. Foodstores within Mansfield District shown in blue

- 5.77 Table 5.14 shows that five of the nine survey Zones have one foodstore which attracts a market share of over 30 per cent from that Zone and is therefore the 'dominant' foodstore. In all cases there are at least one foodstore of subsidiary influence, which provides competition with the dominant foodstore, attracting a market share of between 10 and 29 per cent.
- 5.78 In two of the three Mansfield Zones, no one foodstore claims a dominant market share, which is split between three foodstores of subsidiary influence. This suggests there is strong competition and a good range of local choice, as encouraged in national planning policy guidance.

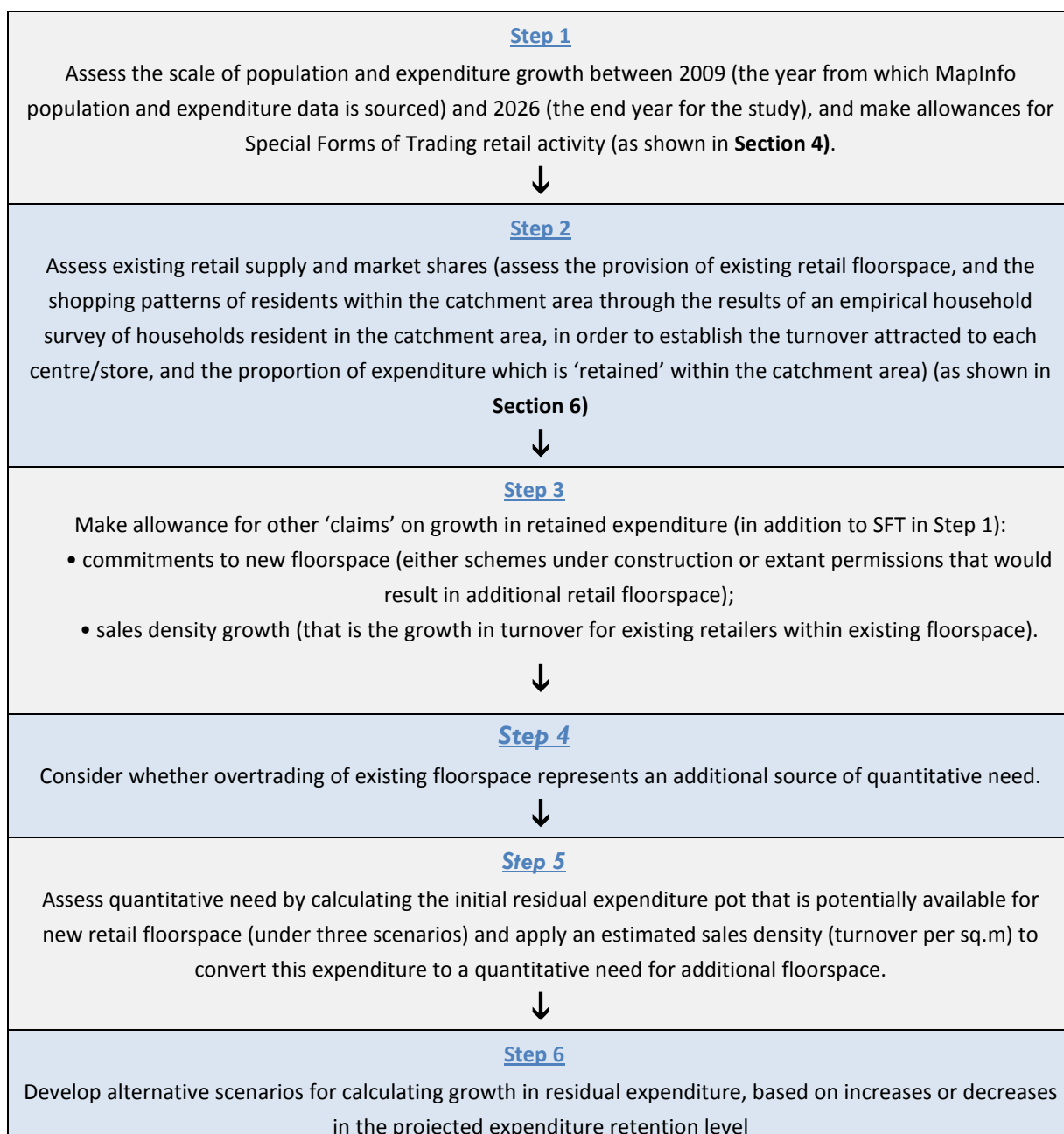
- 5.79 Foodstores in Mansfield also act as ‘dominant’ foodstores in Zones 5 and 7, affirming that the stores draw trade from a wide catchment area.

*Summary of convenience goods shopping patterns*

- 5.80 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 97 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 (as shown in Table 5.13) 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. The strong range of consumer choice is reinforced by the findings of Table 5.14, which shows that in each of the three Mansfield Zones, three foodstores achieve a market share upwards of 10 per cent. Each of the four major supermarket operators has representation in the town, in some cases (Tesco and Morrisons) with more than one store.
- 5.81 Table 5.13 also shows that Mansfield 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.
- 5.82 Therefore, Zones 1 to 3 inclusive, plus Zones 5 and 7 represent Mansfield's main catchment area in terms of convenience shopping. The foodstores in Mansfield attract a more limited trade draw from elsewhere in the MSA, on account of large foodstores in other established towns being in greater proximity to residents in these Zones (for example, residents in Zone 8 look towards Hucknall and residents in Zone 9 look towards Sutton-in-Ashfield and Alfreton).
- 5.83 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.

## 6 QUANTITATIVE NEED FOR ADDITIONAL RETAIL FLOORSPACE

- 6.1 The assessment of quantitative need adopts the widely respected step by step methodology, which is consistent with CLG's practice guidance. The essential steps in the assessment of quantitative retail need build on the analysis undertaken at **Sections 4 and 5** and are as follows:



### Quantitative need for comparison goods floorspace in Mansfield District

- 6.2 This section should be read in conjunction with quantitative comparison need tabulations, which are set out at **Appendix 5** of the study, and are structured as follows:

- Table 1 of Appendix 5 sets out the population of the MSA over the period to 2026.
- Table 2a of Appendix 5 shows the per capita expenditure for comparison goods, for each of the nine MSA Zones.
- Table 3a of Appendix 5 multiplies the figures in Tables 1 and 2a together to show the overall 'pot' of comparison goods expenditure which is available to residents of the MSA over the study period to 2026, having made allowance for special forms of trading.
- Table 4 of Appendix 5 shows the market shares for comparison goods attracted to each of the centres in the MSA. The market shares are converted to spending patterns in Table 5 of Appendix 5, by applying the percentage splits (Table 4 of Appendix 5) to the overall 'pot' of expenditure shown in Table 3a of Appendix 5.
- Tables 6a and 6b of Appendix 5 present a summary of the capacity for additional comparison goods floorspace in **Mansfield District** (rather than the overall MSA<sup>25</sup>) over the study period to 2026.
- The figures set out in Tables 6a of Appendix 5 assume a static retention rate – i.e. that the current levels of expenditure retention will remain unchanged throughout the study period. However, should the Council wish to plan for a more ambitious level of expenditure retention, Table 6b of Appendix 5 presents a summary of the capacity for additional comparison goods floorspace based on an increasing retention rate to 2026. This latter scenario reflects the aspirations of the Council to increase the amount of retail floorspace in Mansfield town centre, for example through the development of the Stockwell Gate area.

### *Step 1: Population and expenditure growth*

- 6.3 We have set out previously (in **Section 4**) the scale of population and expenditure growth which is forecast in the MSA over the study period to 2026. To recap, in **Table 6.1** below we summarise the total population and expenditure available at the interval years throughout the study period.

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<sup>25</sup> The summary capacity figures set out in Tables 6a and 6b remove expenditure flows to other destinations in the MSA which are outside Mansfield District (e.g. Kirby in Ashfield, Sutton in Ashfield and Shirebrook).

**Table 6.1 — Summary of population and comparison goods expenditure growth in MSA**

Reporting year	Population of MSA	Total available comparison expenditure (£m, minus Special Forms of Trading)
2011	309,094	671.50
2016	318,886	801.64
2021	329,840	994.07
2026	340,136	1,192.60

Source: Appendix 5, Tables 1 and 3a. All projections are estimates.

### *Step 2: Assessment of existing retail provision*

- 6.4 Step 2 of the quantitative need assessment requires the current market shares of centres and stores within the MSA to be established, as well as the level of expenditure which is being retained within the MSA, and the distribution of this retained expenditure between the existing retail destinations. We have set out this exercise in **Section 5** of the study, which has been informed by the household survey of shopping patterns of residents across the MSA in April 2011.
- 6.5 Translating these market shares to spending patterns (through applying them to the total comparison goods expenditure of £671.50m available in 2011) shows that, of the £671.50m available to residents in the MSA, £433.48m is spent at stores and destinations within the MSA – this is equivalent to a retention rate of 64.6 per cent for the MSA as a whole. However, as shown in the summary Table 6a (Appendix 5), destinations in Mansfield District account for £309.01m of the total available expenditure, as the District only accounts for a portion of the MSA equivalent to Zones 1 and 2, and the majority of Zone 3. This results in a lower retention rate for Mansfield District of 46.0 per cent. This has been calculated by summing the turnover of all destinations in Zone 1 (£53.44m in 2011, as shown in Table 5 of Appendix 5), Zone 2 (£243.16m) and, from Zone 3, those destinations in Mansfield District – i.e. Mansfield Woodhouse District Centre (£11.67m) and Market Warsop District Centre (£0.75m). Combined, these destinations account for £309.01m of the total ‘pot’ of comparison goods expenditure of £671.50m, equivalent to a retention rate of 46.0 per cent. For ease of reference, this calculation is also shown summarised at the foot of Table 5 of Appendix 5.
- 6.6 Therefore, it can be seen that almost half of the comparison goods expenditure available to residents in the MSA is spent within Mansfield District.

### *Step 3: Claims on Expenditure Growth*

- 6.7 The next step is to make an allowance for ‘claims’ on the growth of retained expenditure. It has previously been discussed that allowance must be made for ‘Special forms of trading’



(SFT), the most common form of which is online shopping. To this end, we have applied discounts on the total available comparison goods expenditure in the MSA of 10.0 per cent at 2011, rising to 12.7 per cent by 2016 before reducing slightly to 12.4 per cent (2021) and 12.1 per cent (2026), reflecting published guidance from Experian<sup>26</sup> in this respect. The amount in monetary terms which SFT accounts for in each of the interval years is summarised at Table 3a of Appendix 5.

6.8 In addition to Special Forms of Trading there are two further claims on expenditure growth which must be taken into account:

- commitments to new floorspace (either schemes under construction or extant permissions that would result in additional retail floorspace); and
- sales density growth (the growth in turnover for existing retailers within existing floorspace);

### **Commitments to new comparison goods floorspace**

6.9 We have been advised by the Council of a number of commitments to new comparison goods floorspace which must be taken into account. We set these out in **Table 6.2** below. We have assumed that the majority of commitments are likely to come forward in the near future<sup>27</sup>. However, the larger town centre strategic commitment (Stockwell Gate South) we have timetabled to come forward by 2016, on account of the lengthier timescale for site assembly and construction.

6.10 Table 6.2 shows that by 2016 there is a total of 4,171 sq.m net committed comparison goods floorspace in the District. Approximately one third of this is taken up by the Stockwell Gate South development. The planning permission for Stockwell Gate South limits A1 retail floorspace to 3,970 sq.m gross. For the purposes of this assessment we have assumed a net sales area which is 70 per cent of the gross sales area, equivalent to 2,779 sq.m net. In the absence of any further information, we have assumed that 50 per cent of the net floorspace will be for the sale of comparison goods, and 50 per cent will be for the sale of convenience goods — 1,390 sq.m net for each. We have assumed that, by applying a turnover of £5,000 per sq.m, the comparison goods floorspace will achieve a turnover of £6.95m at 2016. Should the floorspace mix in the final scheme significantly alter, it is recommended that the floorspace requirements set out below are revisited in order to provide an accurate indication of the level of development which can be supported across the District.

6.11 In the short term, the main comparison goods commitments are the non-food elements of the extension to the Tesco at Oak Tree as well as the redevelopment of the Sainsbury's site and adjacent land on Nottingham Road to provide new Sainsbury's and Aldi foodstores.

<sup>26</sup> Experian Retail Planner 9, September 2011, Appendix 3, 'adjusted' figures.

<sup>27</sup> In the case of the Tesco Extra extension at Oak Tree District Centre, construction of this commitment is already underway. However, as the extension was not trading at the time of the household survey, it is still included as a commitment.

**Table 6.2 — Summary of comparison goods commitments for Mansfield District at 2011 and 2016**

Development	Floorspace (sq.m net)	Estimated turnover (£m)
<b>Commitments at 2011</b>		
Extension to Tesco Extra, Oak Tree District Centre	1,407	4.25
Sainsbury's redevelopment, Nottingham Road, Mansfield*	915	2.20
Former Queens Head public house, Mansfield town centre	311	1.56
Aldi, Nottingham Road, Mansfield	148	0.70
<b>Total at 2011</b>	<b>2,781</b>	<b>8.71</b>
<b>Commitments at 2016</b>		
Stockwell Gate South, Mansfield town centre	1,390	6.95
<b>Total at 2016 (including 2011 commitments)</b>	<b>4,171</b>	<b>15.65</b>
<b>Total at 2016 including sales density growth**</b>		<b>16.44</b>

Source: Table 6a, Appendix 5. Information based on data provided by Mansfield District Council / planning applications. Turnover estimates are sourced directly from planning applications wherever possible.

\*net additional floorspace to existing store

\*\*allowance for increased sales density of 2011 commitments in the period 2011-2016 (see Table 6.3 below)

### Sales density growth

- 6.12 It is also necessary to make allowance for the growth in sales efficiency of existing comparison goods retailers within the MSA, as stores are expected to trade to increasingly efficient levels of turnover per square metre of sales area over the course of the study period.
- 6.13 In our assessment, the low expenditure growth rates projected by Experian for the period up to 2028, particularly in the comparison sector, are not sufficient to support the forecast rates of floorspace efficiency change. PBBi/OE provides no information on anticipated change in floorspace efficiency.
- 6.14 Thus, in making an allowance for growth in floorspace efficiency, we adopted the rate of floorspace efficiency change set out in **Table 6.3** below. We have tied the rate of comparison and convenience goods floorspace efficiency change to the expenditure projections for the forecast period, using a ratio of 37.9 per cent for comparison goods and 46.2 per cent for convenience goods, which is based on our analysis of the historic relationship between comparison expenditure growth and comparison floorspace efficiency change<sup>28</sup>.

<sup>28</sup> Between 1987 and 1999, the underlying floorspace efficiency trend (as recommended by Experian in its previous Retail Planner Briefing Note 7.1 (January 2009) was 2.2 per cent per annum for comparison goods and 0.6 per cent per annum for convenience goods. Over the same period, expenditure growth was 5.8 per cent per annum and 1.3 per cent per annum, respectively (as set out in Appendix 6 of Experian's Retail Planner Briefing Note 7.1), which equates to a ratio of 37.9 per cent for comparison goods and 46.2 per cent for convenience goods.

**Table 6.3 — Sales density growth rates for comparison goods**

Interval period	Comparison goods sales density growth per annum
2011-2016	1.74%
2016-2021	1.75%
2021-2026	1.75%

Source: RTP, derived from Experian and MapInfo/OE projections

#### Step 4: Overtrading

- 6.15 Overtrading refers to both 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) but – as highlighted in the Practice Guidance accompanying PPS4 – can also be recognised by indicators such as overcrowding and congestion within stores. The degree to which stores within a catchment area are under-trading or over-trading is therefore highlighted in the practice guidance as both a quantitative and qualitative indicator of need therefore.
- 6.16 Paragraph 3.16 of the Practice Guidance states that *‘the extent to which the turnover of existing stores significantly exceeds benchmark turnovers may be a qualitative indicator of need, and can in some cases inform quantitative need considerations. For example it may be an expression of the poor range of existing facilities or limited choice of stores and a lack of new floorspace in the locality’*.
- 6.17 In **Table 6.4** below we demonstrate the trading performance of Mansfield town centre, for which Table 5 of Appendix 5 identifies a turnover of £191.68m from the MSA. We can calculate the sales density of the town centre (i.e. its turnover per square metre of sales area floorspace) by applying the household survey-derived turnover to the net comparison goods floorspace for each town. The RU (attached as **Appendix 2** to this study) identifies that Mansfield town centre had in 2009 38,165 sq.m gross comparison goods floorspace. If we apply a gross: net sales ratio of 70 per cent, this is equivalent to 26,716 sq.m net. Therefore, Mansfield town centre achieves a turnover of £7,174 per sq.m.

**Table 6.4 – Turnover of Mansfield town centre (comparison goods)**

Centre	Comparison goods floorspace sq.m gross	Comparison goods floorspace sq.m net (@70% of gross)	Household survey-derived turnover £m	Estimated sales density (£ per sq.m)
Mansfield town centre	38,165	26,716	191.68	7,174

Floorspace source: Mansfield District Council Retail Update 2011. Household survey turnover source: Table 5, Appendix 5.

- 6.18 By comparison, our West Midlands Regional Centres Study, undertaken for the West Midlands Regional Assembly, found an average comparison goods sales density across

the 26 strategic centres of the West Midlands Region of approximately £7,800 per sq.m sales area.

- 6.19 Mansfield's turnover of £7,174 per sq.m compares with centres in the West Midlands such as Shrewsbury (£7,522 per sq.m), Hereford (£7,623 per sq.m), Stafford (£7,999 per sq.m) and Sutton Coldfield (£7,658 per sq.m). The trading performance is slightly stronger than a number of other centres such as Nuneaton and Rugby.
- 6.20 On this basis we consider that Mansfield town centre is currently trading healthily. There is no evidence to suggest that significant over-trading of comparison goods floorspace is currently taking place in the town – performance is in line with what would be expected of a strong performing sub-regional town centre. Therefore no allowance for over-trading of comparison goods floorspace is included in our assessment.
- 6.21 We discuss the **qualitative** need for additional comparison goods floorspace in the following section.

#### *Step 5: Quantitative need*

- 6.22 **Table 6a of Appendix 5** summarises the quantitative need for additional floorspace within the MSA for the study period to 2026, and is structured as follows:
- **Row A** sets out the total population of the MSA at each of the interval periods (2011, 2016, 2021 and 2026), and is derived from Table 1 of Appendix 5.
  - **Row B** sets out the total comparison goods expenditure available to residents of the MSA for each of these periods, and is derived from Table 3a of Appendix 5.
  - **Row C** shows the proportion of expenditure, in monetary terms, which is retained by centres within Mansfield District. This is related to the percentage figure shown in **Row D**. The figure of 46.0 per cent represents the aggregate comparison goods retention rate for destinations within Mansfield District only (rather than including all destinations within the MSA), as revealed by the household survey of shopping patterns. We have set out above (under 'Step 2') how the figure of 46.0 per cent has been calculated<sup>29</sup>. This model assumes that the level of expenditure retention identified will remain static at 46.0 per cent throughout the study period to 2026.
  - **Row E** shows the amount of expenditure which 'leaks' to destinations outside Mansfield District (to destinations elsewhere in the MSA, and to destinations outside the MSA), and is the product of Row B, less Row C.
  - **Rows F and G** show in percentage terms (Row F) and monetary terms (Row G) the amount of inflow into the District. We have made no allowance for inflow into the MSA, and therefore Row G shows no monetary values.
  - **Row H** shows the total comparison goods turnover of destinations with Mansfield District at 2011, which is £309.01m. This is held constant throughout the period to

<sup>29</sup> This is also shown summarised at the foot of Table 5 of Appendix 5.

2026, and the **growth** in expenditure (the initial surplus) is then shown in **Row I**. Therefore Row I shows that by 2016 there will be an additional £59.89m of surplus expenditure available to the District over and above the £309.01m base. By 2026 there has been a substantial growth in the amount of surplus expenditure available, which has increased to £239.80m.

- **Rows J and K** then summarise the 'claims' on the available comparison goods expenditure. Row J shows that the trading efficiency of existing retailers in the District accounts for a 'claim' of £27.84m by 2016, increasing to £58.36m in 2021 and £91.65m in 2026. This is the product of the existing comparison goods turnover of retailers (shown at Row H, and amounting to £309.01m at 2011) and the comparison goods floorspace efficiency growth rates shown at Table 6.3 above. Row K then makes allowance for the comparison goods floorspace commitments which are shown in Table 6.1. As discussed above, in the short term the commitments are relatively limited, amounting to £8.71m in 2011. These are expected to increase to £16.44m by 2016.
- **Row L** shows the sum of Rows J and K.
- The 'summary of capacity' section of Table 6a shows, firstly, the 'initial surplus' (**Row M**) in the District over the period to 2026. The initial surplus replicates the figures shown in Row I, i.e. the growth in retained expenditure by centres in the MSA over the study period. **Row N** then subtracts the 'claims' on capacity as summarised in Row L. **Row O** shows the residual expenditure, in monetary terms, which is available to support new comparison goods expenditure within Mansfield District. It can be seen that on account of the extant planning commitments there is an over-supply of comparison goods floorspace in the District. However, this is only short term, and from 2016 onwards, there is a positive residual expenditure which can support the development of additional floorspace.
- **Row P** shows the turnover per sq.m which is used to translate the residual expenditure shown in Row O to floorspace requirements, we have utilised a turnover figure of **£5,000 per sq.m**, which we consider to represent a realistic District-wide comparison goods turnover rate. In addition, the quality of the units in Mansfield Woodhouse and Market Warsop is likely to generate less efficient sales densities. The turnover per sq.m increases throughout the study period in line with the figures previously set out at **Table 6.3**.
- Finally, Row Q shows the net floorspace requirement for comparison goods in the District over the period to 2026. It can be seen that, owing to the extant commitments, there is an over-supply of floorspace of 1,741 sq.m net at present. However by 2016 there is a positive requirement of 2,865 sq.m net. In the latter part of the study period the requirement increases significantly, to 12,138 sq.m net by 2021 and 19,837 sq.m net at 2026. It should be noted that these figures **are cumulative**.
- Using a gross: net ratio of 70 per cent, Row R translates the net requirements set out above to gross floorspace.

- 6.23 Therefore these figures represent the baseline requirement for additional floorspace in Mansfield District, based on the assumption that current shopping patterns remain unchanged throughout the study period.
- 6.24 The figures should be regularly monitored and updated throughout the study period and it is advised that the longer-term forecasts (i.e. 2021 and 2026) are treated as indicative.

#### **Step 6: Scenario Testing**

- 6.25 We have assumed in our baseline scenario that the current level of expenditure retention in Mansfield District (46.0 per cent) will remain unchanged throughout the study period. However, we consider that there is scope for this level of expenditure retention to be improved – and if the proposed developments for Mansfield town centre come forward, we consider that these have potential to assist in increasing the trade draw of Mansfield, and reduce the number of residents travelling further afield for their comparison goods shopping.
- 6.26 On this basis, we have modelled a second qualitative need scenario – this is based on the District increasing the current retention rate from 46.0 per cent to 49.0 per cent over the course of the study period. This scenario test is summarised at **Table 6b** of **Appendix 5**. Under this scenario, we have assumed that the District's retention rate will increase to 47.5 per cent at 2016 (on account of the planned improvements to the town centre retail offer), then further to 48 per cent in 2021 and 49 per cent in 2026. Subject to the improvements to the town centre coming forward, this is considered to be a realistic and deliverable level of expenditure retention improvement. Any likely improvement in the comparison goods retention rate will – to some extent – be slightly tempered by the planned improvements to the retail offer in Nottingham.
- 6.27 Table 6b shows that under this scenario, the current level of over-provision remains unchanged. However, at 2016 the requirement has increased to 5,045 sq.m net; at 2021 the requirement increases to 15,453 sq.m net, and at 2026 the requirement is 25,322 sq.m net. Once again, it is recommended longer-term requirements are considered indicative, and the figures discussed above and shown in Table 6b are cumulative.
- 6.28 **Table 6.5** below summarises the requirements for Mansfield District at five year interval periods under the 'static' and 'increasing' retention scenarios.

**Table 6.5 – 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 (Table 6a, Rounded)	2,865 (2,900)	12,138 (12,100)	19,837 (19,900)
Increasing Retention (Table 6b, Rounded)	5,045 (5,000)	15,453 (15,500)	25,322 (25,300)

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

- 6.29 Table 6.5 therefore shows that:



- By 2016 there is a requirement for between 2,900 and 5,000 sq.m net comparison goods floorspace in Mansfield District
- By 2021 there is a requirement for between 12,100 and 17,500 sq.m net comparison goods floorspace.
- By 2026 there is a requirement for between 19,900 and 25,300 sq.m net comparison goods floorspace.

6.30 Accordingly these represent the figures which the Council should consider putting forward as the District's comparison goods floorspace target for the LDF period in its emerging Core Strategy. For ease of reference, we round the figures set out in Tables 6a and 6b to the nearest hundred. It should be noted that figures shown above (based on Table 6.5) are cumulative, and that longer-term forecasts post-2021 should be treated as indicative only.

### Quantitative need for convenience goods floorspace in Mansfield District

6.31 The methodological approach to forecasting quantitative need for convenience goods follows the same steps as for comparison goods, as set out at the beginning of this section. As with comparison goods, we have modelled two scenarios for convenience goods – a 'static' retention scenario, which assumes that the current levels of expenditure retention will remain unchanged throughout the study period to 2026, and an 'increasing' retention scenario, which assumes that the anticipated improvements to the convenience goods offer will come forward, and accordingly deliver an improvement to the proportion of convenience goods expenditure which is retained within Mansfield District.

6.32 This chapter should also be read in conjunction with the data tabulations set out at **Appendix 5** to the study, and the following tables are relevant to the convenience goods capacity assessment:

- **Table 1** of Appendix 5 sets out the population of the MSA to 2026, with **Table 2b** of Appendix 5 showing the per capita expenditure for convenience goods, for each of the nine MSA Zones. **Table 3b** of Appendix 5 then multiplies the figures in Tables 1 and 2b of Appendix 5 together to show the overall 'pot' of convenience goods expenditure available to residents of the MSA over the study period, having taken into account special forms of trading;
- **Table 7** of Appendix 5 shows the market shares for convenience goods attracted to each of the principal food stores in the MSA, as identified in the household survey of shopping patterns. The market shares are converted to spending patterns in 2011 in **Table 8** of Appendix 5 by applying the percentages shown in Table 7 to the overall amount of money available to the MSA to spend on convenience goods.
- **Table 9a** then sets out a summary of the capacity for additional convenience goods floorspace in Mansfield District only (not the wider MSA), over the study period to 2026, based on the current levels of convenience goods expenditure remaining unchanged. **Table 9b** shows the requirements under an 'increasing' retention scenario.



### Step 1: Population and expenditure growth

- 6.33 We have set out previously (in **Section 4**) the scale of population and expenditure growth which is forecast in the MSA over the study period to 2026. In **Table 6.6** below we summarise the total population and convenience goods expenditure available at the interval years throughout the study period, having made allowance for SFT.

**Table 6.6 – Summary of population and convenience goods expenditure growth**

Reporting year	Population of MSA	Total available convenience expenditure (£m, minus Special Forms of Trading)
2011	309,094	508.34
2016	318,886	527.65
2021	329,840	556.11
2026	340,136	587.77

Source: Appendix 5, Tables 1 and 3b. All expenditure projections are estimate.

### Step 2: Assessment of existing retail provision

- 6.34 As with comparison goods, the assessment of convenience goods retail provision is based on the findings of the household survey into shopping patterns of residents in the MSA. We have set out in the previous section that the MSA retains approximately three quarters of its available expenditure on convenience goods. However, not all of this flows to stores in Mansfield District, as there are established foodstores elsewhere in the MSA, such as in Worksop, Ollerton and Sutton-in-Ashfield. Of the total £508.34m, the amount of expenditure which flows to stores in Mansfield District is £260.72m, equivalent to a District-wide retention rate of 51.3 per cent. As with the comparison goods, the expenditure retention rate for Mansfield District is therefore lower than the MSA-wide retention rate of 75.7 per cent. The District-wide retention rate can be calculated by adding the total turnover of all foodstores in Zone 1 (£121.50m in 2011, as shown in Table 8 of Appendix 5), the total turnover of all foodstores in Zone 2 (£106.48m), and those stores in Zone 3 which fall within Mansfield District, namely Morrisons at Mansfield Woodhouse (£28.15m), local shops in Mansfield Woodhouse (£3.74m) and local shops in Market Warsop (£0.86m). This results in a total turnover of foodstores in the District of £260.72m. This is also shown summarised at the foot of Table 8 (Appendix 5). The remaining expenditure is spent either elsewhere in the MSA or at foodstores just outside the MSA in centres such as Hucknall and Alferton.

### Step 3: Claims on Expenditure Growth

- 6.35 We have taken into account projections on SFT such as online shopping as part of establishing the total amount of expenditure available in the MSA. In addition to SFT there are two further claims on expenditure growth which must be taken into account:
- commitments to new floorspace (either schemes under construction or extant permissions that would result in additional retail floorspace); and
  - sales density growth (the growth in turnover for existing retailers within existing floorspace);

- 6.36 We have been advised of a number of extant planning permissions for convenience goods in the District. These are summarised in **Table 6.7** below.

**Table 6.7 — Summary of convenience goods commitments for Mansfield District**

Development	Floorspace / sq.m net	Estimated turnover / £m
<b>Commitments at 2011</b>		
Sainsbury's redevelopment, Nottingham Road, Mansfield*	738	3.60
Aldi, Nottingham Road, Mansfield	842	4.00
Extension to Tesco, Oak Tree District Centre	1,556	5.30
Redevelopment of Flamingo PH, Oak Tree Lane	735	7.35
<b>Total at 2011</b>	<b>3,871</b>	<b>20.25</b>
<b>Commitments at 2016</b>		
Stockwell Gate South, Mansfield town centre	1,390	13.90
<b>Total at 2016 (including 2011 commitments)</b>		<b>34.15</b>
<b>Total at 2016 including sales density growth**</b>		<b>34.29</b>

Source: Table 9a, Appendix 5. Based on data provided by Mansfield District Council / planning applications. Turnover estimates are sourced directly from planning applications wherever possible.

\*net additional to existing floorspace

\*\*allowance for increased sales density of 2011 commitments in the period 2011-2016 (see Table 6.8)

- 6.37 It can be seen from Table 6.7 that there are a number of convenience goods planning commitments which by 2016 will account for a claim of £34.29m on the total available convenience goods expenditure. This includes £20.25m of commitments at 2011, including the recently-approved plans for the redevelopment of the Sainsbury's store at Nottingham Road in Mansfield, which will also include a discount Aldi store. Following advice from the Council, we also make allowance for 50 per cent of the permitted retail floorspace at the Stockwell Gate South development to be given over to a foodstore – this amounts to a significant claim of £13.90m.
- 6.38 It is also necessary to include existing retailers improving their trading performance over the course of the study period. We have set out our approach to deriving sales density growth rates above and the sales density growth rates used for convenience goods in this study are shown in **Table 6.8**.

**Table 6.8 — Sales density growth rates for convenience goods**

Interval period	Convenience goods sales density growth per annum
2010-2016	0.14%
2016-2021	0.29%
2021-2026	0.25%

Source: RTP, derived from Experian and MapInfo/OE forecasts

#### Step 4: Overtrading

- 6.39 Overtrading is an important consideration; if it is found to be present it can suggest a level of suppressed requirement for additional convenience floorspace within the MSA.
- 6.40 In assessing the over-trading of convenience stores, we have compared the turnover of each major foodstore within Mansfield District (as listed at Tables 7 and 8 of Appendix 5) with the 'benchmark' turnover the store would be expected to achieve if it was trading at operator average turnover per sq.m rates. Although this exercise relies on the use of operator averages in terms of the amount of floorspace given over to convenience and comparison goods (rather than bespoke figures for each store), and also is based on national operator averages (and therefore take into account more affluent areas such as the South East where sales density per sq.m can be expected to be higher), it nevertheless provides a robust indicative review of the trading performance of the main foodstores within the District. **Table 6.9** below shows the trading performance of these stores against operator averages.

**Table 6.9 — Broad assessment of trading performance of main foodstores in Mansfield District**

Foodstore	Estimated convenience floorspace // sq.m net	Benchmark turnover (based on operator average performance) // £m	Household survey derived turnover // £m	Difference to benchmark // £m
<b>Stores in Zone 1</b>				
Asda <i>Forest Town</i>	3,144	46.43	57.04	+10.61
Tesco Extra <i>Oak Tree Dist Centre</i>	2,960	39.08	48.93	+9.85
<b>Stores in Zone 2</b>				
Tesco Extra <i>Chesterfield Rd South</i>	3,079	40.66	35.38	-5.28
Morrisons <i>Sutton Road</i>	2,729	35.01	34.02	-0.99
Sainsbury's <i>Nottingham Road</i>	1,887	24.15	25.93	+1.78
Iceland <i>Rosemary Centre</i>	443	2.96	3.66	+0.70
<b>Stores in Zone 3</b>				
Morrisons <i>Woodhouse Centre</i>	1,896	24.32	28.15	+3.83

Source: Convenience floorspace estimates derived from operator average turnovers (Source: Verdict Research, UK Grocery Retailers 2010) applied to net sales areas of individual foodstores (Source: IGD, 2010). Household survey derived turnovers apply to convenience goods sales only, and are sourced from Table 8 of Appendix 5. Figures may not add due to rounding.

- 6.41 Table 6.9 above shows that there are three stores in the District which are trading at more than £2m above their expected benchmark turnovers. The most substantial overtrading at

present appears to be at the Asda store at Forest Town, which is shown as trading at £10.6m above company average figures. The Tesco Extra at Oak Tree is performing similarly strongly, although it would be expected that this level of overtrading will be diluted upon completion of the extension to the store which is currently underway. Morrisons in Mansfield Woodhouse is also trading above company benchmarks by approximately £3.8m.

- 6.42 The over-trading of these stores is partially offset by two stores which are trading below benchmarks. Tesco Extra at Chesterfield Road South appears to be under-trading by approximately £5m, and the Morrisons store at Sutton Road is also shown as marginally under-trading.
- 6.43 Based on this assessment, we consider that foodstores in Mansfield are – on aggregate – trading at about £20.5m above benchmark levels at present – although clearly there are fluctuations in the trading performance of the individual stores, as can be seen from the table above. We therefore make an allowance of overtrading of £20.5m in our quantitative assessment.

#### *Step 5: Quantitative Need*

- 6.44 **Table 9a** of Appendix 5 summarises the quantitative need for additional convenience floorspace in Mansfield District for the period to 2026. The summary tables are structured as per the comparison goods examples described above.
- 6.45 As with comparison goods, we have not made any allowance for expenditure inflow into the District, and we also make allowance for existing retailers to improve their trading performance, based on the growth rates set out at Table 6.8 above. This is shown in **Row J** of Table 9a of Appendix 5. The commitments for convenience goods floorspace, as discussed above, are shown in **Row K** of Table 9a of Appendix 5.
- 6.46 The **Summary Table** at the foot of Table 9a (Appendix 5) firstly shows the initial surplus (**Row M**) for the District over the study period to 2026. This represents the growth in retained expenditure by centres over the study period. From this initial surplus, the claims on capacity are then subtracted (**Row N**). **Row O** then adds in the over-trading of foodstores allowance— however this is only included at the 2011 base year, as it is assumed that the over-trading will have largely been alleviated by 2016 through the provision of new floorspace as a result of the number of extant planning permissions for new convenience retail floorspace. **Row P** then shows the residual expenditure, in monetary terms, which is available to support new convenience goods floorspace. It can be seen from Row P that throughout the study period, the residual figure is negative, because the growth in convenience goods expenditure is outstripped by the claims on capacity (and in particular the committed floorspace).
- 6.47 On this basis, there is no capacity in quantitative terms for additional convenience floorspace in the District over the course of the study period. However, this is based on the assumption that a new foodstore will come forward in Mansfield town centre as part of the Stockwell Gate South redevelopment. If this does not come forward, there will be additional capacity to support new development elsewhere. We return to discuss this below.

### Step 6: Scenario Testing

- 6.48 We have set out above that there are a number of extant planning commitments which we expect to come forward in Mansfield in the near future. It is considered that these have potential to improve the District-wide retention rate of 51.3 per cent as shown above. On this basis we have modelled for an improvement in the retention rate from 51.3 per cent to 52.5 per cent in 2016, 53.5 per cent in 2021 and 54.0 per cent in 2026. This is shown in summary **Table 9b** of Appendix 5.
- 6.49 Table 9b (Appendix 5) shows that, even allowing for an increased level of expenditure retention, there is unlikely to be sufficient quantitative expenditure capacity to support further convenience goods floorspace over and above that already granted planning consent for much of the study period. Table 9b (Appendix 5) shows that, under the increasing retention scenario, the over-supply of floorspace levels out after 2021, and therefore after this point there will be a positive floorspace requirement. It is recommended that this is kept under regular review throughout the study period.
- 6.50 The requirements are summarised in **Table 6.10** below.

**Table 6.10 – 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.

- 6.51 Therefore based on these scenarios, we do not expect any quantitative need for convenience goods floorspace to arise within the District over the period to 2021, over and above existing committed floorspace. Under the increasing retention scenario, there is a requirement for a small foodstore (up to approximately 1,000 sq.m net convenience floorspace) at the end of the study period at 2026. Our assessments are based on the assumption that a foodstore will come forward in Mansfield town centre as part of the Stockwell Gate South development. However, if no foodstore comes forward at this site, there will be capacity for additional floorspace — below we present alternative comparison and convenience goods scenarios which consider this possibility.

### Alternative Stockwell Gate South scenarios

- 6.52 The quantitative capacity forecasts set out above are based on the following assumptions in respect of the Stockwell Gate South commitment in Mansfield town centre:
- There is an extant planning consent for 3,970 sq.m gross floorspace, which can be occupied by use classes A1. The approved outline planning application does not

provide any details of potential floorspace splits (i.e. the amount of floorspace which can be used for the sale of comparison goods or convenience goods)

- We have assumed a net sales area of 2,779 sq.m (70 per cent of the gross figure)
- 50 per cent of this (1,390 sq.m net) will be for the sale of comparison goods
- 50 per cent of this (1,390 sq.m net) will be for the sale of convenience goods

6.53 The results of these assumptions are reflected in the quantitative floorspace requirements shown in **Table 6.5** (comparison goods) and **Table 6.10** (convenience goods).

6.54 In Tables **SG1** to **SG4** of **Appendix 5** we set out an alternative scenario whereby all of the permitted retail floorspace (2,779 sq.m net) comes forward as comparison goods floorspace. The results of this scenario are summarised in **Table 6.11**.

**Table 6.11 – Summary of capacity in Mansfield District to 2026 (static and increasing retention) — alternative scenario for Stockwell Gate South**

	2016 (sq.m net)	2021 (sq.m net)	2026 (sq.m net)
Comparison goods – Static retention (Table SG1, Appendix 5)	1,591	10,864	18,562
Comparison goods – Increasing retention (Table SG2, Appendix 5)	3,770	14,178	24,047
Convenience goods – Static retention (Table SG3, Appendix 5)	-940	-138	803
Convenience goods – Increasing retention (Table SG4, Appendix 5)	-452	788	1,988

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

- 6.55 The figures set out in Table 6.11 show that, even if all of the permitted A1 retail floorspace at Stockwell Gate South comes forward as comparison goods floorspace, there will be requirement for significant additional comparison goods floorspace provision, particularly in the latter half of the study period. It would be expected that the majority of this requirement should be directed towards Mansfield town centre. As stated previously, these figures should be subject to regular review throughout the study period.
- 6.56 Under this scenario, there is also a requirement for additional convenience goods floorspace in the District, which arises towards the end of the study period. There is no requirement until 2021, at which point there will be a requirement for a small foodstore up to approximately 800 sq.m net. By 2026, this requirement increases to between 800 and 2,000sq.m net additional convenience goods floorspace. This additional capacity would arise because no convenience goods floorspace would be developed in Mansfield town centre. However, we would advise that any redevelopment of Stockwell Gate South makes

provision for a small foodstore in order to meet an identified qualitative deficiency for this type of store in Mansfield town centre. We return to discuss this in Section 8.

### Conclusions on quantitative need

- 6.57 We have set out above our assessment of the amount of comparison and convenience goods floorspace which is likely to be required in Mansfield District over the course of the Core Strategy period to 2026. The exact amount of floorspace required will to an extent be dictated by the nature of the development which comes forward at Stockwell Gate South.
- 6.58 However, it is clear 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 in accordance with the figures set out at Table 6.11.
- 6.59 If allowance is made for a new foodstore at Stockwell Gate South, and having taken into account the extant planning commitments such as Sainsbury's at Nottingham Road, there is no quantitative requirement for additional convenience goods floorspace in the District until 2026. 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.





## 7 QUALITATIVE NEED FOR ADDITIONAL RETAIL FACILITIES IN MANSFIELD DISTRICT

### Methodology

- 7.1 In the PPS4 plan making policies (i.e. policies EC2-EC8) there is one fundamental change from the preceding PPS6: PPS4 now 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.
- 7.2 Policy EC1.4d states that 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.
- 7.3 CLG's practice guidance provides further detail on what represents qualitative need. Since it is a subjective concept, a number of factors can apply. But the practice guidance outlines five frequently identified factors, namely:
- gaps in existing provision;
  - consumer choice and competition;
  - overtrading;
  - location specific issues;
  - the quality of the existing provision.
- 7.4 Assessments of qualitative need should take these factors into account. Therefore, we rely on the assessment of the existing network of centres (**Section 3**), the analysis of spending patterns (**Section 5**) and other data relevant to the above five factors.

### Gaps in Provision

- 7.5 The practice guidance explains that such an assessment involves the analysis of patterns of retail provision, taking account of retail catchments and levels of accessibility. In assessing whether there are any gaps in provision, it is appropriate to review the spending patterns for the study area, as we have set out in **Section 5**.

### Comparison Shopping and Services

- 7.6 The MSA achieves a retention rate of **64.6 per cent** – meaning that almost two-thirds of all available spending within the MSA is spent at centres within the MSA. Not all of this is directed towards Mansfield – Tables 5 and 6a in Appendix 5 show that centres and stores in Mansfield District retain **46.0 per cent** of the total expenditure available to the MSA. We have set out in the previous section (paragraph 6.5) how the District retention rate of 46.0 per cent has been arrived at. Whilst this can be considered a respectable performance, there is scope for improvement of this. Indeed, we consider that Mansfield will need to work

hard to maintain these current market shares, in light of the expected improvements to the retail offer in Nottingham.

- 7.7 It should be noted from the outset that it is unrealistic for any catchment area to retain 100 per cent of available expenditure. Even in catchments with a sub-regional shopping destination such as Mansfield, there will always be residents who choose to travel to a particular destination for their shopping. However, as reflected in our 'increasing retention' capacity forecast, there is potential for more residents in the MSA to be drawn to Mansfield – and if this takes place, there will be a requirement for additional floorspace to support the increased level of retention which will come about.
- 7.8 In terms of comparison goods offer, the current retail offer in Mansfield is firmly middle market. There is representation from a wide range of retailers, and the presence of large anchor stores such as Marks & Spencer, Debenhams and Primark cements the town as an established shopping destination. We consider there are few qualitative gaps in the offer at present from a middle market perspective – most of the typical high street retailers which would be expected in a sub-regional shopping destination are present. 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.
- 7.9 Much of the prime retail area in Mansfield is occupied by good quality retailers, particularly within and surrounding the Four Seasons centre. However it would appear that the appeal of the town centre would be improved by allowing for a wider range of goods to be sold by the existing retailers. For example, the Marks & Spencer store is relatively small and outmoded. A larger store would reduce the number of residents needing to travel outside the District to visit other M&S stores in Nottingham or Sheffield which may have a substantially larger range of products. Similarly, the range of goods sold from fashion retailers already trading in Mansfield such as River Island and Topshop is extremely limited compared to outlets in larger centres – there may be a case for provision of larger units in order to address the relative lack of choice.
- 7.10 Elsewhere in the District, it is not envisaged that either Mansfield Woodhouse or Market Warsop require the provision of significant amounts of comparison goods floorspace – they largely serve local shopping needs, and therefore demand for large amounts of floorspace would be expected to be limited. Applications for new comparison goods floorspace should be considered on their individual merits, but should be of a scale appropriate to the role and function of the centres.

### *Convenience Shopping and Services*

- 7.11 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 Iceland store at the Rosemary Centre only meets a relatively limited need. There is a small Asda (recently converted from Netto) store on Bancroft Lane, approximately 5-10 minutes walk from the bus station, but practically the potential for linked trips between the town centre and the store are limited on account of the requirement to cross the busy A6009 Belvedere Street.

Therefore there is no foodstore in the town centre to meet either main or top-up shopping needs, with the exception of the small foodhall in Marks & Spencer. 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.

- 7.12 We do not consider there to be any major gaps in provision in any of the district centres in terms of convenience goods retail provision. More generally, it appears Mansfield has a lack of 'deep discount' retailers, and this has been heightened through the transfer of Netto to Asda. However, with the recent permission for Aldi, this situation will be partially remedied. There may be scope for additional provision of such facilities on the northern side of the town to serve Mansfield Woodhouse and Market Warsop, providing that no significant adverse impact would arise on these centres.
- 7.13 In terms of restaurants and cafes, we have identified previously that 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. There are a number of independent coffee shops in peripheral areas of the town centre, but relatively few in the primary shopping area, aside from the recent opening by Costa. The provision of a further range and choice of these facilities would also be beneficial to the centre.

### Consumer choice and competition

- 7.14 Competition between retailers and enhanced consumer choice to meet the needs of the entire community is promoted by PPS4 as a key method of improving the vitality and viability of centres.
- 7.15 In respect of comparison goods shopping, we have identified above that Mansfield has a reasonable comparison goods line-up. The independent retail sector in the town centre does not appear particularly defined, although secondary areas are mostly occupied by such retailers. There may be a case for promotion of an independent shopping 'quarter' in the town centre, in order to define and promote this sector of the town centre's economy to a greater extent. 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.
- 7.16 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. Mansfield Woodhouse and Market Warsop have a range of convenience shopping facilities, with currently two foodstores in Market Warsop (Nisa and Co-Operative) and three in Mansfield Woodhouse (Morrisons, Farmfoods and Nisa). If the Tesco application in Market Warsop is approved, this will further enhance consumer choice in this location and also provide a foodstore capable of meeting some residents' main food shopping needs. It would also stem some of the leakage from the Market Warsop Zone (Zone 3) to Tesco stores in Zones 1 and 2.

- 7.17 There is currently sufficient choice for residents in the District for main food shopping destinations – there are two Tesco Extra stores, a Sainsbury's, two Morrisons and two Asda stores. We consider this range of choice to be sufficient, and this is endorsed by the very low levels of convenience goods expenditure leakage from Mansfield to destinations further afield.

### Overtrading

- 7.18 In the previous section we have set out that comparison goods floorspace in Mansfield appears to be trading healthily, and in line with what would be expected for a sub-regional shopping destination. There is no evidence to suggest that comparison goods floorspace is significantly over-trading however, and in our quantitative analysis we have not made any allowance in the forecasts of the amount of comparison goods retail floorspace which will be required.
- 7.19 However, as we have set out above, there are other qualitative considerations which must be taken into account, including the need for enhanced consumer choice, and the provision of more modern floorspace to enable existing and new retailers to provide a wider range of goods and services.
- 7.20 The delivery of modern floorspace will in turn increase patronage to Mansfield town centre from residents in the District, further increasing footfall and improving the trading performance of the centres.
- 7.21 In qualitative terms, the question of whether the overtrading of the foodstores represents a need is more difficult to justify. The CLG guidance is that the use of benchmarks should not be treated in isolation and to assess the overtrading position adequately there would need to be detailed evidence collected in respect of the trading performance of each store.
- 7.22 It would appear that there is some over-trading of foodstores in the District at present – although only two foodstores are noticeably overtrading. We would expect that the current aggregate over-trading to be partly mitigated by the delivery of additional trading floorspace at Oak Tree District Centre (Tesco extension) and Nottingham Road (Sainsbury's redevelopment).
- 7.23 It is noteworthy that the Morrisons store at Mansfield Woodhouse is over-trading. Site visits to this store confirm that it is beginning to appear dated and constrained when compared to some of the more modern foodstores in the District. The range of products which are sold from the store is limited compared to many Morrisons stores, and the store appears somewhat cramped. Applications to extend the floorspace at this store should be considered favourably as it would benefit the vitality and viability of Mansfield Woodhouse district centre as a whole, given the anchor role which the Morrisons plays in this respect. Should any expansion of floorspace come forward, it should be of a scale which is appropriate to the role and function of the centre.
- 7.24 It is recommended that in order to carry out a detailed assessment of the qualitative over-trading of foodstores in the District, a repeat visit assessment should be made to the major foodstores, considering factors such as:
- The length of queues at checkouts;

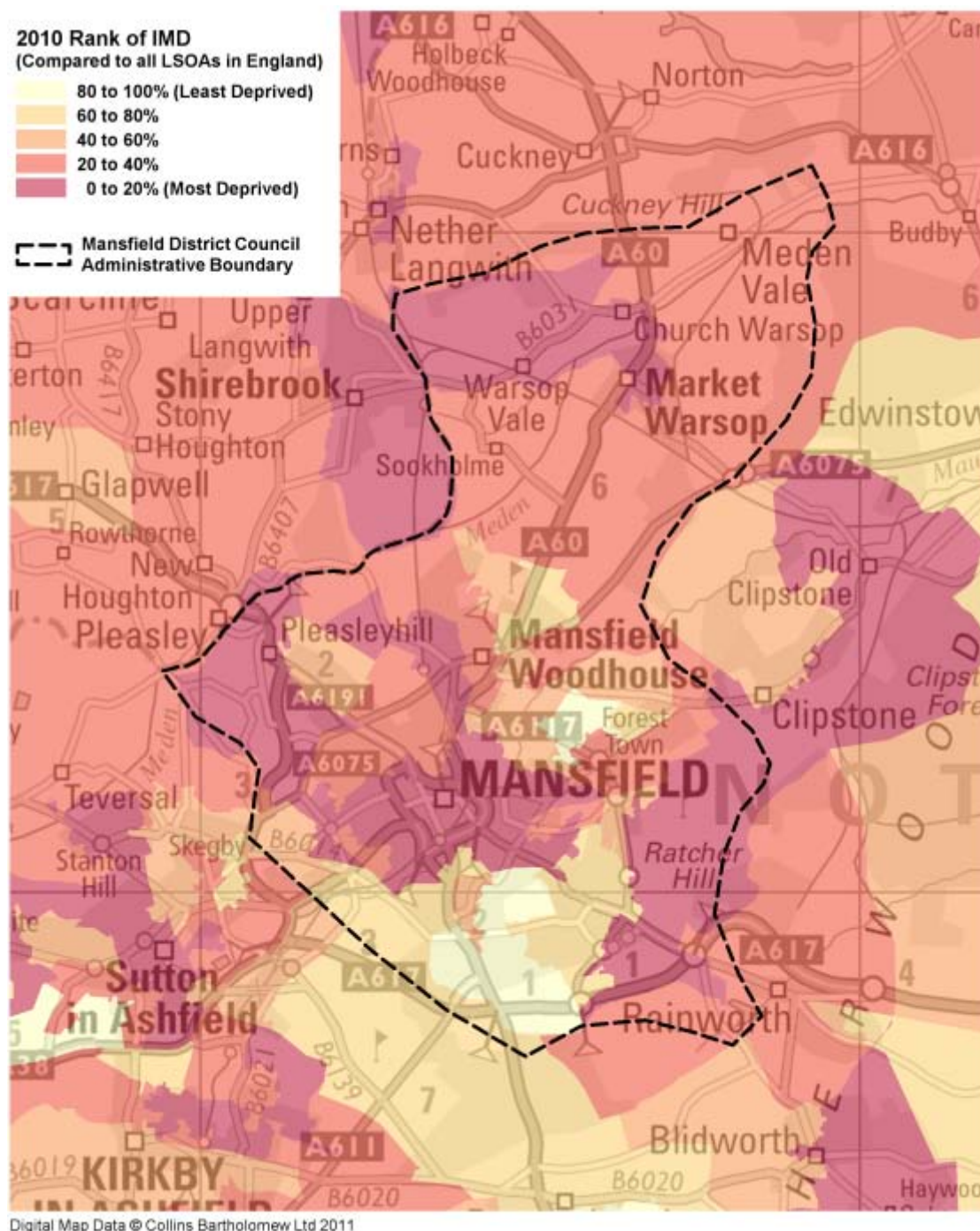
- The number of checkouts which are open in the store (i.e. are all checkouts open and there are still queues);
- The proportion of spaces in the car park which are occupied (where relevant);
- Whether shelves in the store are having to be restocked during busy periods whilst the store is open, and whether there are noticeable gaps in the product ranges available due to these items selling out.

### Location specific needs

- 7.25 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. It is important to understand the IMD for the local geography and its relationship with any qualitative deficiencies, such as a lack of access to certain shops or services.
- 7.26 The IMD 2007 is based on the small area geography known as Lower Super Output Areas (LSOAs) and is the most recent dataset available. Each LSOA has between 1,000 and 3,000 people living in it with an average population of 1,500 people. There are 32,482 LSOAs in England. The LSOA ranked 1 by the IMD 2007 is the most deprived, and that ranked 32,482 is the least deprived. Within each LSOA deprivation is measured by seven measures or indicators known as domains. These comprise:
- Income deprivation: this domain looks at, amongst other things, the proportion of people in Income Support Households or Child Tax Credit Households.
  - Employment deprivation: this domain measures the involuntary exclusion of the working age population from the world of work.
  - Health deprivation and disability: this domain identifies areas with relatively high rates of people who die prematurely or whose quality of life is impaired by poor health or who are disabled.
  - Education, skills and training deprivation: this domain measures deprivation in educational attainment, skills and training for children, young people and the working age population.
  - Barriers to housing and services: this domain measures 'geographical barriers' to housing and services, as well as 'wider barriers' which includes issues such as affordability.
  - Living environment deprivation: this domain focuses on deprivation with respect to the characteristics of the local environment, both within and beyond the home.
  - Crime: this domain measures the incidence of recorded crime for four major crime themes, thus representing the occurrence of personal and material victimization at a small area level.
- 7.27 These seven indicators are then weighted and aggregated into summary measures of deprivation. **Figure 7.1** presents a 'heat' map of IMD data for Mansfield District.



Figure 7.1 – IMD ‘Heat’ map for Mansfield District



- 7.28 The 'heat map' shows that some parts of Mansfield District are in the top 20 per cent most deprived LSOA's in England. 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.
- 7.29 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. For example to the west of the town there are no facilities between the outskirts of the town centre and the Morrisons on the



very edge of the town. In between, there is a small Costcutter supermarket on Sutton Road, but little else in the way of local-level provision. Similarly, to the east of the town centre, there are few facilities between the town centre and the Tesco Extra at Oak Tree.

- 7.30 On this basis, proposals of a suitable scale which will improve local provision in areas of deficiency should be considered positively. Any proposals should not seek to undermine the established retail hierarchy of the District.
- 7.31 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

- 7.32 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.

#### *Comparison shopping*

- 7.33 The quality of provision of retail outlets across the District varies. Much of Mansfield town centre's primary retail area consists of the Four Seasons Shopping Centre. This is a purpose built development which was opened in the 1970s, and remains generally fit for purpose (although it does suffer from a dated appearance, both internally and externally). The main stores which anchor the centre such as Debenhams, Boots and Primark are of a good size and have some have been internally modernised. As we have discussed above, the smaller units in the centre are only able to offer a limited range of products compared to the same retailers' stores in competing destinations. The amalgamation of units in order to create larger footprint units and attract a stronger tenant mix should be considered.
- 7.34 Elsewhere in Mansfield town centre, the quality of provision is considered generally adequate. Some of the units along West Gate (at the Market Place end) are of a good size, although many of the premises are more historic and are therefore not particularly efficient.
- 7.35 In the secondary areas, premises along the western end of West Gate would in many cases benefit from modernisation. The quality of premises in the White Hart Street is also poor, however it is expected that the planning permission due to come forward in this area will address this. In the long term the redevelopment of Beale's Department Store site should be sought to capitalise on the redevelopment of the adjacent bus station/ former Tesco site.
- 7.36 In the district centres, the quality of provision is considered adequate in the context of the role and function of the centres. The retail units are generally smaller, historic units, often with residential or other uses above. There are few examples of units which are in particularly poor condition and in most cases the size and profile of the units meets and reflects local demand. Whilst any applications for modern floorspace of appropriate scale in the district centres should be supported, it is not considered that this should be a priority for the Council.

### *Convenience shopping*

- 7.37 In respect of convenience goods, the quality of provision can be considered adequate at present. There has been investment in the District in recent years through the development of the new Tesco Extra store at Chesterfield Road South. Currently, Tesco are also investing in extending their store at Oak Tree District Centre, and are also seeking planning consent for a new store in Market Warsop. We expect the redevelopment of the Sainsbury's site to come forward in the near future, which represents further substantial investment by a national operator in the District.
- 7.38 The foodstores in the District are mostly relatively modern, and therefore can be expected to trade efficiently and provide a satisfactory shopping experience for residents. We have set out above that Morrisons in Mansfield Woodhouse would benefit from an enhanced range of goods, although we are not aware of any plans to extend this store at present.

## 8 ASSESSMENT OF SCOPE FOR COMMERCIAL LEISURE & COMMERCIAL OFFICE FLOORSPACE

8.1 In this section of the study we focus on the leisure and commercial office sectors. We first pay attention to the leisure sector — identifying current and future leisure expenditure, and the most popular spending locations within the study area. It is important to note the caveat inherent in assessing this sector, namely that the techniques used to determine leisure needs are not as well developed as those utilised in assessing retail needs. Nevertheless, despite this limitation, we use practical resources and effective methodologies to assess this sector for the District as robustly as possible.

8.2 This section should be read in conjunction with the quantitative leisure capacity calculations which are set out at **Tables 10 to 15** of **Appendix 5**.

### *Expenditure growth in leisure services*

8.3 Pitney Bowes Business Insight provides data on per capita leisure expenditure in Classification of Individual Consumption by Purpose (COICOP) categories. We use this resource to determine a broad level of demand and scope for additional leisure facilities in the MSA. We begin by considering the current breakdown of leisure expenditure by COICOP in the study area as shown in **Table 8.1** below.

8.4 It should be emphasised that this expenditure growth is long term over the whole of the study area and our terms of reference do not extend to detailed assessments of the potential for each sub-category of leisure service. However, this scale of growth can assist us in exploring the potential need for additional commercial leisure floorspace in Mansfield District.

**Table 8.1 - Breakdown of Leisure Spend in Study Area (2011)**

COICOP Categories	Description	Total Expenditure, 2011 (£m)	% of Total Leisure Spend
11.1.1, 11.1.2	Restaurants, cafés, bars, etc	289.86	63.7%
9.4.2	Cultural services	60.15	13.2%
9.4.3	Games of chance	37.33	8.2%
11.2	Accommodation services	20.47	4.50%
9.4.1	Recreational and sporting services	28.35	6.2%
12.1.1	Personal services (hairdressers, etc.)	18.67	4.10%
<b>TOTAL 'LEISURE SERVICES' SPEND</b>		<b>454.82</b>	<b>100.0%</b>

Source: Table 13, Appendix 5

8.5 Table 8.1 shows that total spend on leisure services in the MSA amounts to £454.82m, and over 60 per cent of this is spent on restaurants, cafes and bars, which amounts to spending of £289.86m. Following this, the second highest leisure expenditure is on 'cultural services'

(£60.15m), which includes admissions to cinema, theatres, museums/art galleries, film rentals, and 'social subscriptions'<sup>30</sup>. This is followed by spending on 'accommodation services' (£20.47m) and 'Games of chance' (£37.33m), which includes betting, as well as visits to bingo and casinos. Betting accounts for the greatest proportion of 'games of chance' expenditure (36.5 per cent in 2007, according to the Leisure Industries Research Consultancy).

- 8.6 Apportioning leisure expenditure in the COICOP categories provides us with the structure of current expenditure on leisure activities. We are able to use this current structure to calculate the growth in leisure spending by residents of the study area in the period 2011-2026. The projected growth in expenditure on leisure services is set out in **Table 11** (Appendix 5) using Experian's recommended growth rate for spending on leisure services of 0.9 per cent, per capita, per annum for the period 2012 to 2026<sup>31</sup>.
- 8.7 Table 11 of Appendix 5 shows that total leisure services expenditure is expected to increase from £454.82m in 2011 to £490.82m by 2016, £531.02m by 2021 and £572.77m by 2026. The overall growth in expenditure in leisure services in the period 2011-2026 amounts to £117.95m therefore. Table 11 of Appendix 5 also disaggregates this figure for those parts of the study area which fall within Mansfield District<sup>32</sup>, and it can be seen that within this area spending on leisure goods amounts to £145.47m in 2011, which is expected to increase to £178.78m by 2026, a growth of £33.31m.
- 8.8 In **Table 8.2** below we apply the current proportions of leisure spend to determine the expected change (based on the MSA total growth of £117.95m) in each COICOP category, based on the percentage spend distributions set out in Table 8.1.

<sup>30</sup> Subscriptions to clubs, trade unions and friendly societies (National Statistics Consumer Trends, 2001)

<sup>31</sup> In order to calculate the expenditure at the study base year of 2011, we have applied expenditure growth rates of 0.3 per cent per annum between 2009 and 2012 and 0.9 per cent per annum thereafter.

<sup>32</sup> Population of Zones 1 and 2 and 57.2% of population of Zone 3 — see Section 4.

**Table 8.2 - Allocating growth in spending by COICOP categories**

COICOP Categories	Description	Allocating additional spend of £117.95m 2011-26 (£m)
11.1.1, 11.1.2	Restaurants, cafés, bars, etc	75.16
9.4.2	Cultural services	15.60
9.4.3	Games of chance	9.68
11.2	Accommodation services	5.31
9.4.1	Recreational and sporting services	7.35
12.1.1	Personal services (hairdressers etc)	4.84
<b>Total</b>	<b>All Leisure Services</b>	<b>117.95</b>

Source: Table 13, Appendix 5 (final column). Note: figures may not add due to rounding.

- 8.9 It can be seen from Table 8.2 above that spending on restaurants, cafes and bars is expected to increase by £75.16m across the MSA over the period 2011-2026. Reflecting the current patterns of spending set out in Table 8.1, this represents the highest expenditure category by some margin. Expenditure on ‘cultural services’ is expected to increase by over £15m over the course of the study period, with expenditure on ‘games of chance’ and also expected to grow by almost £10m over the study period.

## Commercial leisure spending patterns

### *Study area wide food and drink leisure spending*

- 8.10 As with the retail sector, it is possible to assess the patterns of commercial leisure spending on food and drink uses. In this context, ‘food and drink’ refers to spending in restaurants, cafes, pubs, and similar locations. Compared to retail, food and drink spending is much more mobile due to the trend for people to travel long distances to socialise and since there are no constraints connected with transporting goods to the home.
- 8.11 Furthermore, the assessment of leisure need is not as well established as the retail approach and so less weight can be afforded the conclusions from this exercise. In any event, the results of the survey provide a useful indicator of how the ‘evening economy’ performs within Mansfield District.
- 8.12 **Table 8.3** sets out the level of commercial leisure spending on food and drink within and outside the study area.

**Table 8.3 - Study area commercial leisure spending on food and drink**

	2011 (£m)	2011 (%)
Spending in centres in Mansfield District*	115.38	39.81%
Spending in centres outside Mansfield District	174.48	60.19%
<b>Total spending</b>	<b>289.86</b>	<b>100.0%</b>

Source: Monetary values derived from Rows A, B and C of Table 15, Appendix 5. A 50:50 weighting is applied to the market shares for restaurant spending and bars/clubs spending. \*centres in Mansfield District are the market shares to the following destinations: Mansfield town centre, other local pubs/bars in Mansfield, retail parks/drive thru restaurants in Mansfield, Mansfield Woodhouse District centre, Market Warsop District centre, Forest Town local centre.

- 8.13 Table 8.3, which is derived from Rows A, B and C of Table 15 (Appendix 5) shows that of the total amount of leisure spending which is available to them, in aggregate, destinations in Mansfield District retain 39.86 per cent of commercial spending on food and drink. This means that almost 4 in 10 residents in the MSA direct their spending on food and drink towards locations in Mansfield. The food and drink retention rate is considered to represent a reasonable performance, although given the relative lack of competing destinations (with the exception of Nottingham); it is considered that there may be scope to improve this. 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. However, as we have set out in our health check analysis, Mansfield's relative deficiency in this sector does suggest that scope exists to improve this performance over the course of the study period.
- 8.14 The telephone survey of households also included a number of questions that asked residents of the study area where they spent most money in relation to various types of leisure services, as follows:
- Restaurants;
  - Cafes, pubs, bars;
  - Cinemas/theatres;
  - Bingo/casinos/bookmakers;
  - Health and fitness centres, and;
  - Family entertainment centres (i.e. ten pin bowling and skating).

#### *Restaurants and Cafés*

- 8.15 **Table 8.4** sets out the most popular destinations for spending in residents in the MSA.

**Table 8.4 – most popular destinations for restaurants and café visits in Mansfield Study Area**

Zone	Most popular destination	Second most popular destination	Third most popular destination
1	Mansfield TC (30%)	Mansfield local (24%)	Nottingham (20%)
2	Mansfield local (36%)	Mansfield TC (22%)	Nottingham (20%)
3	Mansfield local (26%)	Mansfield W'house (18%)	Mansfield TC (15%)
4	Worksop (47%)	Sheffield (21%)	Chesterfield / Clowne / Retford (4%ea)
5	Mansfield local (26%)	Edwinstowe (23%)	Mansfield TC / N'ham (5%ea)
6	Newark (24%)	Retford (16%)	Lincoln (13%)
7	Mansfield TC / Rainworth (18%ea)	Mansfield local (14%)	Nottingham (12%)
8	Nottingham (46%)	Hucknall (20%)	Mansfield local (7%)
9	Sutton (42%)	Alfreton / Chesterfield (10%ea)	Mansfield local (8%)

Source: NEMS Household Survey results (Question 32). Note: percentage figures are adjusted to exclude those who responded 'don't know' or 'do not undertake this activity' in response to Q32. Zones in Mansfield District shown in blue.

- 8.16 The proportion of residents who undertake visits to restaurants and cafes varies from 72 per cent in Zone 4 to 56 per cent in Zone 8. It is interesting to note that Mansfield town centre is the most popular destination for only two of the nine survey Zones, and does not attract a market share higher than 30 per cent from any of the Zones. More popular are restaurants and cafes outside the town centre, which attract the highest market share from Zones 2, 3 and 5, as well as market shares from Zones 1, 7, 8 and 9. Therefore it would appear that whilst many residents of the MSA are visiting Mansfield for this activity, there is not a sufficiently strong offer to draw all visitors into the town centre.
- 8.17 Mansfield Woodhouse district centre attracts an 18 per cent market share from residents in its 'local' Zone, Zone 3, which can be considered a good performance given the relatively limited facilities available here.
- 8.18 Nottingham city centre attracts a 20 per cent market share from Zones 1 and 2, and almost 50 per cent of the market share from Zone 8.

#### *Pubs, Bars and Nightclubs*

- 8.19 **Table 8.5** shows the most popular destinations for residents for spending in pubs, bars and nightclubs.



**Table 8.5 – most popular destinations for pubs, bars and nightclub visits in MSA**

Zone	Most popular destination	Second most popular destination	Third most popular destination
1	Mansfield TC (49%)	Mansfield local (25%)	Nottingham (8%)
2	Mansfield local (46%)	Mansfield TC (33%)	Nottingham (7%)
3	Mansfield TC / Mansfield Woodhouse DC (28%ea)	Mansfield local (21%)	Nottingham (9%)
4	Worksop (66%)	Sheffield (6%)	Creswell (5%)
5	Mansfield TC (34%)	Edwinstowe / Mansfield local (15%ea)	New Ollerton (9%)
6	Retford (15%)	Newark (14%)	Tuxford (7%)
7	Mansfield TC (30%)	Rainworth (19%)	Mansfield local (9%)
8	Hucknall (28%)	Nottingham (25%)	Annesley (8%)
9	Sutton (25%)	Mansfield TC (18%)	Alfreton (12%)

Source: NEMS Household Survey results (Question 33). Note: percentage figures are adjusted to exclude those who responded 'don't know' or 'do not undertake this activity' in response to Q33. Zones in Mansfield District shown in blue.

- 8.20 The household survey shows that the proportion of residents undertaking this activity varies from 47 per cent in Zone 7 to 71 per cent in Zone 1. When compared with the findings of Table 8.4 it is apparent that Mansfield is a more popular destination for pub and bar-orientated leisure activity than for restaurants. For example, 49 per cent of residents in Zone 1 visit Mansfield town centre for pub/bar visits, compared to 30 per cent for restaurant visits. Mansfield town centre is also the most popular destination for residents in Zones 5 and 7; the equal most popular destination for residents in Zone 3 (alongside Mansfield Woodhouse).
- 8.21 Mansfield town centre also attracts strong market shares for residents in Zone 2 (33 per cent) and Zone 9 (18 per cent). In the latter, Mansfield attracts a stronger market share for evening economy activities than for retail spending, suggesting a poor range of pubs/bars/clubs in Sutton-in-Ashfield vis-à-vis a stronger offer in Mansfield.
- 8.22 Nottingham is the third most popular destinations for residents in all three Mansfield Zones (Zones 1 to 3) but attracts a market share of under 10 per cent from each. The trends shown in Table 8.5 therefore suggest that Mansfield is a popular destination for pubs/bars/club visits from across the MSA, indicating a good range of facilities are available in the town centre.

### *Cinemas and theatres*

- 8.23 The most popular destinations for cinema and theatre visits for residents in the MSA are summarised in **Table 8.6**. There are two significant considerations to take into account when reviewing trends for cinema and theatre visits. The first is that, when compared to visits to restaurants/pubs, fewer respondents undertake this activity – in six of the nine

survey Zones, under 60 per cent of respondents stated they visit the cinema or theatre. This does not appear to be correlated to provision – in Zones 2 and 3, which both benefit from good access to facilities in Mansfield, just 51 and 52 per cent of respondents respectively visit the cinema and theatre.

- 8.24 The second point is that such facilities are much more polarised than restaurants / pubs. Cinemas and theatres tend to locate only in major urban centres, and therefore in a semi-rural catchment such as the MSA, residents will need to travel further should they wish to visit such facilities.
- 8.25 It can be seen from Table 8.6 that the Odeon in Mansfield is the most popular destination in this category by some degree, and attracts the highest number of visits from seven of the nine survey Zones, including a market share of over 50 per cent from Zones 1, 2, 3 and 5.

**Table 8.6 – most popular destinations for cinema & theatre visits in MSA**

Zone	Most popular destination	Second most popular destination	Third most popular destination
1	Odeon, Mansfield (71%)	Palace Theatre, Mansfield (18%)	Nottingham theatres (6%)
2	Odeon, Mansfield (63%)	Palace Theatre (18%)	Nottingham theatres (16%)
3	Odeon, Mansfield (62%)	Palace Theatre (21%)	Broadway, N'ham / Nottingham theatres (4%ea)
4	Vue, Meadowhall (38%)	Cineworld, Sheffield (15%)	Sheffield theatres (12%)
5	Odeon, Mansfield (70%)	Palace Theatre (17%)	Nottingham theatres (9%)
6	Reel, Newark (21%)	Odeon, Lincoln (9%)	Odeon, Mansfield (6%)
7	Odeon, Mansfield (33%)	Palace Theatre (8%)	Nottingham theatres (4%)
8	Odeon, Mansfield (28%)	Nottingham theatres (13%)	Broadway, Nottingham (5%)
9	Odeon, Mansfield (37%)	Cineworld, C'field (12%)	Nottingham theatres (6%)

Source: NEMS Household Survey results (Question 34). Note: percentage figures are adjusted to exclude those who responded 'don't know' or 'do not undertake this activity' in response to Q34. Zones in Mansfield District shown in blue.

### *Bingo, casino's and bookmakers*

- 8.26 The results of Question 35 of the household survey indicate that the majority of residents in the MSA do not undertake in these activities<sup>33</sup>. In seven of the nine survey Zones, over 90 per cent of respondents stated they did not use these facilities, and therefore identifying the three most popular destinations for each survey Zone is not an effective exercise. Of the total of 81 respondents who do undertake these activities, 36 visited facilities in Mansfield, 13 visited Sutton-in-Ashfield, six visited Nottingham and five played online.

<sup>33</sup> Or acknowledged that they undertook these activities for the purposes of the survey.

### *Health and Fitness Centres*

- 8.27 The results of Question 36 of the household survey indicate that health and fitness facilities, such as gymnasiums and swimming pools, also experience relatively low levels of patronage from the MSA. On aggregate approximately one in five residents visit such facilities, although Zones 1 and 9 have higher levels of patronage at 27 and 33 per cent respectively.
- 8.28 Within Mansfield, there are a range of facilities which each attract similar (relatively low) market shares, including DW Sports Fitness at Portland Retail Park, Bannatyne's at Briar Lane, and Fitness First at Mansfield Leisure Park, as well as Council-run facilities at the Oak Tree Lane leisure centre.

### *Family entertainment*

- 8.29 The results of Question 37 of the household survey suggest that across the MSA, approximately one in five residents visit leisure facilities such as ten-pin bowling and ice skating. Again, the number of residents who visit these facilities is too low to effectively review the top three destinations in each Zone. Across the MSA, 18 per cent of residents visit facilities in Mansfield, 4 per cent visit facilities in Sutton-in-Ashfield, and 1 per cent visit facilities in Nottingham. The results of the survey therefore indicate that Mansfield is the most popular destination for spending in this category across the MSA.

### **Indicative floorspace need for A3, A4 and A5 uses**

- 8.30 We have set out above that a total of £289.86m is currently spent at food and drink locations within the MSA. This is expected to increase to £365.02m by 2026, a growth of £75.16m. Using an indicative market share of 39.81 per cent (which represents the market share of destinations in Mansfield District), we have converted the anticipated growth into an indicative floorspace requirement based on turnover which we have forecast to increase by 0.4 per cent per annum to 2026. The indicative level of quantitative need (gross floorspace) for the District up to 2026 is presented in **Table 8.7**.

**Table 8.7 – A3, A4 and A5 floorspace requirement for Mansfield District, cumulative to 2026**

Year	2016	2021	2026
A3, A4, A5 requirement (cumulative sq.m gross)	1,076	2,267	3,464

Source: Table 15, Appendix 5

- 8.31 This demonstrates that there is a total requirement of approximately 3,500 sq.m gross A3, A4 and A5 leisure floorspace in the District to 2026. The figures set out in Table 8.7 are cumulative – i.e. the additional floorspace required between 2016 and 2021 is 1,191 sq.m gross (2,267 sq.m less 1,076 sq.m), and the additional floorspace required between 2021 and 2026 is 1,197 sq.m gross (3,464 sq.m less 2,267 sq.m).
- 8.32 It would be expected that these requirements would be satisfied through the development of a mixed-use, retail-led scheme which incorporates an element of leisure floorspace provision.

- 8.33 There are no extant planning commitments specifically for A3, A4 or A5 floorspace in Mansfield District. However, it is important to note that there are a number of extant planning consents which include provision for an undetermined amount of leisure floorspace. Upon completion of these developments the Council should adjust the requirements set out above in accordance with the amount of floorspace, if any, which has been developed for A3, A4 or A5 uses.
- 8.34 The commitments which include an unspecified amount of leisure floorspace which we are aware of are:
- Former Queen's Head Public House, Mansfield (planning permission granted July 2010 for a mixed use retail and office building including A1, A2 and A3 uses.
  - Land at Belvedere Street / Stockwell Gate / Quaker Way ('Stockwell Gate South') (planning permission granted May 2010 to extend 2007 outline permission for use classes A1, A2, A3, A4, A5, B1a, D1, D2 and C1).
- 8.35 We would expect that should the Stockwell Gate South development include a substantial element of leisure floorspace, the majority (if not all) of the A3, A4 and A5 floorspace requirement for the District will be satisfied. However, we consider that there is likely to be a qualitative deficiency for certain types of food and drink uses – particularly restaurants – in the town centre, and applications for developments of this nature which enhance the diversity of uses in the town centre should be considered favourably.

### Existing commercial leisure facilities

- 8.36 Map M at Appendix 4 shows the fitness centres, cinemas, theatres, bingo halls and family leisure (i.e. bowling, ice skating, laser tag etc.) within Mansfield District and the surrounding area. Within the MSA, the majority of food and drink uses (A3-A5 uses) can be found in Mansfield town centre and to a lesser extent the district centres of Mansfield Woodhouse and Market Warsop.

#### *A3, A4 and A5 floorspace*

- 8.37 In our performance analysis of Mansfield town centre, we identified that the leisure offer is geared towards drinking rather than eating establishments. Data from the Council's 2011 RU indicates that class A3 uses (restaurants and cafes) make up 4 per cent of total town centre units, and class A5 uses (hot food takeaways) make up 3 per cent of units. Eating outlets in total occupy 7 per cent of units, below the UK average of 9 per cent.
- 8.38 There is a range of types of both eating and drinking establishment, a selection of cafés as well as independent restaurants providing a range of cuisines, and a mix of chain pubs, bars and nightclubs. As we have identified previously, there is a shortage of mid-range multiple restaurants in the town centre, such as Pizza Express, Zizzi, ASK and Nando's. The attraction of such operators to the town centre would further diversify the offer in the town centre, which is too heavily orientated towards drinking establishments at present. For example, there are two Wetherspools and a Lloyds No1 bar – also operated by Wetherspools – within a very short distance of each other in Mansfield town centre.

### *Indoor gyms and leisure centres*

- 8.39 The district is well provided for in terms of indoor gyms and leisure centres. Mansfield has a range of private gym clubs and council-run leisure facilities. Outside the District, there are also popular facilities in Sutton-in-Ashfield, although there appears to be a relative paucity of facilities in the rural eastern side of the MSA.
- 8.40 The current provision of main gym facilities and indoor leisure centres in Mansfield District is shown in **Table 8.8**.

**Table 8.8 – principal indoor gym and leisure centres in Mansfield District<sup>34</sup>**

Name	Location	Operator
Rebecca Aldington Swimming Centre and Fitness Complex	Westdale Road, Mansfield	Mansfield District Council
Oak Tree Leisure Centre	Jubilee Way, Mansfield	Mansfield District Council
River Maun Recreation Centre	Barringer Road, Forest Town, Mansfield	Mansfield District Council
Meden Sports Centre	Burns Lane, Market Warsop	Mansfield District Council
Water Meadows Swimming Complex	Bath Street, Mansfield	Mansfield District Council
Manor Park Sports Complex	Ley Lane, Mansfield Woodhouse	Other public body
Bannatynes Health Centre	Briar Lane, Mansfield	Private
Intake Leisure	Kirkland Avenue, Mansfield	Private
DW Leisure	Portland Retail Park, Mansfield	Private
Oasis Leisure & Fitness First	Nottingham Road, Mansfield	Private
Body & Soul Gym	Leeming Street, Mansfield	Private
Lakeside Leisure Club	Meden Square, Pleasley	Private

Source: RTP desktop analysis / Mansfield District Council

- 8.41 Our headline assessment is that there is currently adequate provision of gym and indoor sports facilities in the District. Mansfield town is served by four leisure centres, including one serving the district centre at Oak Tree and a second serving the local centre at Forest Town. Each of these offers a range of sports and fitness facilities, including swimming, sports courts, and fitness equipment. There are also Council-operated facilities available to residents in Market Warsop. Although Mansfield Woodhouse is not immediately served by a

<sup>34</sup> This table does not include specialist weight training/bodybuilding facilities.

Council-operated facility, local residents have access to facilities at the Manor Park Sports Complex.

- 8.42 In addition to the Council-operated facilities, there are a range of additional private facilities, which have a higher membership cost and generally serve a smaller section of the market. Two of the major operators in this sector (Bannatyne's and Fitness First) are represented in Mansfield. Both of those facilities are on the south side of the town, and there may be a qualitative shortfall in the provision of private facilities to the north of the town, in the Mansfield Woodhouse area. However, we do not consider there to be a pressing need for additional facilities of this nature to serve the town.

### *Cinemas and theatres*

- 8.43 The results of the household survey reviewed above indicate that there is a lack of choice of cinema facilities within the MSA, with virtually the entire MSA looking towards the (limited) provision in Mansfield (as indicated in **Table 8.4**). Although cinema provision requires a larger catchment area than retail, the fact that there is only one cinema in Mansfield – the Odeon at Mansfield Leisure Park on Nottingham Road – suggests that there may be a qualitative need for additional provision in order to provide consumer choice. Outside the catchment area, there are alternative facilities available in Nottingham, Chesterfield, Sheffield, Newark-on-Trent and Lincoln, although the results of the survey indicate that patronage to these facilities from residents in the MSA is relatively limited. However, it is apparent that residents in Mansfield are willing to visit Nottingham to visit independent cinemas such as the Broadway in Nottingham city centre.
- 8.44 In terms of theatre, Mansfield has the Palace Theatre located in the town centre, and the household survey shows this to be a popular destination (taking into account the fact that theatre visitors are generally a more niche amount of the population compared to cinema visitors).

### *Family entertainment*

- 8.45 Family entertainment facilities such as bowling, laser tag and ice skating have some provision within Mansfield. The main destination for these facilities in the 'Superbowl 2000' development at Belvedere Street. There are no laser tag or ice skating venues in the town, and we understand that the nearest facilities are located in Nottingham.

### *Games of chance facilities*

- 8.46 There are three bingo halls in Mansfield District – Walkers Bingo Club at Mansfield Leisure Park, and Gala Bingo at Albert Street within the town centre. There is also a smaller bingo and social club facility at Church Street, Warsop<sup>35</sup>. Residents in the District therefore have access to a range of facilities of this nature. There are no casino venues in the District, with the closest facilities located in Nottingham. There are a range of bookmakers' facilities

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<sup>35</sup> This facility is the subject of a planning application by Tesco which result in the bingo hall ceasing operation if permitted.



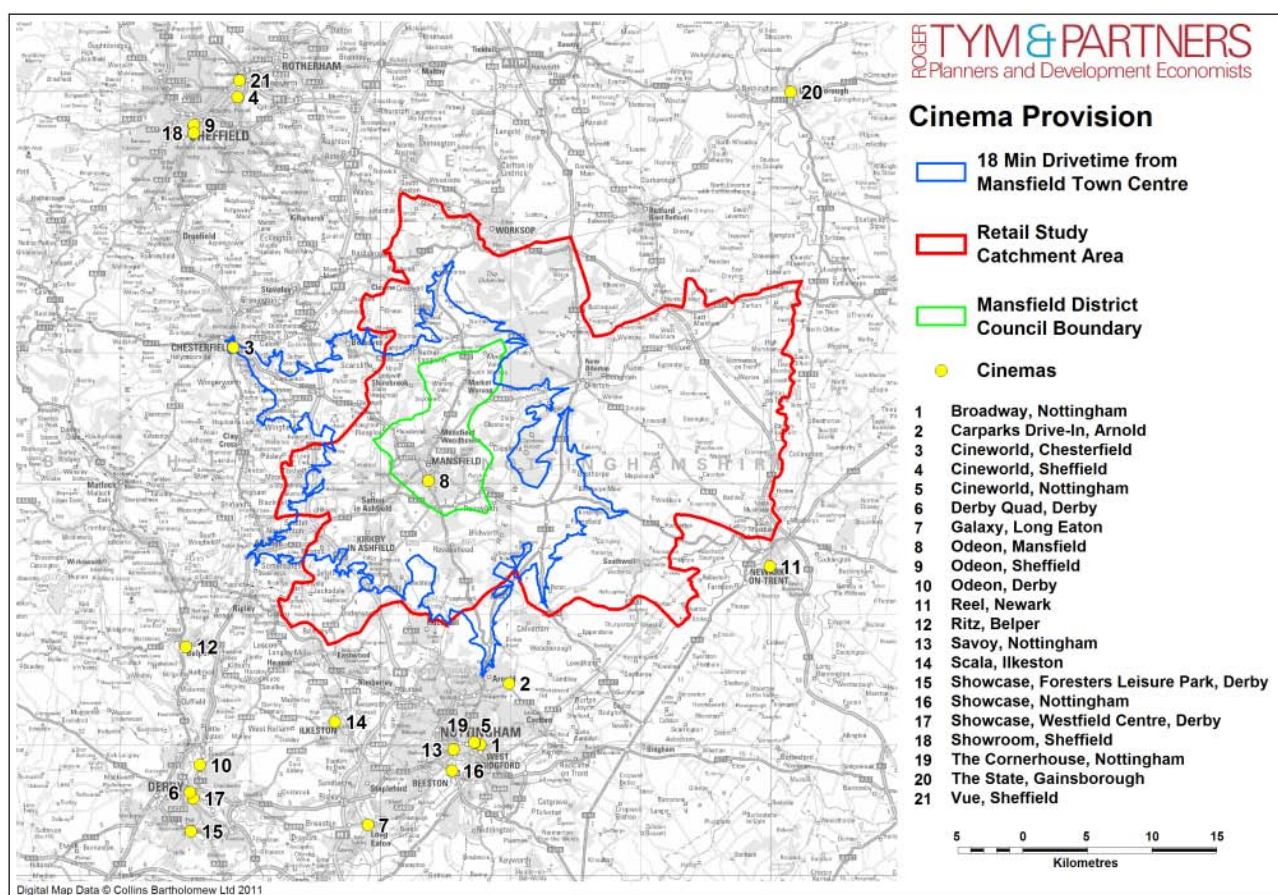
throughout the District, with the largest concentration, as would be expected, in Mansfield town centre. Facilities of this nature in the district centres are limited.

## Gap analysis

### Cinemas

- 8.47 Cinema operators make decisions of expansion or location based on 'screen density' - that is, the existing provision within appropriate drive-time isochrones, taking account of population levels (or the number of screens available per 100,000 people). The latest information that we have access to indicates that the average travel time to a cinema is around 18 minutes (as defined by Caviar). We have therefore analysed cinema provision within an 18-minute drive-time of Mansfield town centre.
- 8.48 **Figure 8.9** shows the cinema provision within and around the 18-minute drive-time isochrone of Mansfield town centre.

**Figure 8.9 – Cinema provision within and surrounding Mansfield District**



- 8.49 Figure 8.9 shows that there are two cinemas within the 18 minute drive-time – the Odeon in Mansfield which we have identified as having an extremely popular trade draw from across the MSA. In addition, the Cineworld in Chesterfield just sits inside the 18 minute drive-time catchment. Figure 8.9 also shows that there are clusters of cinemas in the higher order centres surrounding Mansfield – Sheffield, Derby and Nottingham.



- 8.50 Data from MapInfo indicates that within this 18-minute drive-time catchment, there is a population of 277,440 persons, and a total of 18 cinema screens (eight at Odeon in Mansfield, ten at Cineworld in Chesterfield). This is equivalent to 6.5 screens per 100,000 people, which is above the average for the Midlands TV region (5.6 screens per 100,000 people) and the UK average (6.0 screens per 100,000 people). On paper, this suggests an over-supply of cinema provision in the 18-minute drive time catchment. However, in practice, the location of the Cineworld in Chesterfield on the very western edge of the catchment area means that it will only draw trade from a small proportion of the catchment area (i.e. those who are closer to Chesterfield than Mansfield). If we remove the ten screens at the Chesterfield Cineworld, the screen density reduces to 2.9 screens per 100,000 people, significantly below the regional and UK average. This would indicate that the provision of additional facilities may be desirable over the course of the study period as the population of the District increases.

**Table 8.10 - Cinema Screen Density within an 18-minute drive-time of Mansfield Town Centre**

Cinemas within 18 minute drive-time	No of screens within 18 minute drive-time	Population within 18 minute drive-time	Screen Density (i.e. screens per 100,000 people)	Midlands Average Screen Density	UK Average Screen Density
2	18	277,440	6.5	5.6	6.0

Source: UK Film Council Statistical Yearbook 2009/10 and ONS experimental 2009 mid-year population estimates

### *Private and public gyms*

- 8.51 The Business in Sport and Leisure (BISL) handbook 2009 states that around 12% of the UK population is a gym member. Table 1 of Appendix 5 shows that the estimated population of Mansfield District at the 2009 base year is 99,703 persons. Therefore, assuming gym membership to be in line with national averages, we can assume there are 11,964 gym members in the District. As detailed in Table 8.8 above, there are twelve main health and fitness facilities in Mansfield District (as far as we are aware, all of those listed in Table 8.8 offer gym facilities), suggesting that on average each facility has 997 members.
- 8.52 The BISL handbook states that at March 2008 there were 5,755 private fitness facilities in the UK and 7.2 million of the population held a private membership, meaning an average private health club has 1,251 members. Although the report contained no membership information for the 2,622 public fitness facilities, we see no reason it would differ radically and therefore assume 1,251 to be a reasonable benchmark membership for any given gym.
- 8.53 With 12 gyms, we calculate that Mansfield can reasonably accommodate 15,012 gym members; the calculated membership figure for Mansfield District of 11,964 therefore indicates that there may be some surplus capacity at existing gyms in the District. However the BISL handbook notes that the health and fitness sector has grown over recent years and suggests it is likely to continue to do so; in view of this, we consider the implications of membership level increasing to 15 per cent. Based on Mansfield District's estimated resident population of 99,703 this would mean 14,955 gym members (an average of 1,246

members per gym) - bringing gym membership to capacity levels based on current provision.

- 8.54 The results of the household survey as discussed above identified reasonably strong levels of gym patronage in the District, and therefore there may be a need for some additional provision in the longer term to serve residents in the District.

### **Demand analysis**

- 8.55 Interrogation of the FOCUS Commercial Property Database indicates that there is just one live food and drink requirement for Mansfield and Nottinghamshire, from Belle and Jerome café bar, who have a specific requirement for affluent suburban locations in Derbyshire, Leicestershire and Nottinghamshire.
- 8.56 We expect that economic climate will have impacted on the outcome of this study specifically in relation to operator demand, but as the economic climate improves over time so will demand and this should be acknowledged.

### **Qualitative assessment**

- 8.57 The qualitative assessment is largely informed by our findings above, and the results of the household survey. The clear qualitative need which currently arises in the District is for provision of a better grade of restaurant (mostly casual dining, but also fine dining), in order to complement the drinking establishments which form the majority of the leisure offer at present. The focus of this offer should be Mansfield town centre, although there is also scope for improving the provision in the district centres in this respect (where the current offer is largely restricted to public houses and take-away outlets).
- 8.58 The provision of these facilities would also be of benefit to key town centre facilities such as the Palace Theatre.
- 8.59 There is a good range of drinking establishments in the town centre at present, which are generally clustered in the environs of Clumber Street.
- 8.60 There is also no cinema within the town centre at present. The only cinema serving Mansfield is located out of the town centre. A more centrally-located cinema would further assist in diversifying the evening economy in Mansfield, providing additional footfall in the town centre. We have set out above that there is likely to be a requirement for additional cinema provision in the town over the course of the study period, and should this come forward, there is a strong case for seeking the provision of new facilities in the town centre.

### **Assessment of scope for additional commercial office provision**

- 8.61 In this section we present a broad overview of the scope for additional commercial office floorspace in Mansfield District. The advice has been prepared with the input of commercial property agents Innes England, who have acted as sub-consultants to RTP on this study. Reflecting the requirements of the wider study brief, the assessment focuses on the town and district centres.

### *Recent trends*

- 8.62 Since mid-2008 demand for office space has deteriorated significantly in the midst of the economic downturn. Locally we have witnessed pockets of activity over the last three years but no sustained improvements in take-up to suggest signs of anything like a full recovery. Over the same period, we have seen significant increases in the supply of office space although this has tended to be skewed towards poor quality space.
- 8.63 Take-up over the last three years has been centred on the public sector and those providing public sector funded services such as training, recruitment and medical sector work. Much of this demand has been focused on the city centres where public transport is a key driver.
- 8.64 Following the change of Government last year and the introduction of austerity measures to reduce national debt, public sector spending has reduced significantly. Office take up in the near future will therefore be largely reliant on private sector recovery which is likely to be slow.
- 8.65 Against this background of weak demand and over supply, we have experienced a reduction in the achievable rent and freehold prices which have continued to drift down in the absence of an improvement to market sentiment.

### *Local performance*

- 8.66 Transactions have however continued to take place with activity concentrated on the better quality accommodation in the most established office locations. Equivalent rents (i.e. once adjusted for rental incentives) on good quality accommodation in and around the Mansfield area are currently typically achieving between £7 and £8 per sq ft with transactions having been completed over the first half of 2011 at these levels in all of the principle office developments in the area including I2 on the Oakham Business Park, The Village adjacent to J28, Sherwood Oaks Business Park on the Southwell Road together with the nearby Ransom Wood Development.
- 8.67 These rental levels are significantly below those needed to support speculative development and financial support for pre-let/pre sold opportunities remains extremely constrained. However with this continued level of activity albeit it at reduced rental levels, it is evident that the availability of good quality stock is diminishing over time as deals are done and no construction activity is taking place to provide new good quality supply.
- 8.68 In the medium term we are therefore anticipating the return of Design & Build activity and indeed this has already returned in larger centres such as the nearby Nottingham City Centre office market which has experienced a number of such transactions over the last 12-18 months including the largest office pre-let outside of London in the whole of the UK in 2010. It is therefore important that appropriate provision is made to enable such activity to be accommodated within Mansfield central area to enable it to compete for enquiries in the future. Another emerging trend is that we are seeing activity concentrated on urban centres particularly governed by the benefits of their public transport links.
- 8.69 Another characteristic of larger scale development activity is an emphasis upon the delivery of sustainable buildings. This is often best satisfied through new construction activity being

driven by a combination of companies corporate social responsibility agenda's and an increase in awareness of the reduction in running costs and improved efficiencies that such buildings can offer. This once again emphasises the need to have land available to deliver such stock.

- 8.70 All enquiries received at Innes England's three regional offices are registered on a central database. This information can be analysed by type, size and locality. It is not town specific but is recorded against the general North Nottinghamshire area which is focused on Mansfield and those centres along the A38 corridor. **Table 8.11** below shows the proportion of enquiries by size band registered over 6 month periods since the beginning of 2009 for the North Nottinghamshire area.

**Table 8.11 – Enquires for floorspace in North Nottinghamshire, 2009-2011**

Size Sq.ft (sq.m)	2009 - Q1/2	2009 - Q3/4	2010 - Q1/2	2011 - Q1/2
0 – 2,500 sq.ft (0-232 sq.m)	22%	25%	32%	33%
2,500 – 5,000 sq.ft (232 - 465 sq.m)	29%	38%	31%	33%
5,001 – 10,000 (465 – 929 sq.m)	26%	19%	16%	22%
10,000 – 20,000 (929 – 1,858 sq.m)	19%	12%	16%	2%
20,001 + (1,858 sq.m +)	4%	6%	5%	0%

Source: Innes England. Note: figures for Q3/4 2010 not available.

- 8.71 As is apparent from **Table 8.11** above the depth of demand is in the smaller size band but pre-let activity needs to benefit from an element of economies of scale with generally 10,000 sq ft being the minimum level at which the financial model can work.
- 8.72 As noted above demand is not recorded on a town centre by centre basis but, in the experience of Innes England, very few enquiries for the smaller commercial centres such as Market Warsop and Mansfield Woodhouse are received.

## 9 STRATEGIC RECOMMENDATIONS

- 9.1 In this section we set out a series of strategic recommendations which the Council may wish to take into consideration in preparation of its Core Strategy. This builds on the findings of the assessment set out in the previous chapters, and discusses:
- The suggested retail hierarchy for the District
  - The distribution of retail floorspace in the District
  - Suggested changes to primary shopping frontages and town / district centre boundaries.
  - The scope and location of additional leisure provision in the District
- 9.2 A further requirement of the study brief is to provide advice on the monitoring of the vitality and viability of town and district centres. We set this out at Appendix 3 to the study.
- 9.3 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. Indeed, with the recent permission to extend the anchor Tesco store, a number of smaller units in the centre have been removed.
- 9.4 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.
- 9.5 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.
- 9.6 We set out an audit of the facilities in each of the current district centres in Table 9.1 below. It can be seen that both Mansfield Woodhouse and Market Warsop have a strong range of facilities available, with nine out of ten key facilities which people may require on a day to day basis present in each centre. In some cases there is more than one of a particular facility present (for example, in Market Warsop there are two small supermarkets). The gap in the offer in Market Warsop is the absence of a large supermarket serving the centre at present, although if the emerging proposals for a new Tesco on the edge of the centre are permitted, this deficiency will be satisfied. However as we have advised previously, this should not be at the expense of the vitality and viability of the existing retail offer within the centre, which currently adequately caters for top-up shopping.
- 9.7 Mansfield Woodhouse scores strongly, with nine of the ten key facilities present. Unlike Market Warsop it does have a large foodstore (Morrisons) which clearly plays an important role in the vitality and viability of the centre as a whole. The only gap in the services offer is the lack of an optician, meaning local residents must currently make special journeys to access these facilities. The nearest optician is within Asda at Forest Town.

- 9.8 We are satisfied that Mansfield Woodhouse and Market Warsop fulfil their current retail hierarchy allocations as district centres successfully.
- 9.9 Oak Tree has a more limited range of facilities. The anchor Tesco store provides a large supermarket which has sufficient product range to meet both day-to-day and main food shopping needs. There is also an in-store pharmacy, and a cash machine. Within the district centre there is also a health centre. However, these aside, there are a number of key facilities which are absent, including a bank, library, hot food takeaway and post office. There is a small local shopping parade (Ling Forest Court) nearby which does offer a post office and takeaway, however this does not form part of the defined district centre and does not have particularly strong functional linkages with the centre.

**Table 9.1 — audit of facilities at district centres in Mansfield District**

Centre	Large supermarket	Small supermarket	Bank or building society	Doctor's surgery	Pharmacy	Dentist	Opticians	Library	Take Away	Post Office	Total
Mansfield Woodhouse	✓	✓	✓	✓	✓	✓		✓	✓	✓	9/10
Market Warsop		✓	✓	✓	✓	✓	✓	✓	✓	✓	9/10
Oak Tree	✓			✓	✓						3/10

Source: RTP audit and desktop research

- 9.10 Based on the assessment above, 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.
- 9.11 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
- 9.12 Should the Council wish for Oak Tree to remain as a second-tier District Centre, it is recommended that a proportion of the overall comparison goods floorspace requirement for the District is allocated to the centre, in order to provide additional retail units. This should be supported by the provision of units to meet the identified qualitative shortfall in service provision which we have set out above.



- 9.13 Although a detailed assessment of Sandlands Way, Forest Town – which is currently a local centre in the adopted Local Plan – was outside the remit of the study, we note that Sandlands Way fulfils a similar role and function to the Oak Tree Centre – in that it is anchored by a large foodstore (Asda) and has a limited range of complementary retail and service facilities. We do not consider that there is sufficient case for reclassification of Sandlands Way in the local retail hierarchy to form a District Centre as there is only a limited range of facilities available. However if the Council wishes for Oak Tree to remain a second-tier District Centre, there is likely to be merit in also including Sandlands Way in this tier, given that it offers a greater range of services and facilities compared to Oak Tree. Therefore, if the Council chooses to allocate Sandlands Way as a District Centre, the overall floorspace allocation for the District Centres (set out below) should be split four ways.
- 9.14 We understand that Sainsbury's Supermarkets Ltd have submitted representations to the Council's emerging Core Strategy, suggesting that their redeveloped Nottingham Road site warrants classification as a district centre. Whilst it is outside the remit of the study to review the proposals by Sainsbury's in detail, we would consider there to be an insufficient range of facilities at this site to warrant classification as a district centre. It is considered that the store (alongside the permitted Aldi which also forms part of the redevelopment site) will largely operate as a standalone convenience shopping destination upon its redevelopment.

### **Distribution of comparison goods floorspace**

- 9.15 We now consider the distribution of the floorspace which we have identified in Section 6. The distribution is based on the clear established retail hierarchy set out above and in the adopted Local Plan. We do not consider there is a need to allocate floorspace to support new district or local centres. Therefore, the focus of the comparison goods requirement will be on Mansfield town centre, with a smaller allocation to support the further development of the district centres as required.
- 9.16 It is not considered that there are significant opportunities for the development of a large amount of retail floorspace in the district centres. They are relatively constrained in terms of their ability to expand outwards, and the majority of the opportunity sites which have been identified in the Local Plan have been subsequently developed, mostly for residential use. Nevertheless the allocation of floorspace to the district centres allows for proposals to be considered on their own merits should a suitable site come forward.
- 9.17 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. It will also deliver improved shopping facilities which meet the requirements of the enlarged population of the District which is expected to come forward over the course of the study period. Accordingly it is expected that the further new comparison goods floorspace will be developed in the latter half of the study period to 2026.



*Option 1: RTP Recommended Hierarchy Distribution*

- 9.18 On this basis we have allocated 80 per cent of the floorspace requirement for the District to Mansfield town centre, with 10 per cent allocated to Mansfield Woodhouse and 10 per cent to Market Warsop district centres. This reflects the recommended retail hierarchy set out above. Based on this scenario, **Table 9.2** shows the distribution of comparison goods floorspace in the District for each of the five year interval periods. The range of figures provided represents the 'static' and 'increasing' expenditure retention scenarios set out in Section 6.

**Table 9.2 – Distribution of static and increasing retention comparison goods floorspace between centres in Mansfield District (RTP recommended centre hierarchy distribution)**

	% of total floorspace	2016 (sq.m net)	2021 (sq.m net)	2026 (sq.m net)
Mansfield TC (static retention)	80	2,292	9,711	15,869
Mansfield TC (increasing retention)	80	4,036	12,362	20,257
Mansfield Woodhouse DC (static retention)	10	287	1,214	1,984
Mansfield Woodhouse DC (increasing retention)	10	504	1,545	2,532
Market Warsop DC (static retention)	10	287	1,214	1,984
Market Warsop DC (increasing retention)	10	504	1,545	2,532
Total (static retention)	100	2,865	12,138	19,837
Total (increasing retention)	100	5,045	15,453	25,322

Source: Total floorspace requirements sourced from Tables 6a and 6b, Appendix 5. Figures are cumulative throughout the study period to 2026. Figures may not add due to rounding.

- 9.19 Therefore Table 9.2 shows 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 figures shown in Table 9.2 represent cumulative requirements.
- The district centres 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.

*Option 2: Existing Local Plan Centre Hierarchy Distribution*

- 9.20 Should the Council wish to maintain Oak Tree as a district centre, the total of 20 per cent of the overall floorspace requirement for the district centres should be split three ways between

Mansfield Woodhouse, Market Warsop and Oak Tree. The amount of floorspace to be accommodated in Mansfield Woodhouse and Market Warsop would therefore be reduced accordingly (**Table 9.3**).

**Table 9.3 – Distribution of static and increasing retention comparison goods floorspace between centres in Mansfield District (Existing Local Plan centre hierarchy distribution)**

	% of total floorspace	2016	2021	2026
Mansfield TC (static retention)	80	2,292	9,711	15,869
Mansfield TC (increasing retention)	80	4,036	12,362	20,257
Mansfield Woodhouse, Market Warsop and Oak Tree District Centres (each) (static retention)	6.67	191	809	1,323
Mansfield Woodhouse, Market Warsop and Oak Tree District Centres (each) (increasing retention)	6.67	336	1,030	1,688
Total (static retention)	100	2,865	12,138	19,837
Total (increasing retention)	100	5,045	15,453	25,322

Source: Total floorspace requirements sourced from Tables 6a and 6b, Appendix 5. Figures are cumulative throughout the study period to 2026. Figures may not add due to rounding.

- Under Table 9.3 the amount of floorspace to come forward in Mansfield town centre remains unchanged, but the proportionate requirement for each of the district centres is reduced.

### *Option 3: Four District Centres Hierarchy Distribution*

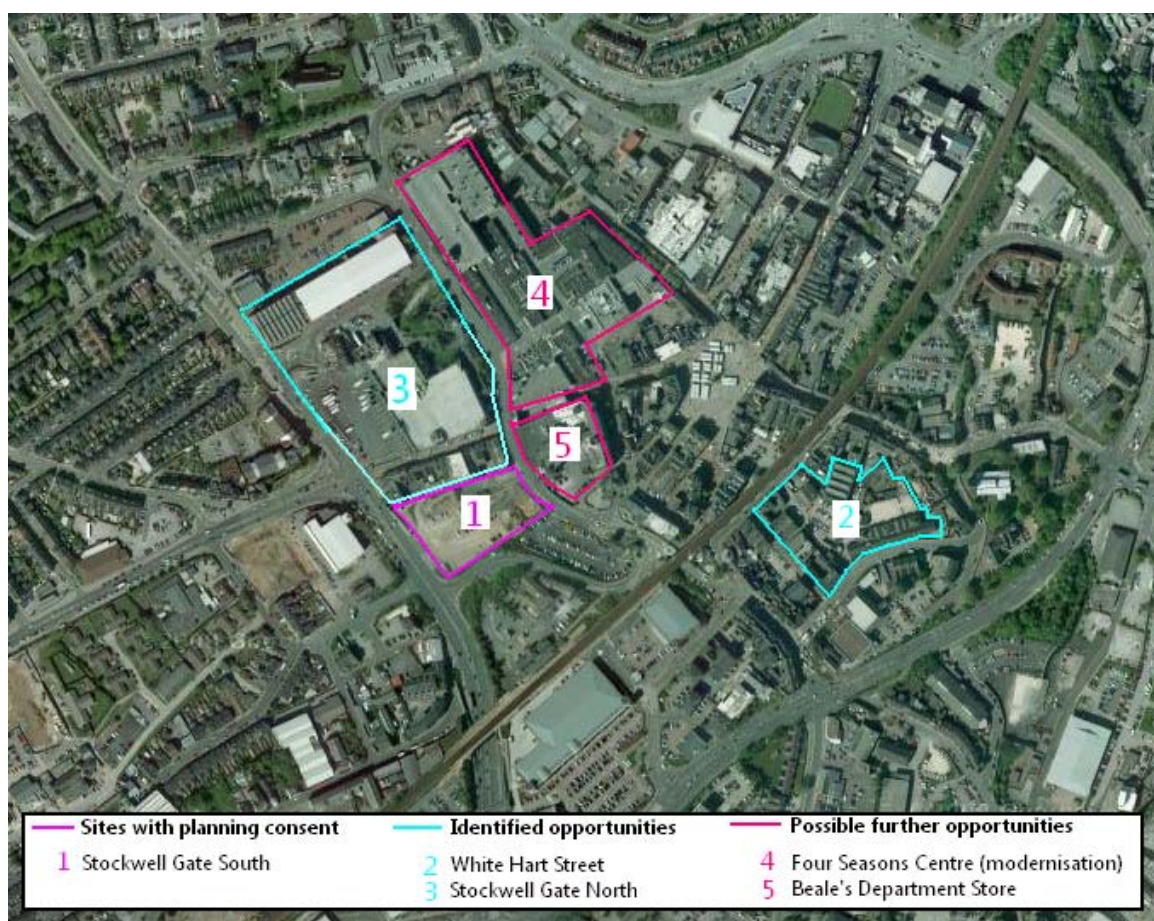
- 9.21 Finally, as discussed above, it is considered that if the Council chooses to include Oak Tree a District Centre in any revision to the retail hierarchy, Sandlands Way (Forest Town) should also be included, as the latter offers a broader range of services and facilities compared to Oak Tree. If this approach is followed, the District Centre floorspace allocation will need to be split four ways (i.e. between Mansfield Woodhouse, Market Warsop, Oak Tree and Sandlands Way). This would generate a requirement of between 143 and 252 sq.m net for each centre to 2016; between 607 and 773 sq.m net by 2021; and between 922 and 1,266 sq.m net by 2026 (cumulative figures). Requirements for Mansfield town centre would be as set out in Tables 9.2 and 9.3.
- 9.22 Whichever floorspace distribution scenario the Council wishes to follow, applications for development outside of these locations should be treated on individual merits. Applications for floorspace in district and local centres should be of a scale appropriate to the limited role and function which these centres play, and the targets set out above for district centres are likely to be sufficient to accommodate any demand which may arise.

- 9.23 We do not consider there is a requirement for additional bulky goods / retail warehouse provision in the District, as Mansfield can be considered well provided for in this respect.
- 9.24 We have not provided recommendations for the distribution of convenience goods floorspace on account of the limited quantitative need identified. However we draw attention to our conclusions in Section 7 in respect of the qualitative requirements for additional provision in the District.

### Opportunity sites

- 9.25 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.
- 9.26 **Figure 9.4** shows the opportunity sites in Mansfield town centre, structured into three groups:
- **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.

Figure 9.4 – redevelopment opportunities in Mansfield town centre



#### *Sites with planning consent*

- 9.27 The only opportunity site which benefits from planning consent is Stockwell Gate South. The advancement of Stockwell Gate South to deliver the consented floorspace should be considered the priority for the Council, particularly in light of the lapse of permission of White Hart Street. We are not aware any breakdown of floorspace which may be given over to retail uses, however it is recommended that Stockwell Gate South includes provision for a convenience foodstore to meet the current qualitative shortfall.

#### *Identified opportunities*

- 9.28 The Council is progressing other redevelopment opportunities in the town centre, with the main retail based opportunity considered to be the Stockwell Gate North site. This parcel of land covers a total of 4.25 hectares, and extends to cover the former Tesco store, the existing (soon to be closed) bus station, the Walkden Street car park, and the Rosemary Centre (a small retail parade which includes Iceland and Argos stores). The Council is the majority landowner in this area, and therefore it is considered that site assembly should be relatively straightforward. The Council's 'Creating a City Centre' strategy document identifies this site as suitable for retail – and therefore the findings of this study endorse that approach, as there is a clear requirement for additional comparison goods floorspace for the town centre.
- 9.29 White Hart Street also forms a clear opportunity site, and the site has until recently benefited from planning permission for mixed-use redevelopment. This permission lapsed in September



2011, and as a result the site is not expected to come forward in the short-term. Nevertheless we include the site as a medium-term opportunity, should development proposals for the site be revived and the subject of a new application. The development of the White Hart Street area should remain a priority for the Council despite this recent change in circumstances.

- 9.30 It is therefore expected that much of the identified requirement in terms of comparison goods provision will come forward on these two sites.

#### *Possible further opportunities*

- 9.31 In addition to the above, we consider that there is a qualitative need to improve the shopping facilities at the Four Seasons Shopping Centre. The centre was constructed in the 1970s and is now beginning to look dated. Apart from the department store anchor, many of the units are too small for the requirements of many modern retailers. The scope for internal redevelopment to provide larger units should be investigated. The scope for outward expansion of the centre is likely to be limited however.
- 9.32 The Beale's Department Store on the opposite side of Stockwell Gate – which occupies a prime site next to the Four Seasons centre and the two Stockwell Gate redevelopment sites – has potential as a longer-term redevelopment opportunity. The store appears to have low patronage and has benefited from relatively little investment. The redevelopment of this site would help to link the existing town centre with the redeveloped Stockwell Gate area.
- 9.33 We have not allocated any sites for convenience goods floorspace, on account of the limited quantitative need arising for these uses. Our quantitative assessment has made provision for a new foodstore in the Stockwell Gate South development. Other applications for convenience goods floorspace should be considered on their individual merits, however it is clear that on account of the high amount of committed floorspace there is insufficient scope for any major new convenience goods facilities in addition to those already consented in the short to medium term.

### **Town centre boundaries and primary shopping frontages**

- 9.34 The Mansfield Local Plan sets out defined boundaries for Mansfield town centre, and Mansfield Woodhouse and Market Warsop district centres. In this section we review the suitability of these boundaries, and make recommendations for amendment if required.

#### *Mansfield town centre*

- 9.35 The existing Local Plan-defined town centre boundary is quite extensive, and occupies the majority of land in between the main thoroughfares of Rosemary Street, St Peter's Way and Chesterfield Road South which border the west, south and eastern sides of the town centre respectively. The boundary takes in the redevelopment sites discussed above, and also the large area of retail warehousing south of the rail line, which was developed subsequent to the publication of the Local Plan in 1998.
- 9.36 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.

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- 9.37 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.
- 9.38 The retail parks do not function as part of the town centre, but as a standalone retail destination in their own right. As we have described previously, it is considered that they complement rather than compete with the town centre. The walk between the retail parks and the town centre is not particularly direct, as the railway line, changes in topography and relatively limited draw of the White Hart Street area of the town centre (at present) act as barriers to movement.
- 9.39 Although St Peter’s Retail Park does not currently represent a significant threat to the vitality and viability of Mansfield town centre, we are of the opinion that in order to protect the vitality and viability of the centre over the course of the Core Strategy period, further development of out-of-centre floorspace in the District should be resisted. As part of this, additional floorspace provision at St Peter’s Way would clearly pose a threat to the vitality and viability of Mansfield town centre. The current allocation of the retail park within the town centre boundary would mean that 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 that 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.
- 9.40 Any applications for retail development which might come forward at St Peter’s Retail Park should be, if approved, restricted by way of planning condition to ‘bulky goods’ retail only. It is understood that the current retail park has open A1 planning consent. It is recommended that any future development is more tightly controlled.
- 9.41 On the eastern side of the town centre, land in the vicinity of Rock Valley and Rock Court is largely given over to a mixture of light industrial and residential uses. These do not actively contribute to the vitality and viability of the town centre. Therefore, it is recommended that in this part of the town centre, the boundary is contracted as far as Toot Hill Lane.
- 9.42 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.
- 9.43 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.
- 9.44 We understand that current Council policies promote 100 per cent of units within primary shopping frontages to be occupied by A1 retailers, falling to 50 per cent of units in secondary



shopping frontages. This is in order to ensure that only those uses which attract the highest levels of footfall (typically A1 retail) are located within the primary shopping area. Such a policy is supported in principle, and it is recommended that this approach is carried through into the Core Strategy. However, there are occasions when non-A1 retail uses (for example coffee shops) can also attract high levels of footfall, but would be excluded from the primary shopping area under the current policy approach. Therefore, the Council may wish to consider a slight reduction in the 100 per cent threshold (to, for example, 90 per cent), in order to allow a degree of flexibility. This would also support the recommendations set out elsewhere in this report for an improvement in the leisure offer of the town centre.

- 9.45 In order to protect and enhance the town centre vitality and viability, care should be taken that non-A1 uses do not form more than three consecutive units within the primary shopping frontage, and any non-A1 units should be customer-facing operations (i.e. they should have an active frontage and be a use which serves the general public – rather than offices, for example).
- 9.46 The existing threshold for secondary shopping frontages is considered appropriate.
- 9.47 We note that within Mansfield town centre at present, retailers such as Costa and McDonalds — neither of which are A1 retail uses — occupy prominent locations within the primary shopping area, suggesting that the Council considers each case on its merits before deciding whether to relax its approach.
- 9.48 **Figure 9.5** shows our recommended town centre boundary for Mansfield town centre, and **Table 9.6** shows the recommended primary and secondary shopping areas.

Figure 9.5 – Recommended alterations to existing town centre boundary and shopping frontages



**Table 9.6 – Schedule of recommended primary and second shopping streets in Mansfield town centre**

<b>Primary shopping areas (existing)</b> <ul style="list-style-type: none"> <li>• Four Seasons shopping centre</li> <li>• West Gate (part)</li> </ul>	<b>Secondary shopping areas (existing)</b> <ul style="list-style-type: none"> <li>• Rosemary Centre, Walkden Street</li> <li>• West Gate (part)</li> <li>• Stockwell Gate</li> <li>• Market Place</li> <li>• Market Street</li> <li>• Queen Street</li> <li>• Church Street</li> <li>• Regent Street (part)</li> <li>• Leeming Street (part)</li> <li>• Clumber Street (part)</li> </ul>
<b>Additional recommended primary shopping areas:</b> <ul style="list-style-type: none"> <li>• None</li> </ul>	<b>Additional recommended secondary shopping areas:</b> <ul style="list-style-type: none"> <li>• Clumber Street, north side (Wilkinson's)</li> </ul>
<b>Removals recommended from primary shopping area:</b> <ul style="list-style-type: none"> <li>• None</li> </ul>	<b>Removals recommended from secondary shopping area:</b> <ul style="list-style-type: none"> <li>• None</li> </ul>

### *Mansfield Woodhouse*

9.49 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. There is no primary shopping area defined in the Local Plan. It is not considered that due to the relatively fragmented nature of the centre that there is considerable merit in defining primary shopping frontage as it would cover a relatively limited area. However, should the Council wish to define primary frontage, it is recommended that a relatively tight area is adopted, as follows:

- Church Street – east side, as far as the pharmacy;
- High Street – both sides, between the junction of Church Street and Rose Lane
- The Woodhouse Centre and Morrisons (including any extension to the store which may come forward).

### *Market Warsop*

9.50 The current district centre boundary takes in the majority of High Street, as well as Sherwood Street and Church Street, up to and including the Nisa foodstore. The application site of the Tesco foodstore is not included within the town centre boundary.

9.51 Currently, the district centre boundary does not include the small further concentration of retail activity on Church Street beyond the Nisa store. This is because the area is slightly divorced from the rest of the district centre by a small residential development. We have set out that there is currently limited pedestrian activity in this area, and on this basis there is not considered to be justification for extension of the district centre boundary in this part of the

district centre. However, if the Tesco store is granted permission, it is recommended that the Council re-assess the functioning of the district centre once the Tesco store has commenced trading. If it is apparent that the Tesco is functioning as part of the centre, there may be scope for a northward extension of the district centre boundary to include the premises on Church Street and the Tesco store. However if the Tesco functions as a standalone foodstore, with little evidence of linked trips, no adjustment to the existing boundaries should be made. The store does not benefit from planning consent at the time of preparation of this study, and therefore on this basis we do not recommend any changes are made in this part of the district centre.

- 9.52 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.
- 9.53 We do not consider there to be a need to identify primary shopping frontage in the district centre. Owing to the small size of the centre, it would largely reflect the existing centre boundary as defined in the Local Plan.

### Impact Test threshold

- 9.54 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. The PPS4 practice guidance states that:

*'In setting such thresholds, important considerations are likely to include the scale of known proposals relative to town centres; the existing vitality and viability of town centres; the cumulative effects of recent developments; the likely effects on a town centre strategy and the impact on any other planned investment.'*

- 9.55 The guidance continues to state that:

*'Where authorities decide not to set out specific floorspace thresholds in LDFs, national policy requires impact assessments to be submitted for retail and leisure developments over 2,500sq.m gross.'*

- 9.56 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. This is based on the following justification:

- Mansfield is a sub-regional shopping destination, and is in the second tier of the East Midlands Regional Plan hierarchy of centres. The centre supports a well developed retail sector, and draws trade from a wide catchment area.
- The centre shows generally strong signs of vitality and viability against the indicators set out at Annex D of PPS4.
- We do not consider there to be any recent development which cumulatively have had an adverse impact on Mansfield town centre.
- Development below 2,500 sq.m gross would not be expected to have a detrimental impact on planned investment in the town centre, as the nature of floorspace



proposed in the centre is of a substantially greater size, and would likely perform a different role and function.

- 9.57 However, it is important for applications to assess whether any trade would be drawn from the district centres. 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

- 9.58 As discussed in the previous chapter, there is clear scope for additional leisure provision in the District over the course of the study period. In particular, we have highlighted two particular deficiencies and priorities for the Council to address:

- 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.

- 9.59 We have established that there are a number of prime redevelopment opportunities which are expected to come forward over the course of the study period. It is considered that proposals at Stockwell Gate South would benefit from the inclusion of an element of leisure floorspace. Potential may also exist in the longer term for provision of these facilities in Stockwell Gate North.

- 9.60 In respect of cinema provision, whilst there is not a pressing need for additional facilities in the town, it is likely that the town centre would benefit from the additional footfall generation such a development would bring. Many town centre cinema schemes (such as the Cinema de Lux in Derby and Nottingham, or the Cineworld in Nottingham for example) are constructed on upper levels of new developments, and therefore can be incorporated as part of mixed use schemes. The Council may wish to give consideration to the potential for town centre sites to accommodate a development of this nature.

### The scope and location of commercial office provision

- 9.61 As discussed in Section 8, 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, with evidence of this trend already re-emerging in Nottingham City Centre. Mansfield District needs to be in a position to capitalise in any return of confidence to the market, and 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. We note that the key

redevelopment sites in Mansfield town centre such as Stockwell Gate South make provision for B1 floorspace, and this is supported.

- 9.62 In order to meet any local-scale demand, the Council should look favourably on proposals which involve the conversion/renovation of upper floors of retail premises, as this would assist in delivering extra footfall to the town centre. Proposals for B1 floorspace at the ground floor level within the primary shopping area should be resisted.





## 10 CONCLUSIONS

- 10.1 This report has set out an updated assessment of the retail needs of Mansfield District, following on from the previous need assessment which was undertaken in 2005. The document will inform the Council's emerging Core Strategy and form part of the Local Development Framework evidence base. The report has been completed in close association with Mansfield District Council and Innes England.
- 10.2 In broad terms, the District's retail centres are functioning well. Mansfield plays an important role as a sub-regional shopping destination, and the evidence from the household survey of shopping patterns which was undertaken in support of this survey is that the town centre draws trade from a wide catchment area.
- 10.3 In Section 2 (and Appendix 1) we have summarised the current national and local planning policy context which this study has been prepared under. Current national policy promotes the vitality and viability of town centres as the preferred destination for retail, leisure and cultural uses. This supports government's wider objectives for sustainable economic growth, by improving the performance of cities, towns, regions, sub-regions and local areas. National policy under PPS12 also identifies the need for local planning authorities to prepare 'sound' core strategies which are founded on a robust and credible evidence base. This study therefore forms the evidence base in respect of retail matters. We also consider the local planning context, in particular the policies of the Local Plan and subsequent planning guidance which identify a number of sites within and adjacent to Mansfield town centre which are suitable for redevelopment over the course of the study period.
- 10.4 The adopted Local Plan sets out a hierarchy of retail centres in the District, which is headed by Mansfield town centre. District centres are identified at Mansfield Woodhouse and Market Warsop (both of which are 'traditional' district centres) and the purpose-built Oak Tree district centre, which is anchored on a purpose-built modern Tesco Extra foodstore. There are also a number of local centres across the District; however the study brief does not require an assessment of these smaller centres.
- 10.5 Section 2 also sets out the local and national context within which the study has been prepared. The economic outlook remains subdued, and the retail sector in particular is in a sustained period of low growth. It is anticipated that conditions for the retail sector will improve over the course of the study period, with demand and confidence returning to the sector, however this is likely to be over the medium to longer term. The convenience retail sector remains more resilient to the downturn, and this is evident in the District with Tesco, Sainsbury's and Aldi obtaining consent for new or extended stores, and Tesco in the process of submitting a planning application for a new foodstore in Market Warsop.
- 10.6 We have assessed the performance of Mansfield town centre and the district centres of Mansfield Woodhouse, Market Warsop and Oak Tree against the indicators set out at Annex D of PPS4. Our assessment has been supplemented by health check work undertaken by the Council, which is also appended to the study. The assessment indicates that Mansfield town centre exhibits generally positive signs of vitality and viability, and the current offer and performance are reflective of what would be expected of a sub-regional shopping destination.

The centre has a range of established anchor stores, such as Debenhams, Primark and Marks & Spencer. Primark is a relatively recent addition to the retail offer, and represents a positive addition to the overall offer.

- 10.7 The retail offer is centred on the Four Seasons Shopping Centre, a purpose built, covered shopping mall. Whilst the larger units in the centre are fit for purpose, the smaller units are only able to accommodate limited product ranges for the national multiple retailers which occupy space there. There may be a case for the amalgamation of units in the centre over the study period to create retail floorspace which is more in keeping with requirements of retailers. In addition, the centre would benefit from modernisation as internally it looks slightly dated.
- 10.8 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 – units are smaller, and vacancy rates are higher. This area would appear to be struggling for vitality and viability at present. 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.
- 10.9 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.
- 10.10 Comparison goods shopping provision is generally strong, but would benefit from more diversification to attract more middle/upper-middle retailers. 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.
- 10.11 The district centres of Mansfield Woodhouse and Market Warsop appear to be performing their role and function adequately. Mansfield Woodhouse benefits from an attractive environment, and generally exhibits positive signs of vitality and viability. The retail mix is reasonable, although there are few gaps in the offer. The anchor Morrisons foodstore appears a popular destination, but the store appears a little cramped and dated. There are some vacant units in secondary parts of the centre which should be monitored.
- 10.12 Market Warsop also displays generally positive signs of vitality and viability with a good retail mix and relatively low vacancy rates. The emerging proposals for a Tesco foodstore on the edge of the district centre boundary are a positive reflection of investor confidence that Market Warsop is a viable trading destination. However, Tesco must be able to demonstrate that no adverse impact on the existing strong convenience offer (including the two existing small supermarkets) will arise if their store is given permission.
- 10.13 As noted above, to inform the findings of the study, a household survey into shopping patterns of residents in Mansfield District and the wider surrounding catchment area (the Mansfield Study Area (MSA)) was undertaken in Spring 2011. This catchment area is considered the area which Mansfield can potentially draw trade from. The MSA was split up into nine survey Zones for the purposes of the assessment. Across these Zones, the 2009 base year population of 305,689 is expected to increase to 340,136 by 2026 – a growth of 34,447 persons. This means that there will be a growth in the amount of comparison and convenience goods expenditure available to support new floorspace. Having made allowance for ‘special forms of trading’ such as online shopping, the amount of spending on comparison goods

shopping is expected to increase from £671.50m (2011) to £1,192.60m (2026). The equivalent growth in convenience goods is more subdued, increasing from £508.34m (2011) to £587.77m (2026).

- 10.14 In section 5 of the study, we set out the current patterns of retail spending in the MSA, based on the findings of the household survey. Just under two thirds of the comparison goods expenditure available to the MSA is spent at stores and destinations within the MSA. Mansfield town centre attracts £191.68m of spending from the MSA – over a quarter of total available comparison goods expenditure. A further £60.15m is spent at the town's retail parks, with smaller (but not insignificant amounts) spent at the district centres. Sutton-in-Ashfield acts as the main competitor, drawing £77m of spending from the MSA. Outside the MSA, the main competing destinations are Nottingham (which attracts £71m of expenditure), Alfreton (£22m), Sheffield (£20m) and Hucknall (£20m).
- 10.15 Mansfield town centre attracts a market share upwards of 40 per cent from three of the nine Zones, and a market share of between 10 and 39 per cent from a further four. We consider this to represent a strong performance. There is no evidence to suggest that the retail parks in the town are competing with the town centre to the extent where a detrimental impact on the town centre is occurring.
- 10.16 Three-quarters of the total convenience goods expenditure available to the MSA is spent at stores within the MSA. However the household survey indicates that Mansfield is self-sufficient in terms of foodstore provision – for the three MSA Zones which cover Mansfield, over 97 per cent of respondents undertake their food shopping within these Zones. This suggests a strong range of consumer choice, with no need for the majority of residents to travel outside the town to undertake their shopping. The most popular foodstores within the District are Asda, Forest Town (which claims £57m of expenditure from the MSA), Tesco Extra at Oak Tree district centre (£49m) and Tesco Extra at Chesterfield Road South (£35m). Asda at Sutton also draws £51m from residents of the MSA, but does not attract significant trade from the District itself. Therefore we consider convenience shopping patterns in the District to be highly sustainable at present, with little leakage of expenditure to centres further afield.
- 10.17 There will be a need for additional comparison goods floorspace to be developed in Mansfield District over the course of the Core Strategy period, over and above that which has already been committed in the planning permission for new floorspace development at Stockwell Gate South. If the current shopping patterns revealed by the household survey remain unchanged throughout the study period, there will be a requirement of 2,900 sq.m net comparison goods floorspace at 2016, increasing to 12,100 sq.m net at 2021 and 19,800 sq.m net at 2026. If the District increases the amount of retention which is spent locally, the requirements increase to 5,000 sq.m net at 2016, 15,500 sq.m net at 2021 and 25,300 sq.m net at 2026. It is recommended that the Council sets out the comparison goods capacity requirements as a 'range' in their emerging Core Strategy, with the figures set out above forming the upper and lower limits.
- 10.18 There is no capacity for additional convenience goods floorspace in the District, until the very end of the study period at 2026. The precise amount of convenience floorspace will depend on whether a foodstore comes forward as part of the Stockwell Gate South development. If it does, the requirement for additional convenience floorspace at 2026 is up to 900 sq.m net. If

the retail element of Stockwell Gate South comes forward entirely as comparison goods floorspace, the requirement for additional convenience floorspace increases to between 800 and 2,000 sq.m net (under the static and increasing retention scenarios respectively) at 2026.

- 10.19 It should be stressed that our capacity assessment is based on a number of assessments of the nature of the floorspace which will come forward at the two permitted town centre redevelopment sites. No firm identification has been provided as to how much comparison and convenience floorspace either development is likely to accommodate. Once such figures become available, it is recommended that the capacity figures set out in this study are revisited. In any instance, it is recommended that the forecasts set out are subject to regular review and updating over the course of the study period, and longer term forecasts (post-2021) should be considered indicative.
- 10.20 We have set out that Mansfield town centre is generally a strong-performing town centre, and there is not considered to be any significant shortfalls in the breadth of the current retail offer. However, there is a need to improve the quality of retailers trading in the town centre, which is currently almost entirely occupied by lower-middle and middle-market retailers. The development of larger format units should assist in attracting a stronger calibre of retailer to the town.
- 10.21 In terms of the qualitative need for additional convenience floorspace, we note that there is a strong level of consumer choice in the town at present. However, there may be a need for small-scale additional facilities (top up shops) to the west and east of the town centre, given the high levels of deprivation which exist in these areas and the relative paucity of small neighbourhood-level facilities. There may be a qualitative need for additional discount foodstore provision to the north/east of the town, and for the modernisation and/or extension of the Morrisons foodstore at Mansfield Woodhouse.
- 10.22 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. 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.
- 10.23 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.
- 10.24 The recommendations set out in Section 9 are based on our audit of the centres, their vitality and viability, and role and function. It is recommended that Oak Tree is downgraded from its current position as a district centre, as although the Tesco foodstore is a strong anchor there is an insufficient range of supporting retail and service provision when compared to Mansfield

Woodhouse and Market Warsop. Minor amendments to the town centre boundary and shopping frontage in Mansfield town centre are recommended.

- 10.25 The retail centres in the District are ultimately performing strongly, and we are satisfied that they enter the Core Strategy period each demonstrating a good level of vitality and viability. The key challenge for Mansfield town centre will be maintaining its current levels of expenditure retention in light of increasing competition from elsewhere. However, with the current planning permissions and future proposals for redevelopment, the potential exists for Mansfield to maintain and strengthen its draw as a sub-regional shopping destination.