

Bolton Council

BOLTON RETAIL AND LEISURE STUDY

Volume 1 - Main Report



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Final Report

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- Appendix 4 - National Trends in the Retail and Leisure Sectors
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VOLUME 5 - BOLTON HOUSEHOLD SHOPPING SURVEY, BY NEMS

1 INSTRUCTIONS, CONTEXTUAL BACKGROUND AND OUTLINE OF REPORT STRUCTURE

Instructions

- 1.1 Bolton Council commissioned Roger Tym & Partners (RTP) to undertake this study by way of its letter of 10 December 2007, following a competitive tender process. The brief, which is reproduced as Appendix 1, explains that the study is to form part of the evidence base for the retail and leisure policies and proposals in the emerging Local Development Framework. Thus, the study has to reflect the Government's requirements, as set out in PPS6 and in the new PPS12 (which are discussed in Section 2 of our report). The study has a forward horizon to 2021, but provides indicative assessments of further need from 2021 to 2026.
- 1.2 Section 2.3 of the brief confirms that the study will form part of the evidence base that will enable the Council to develop policies and proposals that deal with:
- the need for new floorspace for retail, leisure and other main town centre uses; taking account of both quantitative and qualitative considerations;
 - the scope/need for extending the boundaries of the primary shopping areas of the various centres and/or the overall town centre boundaries;
 - the identification of those centres in the UDP's Policy S3 hierarchy where development will be focused, as well as the need for any new centres of local importance;
 - identification of those centres in decline where change needs to be managed;
 - the identification and allocation of new sites and a review of existing development plan allocations, in accordance with the considerations set out in paragraphs 2.28 to 2.51 of PPS6;
 - the need to secure investment in deprived areas and improve access to local facilities, in accordance with the advice in paragraphs 2.55 to 2.59 of PPS6; and
 - the development of criteria based policies for assessing new development proposals on sites that are not allocated in development plan documents.
- 1.3 Thus, in order to enable the Council to deliver these objectives, the brief required that we:
- assess national trends in the retail and leisure sectors;

- undertake a review of national, regional and local policy for retail and leisure uses, whilst also considering the potential changes to PPS6 which are foreshadowed in the White Paper, Planning for a Sustainable Future;
- undertake a household survey across the catchment area as a whole and visitor surveys for each of the town centres identified in Policy S3 of the UDP and at the Middlebrook Retail and Leisure Park;
- undertake retail health checks for all of the Borough's town centres, including an assessment of demand from retail and leisure operators;
- assess current patterns of retail and leisure spending, including an assessment of leakage to competing retail centres and to e-tailing/catalogue shopping;
- assess the quantitative and qualitative need for additional comparison goods and convenience goods retail floorspace, and for leisure uses, at five yearly periods up to 2021 and, more indicatively, up to 2026;
- assess the current and potential future role of the Middlebrook Retail and Leisure Park, including an analysis of how Middlebrook and Bolton town centre relate to each other;
- provide information to assist the Council in its search for sites; and
- provide a review of Bolton's position in the retail hierarchy at both national and regional levels.

Contextual Background

- 1.4 Section 2 of the brief identifies some of the context to our study and it refers to a number of important strategies which we have taken into account; these include:

The Community Strategy 2007 to 2017

- 1.5 The Community Strategy sets a vision for 2017 whereby Bolton '*...becomes a place where everyone has an improved quality of life and the confidence to achieve their ambitions*'. The two main aims which underpin this vision are: '*to narrow the gap between the most and least well off and to ensure economic prosperity*'. In turn, six priority themes are identified to support these aims;
- i) '**healthy**' - as reflected, for example, by improved life expectancy;
 - ii) '**achieving**' - as encouraged, for example, by improved skills and qualifications;
 - iii) '**prosperous**' - through private investment of £600m and the creation of 10,000 extra jobs;

- iv) **'safe'** - with a target to reduce crime by a quarter;
- v) **'cleaner and greener'** - through the provision, for example, of cleaner streets and better parks and open spaces, and
- vi) **'strong and confident'** - through creation of even stronger relations between the Borough's communities.

1.6 The Community Strategy identifies Bolton town centre as being the *'key to our prosperity'* and it emphasises that:

- *'a revitalized town centre is not just important for business, but for Bolton as a whole';* and that
- *'Bolton town centre is a great asset and will be the focus of our new economic opportunities. Good transport links mean most people can travel into town for work'*

The Bolton Town Centre Action Framework 2005 to 2008

1.7 The Town Centre Action Framework sets a context for decision-making and action in Bolton town centre over a four year period from 2005 up to 2008. The Action Framework also identifies some key longer term ambitions for the town centre, which is seen as the Borough's *'...principle economic and cultural asset...'* and *'...of critical importance to the Borough in terms of the economic, social and environmental benefits it can bring'*.

1.8 Thus, the Action Framework gives particular emphasis to:

- the need to promote the vitality of the retail and civic core and help to reconnect it with the town centre's peripheral character areas;
- the key development opportunities that exist in the under-used areas of change, including: the Central Street opportunity to expand the retail core; the mixed-use development opportunity at Church Wharf; the opportunities in the Cultural/University quarter (subsequently developed into the Bolton Innovation Zone, discussed below); and the potential for a new transport interchange in the Trinity railway triangle; and
- the need for a town centre retail plan that articulates how the various retail elements interact and incorporating a strategy for market trading.

The Assessment of Town Centre Vitality and Viability, 2007 Update

1.9 The 2007 Update reports:

- i) a downturn in Bolton town centre's ranking in the national and regional hierarchy, which is attributed, in part, to competition from the Trafford Centre, Manchester City Centre, Middlebrook and neighbouring towns;
- ii) a lack of mid-market/higher end fashion retailers, but noting that the Market Hall redevelopment¹ has succeeded in attracting quality retailers, such as Zara and H&M, and the likelihood that the Central Street regeneration project will help the town centre to recover lost ground;
- iii) the likely beneficial impact of the appointment of Ask and Bluemantle to undertake the Church Wharf redevelopment for leisure, food and drink, business and residential uses;
- iv) the need for reconfiguration of Crompton Place and for improvements in linkages to the Interchange, Bradshawgate and Victoria Square;
- v) the need to improve the quality and condition of Newport Street and the civic space in Victoria Square;
- vi) the need to increase the number of town centre residents and commercial businesses - through projects such as Church Wharf - so as to encourage further provision of bars and restaurants, particularly at ground floor level; and, in short,
- vii) the need to modernize and diversify the overall offer of Bolton town centre.

The Bolton Town Centre Development and Regeneration Position Statement, March 2007

1.10 The Position Statement reports that:

- i) there has been a five per cent increase in the number of jobs in Bolton town centre in the last five years, with strong growth in the health, recruitment, banking, university and social and community services sectors;
- ii) the town centre provides for 19,500 jobs, of which nearly three-quarters are taken by Bolton residents;

¹ When the redevelopment of Market Hall is complete it will be branded as part of the wider Market Place Shopping Centre.

- iii) the town centre's residential market is in its infancy and needs to be nurtured with the creation of a wider mix of uses compatible with urban living, such as the committed mixed-use regeneration schemes at Church Wharf and Central Street;
- iv) the University of Bolton plays an important and strategic role in terms of higher education in the town and as part of the wider Manchester: Knowledge Capital agenda;
- v) Bolton remains under-represented in many of the high value added service sectors;
- vi) there is a need to modernise and diversify the town centre's shopping offer, to increase leisure opportunities and to improve the town centre's restaurant/café/bar offer; and that
- vii) the focused delivery of key strategic sites is likely to yield the optimum rejuvenation of the town centre.

The Bolton Innovation Zone Development Prospectus 2007

- 1.11 The Innovation Zone Prospectus is a major regeneration initiative that is likely to have a significant impact on the sub-regional economy. The Innovation Zone covers 30 hectares of under-used land, stretching from Le Mans Crescent in the civic core, to the University of Bolton in the west, and then across to the Trinity Street Railway Station. The Prospectus for the Innovation Zone envisages £300m of new private investment and the creation of 4,000 new jobs over the next 10 years and it emphasises that this investment will be instrumental in reconnecting the Innovation Zone with the adjacent civic and retail core.
- 1.12 The four core components of this investment programme are identified as being:
 - i) the revitalisation and expansion of the Central Museum and Art Gallery;
 - ii) the creation of 'The Knowledge Centre', which will be a joint library, learning and information facility located between the existing Central Library and the University of Bolton's Dean Road Campus;
 - iii) the enhancement of Bolton Market; and
 - iv) the creation of a new Performance Space theatre building that will serve the needs of the Octagon and the University's School of Arts, Media and Education.
- 1.13 Key commercial development opportunities in the Innovation Zone include:
 - i) a new purpose built bus and rail interchange at Trinity, with associated development for office, retail and leisure uses;

- ii) mixed commercial, leisure and residential development at Westbrook (following the relation of the Bolton Community College);
- iii) provision for public realm, innovation, R&D and education uses at Moor Lane South, so as to link the town centre with the Knowledge Campus;
- iv) employment uses at Deane Road 1, which complement the adjacent Knowledge Campus;
- v) high quality residential development at Deane Road 2 and College Way;
- vi) mixed employment and residential uses at Spa Road and Westpoint;
- vii) a family-focussed leisure and cultural offer at Moor Lane North, including specialist retail uses;
- viii) office, retail, leisure and food & drink uses at Deansgate; and
- ix) leisure, cultural, office, retail and public space uses at Queen Street.

The Bolton Traditional Markets Trading Strategy (TMTS), January 2006

- 1.14 The TMTS articulates the Council's objective to maintain and enhance the role of Bolton Market, located on Ashburner Street. The Strategy estimates that the Market generates a gross annual expenditure by visitors of approximately £32m. Moreover, the TMTS highlights the role played by Bolton Market in satisfying national planning policy, supporting diversity in the town centre, providing employment (502 gross direct jobs), serving the local community and encouraging footfall. The Market is regarded as an integral element of the Cultural Quarter, forming the main focus for street level activity.
- 1.15 Nevertheless, despite the clear economic and social benefits afforded by Bolton Market, the TMTS alludes to a '*general downturn in market trading*'. Factors that appear to be contributing to this in Bolton include a decline in the number of customers, decreasing occupancy rates, poor standards of cleanliness and/or aesthetic quality, lack of parking/accessibility, and uncertainty of the future of the Market, which is deterring traders from investing in their businesses.
- 1.16 The TMTS seeks to arrest this decline and sets out a series of options to address the future operation of the Market. Recommendations include the retention of the Market within the Cultural Quarter, and the carrying out of a major programme of investment, marketing and promotion initiatives.

Second Greater Manchester Local Transport Plan (GMLTP), March 2006

- 1.17 The GMLTP identifies Bolton as a key centre that serves an important retail and employment function. As such, the Plan asserts that there is a need to address current problems relating to transport in the town centre. These problems include:
- poor bus circulation;
 - congestion on the main arterial roads into the centre;
 - poor interchange between bus and rail services;
 - substandard linkages between arrival points and attractions;
 - an incoherent cycle/pedestrian footpath network; and
 - 'rat-running' during peak periods.
- 1.18 To this end, the GMLTP suggests a package of measures including: the development of a new bus and rail interchange, a bus gyratory system in the town centre and contra-flow traffic lanes, junction improvements to facilitate traffic flow, enhancements to the public realm (including the provision of upgraded pedestrian and cycle routes), and the rationalisation of car parking facilities. This proposed approach has subsequently been carried forward through the Bolton Town Centre Transport Strategy.

Coming to Bolton: Town Centre Transport Strategy (TCTS), January 2007

- 1.19 The TCTS puts forward a number of objectives, including:
- i) improvements to the Outer Highway Box to ease through traffic in the town centre;
 - ii) improved bus movement;
 - iii) achieving greater integration of bus and rail infrastructure;
 - iv) providing better access/facilities for people with limited mobility;
 - v) extending the pedestrianised area;
 - vi) providing safe cycle routes with secure parking;
 - vii) reducing the quantity of land taken by surface level parking;
 - viii) improvements to traffic management; and
 - ix) better management of car parking facilities.
- 1.20 Over a five year period, the TCTS advocates a plethora of transport proposals, with a new rail/bus interchange at the core, acting as a major driver for the enhancement

of the Trinity gateway to the town centre. Amongst the planned works are improvements to links between arrival points and town centre attractions, increased parking provision, revised arrangements for traffic flows with associated highways improvements, and extensions to the pedestrianised area, mainly within the *'inner bus circulation route'*. In total, it is envisaged that these works will represent investment in the region of £82m.

Overall Implication of the Contextual Background

- 1.21 Thus, as a result of these on-going initiatives, the brief makes it clear that the strategy for the town centre must provide for a wide range of town centre uses and that we should go beyond the usual retail study.

Structure of the Remainder of the Report

- 1.22 The remainder of our report is structured as follows:

- Section 2 provides a résumé of the requirements of current and emerging national and regional policies in so far as they relate to town centres and the location of retail and leisure development - as set out in PPS6, the Government's Consultation on Proposed Changes to PPS6, RPG13 and the emerging Regional Spatial Strategy. Section 2 also identifies the implications for the preparation of Bolton's Core Strategy DPD arising from the new PPS12.
- Section 3 provides our qualitative analysis of the current performance of Bolton Town Centre, the four Local Town Centres identified under Policy S3 of the UDP and of Middlebrook Retail and Leisure Park. We draw on the findings of our health checks, the surveys of pedestrians and the perceptions of consultees.
- Section 4 provides our analysis of the current patterns of retail and leisure spending, drawing on the telephone survey of households.
- Section 5 provides our analysis of quantitative and qualitative needs in the retail and leisure sectors in the period up to 2021 and, more tentatively, up to 2026.
- Section 6 identifies alternative strategies for meeting the retail and leisure needs which we have identified (as required by paragraph 4.38 of PPS12), our initial evaluation of these alternatives, and the implications for existing and emerging local policy.
- Section 7 sets out a summary of our findings and our recommendations to the Council.

- 1.23 Our overall reporting to the Council comprises five volumes, as follows:

Volume 1 - Main Report

Volume 2 - Figures and Spreadsheets, which relate to our assessments of quantitative need in the retail and leisure sectors.

Volume 3 - Appendices, as follows:

- Appendix 1 - Brief to Consultant
- Appendix 2 - List of Stakeholder Consultees
- Appendix 3 - Health Checks Data
- Appendix 4 - National Trends in the Retail and Leisure Sectors
- Appendix 5 - Analysis of Surveys of Visitors

Volume 4 - Report by NEMS Market Research, entitled 'Bolton Retail and Leisure Visitors Survey'

Volume 5 - Report by NEMS Market Research, entitled 'Bolton Household Shopping Survey'

Base Year and Prices

- 1.24 The base position for our assessment of future retail and leisure needs is established by the survey of households undertaken by NEMS Market Research in April 2008. Thus, April 2008 represents the base date for our assessment of quantitative and qualitative needs. However, all monetary figures in our report are in year 2005 prices, unless otherwise specified. This is because our base data for per capita retail and leisure expenditure are derived from the MapInfo year 2005 database, and they are expressed in year 2005 prices.

2 THE REQUIREMENTS OF NATIONAL AND REGIONAL POLICY

PPS6 - March 2005

- 2.1 The current national policy context, in so far as it relates to town centres and the location of new retail, office and leisure developments, is set, in the main, by PPS6, which is structured under four sections that deal with:
- the Government's objectives;
 - the plan-led approach to positive planning for town centres;
 - the assessment of proposed developments; and
 - measuring and monitoring the vitality and viability of town centres.

- 2.2 In this section of our report, we focus on the Government's objectives and on the plan-led approach to positive planning for town centres.

The Government's Objectives

- 2.3 The very first paragraph of PPS6 makes it clear that *'sustainable development is the core principle underpinning planning'* and that *'the planning system has a key role in facilitating and promoting sustainable and inclusive patterns of development, including the creation of vital and viable town centres'*. The Government's key objective for town centres, therefore, is to promote their vitality and viability (paragraph 1.3).
- 2.4 The Government's second tier objectives are set out in paragraph 1.4 of PPS6; these can be summarised as:
- enhancing consumer choice;
 - supporting efficient, competitive and innovative retail and leisure sectors and improving their productivity; and
 - improving accessibility to existing and new development by a choice of means of transport.
- 2.5 Paragraph 1.5 of PPS6 then sets out the Government's wider objectives; these can be summarised as:
- the promotion of social inclusion by ensuring access to a range of town centre uses and rectifying deficiencies;
 - the regeneration of deprived areas;

- the promotion of economic growth;
- the delivery of more sustainable patterns of development; and
- the promotion of high quality and inclusive design, enhanced public realm and an accessible and safe environment.

2.6 Regional planning bodies (RPBs) and local authorities (LPAs) are therefore required to implement these Government objectives by planning positively for the growth and development of town centres, whilst not restricting competition or innovation (paragraphs 1.6 and 1.7). The main town centre uses to which PPS6 applies are: retail; leisure; offices; and arts, cultural and tourism facilities (paragraph 1.8), with housing said to be *'...an important element in most mixed-use, multi-storey developments'* (paragraph 1.9).

Positive Planning for Town Centres: A Plan-led Approach

2.7 The introduction to Section 2 of PPS6 states that *'in order to deliver the Government's objective of promoting vital and viable town centres, development should be focused in existing centres in order to strengthen and where appropriate, regenerate them'*. Thus, RPBs and LPAs are called upon to:

- i) actively promote growth and manage change in town centres;
- ii) define a network and hierarchy of centres, each performing their appropriate role to meet the needs of their catchments; and
- iii) adopt a proactive and plan-led approach to planning for town centres through regional and local planning.

2.8 We consider it appropriate to summarise these requirements in a different and more logical order to that which is set out in PPS6 itself, starting with the role of regional plans.

The Role of Regional Plans

2.9 Paragraphs 2.12 to 2.14 of PPS6 set out the requirements placed on RPBs in developing their Regional Spatial Strategies (RSSs). The over-riding requirement is for RPBs to set out a vision and strategy for the region's growth, particularly for higher level centres, and provide a strategic framework for planning at the local level. In particular, RPBs must:

- i) develop a strategic framework for the development of a network of centres, taking into account the need to avoid an over concentration of growth in the higher level centres;

- ii) make strategic choices about those centres of regional and sub-regional significance where major growth should be encouraged;
 - iii) identify the need for new centres to be developed in areas of planned major growth;
 - iv) assess the need for additional floorspace in the comparison retail, leisure and office sectors over the lifetime of the RSS (and for five-yearly periods within it) and, having regard to capacity and accessibility considerations, they must identify where the identified needs would best be met;
 - v) monitor and regularly review the implementation of the strategy; and
 - vi) identify the need for major town centre development of regional or sub-regional significance.
- 2.10 However, PPS6 is clear that new or expanded regional or sub-regional shopping centres located in out-of-centre locations are unlikely to meet the requirements of national policy (paragraph 2.14).

Networks and Hierarchies

- 2.11 Paragraphs 2.9 to 2.11 of PPS6 provide further advice in relation to the development of the network and hierarchy of centres, but - in this part of the policy statement - the advice is in relation to both the regional and local levels. Thus, authorities must plan carefully how to distribute any identified growth at both regional and local levels. In defining their spatial objectives, RPBs and LPAs:

‘...should consider whether there is a need to rebalance the network of centres to ensure that it is not overly dominated by the largest centres, that there is a more even distribution of town centre uses, and that people’s everyday needs are met at the local level’ (paragraph 2.9).

- 2.12 Thus, in developing the network and hierarchy, RPBs and LPAs are required to consider:
- i) whether there is a need to avoid over concentration of growth in the higher level centres;
 - ii) the need for investment in those centres requiring to be regenerated; and
 - iii) the need to address deficiencies in the network (paragraph 2.9)
- 2.13 Of crucial importance is the PPS6 requirement that *‘...any significant change in the role and function of centres, upward or downward, should come through the development plan process, rather than through planning applications’*, with higher

order centres dealt with in the RSS and with lower order centres dealt with through the development plan documents (paragraph 2.10).

Promoting Growth and Managing Change

- 2.14 Paragraphs 2.3 to 2.8 of PPS6 turn to the role of LPAs in promoting growth and managing change in town centres. Paragraph 2.3 states that LPAs should - within the regional planning context - actively plan for growth and the management of change in town centres over the period of their development plan documents by:
- i) selecting appropriate existing centres to accommodate growth, making the best use of existing land and buildings, but extending the centres where appropriate;
 - ii) managing the role of existing centres through the promotion of specialist activities, or specific types of uses; and
 - iii) planning for new centres of an appropriate scale in areas of significant growth, or where there are deficiencies in the existing network.
- 2.15 Paragraph 2.4 urges that growth should be accommodated, wherever possible, through *'...more efficient use of land and buildings within existing centres'*. Where growth cannot be accommodated within existing centres, paragraph 2.5 advises LPAs to plan for:
- i) the extension of the primary shopping area, if there is a need for additional retail provision; and
 - ii) the extension of the town centre, to accommodate other main town centre uses.
- 2.16 Where existing centres are in decline, PPS6 advises LPAs to *'...assess the scope for consolidating and strengthening these centres by seeking to focus a wider range of uses there, promote the diversification of uses and improve the environment'* (paragraph 2.8). However, where a reversal of decline is not possible, LPAs are advised to consider a reclassification of the centre, so as to reflect its revised status in the hierarchy.

The Role of Plans at the Local Level

- 2.17 Paragraphs 2.15 to 2.18 of PPS6, deal with the role of the forward planning system at the local level. We note, in particular, the provisions of paragraph 2.15 which require LPAs to adopt a positive and proactive approach to planning for the future of all types of centres within their areas. Thus, in line with the RSS and their community strategies, LPAs should prepare a core strategy development plan document which sets out *'...a spatial vision and strategy for the network and*

hierarchy of centres, including local centres, within their area, setting out how the role of different centres will contribute to the overall spatial vision for their area'.

- 2.18 Paragraph 2.16 urges LPAs to work with stakeholders and the community so as to:
- i) assess the need for new floorspace for retail, leisure and other town centre uses, taking account of both quantitative and qualitative considerations;
 - ii) identify deficiencies in existing provision, assess the capacity of existing centres to accommodate new development and identify centres in decline where change needs to be managed;
 - iii) identify the centres where development will be focused, as well as the need for any new centres of local importance;
 - iv) define the extent of the primary shopping area and the town centre on their Proposals Map;
 - v) identify and allocate sites in accordance with the considerations set out in paragraphs 2.28 to 2.51;
 - vi) review existing land use allocations;
 - vii) promote investment in deprived areas by identifying opportunities for growth and improved access;
 - viii) set out criteria based policies for assessing proposals on sites not allocated in development plan documents; and
 - ix) distinguish between primary and secondary frontages.
- 2.19 Paragraphs 2.19 to 2.22 of PPS6 then proceed to highlight the need for high quality and inclusive design, the importance of accessibility and safety and the need for efficient use of land through the promotion of higher-density mixed-use development. Paragraphs 2.23 and 2.26 deal with the management of the evening economy and the need for a range of leisure, cultural and tourism activities and paragraph 2.27 seeks to promote the retention and enhancement of existing markets and, where appropriate, the creation of new ones.

Site Selection and Land Assembly

- 2.20 Paragraphs 2.28 to 2.52 of PPS6 deal with site selection and land assembly in the forward planning process. Paragraph 2.28 sets out the five key considerations for local authorities when they are selecting sites for development; these are to:
- i) 'assess the need for development';
 - ii) 'identify the appropriate scale of development';

- iii) *'apply the sequential approach to site selection'*;
- iv) *'assess the impact of development on existing centres'*; and
- v) *'ensure that locations are accessible and well serviced by a choice of means of transport'*.

2.21 These considerations match the development control tests set out in paragraph 3.4 of PPS6. In applying them in the development plan preparation process, LPAs are required to work closely with retailers, leisure operators, developers, other stakeholders and the wider community and paragraph 2.31 makes it clear that LPAs may need to make choices between competing development pressures in their town centres.

Need for Development

2.22 Paragraph 2.32 states that need assessments should be carried out as part of the plan preparation and review process, that they should be updated regularly and that LPAs should take account of the regional spatial strategy. Indeed, the LPAs' assessments of need *'...should inform and be informed by the regional needs assessments and form part of the evidence base for development plan documents'*.

2.23 LPAs should place greater weight on quantitative need for specific types of retail and leisure developments taking into account population change, forecast change in expenditure for specific classes of goods and forecast improvements in productivity in the use of existing floorspace.

2.24 Nevertheless, an important qualitative consideration will be the need to improve the range of services and facilities in deprived areas (paragraph 2.35). Another consideration which may be taken into account in the assessment of qualitative need is the degree to which existing shops may be over-trading (paragraph 2.36). However, regeneration and employment impacts - whilst capable of being material considerations - are not indicators of retail need (paragraph 2.37).

Appropriate Scale

2.25 Paragraph 2.41 states that:

'In selecting suitable sites for development, local planning authorities should ensure that the scale of opportunities identified are directly related to the role and function of the centre and its catchment'.

2.26 As a consequence, paragraph 2.42 states that *'...local centres will generally be inappropriate locations for large scale new development...'* and that LPAs *'...should therefore consider setting an indicative upper limit for the scale of developments likely to be permissible in different types of centres...'* If a need is identified for

larger format developments, paragraph 2.43 indicates that sites should be identified within or on the edge of 'city centres' and 'town centres', as defined in Table 1 of Annex A to PPS6.

Sequential Approach to Site Selection

- 2.27 Paragraph 2.44 of PPS6 sets the order of preference in applying the sequential approach, as follows:
- first, locations within existing centres, but subject to caveats relating to suitability, availability and scale in relation to the function of the centre;
 - second, edge-of-centre locations, with a preference given to sites that are, or will be, well connected to the centre; and then
 - out-of-centre sites, with preference given to sites which are, or will be, well served by a choice of means of transport and those with a high likelihood of forming links with the centre.
- 2.28 It is important to note that the distance threshold for the purposes of the 'edge-of-centre' definition, varies from up to 300 metres from the primary shopping area for retail use, to within 300 metres of a town centre boundary for all other main town centre uses (as set out in Table 2 of Annex A of PPS6). It is also noteworthy that LPAs are required to give weight to those locations that best serve the needs of deprived areas when considering alternative sites at the same level in the sequential ranking (paragraph 2.44).
- 2.29 There is a requirement for flexibility and realism on the part of both LPAs and developers/operators when discussing the identification of sites for inclusion in development plan documents. Sites must be available, or likely to become available for development during the development plan document period, and capable of accommodating a range of business models, all parties having been flexible in relation to scale, format, car parking provision and the scope for disaggregation (paragraph 2.45).
- 2.30 A new requirement, however, is for development plan documents to include phasing policies so as to ensure that preferred locations are developed ahead of less central locations (paragraph 2.46).

Assess Impact

- 2.31 If LPAs are proposing to allocate sites in 'edge-of-centre' or 'out-of-centre' locations, they must assess the potential impact on centres within the catchment area of the potential development (paragraph 2.48). LPAs must also assess the potential

impact on other centres of those allocations within a centre which would substantially increase its attraction vis-à-vis other centres (paragraph 2.48).

Ensure Locations are Accessible

- 2.32 Paragraph 2.49 of PPS6 confirms PPG13's aspiration to reduce the need to travel, to reduce reliance on the private car and to ensure that everyone has good access to a range of facilities. As a consequence, in selecting sites for allocation, LPAs are required to have regard to accessibility by a choice of means of transport and the potential impact of development on car use, traffic and congestion.

Other Relevant Matters

- 2.33 After assessing the sites against the five considerations set out in paragraph 2.28 of PPS6, LPAs are able to consider other matters such as physical regeneration, the likely net employment impact, the potential impact on economic growth and the potential impact on social inclusion (paragraph 2.51).

Assembling Sites

- 2.34 Paragraph 2.52 states that LPAs '...should allocate sufficient sites to meet the identified need for **at least the first five years from the adoption of their development plan documents...**' (our emphasis). LPAs are also required to consider the scope for site assembly using their CPO powers in order to ensure that suitable sites are brought forward for development.

Designation of New Centres

- 2.35 Paragraph 2.53 repeats the advice that *'new centres should be designated through the plan-making process where the need for them has been established, such as in areas of significant growth, or where there are deficiencies in the existing network of centres, with priority given to deprived areas.... Whether this is done at the regional or local level will depend on the size of the proposed centre and its proposed role in the hierarchy of existing centres...'* PPS6 is clear, however, that existing out-of-centre facilities must not be regarded as 'centres', unless they are identified as such in the RSS and/or in development plan documents (paragraph 2.54).

Providing for Local Shopping and Other Services

- 2.36 Paragraphs 2.55 to 2.59 are concerned with the provision for local shopping and other services. There is emphasis on the need for a network of local centres, so as to meet people's day-to-day needs and provide a focus for local services. LPAs are encouraged to seek to rectify any deficiencies in local provision, especially in deprived areas, through liaison with the local community, retail operators and other stakeholders.

Conclusions in Relation to PPS6

- 2.37 In our assessment, the provisions of PPS6 reflect the Government's wider emphasis on the need to plan, monitor and manage at both the regional and local planning levels; indeed the key changes in national policy emphasis that arose as a result of the publication of PPS6, in March 2005, were:
- i) a requirement for a much more proactive plan-led approach to planning for town centres through regional and local planning;
 - ii) much more emphasis on the need to develop a network and hierarchy of centres, at both the regional and local levels; and
 - iii) a much greater involvement on the part of the public sector in the management and implementation of changes in town centres and in the monitoring of their vitality and viability.
- 2.38 Where growth cannot be accommodated within existing centres, LPAs are to plan for the extension of the primary shopping area, if there is a need for retail provision, and for the extension of the town centre as a whole to accommodate other main town centre uses.
- 2.39 The five key considerations to apply in selecting sites for development are similar, whether in forward planning or in development control. However, the publication of PPS6 has caused more emphasis to be given to the issue of scale, so that LPAs are to consider setting indicative upper limits for the scale of development likely to be permissible within or on the edge of different types of centres.

PPS12 - June 2008

- 2.40 This study will form part of the evidence base upon which the Council will draw in developing its Local Development Framework and, in particular, its Core Strategy Development Plan Document. Section 4 of the new PPS 12 explains the intended nature of core strategies, gives advice on their preparation and introduces a new test of soundness. For the purposes of this report, we focus on the nature of core strategies and the test of soundness, rather than on the preparation process.

Nature of Core Strategies

- 2.41 Paragraph 4.1 of PPS12 requires that each core strategy must include:
- i) an overall **vision** which sets out how the area and the places within it should develop;
 - ii) **strategic objectives** for the area, focusing on the key issues to be addressed;

- iii) a **delivery strategy** for achieving these objectives, which should set out how much development is intended to happen, where, when and by what means it will be delivered and with locations for strategic development indicated on a key diagram; and
 - iv) clear arrangements for **managing and monitoring** the delivery of the strategy.
- 2.42 In turn, the '*vision*' should be in general conformity with the RSS and closely relate to the Sustainable Community Strategy (paragraph 4.2 of PPS12), and the '*strategic objectives*' should form the link between the '*vision*' and the '*delivery strategy*' (paragraph 4.3 of PPS12).
- 2.43 PPS12 then emphasises that it is the delivery strategy which is central to the process. Paragraphs 4.4 and 4.5 indicate that the delivery strategy must:
- i) show how the objectives will be delivered, whether through actions taken by the Council as a planning authority, or through actions taken by other parts of the Council, or other bodies;
 - ii) set out, as far as practicable, when, where, and by whom these actions will take place;
 - iii) demonstrate that the agencies/partners necessary for its delivery have been involved in its preparation and that the resources that are required have been given due consideration;
 - iv) have a realistic prospect of being provided in the life of the Core Strategy; and
 - v) make clear spatial choices about where developments should go in broad terms.

Strategic Sites

- 2.44 Paragraph 4.6 of PPS12 states that Core Strategies may allocate strategic sites for development, provided these sites are '*...considered central to achievement of the strategy*'; the strategy should not be held up by the inclusion of non-strategic sites. Where Core Strategies do allocate strategic sites, they must include a submission proposals map, but preferably with the sites delineated in outline, rather than in detailed terms (paragraph 4.7 of PPS12).

Infrastructure

- 2.45 Paragraph 4.8 of PPS12 states that:

'The core strategy should be supported by evidence of what physical, social and green infrastructure is needed to enable the amount of development proposed

for the area, taking account of its type and distribution. This evidence should cover who will provide the infrastructure and when it will be provided.'

2.46 Thus, the infrastructure planning process that forms part of the evidence base to the Core Strategy should identify, as far as possible:

- i) infrastructure needs and costs;
- ii) phasing of development;
- iii) funding sources; and
- iv) responsibilities for delivery.

2.47 Paragraph 4.10 makes it plain that the Core Strategy should make proper provision for uncertainty and not place reliance on critical elements of infrastructure whose funding is unknown; it states that:

'The test should be whether there is a reasonable prospect of provision. Contingency planning - showing how the objectives will be achieved under different scenarios - may be necessary in circumstances where provision is uncertain.'

2.48 Paragraphs 4.11 and 4.12 of PPS12 make it clear that there is a need to identify the infrastructure requirements of any strategic sites and that the Core Strategy should include policies for charging the Community Infrastructure Levy (CIL), in anticipation of when such powers come into effect.

Period of Operation

2.49 The time horizon of a core strategy should be at least 15 years from the date of its adoption. The strategy should build in flexibility by considering the implications of different levels of development, so as to reduce the risk of unnecessary updates.

Test of Soundness

2.50 Paragraph 4.54 of PPS12 introduces a new test of 'soundness' for core strategies, as follows:

'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*

2.51 Thus, the PPS12 places more emphasis on the need for development plan documents to:

- i) *‘...demonstrate that the plan is the most appropriate, when considered against reasonable alternatives’. (Paragraph 4.38 of PPS12, our emphasis); and*
- ii) *‘...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).*

Potential Changes to National Policy

White Paper - Planning for a Sustainable Future

2.52 Paragraph 7.55 of the May 2007 White Paper, Planning for a Sustainable Future, announced the Government’s intention to undertake a partial review of PPS6 so as to *‘...replace the need and impact tests with a new test which will have a strong focus on our town centre first policy, and which promotes competition and improves consumer choice avoiding the unintended effects of the current need test’*. Similarly, paragraph 7.56 of the White Paper envisaged that any changes to PPS6 would also take account of the conclusions of the Competition Commission’s investigation of the UK’s grocery sector.

2.53 However, the recently published Proposed Changes to PPS6 represents a half-way house, in that proposals are put forward in relation to a new *‘impact test’*, but not in relation to the *‘competition test’* advocated by the Competition Commission (because of the ongoing legal challenge to the latter’s recommendations). Thus, before we summarise the Proposed Changes to PPS6, we first outline the Competition Commission’s key recommendations.

Competition Commission’s Investigation of the UK Grocery Market

2.54 The Competition Commission published the findings of its investigation of the UK grocery market in April 2008. The Commission’s key recommendations are that:

- i) The Department of Communities and Local Government (CLG) should take such steps as are necessary to make the Office of Fair Trading (OFT) a statutory consultee for all applications for grocery stores in excess of 1,000 sq.m sales area (including applications for extensions which would cause the post-implementation sales area to exceed 1,000 sq.m).

- ii) The OFT should provide advice to the LPA on whether a particular retailer has passed or failed a 'competition test'. A grocery retailer would fail the test if:
 - a) it was not a new entrant to the local area (defined by a ten minute drive time); and
 - b) the total number of facias in the local area were three or fewer; and
 - c) the retailer would have 60 per cent or more of the groceries sales area in the local area.
- iii) CLG should take such steps as are necessary to ensure that LPA's take account of the OFT's advice on the result of the competition test and that LPAs may only determine planning applications in a manner inconsistent with that advice where they are satisfied that:
 - a) *'the particular development would produce identified benefits for the local area that would clearly outweigh the detriment to local people from the area becoming or remaining highly concentrated in terms of grocery retailing; and*
 - b) *the development, or any similar development, would not take place without the involvement of a large grocery retailer that had failed the competition test.'*

2.55 Nevertheless, the Competition Commission makes it clear that:

- i) it does not envisage the competition test being a replacement for the need test (paragraph 11.134 of the CC report);
- ii) its remedies are additional to the reforms mooted in the Planning White Paper and *'...do not preclude any of the reforms proposed in the Planning White Paper in any way'* (paragraph 11.135 of the CC Report); but that
- iii) LPAs should *'...take greater account of competition in their development plans'* (paragraph 11.135 of the CC report).

Proposed Changes to PPS6

2.56 The proposed changes to PPS6 were published for consultation on 10 July 2008. In the Ministerial Foreword, the Secretary of State makes it plain that the proposals are *'...not about revisiting the fundamentals of the policy. It is about improving the effectiveness of our policies, refining the framework so that it helps us achieve the aims of promoting vibrant, viable town centres more successfully.'*

2.57 Thus, Part 1 of the Proposed Changes document sets out the background to the proposed changes, through cross-reference to the Planning White Paper of May

2007. The latter had announced the Government's intention to *'...replace the need and impact tests with a new test which will have a strong focus on our town centre first policy, and which promotes competition and improves consumer choice avoiding the unintended effects of the current need test'*. As a consequence, the two objectives of the revisions, as foreshadowed in the White Paper, are to:

- i) *'...support current and prospective town centre investment, which contributes to economic prosperity and to our social and environmental goals'*. and
- ii) *'...to ensure that planning promotes competition and choice and does not unduly or disproportionately constrain the market'*.

2.58 The remainder of Part 1 sets out the form of the proposed changes and confirms that the Government's response to the Competition Commission's report will be published shortly. Part 2a sets out in detail the proposed changes to Chapters 1 and 2 of PPS6, Part 2b provides a proposed replacement Chapter 3 of PPS6, and Part 2c sets out consequential changes to the text of Chapter 4 of PPS6. We draw attention to the following matters.

Retention of All Five PPS6 Tests in the Development Plan Process

2.59 Part 1 confirms that there is no change to the requirement for local authorities to apply all five of the existing PPS6 tests in the development plan formulation process.

Removal of the Need Test in the Development Control Process

2.60 Part 1 also confirms the removal of the need test in the development control process, for which we provide further comment later in this section.

Retention of the Sequential Test

2.61 Paragraphs 3.13 to 3.19 of the Consultation document retain the sequential test in the development control process, with no material change to the wording of the considerations to be taken into account compared to those set out in the equivalent paragraphs of PPS6.

A New Three-part Impact Test

2.62 Paragraphs 3.19a to 3.19i of the Consultation document propose the introduction of the new impact test, the key feature of which is its broader focus on economic, social and environmental impacts, as well as strategic planning impacts, in all instances taking account of both positive and negative effects. In our assessment, the new impact test comprises three parts as now described.

First Part - Key Town Centre Impact Considerations

2.63 Paragraph 3.19e of the Proposed Changes sets out the **first part** of the new impact test by identifying five key town centre impact considerations that applicants must assess, as follows:

- i) how the proposal relates to the development plan;
- ii) impact on committed and planned in-centre investment;
- iii) whether the proposal is of an appropriate scale;
- iv) impacts on in-centre trade/turnover, taking account of current and future consumer expenditure capacity in the catchment area (our emphasis);
- v) the extent to which the proposal will promote or undermine town centre vitality and viability, including local consumer choice and retail diversity in terms of the range, type and quality of goods.

2.64 Paragraph 3.19f proceeds to state that:

'Where there is clear evidence that the proposal is likely to have a significant adverse impact on the town centre, taking into account the considerations in paragraph 3.19e, this will normally justify the refusal of planning permission.'

2.65 However, the next sentence of paragraph 3.19f goes on to state that:

'Where there are considered to be some adverse impacts, but these are likely to be outweighed by significant wider economic, social and environmental benefits...taking account of the considerations in Paragraph 3.19g...local authorities should consider such proposals favourably' (our emphasis).

Second Part - Wider Impacts

2.66 Thus, the considerations set out in paragraph 3.19g, represent the **second part** of the impact test and require consideration of seven wider impacts, as follows:

- i) impact on allocated sites located outside town centres;
- ii) the accessibility of the proposal by a choice of modes of transport, its impact on distance travelled by car and the scope for the proposal to promote linked trips with existing centres;
- iii) the extent to which a proposal benefits deprived areas and promotes social inclusion;
- iv) net employment impacts;
- v) clawback of expenditure leakage;

- vi) the extent to which a proposal will promote or undermine economic and physical regeneration; and
- vii) the extent to which the proposal makes efficient and effective use of land, including the re-use of previously developed land.

2.67 We note, at this stage, that the considerations set out in paragraphs 3.19e and 3.19g of the consultation document are also to be taken into account in the preparation of development plans, as per the provisions of paragraph 3.19h of the consultation document.

Third Part - Design and Climate Change

2.68 There is, however, a **third part** to the proposed impact test, which is set out in the second part of paragraph 3.19f of the consultation document; this states that:

'Proposals which fail to secure a high quality and inclusive design which does not take the opportunities available for improving the character and quality of the area and the way it functions, or which fail to deliver wider sustainable development objectives, in particular those on tackling climate change, are unlikely to be acceptable in impact terms, irrespective of any wider benefits which may arise from a proposal or its location' (our emphasis).

2.69 Thus, irrespective of the wider benefits of a proposal, it may fail at the third stage because of inadequate design or because of harm to wider sustainability objectives, such as tackling climate change. Indeed, it is arguable that this should be the first part of the test, because the current drafting of the Consultation document suggests that there is no prospect of success if the design is seriously inadequate, or the harm to the climate is too great, irrespective of other benefits (so why put the effort into assessing wider impacts, if there is a fundamental flaw in the proposal with respect to design or sustainability issues).

RTP Comment on the Need Test

2.70 In our assessment, we consider that there is confusion in relation to the widely reported proposed abandonment of the need test. We say this for three reasons:

- i) First, because Section 38(6) of the Planning and Compulsory Purchase Act 2004 provides that *'...if regard is to be had to the Development Plan for the purpose of any determination to be made under the planning acts, the determination must be made in accordance with the plan unless material considerations indicate otherwise.'* Thus, the Consultation document envisages that need will continue to have to be addressed as part of the development plan process; applications must be determined in accordance with the development

plan (unless material considerations indicate otherwise); so how can applicants avoid consideration of need?

- ii) Secondly, because paragraph 3.19e (iv) requires applicants to take account of current and future consumer expenditure capacity in assessing impact on in-centre turnover, which again suggests that considerations of need and impact are inseparable.
- iii) Thirdly, because paragraph 3.19h requires that all of the considerations set out in paragraphs 3.19e and 3.19g should also be taken into account in the preparation of development plans and, in our assessment, such considerations do incorporate an assessment of economic, or expenditure capacity.

2.71 As a consequence, we consider that the draft PPS6 has only limited implications for the preparation of the Council's forthcoming core strategy. If the Government's proposals are approved, need would remain an important consideration for development plan preparation purposes and it is arguable that need must remain a development control issue, because of the provisions of Section 38(6) of the Act and the logic outlined in the paragraph above.

Competition and Consumer Choice

2.72 The final aspect of the Consultation document that we wish to draw attention to relates to the issues of competition and consumer choice. As stated earlier, the Government's formal response to the Competition Commission's recommendations has been delayed, as a result of a legal challenge to these recommendations. Nevertheless, the proposed changes to paragraph 1.4 of PPS6 give more emphasis, not only to enhancement of consumer choice and improved productivity, but also to the concept of promotion of competition between retailers. Furthermore, paragraphs 2.18a to 2.18c of the Consultation document, suggests that:

- i) successful town centres need a good mix of shops and broad range of retailer representation;
- ii) local authorities can help to support the diversification of uses in the town centre as a whole and to ensure that tourism, leisure and cultural activities are dispersed throughout the centre; and that
- iii) there is a need to promote competitive town centre environments.

The Requirements of the Current and Emerging Regional Spatial Strategy

RPG13

- 2.73 RPG13 first sets out seven key objectives and four core development principles that are considered to be necessary to deliver sustainable development across the region. These key objectives and core development principles reflect the national policy objectives which existed in the early part of the new millennium, but they are generalised in nature and of little assistance in guiding the development of a network and hierarchy of town centres, as required by the more recent PPS6.
- 2.74 RPG13's Spatial Development Framework is of some assistance in developing the upper levels in the hierarchy in that it identifies the North West Metropolitan Area (NWMA) - which includes Bolton - as being the focus for a significant proportion of development and urban renaissance resources in the region.
- 2.75 However, within the NWMA, the clear priorities for investment are the city centres of Liverpool and Manchester/Salford and their immediately surrounding inner areas. The second priority is for investment within the ten metropolitan towns and boroughs identified in Policy SD1, where there are concentrations of social, economic and environmental problems; these towns and boroughs include Wigan, Bolton, Bury, Rochdale and Oldham, all of which are in the northern part of the conurbation.
- 2.76 Policy EC8 of RPG13 is also of significance; it states that new retail, leisure and/or mixed-use developments should be encouraged to take place within existing defined town and city centre boundaries in accordance with the sequential approach. Policy EC8 goes on to state that:

'Where a need is established for retail and leisure development, and where the application of the sequential approach has indicated that no suitable town centre sites are available, new or expanded developments in urban areas will be considered where their function forms the core of a mix of uses, including housing and only then when public transport is accessible.'

The Emerging RSS

- 2.77 The Draft Regional Spatial Strategy (RSS) was submitted to the Secretary of State in January 2006. There followed an Examination in Public, which culminated in the submission of the Panel's report in May 2007. The Secretary of State's proposed changes to the Draft RSS were published for consultation on 20 March 2008 and final approval of the RSS is expected to occur in July 2008. In the meantime, the

Regional Assembly has also published (February 2008) a Draft Project Plan and Statement of Public Participation in respect of a Partial Review of the RSS; the scope of this Partial Review will concentrate on the key policy areas of housing, renewable energy and waste.

- 2.78 Thus, the emerging RSS has reached an advanced stage, and significant weight can be given to it, other than in relation to its policies for housing, renewable energy and waste, since these policies, according to the Secretary of State, ‘...do not meet national guidance’.² With this important caveat in mind, we turn to the provisions of the emerging RSS, as proposed to be changed by the Secretary of State.

The Overall Spatial Framework

- 2.79 Policy RDF1 of the emerging RSS seeks to provide a ‘...clear statement of spatial priorities for growth and development, investment and regeneration in the Region’. Indeed, paragraph 5.1 of the Secretary of State’s proposed text states that ‘This policy is the cornerstone of the RSS.’ Thus, the spatial priorities for overall growth and development are defined as follows:

- first, the regional centres of Manchester and Liverpool;
- second, the inner areas surrounding these regional centres - which excludes the administrative area of Bolton³ - with emphasis given to areas in need of regeneration and particularly the Housing Market Renewal Areas; and
- third, a list of 29 towns and cities which include Wigan, Bolton, Preston, Blackburn, Bury, Rochdale and Oldham.

The Retail Hierarchy

- 2.80 So far as the retail hierarchy is concerned, Policy W5 - as recommended to be changed by the Secretary of State - states that:

‘Plans and strategies should promote retail investment where it assists in the regeneration and economic growth of the North West’s town and city centres. In considering proposals and schemes any investment made should be consistent with the scale and function of the centre, should not undermine the vitality and viability of any other centre or result in the creation of unsustainable shopping patterns’.

- 2.81 Policy W5 goes on to state that:

² See Secretary of State’s Reasons for Decision in respect to the Panel’s recommendation R2.1

³ See paragraphs 10.6 to 10.9 of the Secretary of State’s proposed text.

- i) Manchester/Salford and Liverpool city centres will continue to function as the North West's primary retail centres;
- ii) comparison retail facilities should be enhanced and encouraged in the 26 centres listed in the policy (which substantially overlap with the third tier locations identified in Policy RDF1) and include Wigan, Bolton, Preston, Blackburn, Bury, Rochdale and Oldham.
- iii) investment, of an appropriate scale, in centres not identified in ii) above - such as Farnworth, Westhoughton and Horwich - will be encouraged in order to maintain and enhance their vitality and viability, including investment to underpin wider regeneration initiatives, to ensure that centres meet the needs of the local community, as identified by local authorities (our emphasis); and that
- iv) there will be a presumption against new out-of-centre regional or sub-regional comparison retail facilities.

2.82 Nevertheless, notwithstanding the Secretary of State's proposed changes, we consider that the emerging RSS is deficient in that it does not meet, fully, the requirements of PPS6, as set out earlier in paragraph 2.9 of our report. In particular, we consider that the emerging RSS, as proposed to be changed by the Secretary of State, does not:

- i) provide an adequate strategic framework for the development of a network and hierarchy of town centres, with all 26 centres in Policy W5 given equal status;
- ii) give sufficient guidance about those town centres of sub-regional significance where growth is to be encouraged; and that
- iii) it does not provide any guidance in relation to the overall quantum of new retail and leisure floorspace required across the region over the lifetime of the RSS, let alone for five-yearly periods within it.

2.83 Thus, an important task for Bolton's emerging LDF will be the need to define the network and hierarchy of centres within the Borough and the different roles of these centres.

3 PERFORMANCE ANALYSIS - THE PPS6 INDICATORS

Introduction

- 3.1 Our analysis of the performance of the five town centres identified in the study brief - Bolton, Farnworth, Horwich, Westhoughton and Little Lever - has involved an appraisal of each centre in relation to the key indicators of vitality and viability, as identified in Section 4 of PPS6. Thus, our appraisal of each centre has involved:
- i) on-foot surveys;
 - ii) desk research, so as to benchmark the study centres against a range of comparator centres⁴;
 - iii) face-to-face consultations with key stakeholders, including developers, property market agents and retail/leisure operators; and
 - iv) surveys of pedestrians in each of the Policy S3 town centres and at Middlebrook Retail and Leisure Park, undertaken by NEMS Market Research (with NEMS' report reproduced as Volume 4 and with a summary of findings set out in Appendix 5 of Volume 3).
- 3.2 The remainder of this section is structured as follows:
- i) first, we provide an analysis of each centre, using ten indicators of vitality and viability, which closely reflect the advice given in Section 4 of PPS6, and which are defined at the beginning of Appendix 3 of Volume 3;
 - ii) secondly, we provide a résumé of the key findings from the survey of pedestrians, particularly in relation to customer views and satisfaction ratings, and their perceptions of the relationship between Middlebrook Retail and Leisure Park and Bolton town centre; and
 - iii) finally, we draw our own qualitative conclusions in relation to the performance of each of the town centres.
- 3.3 The detailed quantitative data, which inform our analysis of performance of the centres, are set out in Appendix 3 of Volume 3 (Health Checks Data).

⁴ The 10 centres for which we provide benchmark comparator data are Manchester, Preston, Southport, Wigan, Stockport, St. Helens, Blackburn, Bury, Wallasey and Darwen.

Application of the Ten Vitality & Viability Indicators to Bolton Town Centre

Indicator 1 - Retail Rankings

- 3.4 Table 1 of Appendix 3 identifies the change in Bolton town centre's national ranking since 1995/96; it shows a fall of 54 places, from 56th to 110th. Bolton remains the 7th ranking centre in the North West region, but its fall in the national rankings is in contrast to Wigan, which has gained 54 places since 1995/96, rising from 114th to 60th. It is noteworthy, however, that most of the rise in Wigan occurred after 2003/04, as a result of the high quality Grand Arcade development by Modus, which opened in March 2007. Indeed, it would seem that both Bolton and Stockport town centres have lost ground through the failure to secure any major high quality retail and mixed-use development schemes since the mid-1990s. Hence, the urgent need to deliver the major, committed mixed-use projects that already exist, such as those at Central Street and Church Wharf, as discussed in Section 6.

Indicator 2 - Diversity of Uses

- 3.5 The comparison goods sector accounts for 57 per cent of the retail and service floorspace in Bolton town centre, as might be expected of a sub-regional centre (Table 2 of Appendix 3). Compared to the UK average, there is strong representation in the men's and boys' wear, variety/department store and DIY/hardware sub-sectors. Conversely, Bolton has a weak representation in gifts/china/glass and leather goods.
- 3.6 Table 2 of Appendix 3 suggests that there is an under-representation in the '*charity shops, pets and other comparison*' sub-sector, compared to the UK average. Nevertheless, there is a cluster of charity shops located in Newport Street.
- 3.7 Convenience goods floorspace provision is in line with UK average, with strong representation in the greengrocers and fishmongers sub-sectors as a result of the Market (Table 2 of Appendix 3). Bolton also benefits from the Wm Morrison superstore (located within the town centre), the edge-of-centre J Sainsbury superstore and an edge-of-centre Aldi supermarket. The town centre also has a good range of bakers and confectioners/newsagents.
- 3.8 The service sector in Bolton is considerably less well represented than the UK average for such uses, accounting for only 27.5 per cent of the town centre's units and 13.5 per cent of its floorspace (Table 2 of Appendix 3). In particular, Bolton is under-represented in the '*restaurants, cafés, coffee bars, fast food and take-aways*' sub-category. Indeed, stakeholder consultees stressed the need for Bolton town

centre to secure a good range of high quality restaurants, coffee houses and family-orientated eating places. Thus, when the Council is undertaking its target marketing initiatives for the town centre, it may wish to consider quality café/bar/restaurant fascias such as All Bar One, Bank, Bagel Nash, Café Rouge, Carluccios, EAT, Giraffe, Gourmet Burger Kitchen, Ha Ha Bar and Grill, Piccolino, Pret a Manger, Strada, Tampopo, The Restaurant, Bar and Grill, Wagamama, Yo Sushi, Zinc and Zizzi. Many of these operators are being targeted, for example, as part of the Spinningfields regeneration scheme in Manchester City Centre.

- 3.9 Bolton town centre already benefits, however, from a range of key attractions, including the Octagon Theatre, the Town Hall, the Museum and Art Gallery, the Aquarium and the Albert Halls concert venue. Nevertheless, some stakeholders consider Bolton town centre's leisure offer to be deficient, largely as a result of the absence of any family entertainment venues, such as a cinema or bowling alley. Hence, the importance of the Church Wharf regeneration project, which - together with residential and office uses - will provide for a leisure zone that includes cinema, retail, food and drink and hotel uses.

Indicator 3 - Presence of National Multiples and High Profile Retailers

- 3.10 Bolton town centre has a wide range of comparison retail multiples, particularly in the lower and middle market sectors. These multiples include: Clarks, Scholl, Burton, TopMan and TopShop, Accessorize, Adams, Ann Summers, Bay Trading Company, Bon Marche, Dorothy Perkins, Envy, Evans, La Senza, Mothercare, New Look, Wallis, Millets, Peacocks, Primark, Republic, River Island, TK Maxx, Birthdays, Clinton Cards, JD Sports, Waterstones, WH Smith, Currys, HMV, Argos, Boots, The Body Shop, Debenhams and Marks & Spencer. The Ravenside and Trinity Street Retail Parks also contain national multiples, such as Focus, Brantano, Pets at Home, Carpetright, Wickes, T J Hughes, Peacocks, and Next.
- 3.11 However, Bolton has very few 'high-profile' fashion multiples. Indeed, the 'Fashion Count' in MHE's 2008 Shopping Index⁵ indicates that 52 per cent of Bolton's 'fashion' retailers can be described as 'middle' order, 27 per cent are 'lower-middle', 13 per cent represent 'value' fashion, whilst only 6 per cent can be categorised as 'upper-middle' fashion outlets. Thus, Bolton attains a 'middle' rating for fashion in MHE's Index.
- 3.12 Bolton would clearly benefit from the addition of further mid-end and higher-end fashion retailers, which would bolster the quality and variety of the town centre's

⁵ MHE categorises fashion retailers as 'luxury', 'upper', 'upper-middle', 'middle', 'lower-middle' or 'value'.

shopping offer, and enable the town to better compete with neighbouring town centres and the Trafford Centre. It is encouraging, therefore, that new units in the Market Hall redevelopment⁶ have been pre-let to tenants that include Zara, H&M, Warehouse, Lush and Principles, confirming that such middle and higher-order operators are prepared to locate in Bolton, if appropriate space is made available in the right kind of development and in the right kind of retail circuit.

- 3.13 One of Bolton's other distinctive attributes is its representation from some well-respected independent⁷ operators; prominent examples include: Whitakers of Bolton (the town centre's oldest department store), Justicia (a fair trade shop selling gifts from around the world), Prestons of Bolton (the Diamond Centre of the North) and House of Raja's (an Indian department store, located just outside the town centre boundary). Nevertheless, Bolton town centre, in common with comparator centres elsewhere in the sub-region, also contains many value-orientated independents and there is a need to target more independents that fall into the middle and upper quality ranges. Figure 2b of Appendix 3 in Volume 3 shows that Bolton's independent traders are spread throughout the town centre.
- 3.14 Bolton town centre also has reasonable representation from national convenience multiples, including Morrisons, Sainsbury's, Holland & Barrett, Greenhalgh's, Greggs, Hampsons and Thorntons.

Indicator 4 - Operator Demand

- 3.15 The FOCUS database (Table 7 of Appendix 3) confirms a fall in the number of retailer requirements in Bolton town centre, since October 2003. However, similar declines have been experienced in Blackburn, Stockport, and Preston and the number of requirements in Bolton, at 54 in October 2007, exceeds the number of requirements in Wigan and Blackburn, as at that date. Those with requirements in Bolton include Aldi, Bank, Klass, Moss Bros, Savers Health and Beauty, Decathlon and Bang & Olufsen. Food and drink operators on the FOCUS database include Ask Central, Lloyds No 1 Bars Ltd, Pizza Express and Costa
- 3.16 We contacted the agents acting for those retail operators that appear on FOCUS's list, as having property requirements in the town centre, with a view to establishing the firmness, or otherwise of their clients' level of interest in Bolton as an investment location. We received responses from 24 agents, but only eight could confirm and

⁶ When the redevelopment of Market Hall is complete it will be branded as part of the wider Market Place Shopping Centre.

⁷ Experian defines 'multiple retailers' as having nine or more outlets. As a consequence, RTP defines 'independents' as having eight or fewer outlets.

specify actual requirements from their clients for a presence in Bolton, including four pub/bar operators. The other 16 agents were unable to provide details of specific requirements for their clients and we suspect, therefore, that the level of interest is less than firm.

Indicator 5 - The Retail Property Offer

- 3.17 The retail property offer in Bolton town centre is diverse: it comprises converted residential and commercial properties; purpose built indoor shopping centres including Market Place and Crompton Place; the Market; two food superstores and the edge-of-centre Trinity and Ravenside (Manchester Road) retail parks.
- 3.18 The Assessment of Town Centre Vitality and Viability 2007 Update report found that - of the eight comparator centres - Bolton had the highest proportion of units in its existing stock of over 465 sq.m (5,000 sq.ft); this is the size of unit that is more likely to accommodate the modern requirements of retailers. Nevertheless, Bolton town centre's immediately available retail property offer is characterised by small and medium-sized units. Indeed, the average size of the 81 vacant units identified by Experian GOAD is only 149 sq.m gross, which translates into an 'average' net sales area of approximately 104 sq.m⁸. Units of this size are significantly below the floorspace requirements of most comparison goods multiple operators.
- 3.19 Thus, we are not surprised that the on-going Market Hall redevelopment - which is providing for 8,960 sq.m of new floorspace, mainly in the form of larger units - is 80 per cent pre-let to operators such as H&M, Zara, Warehouse, Lush, Principles, Office, Joy and Starbucks, each of which will be opening their first outlet in Bolton. Indeed, the units for H&M and Zara are 1,847 sq.m and 1,496 sq.m, respectively - more than 10 times the average size of a vacant unit in the second-hand stock.

Indicator 6 - Retail Yields

- 3.20 Figure 7 of Appendix 3 confirms that the prime yields in Bolton have improved (lowered) from 6.5 per cent in January 2005, to 6.25 per cent in January 2008. However, the improvement in prime yield since January 2005 has been significantly more pronounced in Manchester City Centre, in Wigan town centre and in Bury town centre, all of which are key competitors to Bolton town centre.

Indicator 7 - Changes in Prime Zone A Shopping Rents

- 3.21 Zone A rents in Bolton averaged £140 per sq.ft in June 2007, in line with the Zone A rents in Preston and Blackburn, but considerably below the Zone A rents being

⁸ The average sales floorspace is derived by applying a gross to net ratio of 70 per cent.

achieved in Stockport, at £190 per sq.ft (Figure 8 of Appendix 3 in Volume 3). Over the last decade the rate of Zone A rental growth has been fastest in Bury town centre (73 per cent growth), Wigan town centre (57 per cent growth), and in Manchester City Centre (50 per cent growth), with Manchester's sharp upturn occurring in the late 1990s and with the sharp upturns in Bury and Wigan occurring more recently since 2005 (see Figure 9 of Appendix 3). In comparison, the Zone A rental growth in Bolton town centre has been just 12 per cent - from £125 per sq.ft in June 1997 to £140 per sq ft in June 2007. Indeed, Bolton's Zone A rent has remained constant since June 1998, which means a fall in real terms when account is taken of inflation.

- 3.22 More positively, anecdotal stakeholder evidence would appear to indicate that rents in Bolton town centre are, at last, on an upward trajectory. One retail property market agent stated that Zone A retail rents in the town centre can be around £200 per sq.ft in prime locations. Although, some property market agents did caution that retail rents continue to grow faster in out-of-centre locations (such as Middlebrook Retail Park) than in Bolton town centre itself, the experience of the impact of the Grand Arcade scheme in Wigan suggests that projects such as Central Street may lead to a similar surge in rents in Bolton town centre.

Indicator 8 - Proportion of Vacant Street Level Property

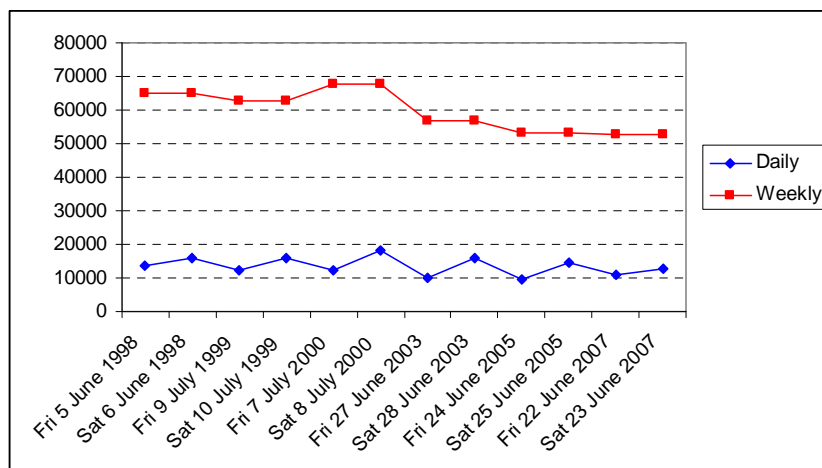
- 3.23 There were 81 vacant units in Bolton town centre at the time of Experian's latest GOAD survey (December 2007), which equates to a vacancy rate - as measured by proportion of units - of 15.9 per cent; this is above the UK average unit vacancy rate of 11.1 per cent. However, some of the vacant units in Victoria Plaza have subsequently been filled by Costa Coffee, Optical Express and Sports Direct and the extension of Primark has removed a further four vacant units. Furthermore, the vitality and viability updates undertaken for the Council since the Bolton Retail Study of November 2001, confirm a reduction over time in the number of vacant units and in the amount of vacant floorspace. Indeed, only 8.5 per cent of the town centre's floorspace was vacant in December 2007, which is marginally below the national average vacancy rate - as measured by floorspace - of 9.3 per cent.
- 3.24 Figure 2 in Appendix 3 of Volume 3 shows that in December 2007 there was a concentration of 17 small vacant units on the periphery of Market Hall, as a result of its then imminent redevelopment. However, these 17 perimeter units have subsequently been converted to 13 units through amalgamations and most of these have been let, or are in the process of being let, in advance of the October 2008 opening.

- 3.25 Figure 2 also identified two relatively large vacant units to the south of the centre (on Great Moor Street and on Bradshawgate). However, both of these units are currently under alteration, and we expect, therefore, that they will be reoccupied again shortly.
- 3.26 Thus, although there is a high vacancy rate in terms of number of units, the vacancy rate in terms of floorspace is below the UK average and will improve further when the on-going redevelopments are completed. Furthermore, the vacant units are dispersed throughout the town centre and there are no major concentrations of long-term vacant units in the retail core.

Indicator 9 - Pedestrian Flows

- 3.27 Figure 3.1 confirms that there has been a steady reduction in the average weekly footfall in Bolton town centre since 1998; and particularly since the year 2000 which experienced an upturn in footfall. This decline in weekly footfall since 1998 is reflected in the gradual reduction in Friday footfall and in the gradual reduction in the Saturday footfall. Such a decline in Bolton town centre since 1998 is to be expected given the increased competition arising from significant investment in Manchester City Centre, the success - as retail destinations - of the out-of-centre Trafford Centre and Middlebrook Retail Park, and competition from Wigan which has also experienced significant investment.

Figure 3.1 Pedestrian Flows in Bolton, 1998-2007



Source: Bolton Council

Indicator 10 - State of Town Centre Environmental Quality

- 3.28 Bolton town centre has an attractive retail and civic core, a large proportion of which is pedestrianised, well-maintained, and pedestrian-friendly. Indeed, the town centre

incorporates a number of conservation areas and the civic area around the Town Hall is particularly attractive, with distinctive buildings of architectural significance.

- 3.29 Given the large size of the town centre, it is inevitable that the quality of the environment is inconsistent. There are several areas adjacent to the ring road that are characterised by poorly maintained buildings and areas of vacant or underused land. However, many of these areas are identified as mixed-use development opportunities in the Council's adopted UDP and will be subject to improvement as a result of on-going regeneration initiatives, such as Church Wharf, Merchant's Quarter and the Bolton Innovation Zone.

Summary of the Performance of Bolton Town Centre

- 3.30 We are concerned that most of the health check indicators suggest a decline in Bolton town centre's overall vitality and viability since the mid-1990s, as a reflection of the fierce competition from high quality developments in Manchester City Centre, the Trafford Centre, Middlebrook Retail Park and the high quality Grand Arcade development in Wigan town centre. Thus, we note, in particular, the following:
- Bolton town centre's fall of 54 places in the Management Horizons Index since 1995/96, which compares to a rise of 54 places for Wigan town centre;
 - the faster pace of growth in Zone A rents in Bury, Wigan and Manchester;
 - the bigger improvements (reductions) in prime yields achieved in Bury, Wigan and Manchester;
 - the steady reduction in average weekly footfall since 1998;
 - the lack of high profile fashion multiples, whilst being encouraged by the pre-lets in the Market Hall redevelopment to H&M and Zara;
 - the lack of family entertainment centres and the lack of a cinema; and
 - the disappointing food and drink offer.
- 3.31 Nevertheless, we are encouraged that Bolton town centre has retained an attractive retail and civic core and an impressive cultural offer in the form of the Octagon Theatre, the Museum and Art Gallery, the Town Hall and the Albert Halls concert venue. Of most fundamental significance, however, are the ongoing regeneration initiatives and opportunities for high quality development across a range of town centre uses, including key flagship projects, such as Central Street, the Bolton Innovation Zone, Church Wharf, the proposals for the Merchant's Quarter, the proposals for the Urban Village and the ongoing commitments in Little Bolton. These opportunities are discussed in Section 6 of our report.

Application of the Ten Vitality & Viability Indicators to Farnworth Town Centre

Indicator 1 - Retail Rankings

- 3.32 Farnworth town centre's position in the MHE Index in 2008, at 590, is similar to its position in 1995/96, at 587. However, this apparently static position masks an improvement in the town centre's ranking in the period from 1996 to 2004, before a decline by 2008 to reach, more or less, its 1995/96 starting position. Nevertheless, given the national polarisation trend which has led to a weakening of smaller town centres, we can be encouraged by Farnworth's performance in relation to this indicator. Indeed, we note that the comparable town centre of Wallasey in Merseyside has declined by 310 places since 1995/96.

Indicator 2 - Diversity of Uses

- 3.33 Farnworth town centre's convenience sector is over-represented compared to the national average (Table 3 of Appendix 3). The centre benefits from Asda as the key anchor trader, together with the smaller Aldi, Lidl and Iceland supermarkets. Farnworth Market is also important and the centre benefits from an attractive range of independent convenience traders, including seven bakers, two butchers, several grocery stores, an off-licence and eight newsagents.
- 3.34 Conversely, Farnworth's comparison goods sector is under-represented compared to the UK average, when measured in terms of floorspace. Although the centre possesses stores operated by Burtons/Dorothy Perkins and Ethel Austin, it is notable that Farnworth suffers under-representation in the important clothing sub-categories (footwear, menswear, womenswear, and mixed/general clothing). In contrast, Farnworth has severe over-representation in the electrical, DIY/hardware and motor accessories sub-sectors.
- 3.35 Farnworth's services sector is also under-represented compared to the UK average, particularly when measured by floorspace. Moreover, whilst there is a plethora of fast food outlets, there is an under-representation of quality restaurants and sit-down, family-oriented, eating venues. The town centre does, however, provide two nightclubs and the Farnworth Little Theatre.

Indicator 3 - Presence of National Multiples and High Profile Retailers

- 3.36 Farnworth town centre has good representation from national convenience multiples, including Asda, Aldi, Lidl and Iceland supermarkets. The town centre

also contains a Heron Frozen Foods store, as well as Greenhalgh's, Greggs, and Hampsons bakeries.

- 3.37 The comparison retail multiples in the town centre include: Burtons/Dorothy Perkins, Ethel Austin, Superdrug, Woolworths, Birthdays, Select, Card Factory, Bon Marche, and Shoefare. However, the range of comparison multiple retailers focuses on the discount end of the retail spectrum and Farnworth is given a 'value' rating in MHE's 2008 Shopping Index.

Indicator 4 - Operator Demand

- 3.38 The Focus database suggests that operator demand in Farnworth town centre is very low, with just two entries (Table 7 of Appendix 3). Indeed, comparable centres such as Wallasey and Darwen have eight and six requirements, respectively.

Indicator 5 - The Retail Property Offer

- 3.39 The retail property portfolio in Farnworth is diverse: it comprises a mixture of converted residential/commercial buildings along Market Street; Farnworth Market; small purpose built retail units along Brackley Street as part of the 1960s market precinct development; four supermarkets; and several small non-food retail sheds, two of which are vacant.
- 3.40 The precinct itself requires enhancement, appearing tired, dated, and subject to vandalism in parts. We note, however, that there is an extant planning consent (ref 77546/07) for the redevelopment and refurbishment of Farnworth Market and part of the Precinct. Implementation of this consent will lead to a significant reduction in the number of market stalls from 108 to 48 (with the reduced provision remaining sufficient to meet the likely demand from stallholders). In turn, the former market footprint will be replaced by a new 1,579 sq.m store, targeted at Wilkinsons. In addition, three new retail units will be created within the Precinct. Thus, implementation will not only improve the centre's retail offer, but it will improve environmental conditions and help to reduce levels of anti-social behaviour that is caused by the open aspect of the current market.

Indicator 6 - Retail Yields

- 3.41 Data from the Valuation Office suggest that prime retail yields in Farnworth have improved from 11 per cent in 2001 to 8.25 per cent in January 2008 (Figure 7 of Appendix 3), which is a trend confirmed by local property market agents. So far as comparator centres are concerned, we note that the improvement in Farnworth has been matched by a similar improvement in Wallasey, whereas the prime yield in Darwen has remained constant.

Indicator 7 - Changes in Prime Zone A Shopping Rents

3.42 Published time-series rental data are not available for Farnworth. However, locally active retail property agents reported Zone A retail rents of around £25 per sq.ft, which are comparable to the rental levels being achieved in Westhoughton, but lower than in Wallasey for which Colliers CRE report a Zone A rent of £45 per sq.ft (Figure 8 of Appendix 3).

Indicator 8 - Proportion of Vacant Street Level Property

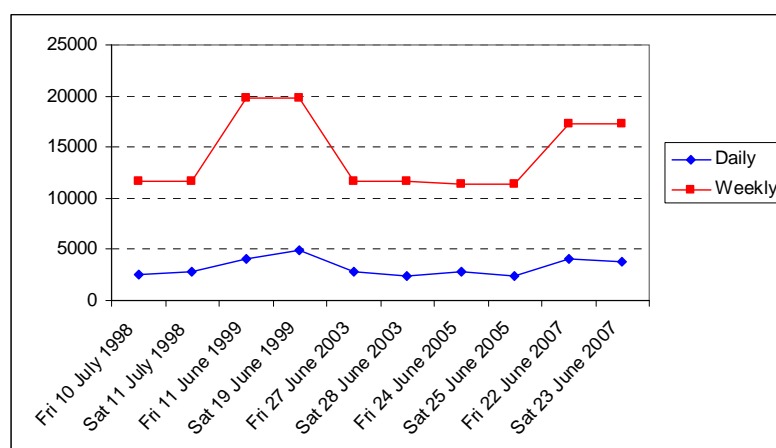
3.43 The most recent GOAD survey of August 2006 reveals 20 vacancies in Farnworth town centre, which equates to a vacancy rate of 11.6 per cent, in line with the UK average at that time. However, the vacancy rate has increased since the GOAD survey and our own on-foot survey of the centre in March 2008 identified 30 vacant retail/service properties.

3.44 Figure 4 in Appendix 3 highlights the location of vacant units in Farnworth in August 2006; this reveals a spread of vacancies throughout the centre, including two large units off Leigh Street and a cluster of small units in the precinct.

Indicator 9 - Pedestrian Flows

3.45 Figure 3.2 shows the total pedestrian flow recorded at the 15 monitoring stations in Farnworth town centre, between 1998 and 2007. The average daily weekly flows appear to have peaked in 1999 and again in 2007 and the same trend is apparent in the flows for Fridays and Saturdays.

Figure 3.2 Pedestrian Flows in Farnworth, 1998-2007



Source: Bolton Council

Indicator 10 - State of Town Centre Environmental Quality

- 3.46 The environment of Farnworth town centre is in need of some enhancement. Although the centre benefits from some pedestrianisation along Brackley Street, Market Street is subject to heavy traffic levels, and the pedestrianised area around the precinct has little street furniture and is poorly maintained. Moreover, the precinct contains vacancies and buildings which are subject to graffiti/vandalism. Another issue, raised by one of the Councillors we consulted, is the adverse environmental impact of shutters being down in the day time as a result of the high number of fast food outlets in Farnworth, which open only in the evenings. Nevertheless, as explained above, the implementation of extant consent (ref 77546/07) for redevelopment of the market and provision of new retail units will significantly improve the environment of the town centre, as well as its retail offer.

Summary of the Performance of Farnworth Town Centre

- 3.47 Although Farnworth town centre's position in the national rankings has remained stable since the mid 1990s and although prime yields have improved, the weight of the evidence from the indicators suggests a decline in the town centre's overall vitality and viability. Vacancies have risen and occupier demand seems to be low. Moreover, although Farnworth benefits from a healthy convenience goods sector, the comparison goods sector is limited and very much focussed at the discount end of the market. Of most concern, however, is the relatively poor state of the environment of the centre and the need for substantial investment in refurbishing and modernising the precinct.
- 3.48 We note, however, that there is an extant planning consent (ref 77546/07) for the redevelopment and refurbishment of Farnworth Market and part of the Precinct. Implementation of this consent will lead to a significant reduction in the number of market stalls from 108 to 48 (with the reduced provision remaining sufficient to meet the likely demand from stallholders). In turn, the former market footprint will be replaced by a new 1,579 sq.m store, targeted at Wilkinsons. In addition, three new retail units will be created within the Precinct. Thus, implementation will not only improve the centre's retail offer, but it will improve environmental conditions and help to reduce levels of anti-social behaviour that is caused by the open aspect of the current market.

Application of the Ten Vitality & Viability Indicators to Horwich Town Centre

Indicator 1 - Retail Rankings

- 3.49 Table 1 of Appendix 3 reveals that Horwich town centre dropped 231 places in the national rankings in the period 1998/99 to 2003/04, following the opening of Middlebrook. However, there has been a substantial improvement in Horwich town centre's ranking since 2004, from 967 up to 874 in 2008.

Indicator 2 - Diversity of Uses

- 3.50 Horwich town centre retains a good convenience offer, including supermarkets operated by Somerfield, Aldi and Iceland, and a range of independent bakers, butchers, greengrocers, off-licences and newsagents (Table 4 of Appendix 3). Moreover, fresh food produce is available at the market and the town has a strong reputation for a good food offer, despite the absence of any superstore operators - with Asda and Tesco located nearby at Middlebrook.
- 3.51 However, the town centre's comparison goods offer is limited and there is a particularly poor representation of footwear, menswear, children's-wear and women's-wear retailers (Table 4 of Appendix 3). Moreover, there is no variety store and an above average representation of charity shops.
- 3.52 Thus, Horwich functions more as a convenience and service centre. Indeed, service outlets account for 34 per cent of the floorspace in Horwich, compared to a UK average of 22 per cent. Furthermore, Horwich has good representation in all of the services sub-sectors, except building societies and with particularly high numbers of hairdressers/beauty parlours and cafés/coffee bars/takeaways. The town centre also benefits from having a leisure centre and an art studio, and there is a significant amount of residential property (including a nursing home) within the town centre boundary, as defined in the UDP. However, this residential property does serve to dilute and disjoint the retail and services offer in parts of the centre.

Indicator 3 - Presence of National Multiples and High Profile Retailers

- 3.53 The presence of multiple retailers in Horwich town centre is limited to Somerfield, Aldi, Iceland, the Co-op, Bargain Booze, Greenhalghs, Hampsons, Blockbuster Video and Dollond & Aitchison. There is a very weak representation of comparison goods multiples and none of the town centre's restaurants, fast-food outlets or pubs/bars are operated by national chains. However, the town centre does contain

a better range of service multiples, with several banks occupying premises along Winter Hey Lane and Lee Lane, together with a Post Office.

Indicator 4 - Operator Demand

- 3.54 The latest FOCUS Town Report for Horwich (October 2007) identifies no published retail requirements for the town (Table 7 of Appendix 3). However, we have identified interest in Horwich town centre from Heron Frozen Foods, which is seeking a unit of 200 sq.m to 350 sq.m gross.

Indicator 5 - The Retail Property Offer

- 3.55 The majority of retail outlets in Horwich (with the exception of the town's supermarkets) are accommodated in converted residential/commercial buildings, rather than purpose-built retail units. Horwich's retail property offer is dominated by small retail units, many of which are in need of cosmetic enhancement. Indeed, our analysis of Experian's GOAD data for Horwich indicates that the 12 vacant units in the town centre have an average gross floorspace of around 100 sq.m, which is below the requirements of many independent operators, let alone multiples.

Indicator 6 - Retail Yields

- 3.56 Published time-series data on retail yields are not available for Horwich. However, locally active retail property agents reported that yields in Horwich are comparable to those achieved in Farnworth.

Indicator 7 - Changes in Prime Zone A Shopping Rents

- 3.57 Published time-series rental data are also not available for Horwich. However, locally active retail property agents reports Zone A retail rents of around £17 to £18 per sq.ft. This rental level is lower than Zone A retail rents achieved in both Farnworth and Westhoughton, but is higher than the average Zone A rental level achieved in Little Lever.

Indicator 8 - Proportion of Vacant Street Level Property

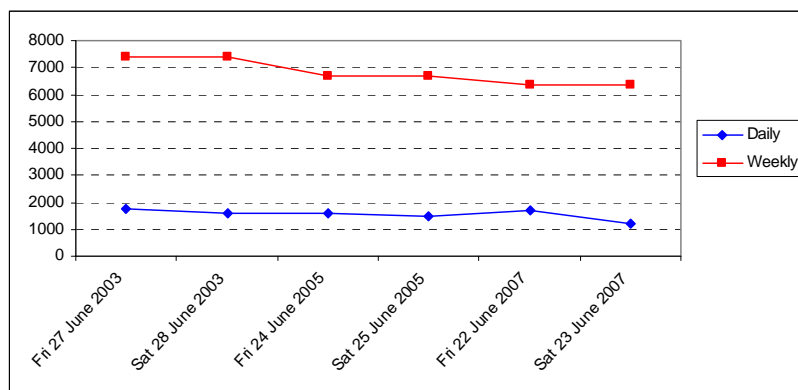
- 3.58 There were 12 vacant units in Horwich town centre at the time of Experian's latest GOAD survey (August 2006), which equates to a vacancy rate of 8.1 per cent (see Figure 6 of Appendix 3). However, the vacancy rate has since increased and our own on-foot survey of the centre in March 2008 identified additional vacant retail/service properties located along Chorley New Road, and at the junction of Winter Hey Lane with Chorley New Road. There are also two prominent vacancies - a large vacant restaurant and a derelict church - located along Lee Lane, just

outside the town centre boundary, but which nevertheless represent eyesores in a gateway location on the edge of the town centre.

Indicator 9 - Pedestrian Flows

3.59 Figure 3.3 shows the total pedestrian flow recorded at the 14 monitoring stations in Horwich town centre, between 2003 and 2007; it indicates that daily and weekly footfall has declined over the monitoring period, from its peak in 2003. Indeed, total weekly pedestrian flow has fallen from over 7,000 visitors a week in 2003, to just over 6,000 visitors a week by 2007; this compares to an average weekly flow in Farnworth in 2007 of around 17,000.

Figure 3.3 Pedestrian Flows in Horwich, 2003-2007



Source: Bolton Council

Indicator 10 - State of Town Centre Environmental Quality

3.60 Like Farnworth, the environment of Horwich town centre is in need of some environmental enhancement. Although the centre was generally clean, with little litter, at the time of our on-foot survey, it lacks street furniture, planters, and so on, which would enhance the pedestrian environment and improve the overall character of the town centre.

3.61 Indeed, Horwich lacks a focal point, with retail/service uses being primarily stretched out along two perpendicular, linear roads (with residential properties in between). As in Farnworth, there is a high proportion of vacant units in the centre, and many poorly maintained properties, which degrade the environment. In particular, the Market Hall, which was only partly in use at the time of our on-foot survey, appears to be in need of significant investment, an issue which was also highlighted by local stakeholders.

Summary of the Performance of Horwich Town Centre

- 3.62 Despite the recent improvement in Horwich's position in the national retail rankings, there are indications of a decline in the centre's overall vitality and viability. The convenience and service offer is good, but the comparison sector offer is very limited - even more so than in Farnworth - and it is focussed on the discount end of the market. Moreover, vacancies have risen since the most recent GOAD survey, with some of the vacant units in prominent locations; operator demand is very limited; and footfall has declined.
- 3.63 The environment of the centre would benefit from some enhancement, particularly the Market Hall which appears to be in a state of disrepair. Moreover, the centre lacks a focal point, with the residential uses within the town centre boundary diluting the character of the shopping environment in parts of the centre.
- 3.64 We anticipate, however, that both Horwich town centre and Middlebrook Retail Park will benefit from the redevelopment of the 40 hectare Horwich Locomotive Works site, which will ultimately deliver around 1,600 new houses on half the site, with the other half developed for a range of employment uses.

Application of the Ten Vitality & Viability Indicators to Westhoughton Town Centre

Indicator 1 - Retail Rankings

- 3.65 Westhoughton's ranking in the MHE Index in 2008 - at 1,866 - is considerably below that of Farnworth and Horwich, which have ranks of 590 and 874, respectively (Table 1 of Appendix 3). However, Westhoughton was not included in the MHE Index in earlier years and so it is not possible to chart change over time.

Indicator 2 - Diversity of Uses

- 3.66 Westhoughton lacks an anchor supermarket, with the convenience goods representation limited to two small Co-ops, eight independent units and the market (Table 5 of Appendix 3). This deficiency is being rectified, however, by the provision of a new J Sainsbury store of 4,300 sq.m gross on the edge of the town centre, following the grant of planning permission in May 2008.
- 3.67 Table 5 of Appendix 3 confirms that Westhoughton has 31 comparison goods outlets and that there is a reasonable range across the various sub-sectors, including three clothes shops, a footwear shop, six furniture/textiles stores, two jewellers, seven shops selling hardware and household items, two variety stores, a hobby shop, a florist and three pharmacies/opticians. Thus, Westhoughton's

comparison retail offer is varied and meets a number of local needs, particularly for more day-to-day comparison goods items, such as pharmaceutical goods and small household items.

- 3.68 Service outlets in Westhoughton account for 33.3 per cent of town centre units, which is equivalent to the UK average of 33.2 per cent. Of particular note is the large number of units within the *'hairdressers, beauty parlours and health centres'* and the *'banks and financial services'* sub-categories. However, Westhoughton also benefits from representation from three estate agents, a travel agent, a drycleaner, and eight units in the *'restaurants, cafes, coffee bars, fast food and take-aways'* sub-category. Indeed, Westhoughton's food offer includes several restaurants catering for sit-down meals, in addition to the McDonalds and Dominos Pizza outlets. Westhoughton also has a number of public houses and bars, including a JD Wetherspoon outlet.

Indicator 3 - Presence of National Multiples and High Profile Retailers

- 3.69 Westhoughton's convenience goods offer includes only two national multiple operators, namely Co-op and Bargain Booze. There is a slightly wider range of comparison retail multiples in the town centre, with operators including Ethel Austin, Rowlands pharmacy, Blockbuster Video and Toymaster.
- 3.70 The town centre does contain a better range of service multiples, with several banks occupying premises along Market Street, together with a Post Office, McDonalds and Dominos Pizza outlets, and a JD Wetherspoon bar/restaurant.

Indicator 4 - Operator Demand

- 3.71 The latest FOCUS Town Report for Westhoughton (October 2007) identifies no published retail requirements for the town. Indeed, there have been no published retail requirements identified for Westhoughton since April 2000. However, as noted under Indicator 2 above, we are aware that Sainsbury's has a requirement for a supermarket in Westhoughton, and the operator recently gained planning consent to develop the site of Westhoughton Cricket Ground (on the edge of the town centre, off Cricketers Way). We have also identified interest from Aldi, which is seeking to develop a store of around 1,500 sq.m gross.

Indicator 5 - The Retail Property Offer

- 3.72 The majority of the retail and service uses are accommodated in converted residential and commercial buildings, particularly along Market Street. However, there are also some small and medium-sized, purpose-built retail units, accommodating both food and non-food operators, to the north of Cricketers Way.

Overall, the retail property stock in Westhoughton appears to be in generally good condition, including the indoor Market Hall, which seemed to be well-maintained at the time of our on-foot survey of the centre. However, we understand from anecdotal stakeholder evidence that the Market Hall has been the subject of development speculation in the past.

Indicator 6 - Retail Yields

- 3.73 Published time-series data on retail yields are not available for Westhoughton. However, locally active retail property agents reported that yields in Westhoughton are comparable to those achieved in Farnworth and Horwich (with yields as low as 6.75 and 7.0 per cent possible in prime locations).

Indicator 7 - Changes in Prime Zone A Shopping Rents

- 3.74 Published time-series rental data are also not available for Westhoughton. However, locally active retail property agents report average Zone A retail rents in the centre of around £20 per sq.ft. This rental level is lower than Zone A retail rents achieved in Farnworth, but is marginally higher than the average rental level achieved in Horwich.

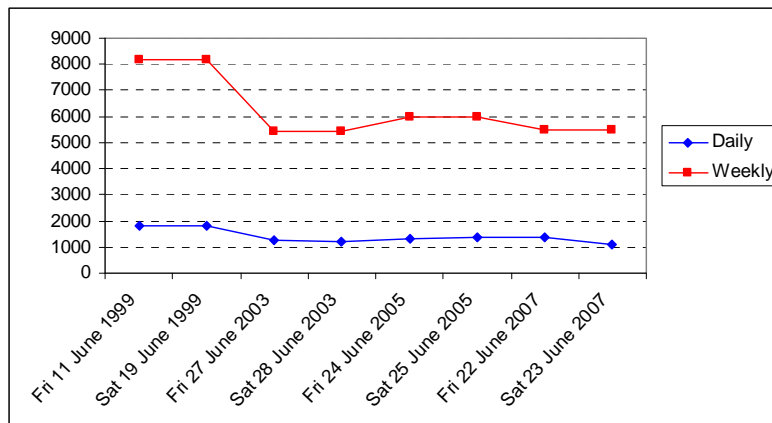
Indicator 8 - Proportion of Vacant Street Level Property

- 3.75 There were 9 vacant units in Westhoughton town centre at the time of our on-foot survey of the centre (March 2008); this equates to a vacancy rate of 11.5 per cent, which is broadly equivalent to the UK average vacancy rate of 11.1 per cent.
- 3.76 The vacant units are small, dispersed throughout the centre and, generally, are not located in prominent positions. There was only one small concentration of vacancies, where two very small kiosk/retail units were vacant, adjacent to a larger, vacant public house. This small cluster of vacancies could be considered an eyesore and the site would benefit from reoccupation, or redevelopment.

Indicator 9 - Pedestrian Flows

- 3.77 Figure 3.4 below shows the total pedestrian flow recorded at the 10 monitoring stations in Westhoughton town centre, between 1999 and 2007. It indicates that daily and weekly footfall has declined over the monitoring period, from its peak in 1999, when pedestrian flow was estimated at 8,000 visitors a week. However, the sharpest fall was between 1999 and 2003, during which time the impact of Middlebrook and the Trafford Centre would have been most pronounced. Since 2003, pedestrian flow has remained relatively stable at around 5,500 to 6,000 visitors a week.

Figure 3.4 Pedestrian Flows in Westhoughton, 1999-2007



Source: Bolton Council

Indicator 10 - State of Town Centre Environmental Quality

3.78 Westhoughton is a small, pleasant town centre. At the time of our on-foot survey, we found Westhoughton to be clean and well-maintained, with the environment of the centre enhanced by the provision of street furniture and ornamental lighting. Although traffic passes through Market Street, there was no evidence of any road congestion in the centre, and bollards were in place to protect pedestrians from passing traffic. The western side of the town centre is particularly pleasant, with a small park and war memorial located on the edge of the centre and this area is located within a conservation area.

Summary of the Performance of Westhoughton Town Centre

3.79 Overall, we conclude that Westhoughton is a pleasant, attractive, healthy town centre. Westhoughton serves, primarily, a localised role, in meeting residents' day-to-day retail and service needs. The centre contains a number of small restaurants and bars, including a JD Wetherspoon outlet. The environment of the centre is pleasant and generally well-maintained, and the centre offers a range of retail units, from small converted properties, to medium-sized purpose-built units. Although the convenience offer of Westhoughton is somewhat limited (with no major supermarket at present), this will be addressed following the approval of planning permission for a Sainsbury's supermarket on the edge of the centre.

Application of the Ten Vitality & Viability Indicators to Little Lever Town Centre

Indicator 1 - Retail Rankings

- 3.80 Little Lever's year 2008 ranking in the MHE Index - at 2,356 - is considerably lower than the other town centres identified in Policy S3 of the UDP (Table 1 of Appendix 3). However, Little Lever was not included in the MHE Index in earlier years and so it is not possible to chart change over time.

Indicator 2 - Diversity of Uses

- 3.81 At the time of our March 2008 survey, there were nine convenience outlets in Little Lever, comprising a small Tesco Metro, two bakeries, a butcher's shop, two newsagents, two general grocery stores and Little Lever market (Table 6 of Appendix 3). These operators meet some of the day-to-day needs of the local catchment area, but are unlikely to serve in any material way as a weekly convenience goods destination.
- 3.82 Little Lever contains only 11 comparison goods outlets; it has no clothes shops, furniture stores, or specialist goods shops. The majority of comparison goods shops in Little Lever are focused on the sale of day-to-day items such as toiletries, flowers and pharmaceutical goods. The comparison offer in Little Lever is, therefore, very limited in its diversity.
- 3.83 There are 16 service outlets in Little Lever, including seven hairdressers and six eating establishments, although most of these are take-aways. In addition, Little Lever has a laundry, a bank, and an estate agent, but it is arguable that Little Lever constitutes a 'local centre' for the purposes of Table 1 of Annex A of PPS6.

Indicator 3 - Presence of National Multiples and High Profile Retailers

- 3.84 Little Lever has very few national multiple retailers; these are Tesco, Co-op, Hampsons, Cohen's Chemist, the Royal Bank of Scotland and the Post Office.

Indicator 4 - Operator Demand

- 3.85 We are not aware of any published retail requirements for Little Lever. However, from our own research, we have identified interest in Little Lever from Aldi, which is seeking a site capable of accommodating a store of around 1,500 sq.m gross

Indicator 5 - The Retail Property Offer

- 3.86 Little Lever comprises a mix of converted residential/commercial buildings, and purpose-built retail units. The single-storey, purpose-built precinct of retail units is

now rather tired and dated in appearance. The open-air precinct, which contains some dark alleyways, is protected by barbed wire to the rear; it is not very inviting and would certainly benefit from comprehensive modernisation.

Indicator 6 - Retail Yields

- 3.87 Published time-series data on retail yields are not available for Little Lever. However, locally active retail property agents reported that yields in Little Lever are comparable to those achieved in Horwich and Westhoughton.

Indicator 7 - Changes in Prime Zone A Shopping Rents

- 3.88 Published time-series rental data are also not available for Little Lever. However, locally active retail property agents report Zone A retail rents of between £15 and £16 per sq.ft, which is the lowest rental level achieved in any of the study centres. Furthermore, anecdotal evidence from local property market agents indicates that, unlike the other four study centres, rents are generally static in Little Lever, and are showing no signs of an upward trajectory.

Indicator 8 - Proportion of Vacant Street Level Property

- 3.89 There were 15 vacant units in Little Lever town centre at the time of our on-foot survey in March 2008; this equates to a vacancy rate of 28.9 per cent, which is significantly above the UK average vacancy rate of 11.1 per cent. In general, the vacant units are small and dispersed throughout the linear centre. There are no particular concentrations of vacancies and, generally, the vacant units are not in prominent gateway locations.

Indicator 9 - Pedestrian Flows

- 3.90 We are not aware of any formal pedestrian flow counts undertaken recently in Little Lever town centre. However, on all occasions that we undertook on-foot surveys of Little Lever, we found the centre to be relatively quiet.

Indicator 10 - State of Town Centre Environmental Quality

- 3.91 The environmental quality of Little Lever town centre is relatively poor and in need of enhancement. Although the centre was generally clean, with little litter, at the time of our on-foot surveys, it lacks street furniture, planters, and so on, which would enhance the pedestrian environment and improve its character.
- 3.92 As in Farnworth and Horwich, there is a high proportion of vacant units in the centre, in addition to many poorly maintained properties with low-quality frontages, that degrade the environment of the centre. In particular, the precinct in Little Lever,

which could provide a focal point to an otherwise linear centre, is uninviting and tired in its appearance and would certainly benefit from enhancement.

Summary of the Performance of Little Lever Town Centre

- 3.93 Little Lever is a small, linear centre, which performs an essentially localised role, catering primarily for service and top-up food shopping needs. However, our healthcheck has identified several indicators of decline in Little Lever, including a very high vacancy rate, low and static Zone A retail rents, limited operator demand for representation in the centre, and a relatively poor environment. Even the precinct, which could potentially form a focal point of the centre, lacks character and would benefit from comprehensive modernisation. However, despite the existence of a large number of vacant units, these are small and dispersed through the centre so that there are no obvious development opportunities for meeting the requirements of an operator such as Aldi. Thus, the focus in the future may well relate to consolidation and enhancement initiatives.

Customer Views and Behaviour - The Key Findings and Survey of Pedestrians

- 3.94 One of the key indicators of vitality and viability, identified in paragraph 4.4 of PPS6, is customer and residents' views and behaviour. As a consequence, we commissioned NEMS Market Research to undertake a survey of 1,804 households resident throughout the overall catchment area, together with a survey of 626 pedestrians across the five town centres covered in the study brief and at the Middlebrook Retail and Leisure Park. The findings of the survey of households are presented in Section 4 of our report, in discussing current patterns of retail and leisure spending, whereas the findings of the survey of pedestrians are reported in Appendix 5 of Volume 3 and in Volume 4. Thus, in this section of our report, we identify the key findings from the survey of pedestrians, focusing on customer satisfaction ratings, customer behaviour and suggestions for improvements.

Mode of Travel

- 3.95 There is a significant variation across the centres in terms of mode of travel for visitors, whether expressed as a proportion of trips to the centre, or as a proportion of people visiting the centre⁹. Thus, pedestrian survey confirms that:

⁹ If Person A visits a town centre 5 times per week and Person B visits once per week, then Person A is 5 times more likely to be interviewed than Person B. Thus, the un-weighted findings become a sample of **trips** to the centre. In order to express the findings as a proportion of **people**, the results need to be

- **Middlebrook Retail Park** is most reliant on car-borne customers, with 83 per cent of trips to the centre being by car/van/taxi, and with 91 per cent of visitors to the centre relying on the car/van/taxi mode.
- **Little Lever** is most reliant on walk-in patronage, with 78 per cent of trips being by foot and with 83 per cent of visitors representing walk-in patronage.
- **Bolton town centre** is most reliant on public transport, with the bus mode accounting for 40 per cent of both trips and visitors. However, Bolton has the lowest walk-in patronage, after Middlebrook, and around two-fifths of trips and visitors to Bolton are by car mode.
- **Horwich town centre** also has a high walk-in patronage, with 64 per cent of trips being by foot and 65 per cent of visitors being by foot.
- **Farnworth town centre** secures the second highest frequency of bus patronage (20 per cent of trips and 22 per cent of visitors) after Bolton town centre, but it also attracts both car-borne trade (39 per cent of trips) and walk-in trade (40 per cent of trips).
- **Westhoughton town centre** has the second highest car mode share (42 per cent of trips and 54 per cent of visitors) after Middlebrook, but Westhoughton is also reliant on significant numbers of people arriving by bus (13 per cent of trips) and by foot (40 per cent of trips).

Frequency of Visits to the Centres

- 3.96 The smaller town centres are visited most frequently, particularly Little Lever (where 77 per cent of visitors visit at least once a week) and Horwich (where 74 per cent of visitors visit at least once a week). Conversely, Middlebrook Retail Park attracts customers who visit infrequently; indeed, 70 per cent of the visitors to Middlebrook visit less than once per month. Bolton town centre falls between the smaller town centres and Middlebrook - 40 per cent of people who visit Bolton do so frequently, whereas 60 per cent visit once or twice per month, or less frequently.

Main Purpose of Visit

- 3.97 The pedestrian survey asked about the main purpose of visit on the day of the survey and the top three responses for each centre are as set out in Table 3.1.

weighted by the inverse of the frequency of visit. For mode of travel, both weighted and un-weighted results are relevant, but for all other questions we utilise the weighted results, which express the findings as a proportion of people.

Table 3.1 Main Purpose of Visit to Centre (% of people)

Centre	Top 3 Responses - % of Total Responses in Each Centre		
	1	2	3
Bolton	To buy non-food goods (34%)	To buy food and grocery items (13%)	For personal services (11%)
Farnworth	To buy food and grocery items (30%)	To buy non-food goods (24%)	For personal services (21%)
Horwich	To buy food and grocery items (29%)	Work (21%)	No particular reason (18%)
Westhoughton	For personal services (27%)	To buy non-food goods (22%)	To buy food and grocery items (16%)
Little Lever	To buy food and grocery items (53%)	Browsing/walking around (24%)	For personal services (6%)
Middlebrook RP	To buy non-food goods (57%)	To visit a commercial leisure facility (12%)	To buy food and grocery items (10%)

Like and Dislikes

3.98 The pedestrian survey also canvassed customers' likes and dislikes and their satisfaction rating with respect to the range and quality of shops in the centre; the findings are set out in Tables 3.2 and 3.3, respectively. As expected, Bolton and Middlebrook achieve the highest satisfaction ratings with respect to range and quality of shops, but the satisfaction rating is also very high for Little Lever, perhaps as a result of the recent introduction of Tesco Metro.

Table 3.2 Aspects Most Liked/Disliked About the Centres (% of people)¹⁰

Centre	Top 3 Responses - % of Total Responses in Each Centre					
	Like Most			Dislike Most		
	1	2	3	1	2	3
Bolton	Near / convenient (28%)	Pedestrianised Streets (16%)	Nothing in particular (16%)	Nothing in particular (49%)	Dirty shopping streets (8%)	Run down appearance (8%)
Farnworth	Nothing in particular (30%)	Near / convenient (20%)	Compact centre (13%)	Lack of national multiples (28%)	Nothing in particular (27%)	Lack of choice of independents (17%)
Horwich	Nothing in particular (33%)	Not too crowded (20%)	Character / Atmosphere (16%)	Nothing in particular (34%)	Presence of 'undesirables' (15%)	Dislike everything (12%)
Westhoughton	Near / convenient (38%)	Nothing in particular (19%)	Not too crowded (13%)	Choice of shops is inadequate (40%)	Lack of national multiples (32%)	Nothing in particular (24%)
Little Lever	Near / convenient (46%)	Choice of independents (29%)	Range of public services (24%)	Dirty shopping streets (30%)	Feels unsafe (28%)	Nothing in particular (20%)
Middlebrook RP	Parking is free (34%)	Near / convenient (26%)	Choice of non-food shops (26%)	Nothing in particular (44%)	Road congestion (11%)	Match day traffic is a nightmare (7%)

Table 3.3 Satisfaction with Range and Quality of Shops in Centre (% of people)

Centre	Satisfied or very satisfied	Neutral	Dissatisfied or very dissatisfied	No opinion/ don't know
Bolton	77%	12%	8%	3%
Farnworth	39%	14%	40%	7%
Horwich	59%	17%	21%	3%
Westhoughton	28%	19%	53%	0%
Little Lever	76%	8%	16%	0%
Middlebrook RP	77%	17%	6%	0%

¹⁰ Survey respondents had the option of naming up to five main 'likes' and 'dislikes'.

Environmental Satisfaction Ratings

3.99 The pedestrian survey also sought customer satisfaction ratings in relation to five environmental factors, as set out in Table 3.4.

Table 3.4 Assessment of Environmental Quality (% of people)

Centre	Environmental Factor - Top Response (as a % of Total Responses in Each Centre)				
	Cleanliness of shopping streets	Personal safety / lighting / policing issues	Quality of buildings / townscape	Shelter from weather	Pedestrian / vehicular safety issues
Bolton	Good or very good (48%)	Good or very good (41%)	Good or very good (65%)	Good or very good (44%)	Good or very good (60%)
Farnworth	Satisfactory (50%)	Satisfactory (47%)	Satisfactory (40%)	Poor or very poor (52%)	Satisfactory (33%)
Horwich	Good or very good (71%)	Good or very good (60%)	Good or very good (42%)	Poor or very poor (60%)	Satisfactory (53%)
Westhoughton	Good or very good (60%)	Good or very good (45%)	Satisfactory (43%)	Poor or very poor (72%)	Satisfactory (52%)
Little Lever	Poor or very poor (44%)	Poor or very poor (53%)	Satisfactory (46%)	Poor or very poor (47%)	Satisfactory (64%)
Middlebrook RP	Good or very good (87%)	Good or very good (68%)	Good or very good (59%)	Good or very good (55%)	Good or very good (50%)

3.100 It is noteworthy that:

- **Middlebrook** achieves the best customer satisfaction ratings in relation to cleanliness of the streets, personal safety issues and shelter from weather;
- **Bolton town centre** achieves the best customer satisfaction ratings in relation to quality of buildings/townscape and in relation to pedestrian vehicular safety issues;
- the most frequent response in **Little Lever**, in relation to cleanliness of the shopping streets, personal safety issues and shelter from the weather, was 'poor' or 'very poor';
- the top response to four of the five factors in **Farnworth town centre** was 'satisfactory' and for none of the environment factors was 'good' or 'very good' the most frequent response, but like the other smaller centres, Farnworth scores badly in relation to shelter from weather;

- **Horwich town centre** scores well in relation to cleanliness of the streets, personal safety issues and quality of buildings, but badly in relation to shelter from the weather;
- **Westhoughton** scores well in relation to cleanliness of its shopping streets and in terms of personal safety issues, but badly in relation to shelter from weather.

Accessibility Satisfaction Ratings

3.101 The pedestrian survey also sought customer satisfaction ratings in relation to ten accessibility factors, as set out in Table 3.5. The findings reveal that:

- Middlebrook achieves the highest satisfaction rating in relation to location of car parks, followed by Westhoughton and Horwich;
- Middlebrook also secures the highest satisfaction rating in relation to the security of its car parks;
- Little Lever scores best in relation to location of bus stops, followed by Westhoughton, Horwich and Bolton;
- Bolton achieves the best rating in relation to the security of its bus station;
- Westhoughton scores best in relation to the location of its train station;
- No centre scores particularly well in relation to the security of its train station and too few respondents in each centre were able to give an appraisal of cycling accessibility;
- Bolton town centre achieves the highest rating in relation to the amount and quality of its pedestrianisation, followed by Middlebrook and Farnworth;
- Middlebrook achieves the best rating in relation to ease of movement on foot, followed by Bolton town centre; and
- 'Satisfactory' was the top response in all centres in relation to access for people with mobility, hearing and sight disabilities.

Table 3.5 Assessment of Accessibility (% of people)

Centre	Accessibility Factor - Top Response (as a % of Total Responses in Each Centre)									
	Location of car parks	Security of car parks	Location of bus stops /bus station	Quality /Security of bus station	Location of train station	Quality / Security of train station	Ease of cycling access	Amount / Quality of pedestrianisation	Ease of movement around centre on foot	Access for people with mobility / hearing / sight disabilities
Bolton	Good or very good (32%)	Don't know (39%)	Good or very good (45%)	Satisfactory (50%)	Satisfactory (48%)	Satisfactory (48%)	Don't know (66%)	Good or very good (68%)	Good or very good (81%)	Satisfactory (37%)
Farnworth	Satisfactory (49%)	Satisfactory (54%)	Satisfactory (36%)	Satisfactory (40%)	Satisfactory (42%)	Satisfactory (41%)	Don't know (68%)	Good or very good (47%)	Satisfactory (49%)	Satisfactory (52%)
Horwich	Good or very good (49%)	Good or very good (39%)	Good or very good (46%)	Satisfactory (37%)	Satisfactory (53%)	Satisfactory (38%)	Don't know (76%)	Satisfactory (51%)	Satisfactory (47%)	Satisfactory (59%)
Westhoughton	Good or very good (59%)	Good or very good (44%)	Good or very good (46%)	Don't know (73%)	Good or very good (43%)	Don't know (74%)	Don't know (62%)	Satisfactory (49%)	Satisfactory (50%)	Satisfactory (48%)
Little Lever	Good or very good (44%)	Good or very good (43%)	Good or very good (69%)	Satisfactory (46%)	Don't know (44%)	Satisfactory (48%)	Don't know (77%)	Satisfactory (49%)	Satisfactory (53%)	Satisfactory (48%)
Middlebrook RP	Good or very good (90%)	Good or very good (60%)	Don't know (74%)	N/A	Don't know (57%)	N/A	Don't know (82%)	Good or very good (57%)	Good or very good (90%)	Don't know (42%)

Suggestions for Improvement

3.102 Table 3.6 sets out the most frequent responses relating to suggested improvements in each of the centres, but excluding 'don't know/no opinions', which accounted for 47 per cent of respondents in Horwich town centre and 44 per cent of respondents in Bolton town centre.

Table 3.6 Most Frequent Suggestions for Improvement in Each Centre

Centre	Top 3 Responses ¹¹ - % of Total Responses in Each Centre		
	1	2	3
Bolton	Improvement to the market in Ashburner Street (11%)	Better quality of shops (9%)	Cleaner streets / removal of litter (8%)
Farnworth	More national multiple retailers (21%)	Better quality of shops (19%)	Improvement to the market (17%)
Horwich	Improved security measures (10%)	Cleaner streets / removal of litter (9%)	More control of anti-social behaviour (7%)
Westhoughton	More independent shops (32%)	Better choice of shops in general (29%)	Improve appearance / environment of centre (25%)
Little Lever	Better quality of shops (39%)	Cleaner streets / removal of litter (32%)	Improve appearance / environment of centre (26%)
Middlebrook RP	More / better eating places (20%)	Better choice of shops in general (18%)	More independent shops (14%)

3.103 In each of the centres there is a different range of suggestions for improvement, but we particularly note that the most frequent suggestions for improvement in Bolton town centre relate to the need to improve the Market in Ashburner Street, the attraction of better quality shops and the need for cleaner streets. The next two responses in Bolton town centre were more/better pubs and nightlife and more/better eating places.

¹¹ The top three 'positive' responses are listed for each centre (i.e. we have not considered 'don't know' to be a positive response).

The Relationship between Bolton Town Centre and Middlebrook Retail and Leisure Park

- 3.104 Visitors interviewed in Bolton town centre were asked whether they also visit Middlebrook Retail and Leisure Park, and visitors to Middlebrook Retail and Leisure Park were asked whether they also visit Bolton town centre. The results, as set out in Table 3.7, show that approximately 48 per cent of people who visit Bolton town centre also visit Middlebrook, whilst 51 per cent of people who visit Middlebrook Retail and Leisure Park also visit Bolton town centre.

Table 3.7 Visitors to both Bolton Town Centre and Middlebrook Retail and Leisure Park (% of people)

Visitors to Bolton town centre	Also visit Middlebrook Retail and Leisure Park?	
	Yes	No
	48%	52%
Visitors to Middlebrook RP	Also visit Bolton Town Centre?	
	Yes	No
	51%	49%

- 3.105 The people who visit both Bolton town centre and Middlebrook Retail and Leisure Park were then asked a series of additional questions, designed to explore the relationship between the two destinations. The first question was whether the development of the Middlebrook Retail and Leisure Park had any effect on frequency of visits to Bolton town centre. Of the visitors to Middlebrook, 75 per cent said there had been no impact on visits to Bolton town centre and of the visitors to Bolton, 60 per cent said there had been no impact.
- 3.106 Pedestrians were then asked about the relative advantages and disadvantages of Bolton town centre and Middlebrook Retail and Leisure Park and the responses are as set out in Tables 3.8 and 3.9. Table 3.8 reveals that the main advantages for Middlebrook are: free parking, easier parking and Sunday opening, with the main disadvantage being that Middlebrook does not have as wide a range of shops as Bolton. Conversely, Table 3.9 reveals that Bolton Town centre's main advantages are its better variety and choice of shops and proximity to the respondents home, whereas the main disadvantage is perceived to be the cost and amount of parking spaces.

Table 3.8 Advantages/Disadvantages of Middlebrook Retail and Leisure Park vis-à-vis Bolton Town Centre

	Advantages (Top 2 Responses)		Disadvantages (Top 2 Responses)	
	1	2	1	2
People interviewed at Middlebrook RP	Free parking / easier or better parking facilities (60%)	Open Sundays (17%)	Not as wide choice of shops (26%)	Too far away (12%)

Table 3.9 Advantages/Disadvantages of Bolton town centre vis-à-vis Middlebrook Retail and Leisure Park

	Advantages (Top 2 Responses)		Disadvantages (Top 2 Responses)	
	1	2	1	2
People interviewed in Bolton town centre	Better variety of shops / more choice (32%)	Closer to home / more convenient (10%)	Parking (cost / number of spaces) (14%)	Too far away / not as convenient (9%)

3.107 Pedestrians were then asked about their preferences in relation to the two destinations for food shopping, non-food shopping and eating out. The responses are set out in Table 3.10. Bolton town centre remains the destination of clear preference for non-food shopping and eating out, on the part of both Bolton town centre pedestrians and Middlebrook pedestrians. However, for food shopping the preference is more even, with Middlebrook pedestrians having a greater propensity to prefer Middlebrook for food shopping, whereas Bolton pedestrians have a marginally greater propensity to prefer the town centre for food shopping.

Table 3.10 Preference of Bolton Town Centre/Middlebrook Retail and Leisure Park for Different Types of Visit

Type of Visit	People Interviewed in Bolton TOWN CENTRE		People Interviewed at Middlebrook RP	
	Prefer Bolton Town Centre	Prefer Middlebrook	Prefer Bolton Town Centre	Prefer Middlebrook
Food Shopping	31%	30%	30%	38%
Non-Food Shopping	50%	22%	36%	31%
Drinking / Eating Out	43%	19%	43%	7%

3.108 Finally, pedestrians in both centres were asked to choose which statement most closely matches their perception of the relationship between the town centre and Middlebrook and the responses are summarised in Table 3.11. The modal perception - accounting for 42 per cent of town centre pedestrians and 32 per cent

of Middlebrook pedestrians - is that Middlebrook is generally complementary to Bolton town centre. The next most frequent perception is that Middlebrook competes with the town centre and has had a harmful effect on it. The third most frequent response is that Middlebrook and the town centre have had no effect on each other and operate independently. Only 7 per cent of respondents in both centres perceived that Middlebrook had actually helped to enhance the town centre.

Table 3.11 Perception of Relationship between Bolton Town Centre and Middlebrook Retail and Leisure Park

Perceptions	% of Total Responses in Each Centre	
	People Interviewed in Bolton Town Centre	People Interviewed at Middlebrook RP
Middlebrook RP is generally complementary to Bolton TC	42%	32%
Middlebrook RP competes with Bolton TC & has had a harmful effect on it	19%	32%
Middlebrook RP has helped to enhance Bolton TC	7%	7%
Middlebrook RP & Bolton TC have no effect on each other and operate independently	18%	27%
I have no idea how the two centres relate to each other	14%	3%

Conclusions

Performance of Bolton

- 3.109 We are concerned that most of the health check indicators suggest a decline in Bolton town centre's overall vitality and viability since the mid-1990s, as a reflection of the fierce competition from high quality developments in Manchester City Centre, the Trafford Centre, Middlebrook Retail Park and the high quality Grand Arcade development in Wigan town centre.
- 3.110 Nevertheless, we are encouraged that Bolton town centre has retained an attractive retail and civic core and an impressive cultural offer in the form of the Octagon Theatre, the Museum and Art Gallery, the Town Hall and the Albert Halls concert venue. Indeed, we note the high customer satisfaction ratings in relation to the quality of the town centre's buildings and townscape, and in relation to pedestrian vehicular safety issues.
- 3.111 Of most fundamental significance, however, are the ongoing regeneration initiatives and opportunities for high quality development across a range of town centre uses, including key flagship projects, such as Central Street, the Bolton Innovation Zone,

Church Wharf, the proposals for the Merchant's Quarter, the proposals for the Urban Village and the ongoing commitments in Little Bolton.

Performance of Farnworth

- 3.112 Although Farnworth town centre's position in the national rankings has remained stable since the mid 1990s and although prime yields have improved, the weight of the evidence from the indicators suggests a decline in the town centre's overall vitality and viability. Vacancies have risen and occupier demand seems to be low. Moreover, although Farnworth benefits from a healthy convenience goods sector, the comparison goods sector is limited and very much focussed at the discount end of the market. Of most concern, however, is the relatively poor state of the environment of the centre and the need for substantial investment in refurbishing and modernising the precinct.
- 3.113 Moreover, the survey of pedestrians suggests that there is room for improvement across a whole range of environmental and accessibility issues and the overall customer satisfaction rating is very much one of being 'satisfactory', rather than on a more positive response.
- 3.114 We note, however, that there is an extant planning consent (ref 77546/07) for the redevelopment and refurbishment of Farnworth Market and part of the Precinct, implementation of which will improve not only the centre's retail offer, but also its environmental conditions, thereby helping to reduce levels of anti-social behaviour that is caused by the open aspect of the current market.

Performance of Horwich

- 3.115 Despite the recent improvement in Horwich's position in the national retail rankings, there are indications of a decline in the centre's overall vitality and viability. The convenience and service offer is good, but the comparison sector offer is very limited - even more so than in Farnworth - and it is focussed on the discount end of the market. Moreover, vacancies have risen since the most recent GOAD survey, with some of the vacant units in prominent locations; operator demand is very limited; and footfall has declined.
- 3.116 Horwich town centre achieves quite a good customer satisfaction rating in relation to the cleanliness of the streets, personal safety issues, and the quality of its buildings. Horwich also scores well in relation to the location of, and security of, its car parks and its bus stops. Nevertheless, it is clear that the environment of the centre would benefit from some enhancement, particularly the Market Hall which appears to be in a state of disrepair. Moreover, the centre lacks a focal point, with

the residential uses within the town centre boundary diluting the character of the shopping environment in parts of the centre.

- 3.117 We anticipate, however, that both Horwich town centre and Middlebrook Retail Park will benefit from the redevelopment of the 40 hectare Horwich Locomotive Works site, which will ultimately deliver around 1,600 new houses on half the site, with the other half developed for a range of employment uses.

Performance of Westhoughton

- 3.118 Overall, we conclude that Westhoughton is a pleasant, attractive, healthy town centre. Westhoughton serves, primarily, a localised role, in meeting residents' day-to-day retail and service needs. The centre contains a number of small restaurants and bars, including a JD Wetherspoon outlet. The environment of the centre is pleasant and generally well-maintained, and the centre offers a range of retail units, from small converted properties, to medium-sized purpose-built units. Although the convenience offer of Westhoughton is somewhat limited (with no major supermarket at present), this will be addressed following the approval of planning permission for a Sainsbury's supermarket on the edge of the centre.
- 3.119 We note that Westhoughton achieves a good customer satisfaction rating in relation to the cleanliness of its shopping streets and personal safety issues and that it also scores well in relation to the location of its train station, the location of its bus stops and the location and security of its car parks.

Performance of Little Lever

- 3.120 Little Lever is a small, linear centre, which performs an essentially localised role, catering primarily for service and top-up food shopping needs. However, our healthcheck has identified several indicators of decline in Little Lever, including a very high vacancy rate, low and static Zone A retail rents, limited operator demand for representation in the centre, and a relatively poor environment. Even the precinct, which could potentially form a focal point of the centre, lacks character and would benefit from comprehensive modernisation. However, despite the existence of a large number of vacant units, these are small and dispersed through the centre so that there are no obvious development opportunities for meeting the requirements of an operator such as Aldi. Thus, the focus in the future may well relate to consolidation and enhancement initiatives.
- 3.121 Indeed, we note that Little Lever already scores very low customer satisfaction ratings in relation to the cleanliness of its shopping streets, personal safety issues and shelter from the weather. Nevertheless, the customer satisfaction rating with the retail offer in Little Lever is high, perhaps as a result of the recent introduction of

Tesco Metro. Little Lever also achieves good satisfaction ratings in relation to the location of its bus stops and the location and security of its car parks.

Performance of Middlebrook

- 3.122 The out-of-centre Middlebrook Retail Park achieves the best customer satisfaction ratings in relation to cleanliness, personal safety issues and shelter from the weather. Middlebrook also scores well in relation to the security of its car parks and absence of parking charges, and there is little vehicular/pedestrian conflict within the Park itself, other than on match days.
- 3.123 So far as the relationship between Bolton town centre and Middlebrook is concerned, the modal response from the survey of pedestrians is that Middlebrook is generally complementary to the town centre. Nevertheless a significant minority perceive that Middlebrook competes with the town centre and has had a harmful effect on it. Middlebrook's main advantages over the town centre relate to the availability of plentiful free car parking and Sunday openings, whereas its key disadvantage is its restricted choice of retail offer.

4 CURRENT PATTERNS OF RETAIL AND LEISURE SPENDING

Household Survey Methodology

- 4.1 Our assessment of current patterns of retail and leisure spending is based on a telephone survey of 1,804 households undertaken by NEMS Market Research in April 2008. The overall catchment area for the survey (Figure 4.1 in Volume 2) was defined on the basis of:
- i) evidence gained from the surveys of pedestrians in relation to their place of residence postcode;
 - ii) evidence from previous studies undertaken for the Council by CB Hiller Parker and Jones Lang La Salle; and
 - iii) consultations with officers of the Council.
- 4.2 Thus, the overall catchment area is wider than the administrative area of Bolton and it is disaggregated into 16 zones, based on postcodes, as listed in Section 2.1 of the separately bound report by NEMS (Volume 5). We ensured that there was a minimum of 100 successful respondents in each zone and the results were weighted according to the actual population in each zone, as set out in Section 2.2 of NEMS' report. An explanation of the statistical reliability of the survey sample is given on page iii of NEMS' report.
- 4.3 The survey questionnaire, which is reproduced in the penultimate section of NEMS' report, sought to establish:
- i) patterns of convenience goods spending, based on the location of:
 - o the shop where the household spends most money on food and groceries and the amount spent per week (questions 1 and 2);
 - o the shop where the household undertakes most 'top-up' food and groceries purchases and the amount spent per week (questions 3 and 4);
 - o spending on food and groceries in small shops for those who named supermarkets in i) and ii) above (questions 5, 6 and 7).
 - ii) patterns of comparison goods spending, based on the locations of the last two purchases of:
 - o clothes and shoes (questions 8 and 9);
 - o furniture, carpets or soft household furnishings (questions 10 and 11);
 - o DIY and decorating goods (questions 12 and 13);

- Domestic appliances such as washing machines, fridges, cookers, TVs, DVD players or computers (questions 14 and 15); and
 - Specialist items such as jewellery, photographic goods, musical instruments or sports equipment (questions 16 and 17).
- iii) the proportion of the household's total spending on non-food goods that is accounted for by:
- the internet;
 - paper catalogues; and
 - TV interactive shopping.
- iv) patterns of spending on leisure services based on the locations where the household spends most money on:
- restaurants/cafés;
 - pubs/bars/nightclubs;
 - cinema;
 - museums and art galleries;
 - family entertainment centres, such as ten pin bowling, skating and so on;
 - health and fitness;
 - gambling - casino/bingo/bookmaker; and
 - theatre/concerts.

4.4 The composite pattern of spending for convenience goods was achieved on the basis of the mean weekly household spend findings, as follows:

	Mean Weekly Household Spend	Percentage Weighting
Main Food & Groceries	£66.10	80.5%
Top-up Food & Groceries	£13.94	17.0%
Small Local Shops	£2.04	2.5%
All Convenience Goods	£82.08	100%

4.5 The composite pattern of spending for comparison goods was achieved on the basis of MapInfo expenditure data in relation to five categories of spend, as follows:

	Percentage Weighting
clothing and footwear	25.8%
furniture, carpets and soft furnishings	13.8%
DIY and decorating goods	10.6%
domestic appliances	16.3%
specialist/other goods	33.6%
All Comparison Goods	100.0%

The Overall Catchment Area

- 4.6 The overall catchment area is shown in Figure 4.1 in Volume 2; it comprises 16 zones, based on postcodes, as set out in Spreadsheet 1 of Volume 2. For convenience, we have labeled the zones as set out in Table 4.1. Thus, the majority or all of the population in Zones 1, 2, 3, 4, 5, 6, 8, 11, 14 and 15 live within the administrative area of Bolton; the majority of the population in Zones 10 and 12 live within the administrative area of Wigan; the majority of the residents of Zones 9 and 16 live within the administrative area of Salford; the majority of the population in Zone 7 live within the administrative area of Bury; and the majority of the population in Zone 13 live within the administrative area of Chorley.

Table 4.1 The Overall Catchment Area

Zone No	Zone Name	Predominant Administrative Area Based on Population
1	North West Bolton	Bolton
2	Central Bolton	Bolton
3	North East Bolton	Bolton
4	East Bolton	Bolton
5	South West Bolton	Bolton
6	Little Lever	Bolton
7	Radcliffe	Bury
8	Farnworth	Bolton
9	Walkden	Salford
10	Leigh and Atherton	Wigan
11	Westhoughton	Bolton
12	East Wigan	Wigan
13	Chorley	Chorley
14	Horwich & Middlebrook	Bolton
15	Egerton-Edgworth	Bolton
16	Swinton	Salford

- 4.7 The population of the catchment area in 2008, disaggregated by zone, is shown in the first row of figures in Spreadsheet 2. The overall population in the 2008 base year amounts to approximately 530,000 people, which is derived by applying the ONS Revised 2004 Population Projections (published in September 2007) to the mid-year 2005 zonal estimates provided by MapInfo/Oxford Economics¹².

¹² We have also tested an alternative scenario based on AGMA/OEF population projections

- 4.8 Thus, having explained the methodology employed in the survey of households, we turn to the findings.

Comparison Goods Spending Patterns

- 4.9 The per capita spend on comparison goods in 2008 (Spreadsheet 3) varies from £2,715 in Zone 2 (Central Bolton) to £3,480 in Zone 15 (Egerton/Edgworth). In comparison, the average UK spending on comparison goods in 2008 is £3,327 per capita and Spreadsheet 3 reveals that 14 of the 16 Zones in Bolton's catchment area have per capita comparison goods spending levels below the UK average.
- 4.10 The total amount of comparison goods spending for residents of the whole of the catchment area in 2008 is £1,624.5m (Spreadsheet 4), of which £106.5m, or 6.6 per cent, is spent on Special Forms of Trading (catalogue, TV and internet shopping, which we subsequently abbreviate as SFT).
- 4.11 The pattern of expenditure flows for the comparison goods sector as a whole, as revealed by the survey of households, is set out in Spreadsheets 5 and 6 (including SFT) and in Spreadsheets 7 and 8 (excluding SFT). In describing the current patterns of comparison shopping, we focus on Spreadsheets 5 and 6, which include SFT.
- 4.12 Table 4.2 - which is derived from the final column of Spreadsheet 6 in Volume 2 - reveals that Bolton town centre retains £504m, or 31 per cent, of the overall comparison goods expenditure of residents of the Figure 4.1 catchment area (Volume 2). Middlebrook Retail & Leisure Park retains £139m, or 9 per cent of the comparison goods expenditure of residents of the catchment area, and other town centres, retail parks and freestanding stores located within the overall catchment area (but not necessarily within Bolton Borough) account for a further £395m of the comparison goods expenditure of residents of the catchment area. Thus, overall, some 63.9 per cent of the expenditure on comparison goods of residents of the catchment area is spent in town, district and local centres, in retail parks and in freestanding stores which are located within the catchment area; this is known as the aggregate retention rate.
- 4.13 Table 4.2 also shows that some 23.4 per cent of comparison goods expenditure flows to town and city centres and retail parks in the buffer areas (shown in Figure 4.2 of Volume 2) located just outside the catchment area (mainly to Manchester City Centre, Bury town centre, the Trafford Centre and Wigan town centre); some 6.6 per cent is spent on SFT; and the balance of 6.1 per cent is spent in more distant locations, such as Preston.

Table 4.2 Broad Destination for Comparison Goods Expenditure

Broad Destination for Comparison Goods Expenditure	£m	%
Bolton town centre	503.9	31.0
Middlebrook Retail & Leisure Park	139.3	8.6
Other Centres/Retail Parks/Freestanding Stores within Catchment	395.2	24.3
Total Retained Expenditure	1,038.4	63.9
Buffer Zones Just Outside Catchment Area	379.5	23.4
SFT - leakage	106.5	6.6
Other more distant leakage	100.1	6.1
Total Leakage	586.1	36.1
TOTAL	1,624.5	100.0

- 4.14 The estimated comparison goods turnovers of the town centres located within the catchment area, prior to making any allowance for any expenditure inflow from those who are resident beyond the catchment area, are set out in the penultimate column of Spreadsheet 6, and are summarised in Table 4.3. The centres/retail parks which are *italicised* in Table 4.3, are located within the overall catchment area, but outside the administrative boundary of Bolton Council.
- 4.15 Table 4.3 confirms Bolton's status as a strategic centre, with a comparison goods turnover of approximately £504m, which fully justifies its inclusion in Policy W5 of the emerging RSS. Table 4.3 also shows the popularity of Middlebrook Retail Park as a location for comparison goods spending; it draws £139m from residents of the overall catchment area and it is the clear second destination for comparison goods purchases within Bolton's administrative area. Furthermore, we note that the third ranking location within Bolton's administrative area is the out-of-centre Bolton Gate Retail Park, with a turnover drawn from catchment area residents of £42.3m.

Table 4.3 Comparison Goods Expenditure Retained within the Catchment Area

Towns Within the Catchment Area	Comparison Goods Turnover Drawn from Catchment Area Residents (£m)
Bolton Town Centre	503.9
<i>Chorley Town Centre</i>	<i>75.2</i>
<i>Leigh Town Centre</i>	<i>67.5</i>
Horwich Town Centre *	*39.4
Farnworth Town Centre	23.2
<i>Walkden Town Centre</i>	<i>22.1</i>
<i>Swinton Town Centre</i>	<i>21.7</i>
<i>Atherton Town Centre</i>	<i>10.8</i>
<i>Radcliffe Town Centre</i>	<i>10.2</i>
Westhoughton Town Centre	6.7
Retail Parks and Freestanding Stores within the Catchment Area	Comparison Goods Turnover Drawn from Catchment Area Residents (£m)
Middlebrook Retail and Leisure Park	139.3
Bolton Gate Retail Park, Bolton	42.3
Trinity Retail Park, Bolton	11.8
<i>Parsonage Retail Park, Leigh</i>	<i>10.0</i>
Burnden Retail Park, Bolton	9.7
Ravenside/Manchester Road Retail Park, Bolton	**6.1

*We suspect that the estimated comparison goods turnover for Horwich town centre may include some turnover which should have been attributed to Middlebrook Retail & Leisure Park. However, NEMS has informed us that our suspicion cannot be verified, but confirms that the interviewers were fully aware of the separate existence of Middlebrook Retail Park.

** Included within 'Other Stores Zone 4' in Spreadsheet 6

- 4.16 Farnworth and Horwich justify their position as 'Local Town Centres' under Policy S3 of the UDP, although we suspect that the comparison goods turnover figure for Horwich town centre has been inflated by expenditure which should actually have been attributed to Middlebrook Retail Park. Westhoughton performs less well as a comparison goods destination and Little Lever achieves a comparison goods turnover of less than £2m.
- 4.17 The main destinations for leakage, again as shown in the penultimate column of Spreadsheet 6, are summarised in Table 4.4. There are five principle destinations for comparison goods expenditure leakage which, in order of importance, are Manchester City Centre, Bury town centre, e-tail/TV interactive sales, the Trafford Centre and Wigan town centre.

Table 4.4 Main Destinations for Comparison Goods Expenditure Leakage

Towns Outside the Catchment Area	Comparison Goods Expenditure Leakage (£m)
Manchester City Centre	102.4
Bury Town Centre	83.0
Wigan Town Centre	64.5
Preston City Centre	17.1
Retail Parks and Freestanding Stores Outside the Catchment Area	Comparison Goods Expenditure Leakage (£m)
The Trafford Centre	74.0
Robin Retail and Leisure Park, Wigan	11.2
E-tailing	63.6
Catalogue Shopping	28.9
TV/Interactive Shopping	14.0

- 4.18 The catchment area's retention level by zone (see Spreadsheet 5, '*Sub Total of Study Area*' row) varies from lows of 28.3 per cent in Zone 7 (Radcliffe), 34.7 per cent in Zone 12 (East Wigan) and 40.1 per cent in Zone 16 (Swinton), to highs of 80.4 per cent in Zone 8 (Farnworth), 81.2 per cent in Zone 5 (South-West Bolton), 83.4 per cent in Zone 2 (Central Bolton) and 85.3 per cent in Zone 6 (Little Lever). There are also reasonably high catchment area zonal retention levels of over 70 per cent for Zone 1 (North-West Bolton), Zone 4 (East Bolton), Zone 10 (Leigh and Atherton) and Zone 14 (Horwich and Middlebrook).
- 4.19 The localised retention rate - which is the proportion of expenditure on comparison goods available to residents in a specific zone which is spent in town centres and stores located within that zone - is highest for Zone 2 (Central Bolton), at 71.2 per cent (see Spreadsheet 5, '*Zone 2*' column and '*Sub Total Zone 2*' row). The next highest localised retention rates for comparison goods are for Zone 13 (Chorley), which has a localised retention rate of 52.4 per cent, Zone 10 (Leigh and Atherton) which has a localised rate of 47.8 per cent and Zone 14 (Middlebrook & Horwich) which has a localised retention rate of 40.6 per cent.

Comparison Goods Market Shares

Bolton Town Centre

- 4.20 Figure 4.3 in Volume 2 presents a zonal analysis of Bolton town centre's comparison goods market shares, based on the findings set out in Spreadsheet 5. The town centre secures a comparison goods market share in excess of 40 per cent

in 7 of the 16 survey zones. These seven zones form the most densely developed part of the Bolton urban area and they can be considered to represent Bolton town centre's primary catchment area; indeed, Spreadsheet 6 reveals that Bolton town centre derives two-thirds of its turnover from these seven zones. Moreover, the town centre's market share exceeds 60 per cent in Zone 2 (Central Bolton) and in Zone 5 (South-West Bolton), and it exceeds 50 per cent in Zone 1 (North-West Bolton), Zone 4 (East Bolton) and Zone 6 (Little Lever).

- 4.21 Bolton town centre also achieves a market share of between 20 per cent and 40 per cent in a further 4 zones, which represent its secondary catchment area; these are the Walkden, Westhoughton, Horwich & Middlebrook and Egerton-Edgworth zones which cover the remainder of the Borough, together with areas to the north and south. Thus, Bolton town centre has a comparison goods market share of at least 20 per cent throughout its administrative area.
- 4.22 Bolton town centre achieves a market share of 10 to 20 per cent in the Radcliffe, Leigh & Atherton and Swinton zones; these form the tertiary catchment area shown in orange in Figure 4.3 in Volume 2. However, Bolton town centre's comparison goods market share falls to below 10 per cent in the Chorley and East Wigan zones, shown in yellow in Figure 4.3 in Volume 2.

Middlebrook Retail & Leisure Park

- 4.23 Spreadsheet 5 reveals that Middlebrook Retail and Leisure Park secures a maximum comparison goods market share of 20 per cent in Zone 14 (Horwich & Middlebrook). Middlebrook secures a market share of between 10 and 20 per cent in a further three zones in the western part of the catchment, these being Zone 1 (North West Bolton), Zone 11 (Westhoughton) and Zone 12 (East Wigan). However, in all of the other 12 zones Middlebrook's comparison goods market share is less than 10 per cent, with particularly low shares in the zones located in the eastern part of the overall catchment area.

Farnworth Town Centre

- 4.24 Farnworth town centre's comparison goods market share reaches a maximum of 12 per cent in its local Zone 8 (Spreadsheet 5). The only other zones from which Farnworth town centre derives any material level of comparison goods expenditure are Zone 6 (Little Lever) and Zone 9 (Walkden), for which Farnworth secures market shares of 3.47 per cent and 4.11 per cent, respectively.

Horwich Town Centre

- 4.25 The survey findings set out in Spreadsheet 5 suggest that Horwich town centre secures a comparison goods market share of 20 per cent in Zone 14. We suspect, however, that the survey derived turnover estimate for Horwich town centre, of £39m, has been exaggerated and that some of the respondents who gave Horwich as their comparison goods spending destination actually meant the Middlebrook Retail Park. Furthermore, we note that Horwich town centre draws materially from only one further zone, that being Zone 11 (Westhoughton) from which it secures a market share of 5 per cent.

Westhoughton Town Centre

- 4.26 Spreadsheet 6 reveals that Westhoughton town centre draws 77 per cent of its comparison goods turnover from residents of its local Zone 11, for which Spreadsheet 5 reveals a market share of 5.81 per cent.

Little Lever Town Centre

- 4.27 Spreadsheet 6 reveals that Little Lever town centre attracts a comparison turnover of approximately £2m, almost all of which is secured from residents of its local Zone 6, for which Spreadsheet 5 reveals a market share of just 2.61 per cent.

Overlapping Comparison Goods Catchments

- 4.28 Figure 4.4 in Volume 2 and Table 4.5 present an analysis of 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 per cent and 40 per cent. Thus, Figure 4.4 in Volume 2 and Table 4.5 reveal that:
- i) Bolton town centre is the un-opposed dominant centre in four zones (solid red in Figure 4.4 of Volume 2);
 - ii) Bolton town centre is the dominant centre in a further three zones, but in these zones it is competing with a centre which has subsidiary influence, ie Zones 1, 3 and 8 where the subsidiary influence centres are Middlebrook, Bury and Farnworth, respectively;
 - iii) Chorley is the un-opposed dominant centre in Zone 13 (solid green in Figure 4.4 of Volume 2);
 - iv) Bury is the dominant centre in Zone 7, but with Bolton having a subsidiary influence in this zone;

- v) for seven zones there is no dominant centre - these are the overlapping hatched areas in Figure 4.4 of Volume 2, with no solid colour, and it is these zones for which the competition for market share is most intense.

Table 4.5 Dominant Comparison Goods Centres and Centres of Subsidiary Influence

Zone	Dominant Centre (Market Share 40%+)	Centres of Subsidiary Influence (Market Share 10% to 39%)
1	Bolton	Middlebrook
2	Bolton	
3	Bolton	Bury
4	Bolton	
5	Bolton	
6	Bolton	
7	Bury	Bolton
8	Bolton	Farnworth
9	-	Bolton/Manchester/Leigh
10	-	Leigh/Bolton
11	-	Bolton/Middlebrook
12	-	Wigan/Middlebrook
13	Chorley	
14	-	Bolton/Middlebrook/Horwich
15	-	Bolton
16	-	Manchester/Trafford Centre/Bolton/Swinton

- 4.29 We suspect, therefore, that Bolton's primary catchment area has shrunk since the late 1980s as a result of increased competition from Manchester City Centre, the Trafford Centre, Middlebrook and the high quality Grand Arcade development in Wigan town centre.

Comparison Goods Sub-sectors

- 4.30 We now turn to the pattern of shopping for various comparison goods sub-sectors, these are:
- clothes and shoes, which account for £419m of the comparison goods spending of residents of the catchment, of which 36 per cent is spent in Bolton town centre;
 - furniture, carpets, and soft household furnishings, which account for £224m of the comparison goods spending of residents of the catchment, of which 30 per cent is spent in Bolton town centre;

- DIY and decorating goods, which account for £172m of the comparison goods spending of residents of the catchment, of which 20 per cent is spent in Bolton town centre;
- domestic appliances, which account £265m of the comparison goods spending of residents of the catchment, of which 27 per cent is spent in Bolton town centre; and
- specialist comparison items (such as jewellery, photographic items, sports equipment and musical instruments), which account for £546m of the comparison goods spending of residents of the catchment, of which 32 per cent is spent in Bolton town centre

Clothes and Shoes

- 4.31 Overall, 59.4 per cent of the expenditure on clothes and shoes of residents of the catchment area is spent in town centres, retail parks and in freestanding stores which are located within the catchment area (see final column of Spreadsheet 9b); this is a relatively modest retention level for basic comparison needs.
- 4.32 Bolton town centre accounts for £152.8m of the £248.9m expenditure on clothes and shoes which is retained in the overall catchment area, followed by Middlebrook Retail and Leisure Park (£27.8m), and then Chorley and Leigh town centres (at £16.2m and £14.2m, respectively).
- 4.33 The main leakage destinations for clothes and shoes are shown in Table 4.6

Table 4.6 Leakage Destinations for Clothes and Shoes:

Towns Outside the Study Area & Other Leakage Destinations	Clothes & Shoes Expenditure (£m)
Manchester City Centre	38.8
The Trafford Centre	32.8
Bury Town Centre	23.6
Wigan Town Centre	22.6
Other Stores, Outside Buffer Area	21.1
SFT	15.4
Preston City Centre	5.7

Furniture, Carpets and Soft Furnishings

- 4.34 Overall, 71.0 per cent of the expenditure on furniture, carpets and soft furnishings of residents of the catchment area is spent in town centres, retail parks and in freestanding stores which are located within the catchment area (see final column of Spreadsheet Table 9d); this is a reasonably high retention level.

- 4.35 Bolton town centre accounts for £68.1m of the £159.1m expenditure on furniture and soft household furnishings which is retained in the catchment area, followed by Middlebrook Retail and Leisure Park (£35.8m), and then Chorley and Leigh town centres (£11.2m and £9.3m, respectively). Horwich is the only other town centre within the catchment area to achieve a spending level on these categories of goods which is in excess of £5m.
- 4.36 The main leakage destinations for furniture, carpets and soft furnishings are shown in Table 4.7:

Table 4.7 Leakage Destinations for Furniture, Carpets and Soft Furnishings

Towns Outside the Study Area & Other Leakage Destinations	Furniture, Carpets & Soft Furnishings Expenditure (£m)
Manchester City Centre	11.5
SFT	10.2
Bury Town Centre	7.9
Other Stores, Outside Buffer Area	7.2
Wigan Town Centre	5.1
IKEA, Warrington	4.7
The Trafford Centre	3.0

DIY and Decorating Goods

- 4.37 Overall, 82.7 per cent of the expenditure on DIY and decorating goods of residents of the catchment area is spent in town centres, retail parks and in freestanding stores which are located within the catchment area (see final column of Spreadsheet Table 9f); this is a high level of retention.
- 4.38 The main destinations for DIY and decorating expenditure within the catchment area are Bolton town centre (£34.8m), Bolton Gate Retail Park, (£28.1m), Leigh town centre (£12.3m), Chorley town centre (£11.9m) and Middlebrook Retail and Leisure Park (£8.6m).
- 4.39 The main leakage destinations for DIY and decorating goods are shown in Table 4.8:

Table 4.8 Leakage Destinations for DIY and Decorating Goods

Towns Outside the Study Area & Other Leakage Destinations	DIY and Decorating Goods Expenditure (£m)
Bury Town Centre	6.9
Wigan Town Centre	4.0
Other Stores, Outside Buffer Area	3.2
Crostones Retail Park, Bury	2.6
Robin Retail and Leisure Park, Wigan	2.3

Domestic Appliances

- 4.40 Overall, 71.6 per cent of the expenditure on domestic appliances of residents of the catchment area is spent in town centres, retail parks and in freestanding stores which are located within the catchment area (see final column of Spreadsheet Table 9h); again this is a reasonably high level of retention.
- 4.41 The main destinations for expenditure on domestic appliances within the catchment area are Bolton town centre (£71.9m), Middlebrook Retail and Leisure Park (£35.1m), Chorley town centre (£13.9m), Leigh town centre (£10.4m), Bolton Gate Retail Park, (£9.6m), and Horwich town centre (£9.3m).
- 4.42 The main leakage destinations for expenditure on domestic appliances are shown in Table 4.9:

Table 4.9 Leakage Destinations for Domestic Appliances

Towns Outside the Study Area & Other Leakage Destinations	Expenditure on Domestic Appliances (£m)
SFT	23.3
Bury Town Centre	10.8
Manchester City Centre	8.5
Wigan Town Centre	5.7

Specialist Comparison Items

- 4.43 Overall, 54.9 per cent of the expenditure on specialist comparison goods items of residents of the catchment area is spent in town centres, retail parks and in freestanding stores which are located within the catchment area (see final column of Spreadsheet Table 9j); this is a relatively modest level of retention.
- 4.44 The main destinations for expenditure on specialist comparison items within the catchment area are Bolton town centre (£176.4m), Middlebrook Retail and Leisure

Park (£32.1m), Chorley town centre (£22.1m), Leigh town centre (£19.1m), Horwich town centre (£13.0m) and Walkden town centre (£11.1m).

- 4.45 The main leakage destinations for expenditure on specialist comparison goods are shown in Table 4.10, which shows that SFT accounts for the highest leakage of expenditure on specialist goods items, followed by Manchester City Centre, Bury town centre, the Trafford Centre and Wigan town centre.

Table 4.10 Leakage Destinations for Specialist Comparison Items

Towns Outside the Study Area & Other Leakage Destinations	Expenditure on Specialist Comparison Goods (£m)
SFT	57.0
Manchester City Centre	41.8
Bury Town Centre	33.6
The Trafford Centre	32.2
Wigan Town Centre	26.8
Abroad	18.2
Other Stores, Outside Buffer Area	17.9

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

- 4.46 Table 4.11 presents a summary of retention and leakage for each of the five comparison goods sub-sectors. Bolton Town Centre's sub-sector shares (first row of percentages) is highest for clothes and shoes, at 36 per cent, followed by the specialist and other comparison goods sectors, at 32 per cent. In contrast, Middlebrook's highest shares (second row of percentages) are in the furniture and electrical sub-sectors. Similarly, other centres, retail parks and freestanding stores within the catchment, secure a high percentage of the DIY and electrical sub-sectors (third row of percentages).
- 4.47 It is disappointing, however, that the overall retention rate (fourth row of percentages in Table 4.11) is lowest for clothes and shoes (59 per cent) and for specialist items (55 per cent). This is an important piece of evidence which suggests a need to promote quality developments - such as the Market Hall redevelopment - which are targeted at higher value middle and up-market comparison retailers. We have noted, already, that the Market Hall redevelopment has secured lettings to the likes of H&M, Zara, Warehouse, Lush and Principles, but our subsequent analysis in Section 5 (see Table 5.9, in particular), confirms that there are very many high quality comparison facias which are not yet represented in Bolton town centre, but are well represented at the Trafford Centre.

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

	Clothes & Shoes	Furniture etc	DIY	Electrical	Specialist	All Comparison
Retained by 'Bolton town centre'	36%	30%	20%	27%	32%	31%
Retained by Middlebrook	7%	16%	5%	13%	6%	9%
Retained by 'Other Centres/ Retail Parks/ Freestanding Stores within catchment'	16%	25%	58%	32%	17%	24%
Total Retained Expenditure	59%	71%	83%	72%	55%	64%
Buffer Zones						
Just Outside	30%	17%	15%	17%	27%	23%
SFT leakage	4%	8%	0%	9%	10%	7%
Other more distant leakage	7%	5%	2%	3%	8%	6%
Total Leakage	41%	29%	17%	28%	45%	36%
TOTAL	100%	100%	100%	100%	100%	100%

Patterns of Convenience Goods Expenditure

- 4.48 The per capita spend on convenience goods in 2008 (Spreadsheet 13) varies from lows of £1,492 in Zone 5 (South-West Bolton) and £1,497 in Zone 2 (Central Bolton) to highs of £1,711 in Zone 15 (Egerton-Edgworth) and £1,728 in Zone 16 (Swinton). In comparison, the average UK spending on convenience goods in 2008 is £1,676 per capita and Spreadsheet 13 reveals that 13 of the 16 Zones in Bolton's catchment area have convenience goods spending levels below the UK average.
- 4.49 The total amount of convenience goods spending for residents of the whole catchment area in 2008 is £856.9m (Spreadsheet 14), of which £24.0m, or 2.8 per cent, is spent on Special Forms of Trading (Catalogue, TV and internet shopping, which we subsequently abbreviate as SFT).
- 4.50 The pattern of expenditure flows for the convenience goods sector as a whole, as revealed by the survey of households, is set out in Spreadsheets 15 and 16, having excluded SFT. These are the spreadsheets upon which we focus in describing current patterns of convenience goods expenditure.
- 4.51 Table 4.12 - which is derived from the final column of spreadsheet 16 in Volume 2 - reveals that Bolton town centre retains £82m, or 10 per cent, of the overall convenience goods expenditure of residents of the Figure 4.1 catchment area (Volume 2). Other town centres and freestanding stores located with the catchment

area account for a further £680m of the convenience goods expenditure of residents of the catchment area. Thus, overall, some £762m, or 92 per cent, of the expenditure on convenience goods of residents of the catchment area is spent in town, district and local centres and in freestanding stores which are located within the catchment area; this is known as the aggregate retention rate (See Spreadsheet 16, final column, Sub-Total of Study Area row). A further 8.1 per cent of convenience expenditure flows to stores in the nearby buffer zones shown in Figure 4.2 of Volume 2 and long distance leakage (excluding SFT) is limited to 0.5 per cent, as might be expected.

Table 4.12 Broad Destination for Convenience Goods Expenditure

Broad Destination for Convenience Goods Expenditure	£m	%
Bolton town centre	82	10
Other Centres and freestanding stores within the catchment	680	82
Total Retained Expenditure	762	92
Buffer Zones Just Outside Study Area	67	8
Other More Distant Locations	4	1
Total Leakage	71	8
TOTAL	833	100%

- 4.52 The estimated convenience goods turnovers of the foodstores located within the catchment area, prior to making any allowance for any expenditure inflow from those who are resident beyond the catchment area, are set out in the penultimate column of Spreadsheet 16, and are summarised in Table 4.13. The foodstores which are *italicised* in Table 4.13, are located within the Study Area, but outside the administrative boundaries Bolton Borough itself.
- 4.53 Thus, the 18 large superstores located within the catchment area, as listed in Table 4.13, collectively account for 76 per cent of the aggregate convenience goods expenditure of the catchment area's residents. This reflects the polarisation trend experienced in the convenience goods sector, whereby there has been continued growth in the aggregate market share of the top four operators - Tesco, Asda, J Sainsbury and Wm Morrison - at the expense of smaller supermarket operators and independent retailers.

Table 4.13 Convenience Goods Expenditure Retained within the Catchment Area

Foodstores Within the Overall Catchment Area	Convenience Goods Turnover Drawn from Catchment Area Residents (£m)
Tesco Extra, Mansell Way, Horwich	64.2
<i>Tesco, Ellesmore Shopping Centre, Walkden</i>	<i>54.7</i>
Asda, Brackley Street, Farnworth	47.7
Wm Morrison, Mornington Road, Bolton	47.5
Asda, Astley Bridge, Bolton	43.2
<i>Asda, Pilkington Way, Radcliffe</i>	<i>43.2</i>
Wm Morrison, Lea Gate, Harwood, Bolton	33.8
Wm Morrison, Blackhorse Street, Bolton	30.8
Asda, Manchester Road, Bolton	30.8
Asda, The Linkway, Horwich	29.9
<i>Wm Morrison, Brooke Street, Chorley</i>	<i>29.8</i>
<i>Asda, Atherleigh Way, Leigh</i>	<i>28.5</i>
<i>Tesco, Crabtree Lane, Atherton</i>	<i>27.7</i>
<i>Tesco, Cross Street, Hindley, Wigan</i>	<i>26.8</i>
J Sainsbury, Trinity Street, Bolton	26.6
<i>Tesco Extra, Akhurst Industrial Units, Chorley</i>	<i>26.0</i>
<i>Wm Morrison, Swinton Hall Road, Swinton</i>	<i>25.5</i>
<i>Wm Morrison, Makerfield Way, Ince</i>	<i>16.4</i>

4.54 The main leakage destinations for convenience goods expenditure, again as shown in the penultimate column of Spreadsheet 16, are set out in Table 4.14:

Table 4.14 Main Destinations for Convenience Goods Expenditure Leakage

Stores Outside the Study Area	Convenience Goods Expenditure Leakage (£m)
Other Stores in Buffer 4 of Fig 4.2 (ie Salford & Manchester)	14.8
Tesco, Woodfield Retail Park, Bury	13.4
Bury Town Centre	11.6
Wigan Town Centre	10.5
Other Stores in Buffer 3 of Fig 4.2 (ie Bury)	6.8

4.55 The catchment area's retention level by zone (see Spreadsheet 15, 'Sub Total of Study Area' row) varies from lows of 72.6 per cent in Zone 7 (Radcliffe) and 78.6 per cent in Zone 12 (East Wigan), to a high of 100.0 per cent in Zone 1 (North-West Bolton). There are also very high catchment area zonal retention levels of over 90 per cent for Zone 2 (Central Bolton), Zone 4 (East Bolton), Zone 5 (South-West Bolton), Zone 6 (Little Lever), Zone 8 (Farnworth), Zone 9 (Walkden), Zone 10

(Leigh and Atherton), Zone 11 (Westhoughton), Zone 13 (Chorley), Zone 14 (Horwich and Middlebrook) and Zone 15 (Egerton-Edgworth).

- 4.56 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 town centres and stores located within that zone - is highest for Zone 13 (Chorley), which has a localised retention rate of 87.5 per cent (see Spreadsheet 15, 'Zone 13' column and 'Sub Total Zone 13' row and Table 4.15). The next highest localised retention rates for convenience goods are for Zone 10 (Leigh and Atherton), which has a localised retention rate of 87.3 per cent (Zone 14 Horwich and Middlebrook which has a localised retention rate of 75.7 per cent and the Bolton Zones 1 to 5, which have a collective local retention of 74.5 per cent).

Table 4.15 Localised Convenience Goods Retention Levels

Zones	Area	Localised Convenience Goods Retention Rate (%)
1 to 5	Bolton	74.5
6	Little Lever	38.4
7	Radcliffe	59.6
8	Farnworth	72.4
9	Walkden	62.7
10	Leigh & Allerton	87.3
11	Westhoughton	14.3
12	East Wigan	64.7
13	Chorley	87.5
14	Horwich & Middlebrook	75.7
15	Egerton-Edgworth	9.8
16	Swinton	41.5

- 4.57 However, despite the fact that most convenience goods expenditure is retained by stores located within the overall catchment area, the survey findings (summarised in Table 4.15) indicate that there are three parts of the catchment where the localised retention rate is low; these are:
- i) Egerton-Edgworth (Zone 15), where the localised convenience goods retention rate is just 9.8 per cent and where most residents travel to the Asda at Astley Bridge, or to the Wm Morrison store at Lea Gate, Harwood;
 - ii) Westhoughton (Zone 11), where the localised retention rate is just 14.3 per cent, and where most residents travel to the Asda or Tesco stores at Middlebrook; and

iii) Little Lever (Zone 6), where the localised retention rate is 38.4 per cent, but with the Asda at Burnden Park accounting for two-thirds of this retention rather than Little Lever town centre. Thus, many residents in Zone 6 travel to the stores in Central Bolton, to the Asda at Burnden and to the Asda stores in Radcliffe and Farnworth.

4.58 Thus, the survey findings suggest that there is a need for an improved convenience offer in Egerton, Westhoughton and Little Lever and we endorse the extant consent for a J Sainsbury store at Westhoughton.

Convenience Goods Market Shares

4.59 As stated earlier, we have found that the 18 superstores located within the overall catchment area account for 76 per cent of the aggregate convenience goods expenditure of catchment area residents. In Table 4.16, we present an analysis of convenience goods market shares, which shows dominant stores with a zonal market share of over 30 per cent and stores with shares between 10 and 30 per cent, which have subsidiary influence.

4.60 The analysis in Table 4.16 shows that:

- i) Only four of the 16 survey zones lack a dominant store with a market share of over 30 per cent; these are Zone 4 (East Bolton), Zone 5 (South-West Bolton), Zone 6 (Little Lever) and Zone 11 (Westhoughton).
- ii) Only one zone has two dominant stores, which is Zone 10 (Leigh and Atherton).
- iii) Residents of Zone 4 (East Bolton) have a choice of four superstores, but only two operators - Asda and Wm Morrison.
- iv) Residents of Zone 5 (South-West Bolton) have a choice of three different superstore operators - Wm Morrison, J Sainsbury and Asda.
- v) The highest individual zonal market shares are enjoyed by:
 - o Asda at Farnworth, which accounts for 63.6 per cent of the convenience goods expenditure of the residents of Zone 8;
 - o Asda at Radcliffe, which accounts for 55.1 per cent of the convenience goods expenditure of the residents of Zone 7;
 - o Tesco at Walkden, which accounts for 51.9 per cent of the expenditure of residents of Zone 9;
 - o Wm Morrison at Harwood, which accounts for 42.7 per cent of the convenience goods expenditure of residents of Zone 3; and

- the Tesco Extra at Mansell Way, Horwich, which accounts for 42.7 per cent of the convenience goods expenditure of the residents of Zone 14.

Table 4.16 Market Shares for Convenience Goods Dominant Stores and Stores with Subsidiary Influence

Zone	Dominant Stores (Market Share of 30%+)	Subsidiary Stores (Market Share 10 to 30%)
1	Wm Morrison, Morington Rd, Bolton	Asda, Astley Bridge, Bolton Tesco, Mansell Way, Horwich
2	Wm Morrison, Morington Rd, Bolton	Asda, Astley Bridge, Bolton
3	Wm Morrison, Lea Gate, Harwood	Bury Town Centre
4		Wm Morrison, Blackhorse St, Bolton Asda, Manchester Rd, Burnden Wm Morrison, Lea Gate, Harwood Asda, Astley Bridge, Bolton
5		Wm Morrison, Blackhorse St, Bolton J Sainsbury, Trinity St, Bolton Asda, Manchester Rd, Burnden
6		Asda, Manchester Rd, Burnden Little Lever Town Centre Asda, Pilkington Way, Radcliffe
7	Asda, Pilkington Way, Radcliffe	Tesco, Woodfield Retail Park, Bury
8	Asda, Brackley Street, Farnworth	
9	Tesco, Walkden	
10	Tesco, Atherton Asda, Leigh	
11		Asda, The Linkway, Middlebrook Tesco, Mansell Way, Middlebrook Westhoughton Town Centre
12	Tesco, Hindley	Wm Morrison, Makerfield Way, Ince Wigan Town Centre
13	Tesco, Chorley Wm Morrison, Chorley	Chorley Town Centre
14	Tesco, Mansell Way, Middlebrook	Horwich Town Centre Asda, The Linkway, Middlebrook
15	Asda, Astley Bridge, Bolton	Wm Morrison, Lea Gate Harwood
16	Wm Morrison, Swinton	Tesco, Walkden

4.61 Nevertheless, despite the very high market shares achieved by individual stores in Farnworth, Radcliffe and Walkden, there is no part of the overall catchment area for which an individual operator's share within a 10 minute travel time isochrone would exceed the 60 per cent threshold set out by the Competition Commission. As a

consequence, there is little likelihood, in the short term, of any failure of the competition test.

- 4.62 The survey findings confirm that most convenience shopping is undertaken on a highly localised basis. Indeed, Spreadsheet 15 reveals that only four stores within the catchment area have market shares of over 10 per cent in three or more zones; these are: the Asda store at Astley Bridge; the Wm Morrison store at Lea Gate, Harwood, Bolton; the Asda store at Manchester Road, Burnden Park, Bolton; and the Tesco Extra at Mansell Way, Horwich (Middlebrook Retail and Leisure Park).
- 4.63 Table 4.17, which is derived from Spreadsheet 16, Volume 2, sets out the zones from which each of the 18 superstores draws most of their convenience goods trade and the proportion of turnover accounted for by these main sources.

Table 4.17 Catchment Area Superstores - Main Sources of Convenience Trade

Superstore	Main Sources of Trade (Zones)	Proportion of Turnover drawn from Main Sources of Trade
Tesco Extra, Mansell Way, Horwich	1, 11 & 14	70%
Tesco, Walkden	9 & 16	94%
Asda, Farnworth	8	64%
Wm Morrison, Morington Road	1 & 2	65%
Asda, Astley Bridge	1, 2 & 15	80%
Asda, Radcliffe	7	80%
Wm Morrison, Lea Gate, Harwood	3	67%
Wm Morrison, Blackhorse St, Bolton	2, 3, 4, 5 & 6	82%
Asda, Manchester Road, Burnden	2, 4, 5, 6 & 8	87%
Asda, Middlebrook	5, 11 & 14	81%
Wm Morrison, Chorley	13	78%
Asda, Leigh	10	69%
Tesco, Atherton	10	81%
Tesco, Hindley	12	93%
J Sainsbury, Trinity Street, Bolton	2, 3, 4, 5 & 6	75%
Tesco, Chorley	13	95%
Wm Morrison, Swinton	16	98%
Wm Morrison, Ince	12	80%

Source: Spreadsheet 16, Volume 2

- 4.64 Thus, the stores with the widest pattern of convenience trade draw are those located in or close to Bolton town centre - that is, the J Sainsbury at Trinity Street, the Asda at Burnden, the Wm Morrison at Blackhorse Street, the Asda at Astley Bridge and the Wm Morrison at Morington Road.

Pattern of Spending on Leisure Services

4.65 The telephone survey of households also included a number of questions that asked residents of the overall catchment area where they spent most money in relation to various types of leisure services, as follows:

- i) restaurants and cafés,
- ii) pubs, bars and nightclubs;
- iii) cinemas;
- iv) museums and art galleries;
- v) family entertainment centres (ie ten pin bowling, skating and so on)
- vi) health and fitness centres;
- vii) bingo/casinos/bookmakers; and
- viii) theatres/concerts.

4.66 The most popular destinations for these different activities for residents of each survey zone, is set out in Table 4.18.

Restaurants and Cafés

4.67 Almost 80 per cent of households across the catchment area undertake visits to restaurants and cafés. The most popular destinations, by far, are Bolton town centre (26 per cent) and Manchester City Centre (11 per cent). Chorley and Wigan town centres are the next most popular destinations each accounting for 4 per cent of respondents.

4.68 Bolton town centre is the most popular destination for visits to restaurants and cafés on the part of the residents of Zones 1, 2, 3, 4, 5, 6, 8, 11 and 15. The most popular destinations for residents of Zone 7 are Bury and Manchester. For residents of Zone 9, Manchester is the most popular restaurant destination, whereas for residents of Zone 10, Leigh is the most popular destination. For residents of Zone 12, Wigan is the most popular destination; for residents of Zone 13, it is Chorley; for residents of Zone 14, it is Horwich; and for residents of Zone 16, it is Manchester. These patterns reflect the fairly localised nature of visits to restaurants and cafés.

4.69 Horwich/Middlebrook is the most popular restaurant destination for residents of Zone 14 (26 per cent), but is closely followed by Bolton town centre (24 per cent).

4.70 Farnworth town centre is the most popular restaurant destination for 10 per cent of the residents of Zone 8 and Westhoughton town centre is the most popular restaurant destination for 20 per cent of the residents of Zone 11. However Little

Lever town centre is the favoured restaurant destination for only one per cent of the residents of its local Zone 6 and it clearly does not perform well in this respect.

Table 4.18 Most Popular Destinations for Expenditure on Leisure Services

Survey Zone	Main Destination by Category of Leisure Pursuit							
	Restaurants /Cafes	Bars/ Clubs & Pubs	Cinema	Museums & Art Galleries	Family Entertainment	Health & Fitness	Bingo, Casino & B'maker	Theatre & Concerts
1	Bolton	Bolton	Valley LP	Bolton	M'brook	Bolton	Bolton	Mcr
2	Bolton	Bolton	Valley LP	Bolton	M'brook	Bolton	Bolton	Mcr
3	Bolton	Bolton	Valley LP	Mcr	Bury	Bolton	Bolton	Mcr
4	Bolton	Bolton	Valley LP	Bolton	M'brook	Bolton	Bolton	Mcr
5	Bolton	Bolton	Valley LP	Bolton	M'brook	Bolton	Bolton	Mcr
6	Bolton	Bolton	Valley LP	Bolton	M'brook	Bolton	Bolton	Mcr
7	Bury	Bury	Valley LP	Mcr	Bury	Radcliffe	Bolton	Mcr
8	Bolton	Bolton	Valley LP	Bolton	M'brook	Bolton	Walkden	Mcr
9	Mcr	Mcr	Valley LP	Mcr	M'brook	Walkden	Walkden	Mcr
10	Leigh	Leigh	M'brook	Mcr	M'brook	Atherton	Leigh	Mcr
11	Bolton	West-houghton	M'brook	Mcr	M'brook	Bolton	West-houghton	Mcr
12	Wigan	Wigan	M'brook	Mcr	Wigan	Wigan	Wigan	Mcr
13	Chorley	Chorley	M'brook	Mcr	M'brook	Chorley	Chorley	Mcr
14	Horwich	Horwich	M'brook	Bolton	M'brook	Horwich	Bolton	Mcr
15	Bolton	Bolton	Valley LP	Mcr	M'brook	Bolton	Bolton	Mcr
16	Mcr	Mcr	Trafford Ctr	Mcr	Trafford Ctr	Walkden	Swinton	Mcr
Main Spend (across all zones)	Bolton	Bolton	Valley LP	Mcr	M'brook	Bolton	Bolton	Mcr

Pubs, Bars and Nightclubs

- 4.71 Only 53 per cent of households claim to visit pubs, bars or nightclubs. However, as was the case with restaurants, it is Bolton (17 per cent) and Manchester (7 per cent) which are, by far, the most popular destinations for pubs, bars or nightclubs, followed by Chorley (4 per cent), Wigan (3 per cent) and Bury (2 per cent).
- 4.72 Bolton town centre is the most popular destination for visits to pubs and bars on the part of residents of Zones 1, 2, 3, 4, 5, 6, 8, and 15 and the most popular

destinations for the remaining zones, which are set out in Table 4.17, reflect the localised nature of spending in pubs and bars.

Cinemas

- 4.73 The most important cinema destinations are Valley Leisure Park (20 per cent), Middlebrook Retail and Leisure Park (17 per cent), the Trafford Centre (3 per cent) and Manchester City Centre (3 per cent). As might be expected, Middlebrook is the most popular destination for residents in the western part of the catchment, whereas Valley Leisure Park is the principal destination for those resident in the core of the Bolton urban area.

Museums & Art Galleries

- 4.74 Around 58 per cent of respondents do not visit museums and art galleries, but for those that do, the only material destinations are Manchester City Centre followed by Bolton town centre.

Family Entertainment Centres (ie Ten Pin Bowling, Skating and so on)

- 4.75 Sixty four per cent of respondents claim not to visit family entertainment centres such as ten pin bowling alleys and skating rinks. However, Middlebrook Retail Park is the dominant location for such activities in 12 of the 16 survey zones.

Health and Fitness Centres

- 4.76 Sixty seven per cent of respondents claim not to undertake health and fitness activities and Bolton is the most important location for the minority who do participate. Although we have no national data on the proportion of households undertaking health and fitness activities, it is perhaps noteworthy that non-participation in the Bolton catchment area is very similar to the Knowsley and Wirral catchment areas, where similar surveys undertaken by RTP earlier this year found non-participation rates of 68 per cent and 66 per cent, respectively.

Bingo/Casinos/Bookmakers

- 4.77 Eighty four per cent of respondents claim not to undertake activities which involve gambling, such as visits to bingo halls, casinos and bookmakers. Of those that do participate, Bolton is again the most important location.

Theatres/Concerts

- 4.78 Forty four per cent of respondents claim not to undertake expenditure through visits to theatres or concert halls. However, of those that do participate, Manchester City

Centre is by far the most important location, for residents of all zones in the catchment area.

Conclusions in Relation to Retail & Leisure Spending Patterns

Comparison Goods Spending

- 4.79 Overall, some 64 per cent of the comparison goods expenditure of the residents of the catchment area is retained by town centres, retail parks, and freestanding stores located within the catchment. The main destinations within the catchment area are: Bolton town centre, which secures £504m of the residents' comparison goods expenditure; Middlebrook Retail Park, which secures £139m of the residents' comparison goods expenditure; and Bolton Gate Retail Park, which secures £42m of the residents' comparison goods expenditure.
- 4.80 Short-distance leakage to places like Manchester City Centre, the Trafford Centre, Bury town centre and Wigan town centre account for 23 per cent of the residents' comparison goods expenditure; SFT leakage accounts for 7 per cent; and the remaining 6 per cent of comparison goods expenditure is accounted for by longer distance leakage to places like Preston City Centre.
- 4.81 Bolton town centre secures a comparison goods market share in excess of 60 per cent in two zones, in excess of 50 per cent in five zones, in excess of 40 per cent in seven zones and in excess of 20 per cent in 11 of the 16 zones. Conversely, Middlebrook Retail Park's maximum comparison goods market share is 20 per cent in just one zone and in the range 10 per cent to 20 per cent in a further three zones. Thus, in 12 of the 16 zones Middlebrook Retail Park's comparison goods market share is less than 10 per cent.
- 4.82 Farnworth town centre achieves a maximum comparison goods market share of 12 per cent in Zone 8; Horwich town centre secures a maximum comparison goods market share of 20 per cent¹³ in Zone 14; Westhoughton town centre achieves a maximum market comparison goods market share of 6 per cent in Zone 11; and Little Lever town centre secures a maximum comparison goods market share of just 3 per cent in Zone 6.
- 4.83 Bolton town centre secures an unopposed dominant comparison goods market share in excess of 40 per cent in four zones (Figure 4.4 of Volume 2) and although it secures a market share in excess of 40 per cent in a further three zones, it faces

¹³ We suspect that this market share is inflated by respondents who said 'Horwich' when they meant 'Middlebrook Retail Park'.

subsidiary competition in these zones from other centres which have a market share in the range 10 per cent to 40 per cent.

- 4.84 For seven of the survey zones, to the west and south of the catchment, there is no dominant comparison goods centre. This suggests that Bolton town centre's primary catchment area has shrunk since the time of CB Hillier Parker's Bolton Retail Study of November 2001, as a result of strong competition from Manchester City Centre, the Trafford Centre, Middlebrook Retail Park and Wigan town centre.
- 4.85 It is disappointing, however, that the overall retention rate (fourth row of percentages in Table 4.11) is lowest for clothes and shoes (59 per cent) and for specialist items (55 per cent). This is an important piece of evidence which suggests a need to promote quality developments - such as the Market Hall redevelopment - which are targeted at higher value middle and up-market comparison retailers. We have noted, already, that Market Hall has secured lettings to the likes of H&M, Zara, Warehouse, Lush and Principles, but our subsequent analysis in Section 5 (see Table 5.9, in particular), confirms that there are very many high quality comparison facias which are not yet represented in Bolton town centre, but are well represented at the Trafford Centre.

Convenience Goods Spending

- 4.86 Overall, 92 per cent of the convenience goods expenditure of residents of the overall catchment area is retained by town, district and local centres and freestanding stores located within the catchment area. Thus, as might be expected in the convenience sector, there is a minimal level of strategic leakage.
- 4.87 The household survey suggests that there has been a continuing polarisation trend in the convenience goods sector, in that the 18 superstores located within the catchment area, now account for 76 per cent of the aggregate convenience goods expenditure of the residents of the catchment area. Indeed, only 4 of the 16 zones lack a 'dominant' superstore which is defined as having a convenience goods market share in excess of 30 per cent.
- 4.88 The highest individual market shares are achieved by Asda in Farnworth, Asda in Radcliffe, Tesco in Walkden, Wm Morrison at Harwood and Tesco at Mansell Way Horwich. Nevertheless, there is no part of the overall catchment area for which there is a 10 minute isochrone with an individual operator having a convenience goods market share in excess of 60 per cent. It is unlikely, therefore, that there will be any failure of the competition test in the near future.
- 4.89 However, there are three parts of the catchment area where there is a localised deficiency in convenience goods provision; these are the Egerton/Edgworth zone,

where the localised convenience goods retention rate is only 10 per cent; the Westhoughton zone, where the localised retention rate is only 14 per cent (but which is being addressed by the J Sainsbury commitment at Cricketers Way); and the Little Lever zone, where the localised retention is only 38 per cent (but two-thirds of which is accounted for by the Asda at Burnden Park).

- 4.90 Moreover, the household survey confirms that most convenience goods purchases are undertaken on a highly localised basis and only four superstores have a convenience goods market share in excess of 10 per cent in three or more zones. The stores which do have the most diverse catchments are those located within, or close to, Bolton town centre - these being the J Sainsbury store at Trinity Way, the Asda at Burnden Park, the Wm Morrison at Blackhorse Street, the Asda at Astley Bridge and the Wm Morrison at Morington Road.

Leisure Services Spending

- 4.91 Bolton town centre and Manchester City Centre are by far the most important locations for spending at restaurants and cafés, but this type of spending tends to be quite localised and Westhoughton, Farnworth and Horwich town centres are all popular in their local zones; the same cannot be said for Little Lever.
- 4.92 Likewise, Bolton and Manchester are the top locations for spending in pubs and bars, but again, the pattern of spending is localised and Westhoughton and Horwich town centres perform well in their local zones.
- 4.93 So far as cinemas are concerned, there is a divide between the Valley Leisure Park which serves residents in the more densely developed core of the urban area and Middlebrook Retail Park which serves the Western part of the catchment.
- 4.94 Manchester City Centre is the most important location for visits to museums and art galleries, but Bolton town centre performs quite well for residents in the core of the catchment.
- 4.95 The Middlebrook Retail Park seems to reign supreme when it comes to expenditure in family entertainment centres, being dominant in 12 of the 16 survey zones.
- 4.96 Two-thirds of the respondents do not participate in health and fitness and Bolton town centre is the most important destination for those that do. Similarly, 84 per cent of participants do not participate in gambling in bingo halls, casinos, bookmakers and so on, and again for those that do Bolton town centre is the most important location.
- 4.97 Manchester City Centre is by far the most important location for visits to theatres and concert halls for residents of all 16 zones.

5 QUANTITATIVE AND QUALITATIVE NEED IN THE RETAIL AND LEISURE SECTORS

Introduction

- 5.1 We turn now to our assessment of the quantitative and qualitative needs likely to arise in the retail and leisure sectors in the period up to 2021 and, more indicatively¹⁴, for the further period from 2021 to 2026. In undertaking the assessment of retail and leisure needs, we have followed the guidance set out in paragraphs 2.32 to 2.37 of PPS6. However, as stated earlier in paragraph 2.56 of our report, we must emphasise the absence of any guidance in the emerging RSS on the overall quantum of need to be delivered across the region. We deal first with quantitative retail need, taking the class of goods approach to the assessment, as required by paragraph 2.34 of PPS6.

Methodology for Assessing Quantitative Retail Need

- 5.2 The essential steps in the assessment of quantitative retail need are as follows:
- i) establish the appropriate catchment area for the highest order town centre being considered, in this case Bolton;
 - ii) assess the existing level of population and existing volume of retail expenditure of those resident within the defined catchment area;
 - iii) establish where the expenditure of the residents of the catchment area is currently spent, through use of an empirical survey of households resident in the catchment area (as discussed in Section 4), and thereby establish the proportion of expenditure which is currently retained by town centres and freestanding stores located within the catchment - that is the current retention rate;
 - iv) apply forecasts of population change and per capita expenditure growth, so as to establish the overall level of projected growth in expenditure for residents of the catchment area and an assessment of growth in retained expenditure, using, initially, a constant retention assumption;
 - v) make allowance for 'claims' on the growth in retained expenditure as a result of:
 - o floorspace efficiency change (that is the growth in turnover for existing retailers within existing floorspace);

¹⁴ Longer term projections are more 'indicative' because of the exponential shape of the expenditure growth graph and because PPS6 enshrines the need to plan, monitor and manage.

- growth over time in Special Forms of Trading (SFT), mainly e-tail growth, but taking account, also, of the projected decline in catalogue sales; and
 - planning commitments.
- vi) calculate the initial residual expenditure pot which is potentially available for new retail floorspace, based on steps iv) and v) above;
- vii) make an allowance for under-trading or over-trading in the base year, if this is justified on the basis of circumstances identified by the Court of Appeal in its Kiddlington judgment¹⁵; and
- viii) develop alternative scenarios for calculating growth in residual expenditure, based on:
- increases or decreases in the projected retention level;
 - increases or decreases in the geographical size of the catchment area, if this is justified as part of a strategy to raise the role and function of the centre as part of the development plan process; and
 - sensitivity testing of key assumptions.

Definition of the Overall Catchment Area

- 5.3 The overall catchment area was defined on the basis of the approach described in paragraph 4.1 of our report, and split into 16 zones based on postcodes, as shown in Figure 4.1 and Spreadsheet 1 (in Volume 2).

Existing Level of Population and Expenditure

- 5.4 The population by zone in the 2008 base year is set out in the top row of Spreadsheet 2; those data are based on year 2005 zonal population figures supplied by MapInfo and rolled forward to 2008, using the ONS's Revised 2004 sub-national population projections¹⁶, having allocated each zone to the relevant local authority (as shown in bold in Spreadsheet 1).
- 5.5 The zonal per capita expenditure data are supplied by MapInfo for the year 2005, as set out in the top row of Spreadsheet 3 for comparison goods and in the top row of Spreadsheet 13 for convenience goods. These data are then rolled forward to 2008

¹⁵ The First Secretary of State and Another and Sainsburys Supermarkets Ltd, 6 May 2005, Case No C3/2004/1658.

¹⁶ We have also repeated all of the analysis using AGMA/OEF population forecasts. The latter produce a slightly greater gain in population up to 2026, but there is no material impact on our assessment of quantitative retail need. Nevertheless, Volume 2 contains both sets of spreadsheets, although our text in Volume 1 refers only to the results produced by ONS's Revised 2004 projections.

using the MapInfo/OEF forecasts¹⁷ of 4.9 per cent, per annum for comparison goods and 1.2 per cent, per annum for convenience goods.

- 5.6 The existing expenditure in 2008 is derived from the product of Spreadsheets 2 and 3 for comparison goods and from the product of Spreadsheets 12 and 13 for convenience goods. Thus, the year 2008 expenditure pot, both including SFT and excluding SFT, is set out in the first and third rows of Spreadsheet 4 for comparison goods, and in the first and third rows of Spreadsheet 14 for convenience goods.

Existing Retention Rate

- 5.7 The next step is to use the household survey findings to establish current patterns of expenditure and the current retention rate, as described in Section 4 of our report. Thus, the current pattern of expenditure and current retention rate for comparison goods, excluding SFT, is as set out in Spreadsheet 8, with the overall retention rate for comparison goods being 68.3 per cent (as set out in the final column, 'sub-total of study area' row). For convenience goods, the pattern of expenditure and current retention rate, excluding SFT, is as set out in Spreadsheet 16, which reveals a convenience goods retention rate of 91.5 per cent (see the final column of Spreadsheet 16, in the 'sub-total of study area' row).

Growth in Expenditure and Growth in Retained Expenditure

- 5.8 The next steps are to apply forecasts of population change and per capita expenditure growth, so as to establish the overall level of projected growth in expenditure for all residents of the catchment area and then an assessment of growth in retained expenditure, using, initially, a constant retention assumption.
- 5.9 Population change is based on the ONS Revised 2004 sub-national projections, as set out in Spreadsheet 2. The data on growth in per capita expenditure are as set out in Spreadsheet 3 for comparison goods and in Spreadsheet 13 for convenience goods, utilising the growth rates referred to in paragraph 5.5 above.
- 5.10 Spreadsheet 4 is the product of Spreadsheets 2 and 3 and it sets out the total growth in comparison goods expenditure for all residents in the overall catchment area, with and without SFT. Spreadsheet 14 sets out the corresponding data for growth in convenience goods expenditure.
- 5.11 Thus, Row A of Spreadsheet 10a sets out the total growth in comparison goods expenditure up to 2026 and it reflects the final column of figures in Spreadsheet 4, having excluded SFT.

¹⁷ As set out in Table 2 of MapInfo Brief 07/02.

- 5.12 Similarly, the Row A of Spreadsheet 17a sets out the total growth in convenience goods expenditure up to 2026 and it reflects the final column of figures in Spreadsheet 14, having excluded SFT.
- 5.13 In excluding SFT, we have used the survey findings for the 2008 base year in the comparison sector, but we have allowed SFT to grow over time at the rates shown in Table 5.1. These rates reflect the advice given in Table 5.1 of Experian's Retail Planner Briefing Note 5.1. However, in the convenience sector, we have halved the proportions of expenditure accounted for by SFT so as to reflect the fact that a proportion of the convenience goods bought over the internet are still supplied from shelves in supermarkets, rather than from distribution warehouses, as is more often the case in the comparison goods sector.

Table 5.1 Projected Growth in Special Forms of Trading (SFT)

Year	Comparison Goods		Convenience Goods	
	%	Source	%	Source
2008	6.6	NEMS Survey	2.8	Experian x 0.5
2011	9.5	RTP Estimate	3.5	Experian x 0.5
2016	14.4	Experian	3.65	Experian x 0.5
2021	14.4	Experian	3.65	Experian x 0.5
2026	14.4	Experian	3.65	Experian x 0.5

- 5.14 Thus, having calculated the growth in total expenditure for all residents of the catchment area (Row A of Spreadsheets 10a and 17a), the next step is to assess the growth in retained expenditure (Row C of Spreadsheets 10a and 17a), initially on the basis of a constant aggregate retention level (Row B of Spreadsheets 10a and 17a). Thus, the growth in retained comparison goods expenditure from 2008 to 2026, under the constant market share assumption, is £1,332.7m (final column, Row C of Spreadsheet 10a). The growth in retained convenience goods expenditure from 2008 to 2026, under the constant market share assumption, is £225.4m (final column, Row C of Spreadsheet 17a).

'Claims' on Growth in Retained Expenditure

- 5.15 The next step is to make an allowance for 'claims' on the growth in retained expenditure. We have already allowed for the growth in SFT, as explained in paragraph 5.13 above. The remaining 'claims' are:
- i) growth in floorspace efficiency, which is growth in the turnover of existing retailers within their existing floorspace; and
 - ii) an allowance for the turnover absorbed by planning commitments.

- 5.16 In making an allowance for growth in floorspace efficiency (Rows D and E of Spreadsheets 10 and 17a), we have utilised Experian's 'central case' recommendations¹⁸ of:
- i) 2.2 per cent, per annum in the comparison goods sector; and
 - ii) 0.6 per cent, per annum in the convenience goods sector.
- 5.17 The effect of the gain in floorspace efficiency of existing retailers amounts to a 'claim' of £497.1m in the comparison goods sector (Row E of Spreadsheet 10a). The corresponding effect in the convenience goods sector amounts to £86.6m (Row E of Spreadsheet 17a).
- 5.18 The next step is to allow for the future turnover requirements of planning commitments, having made an assessment of how much the commitments' turnovers will be derived from residents of the overall catchment area. The comparison good commitments are scheduled in Table 5.2¹⁹ and the convenience goods commitments are scheduled in Table 5.3; they also appear above Row F of Spreadsheets 10a and 17a, respectively. The commitment with the highest turnover for both comparison goods and convenience goods is the Central Street site in Bolton, which we assume will be fully trading by 2016.

Residual Expenditure Potentially Available for New Floorspace

- 5.19 Row G of Spreadsheets 10a and 17a sets out the residual expenditure potentially available for new floorspace, having allowed for all of the claims on the growth in retained expenditure - that is, growth over time in SFT, growth in floorspace efficiency and commitments.
- 5.20 Row H of Spreadsheets 10a and 17a converts the residual expenditure to a floorspace requirement expressed as a net sales area, having applied an average sales density for comparison goods of £5,337 per sq.m sales area in 2011 and an average sales density for convenience goods of £10,181 per sq.m sales area in 2011. Finally, we convert the sales area requirement to a gross floorspace requirement, as set out in Row I of Spreadsheets 10a and 17a, using a net to gross ratio of 70 per cent for comparison goods and 65 per cent for convenience goods.

¹⁸ Experian Retail Planner Briefing Note 5.1, Page 28

¹⁹ Please note the distinction in Tables 5.2 and 5.3 between gross floorspace and net sales area; it is the latter that is used in calculating the turnover requirements of the commitments.

Table 5.2 Comparison Retail Commitments within the Bolton Catchment Area (as at 1 June 2008)

Application Ref	Details of Proposal	Address	Gross Floorspace (sq.m)	Net Floorspace (sq.m)	Date Approved	Comp Turnover at 2011 (£m)	Comp Turnover at 2016 (£m)
BOLTON							
78732/07	Additional floorspace (mezzanine) at retail park	Wickes, Unit 1 Trinity Retail Park, Bolton, BL2 1HY	2,694	2,155	Approved 24/12/07	6.7	7.5
77546/07	New retail units and market stalls	The Market Place and Market Precinct, Brackley Street, Farnworth, Bolton	-	2,014	Approved 30/08/07	5.4	6.0
75892/06	Mezzanine	Comet, 69 The Linkway, Middlebrook, Horwich	-	536	Approved 02/03/07	1.0	1.1
68386/04	Extension of existing retail unit, and 1 new unit	Unit 3, Central Retail Park, Manchester Road, Bolton	-	975	Approved 10/01/05	3.6	4.1
78000/07	Sainsbury's supermarket (non-food goods)	Cricketers Way, Westhoughton	-	604	Approved May 08	4.0	4.4
71649/05	Town centre redevelopment (comparison goods)	Central Street, Bolton	25,084 ⁽¹⁾	18,813	OPP approved		141.1
68835/04 & 68834/04	Market Hall Redevelopment	Market Hall, Corporation Street/Knowsley Street, Bolton	-	8,957	Approved 03/03/05	60.2	67.2
SALFORD							
	2 x A1 units	Station Road/Swinton Hall Road/Chadwick Street, Swinton	3,420	2,565	Approved subject to S106	3.4	3.8
	Retail unit	Land west of the Stocks Hotel, Bolton Road/Manchester Road, Walkden	663	497	Approved 06/12/07	0.4	0.4
WIGAN							
A/05/63638	Retail unit + garden centre	Grasmere Street, Leigh	8,045	6,838	Approved 08/11/06	12.8	14.2
A/08/70731	Mezzanine	Parsonage Retail Park, Leigh	697	592	Approved 08/11/06	1.1	1.2
TOTAL				44,547		98.6	251.0

Table 5.3 Convenience Retail Commitments within the Bolton Catchment Area (at 1 June 2008)

Application Ref	Details of Proposal	Address	Gross Floorspace (sq.m)	Net Floorspace (SQ.M)	Date Approved	Conv Turnover at 2011 (£m)	Conv Turnover at 2016 (£m)
BOLTON							
78000/07	Sainsbury's supermarket (convenience goods)	Cricketers Way, Westhoughton	-	2,184	Approved May 08	20.6	21.2
71649/05	Town centre redevelopment (convenience goods)	Central Street, Bolton	7,432 ⁽¹⁾	4,459	OPP approved		46.8
TOTAL				6,643		20.6	68.0

⁽¹⁾The total floorspace at Central Street for comparison goods and convenience goods equates to 32,516 sq.m gross. The total retail floorspace - including an element of café/restaurant/bar uses - amounts to 33,394 sq.m gross.

- 5.21 Thus, under the constant market share assumption the quantitative comparison goods need shown in Row I of Spreadsheet 10a amounts to 39,900 sq.m gross in the period up to 2021, but noting the negative residual in the period up to 2016. Conversely, Row I of Spreadsheet 17a shows that the quantitative convenience goods need in the period up to 2021, amounts to 3,400 sq.m gross, but again with a negative residual in the period up to 2016.

Adjustments for Under-trading/Over-trading in the Base Year

Comparison Goods Sector

- 5.22 Spreadsheet 6 reveals an estimated comparison goods turnover for Bolton town centre of approximately £504m, excluding any expenditure inflow from those resident beyond the catchment area. This turnover estimate implies a comparison goods sales density for Bolton town centre of approximately £7,700 per sq.m sales area, using floorspace data from Experian and a net to gross ratio of 0.8. 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. Thus, Bolton town centre seems to be trading at a level very close to the average for centres of a similar position in the retail hierarchy.
- 5.23 Spreadsheet 6 reveals that the Middlebrook Retail Park draws £139m of comparison goods expenditure from residents of the catchment area. This suggests a trading density of around £5,000 per sq.m sales area, if an allowance is made for expenditure inflow from those who reside beyond the catchment area. Such a sales density is in line with expectations given Middlebrook's mix of 'high street' and 'bulky goods' retailers.
- 5.24 Thus, given that the two principal destinations for comparison goods are trading at levels in line with expectations, there is no case for an adjustment for under-trading or over-trading in the comparison goods sector in the Bolton Catchment area.

Convenience Goods Sector

- 5.25 The convenience goods expenditure retained by centres and food stores within the overall catchment area is set out in Spreadsheet 16. For the 18 large superstores, which collectively account for 76 per cent of the aggregate convenience goods expenditure of the catchment area's residents, the convenience expenditure drawn from the catchment area is summarised in Table 4.13 in Section 4 of this report.
- 5.26 For the nine superstores within the administrative area of Bolton, which derive most of their convenience goods turnover from residents of the catchment, we have

made a comparison of survey-based turnover estimates with so-called benchmark turnovers which assume that the stores are trading at company average levels. The analysis, which is set out in Table 5.4, reveals four superstores to be trading substantially above the company average, three stores which are substantially under-trading and two stores which are trading more or less in line with expectations.

- 5.27 However, two of the stores which are over-trading are located in town centres, where over-trading is, in principle, to be welcomed, unless it causes customer discomfort. Thus, although the aggregate position for the nine stores is one of over-trading - to a level of approximately £37m - this does not necessarily represent a quantitative retail need across the catchment as a whole. Indeed, if we exclude the stores located in town centres, the aggregate over-trading reduces to £12.9m. Thus, in Spreadsheet 17b, we make an allowance for over-trading in edge-of-centre and out-of-centre stores as a sensitivity test.

Increase or Decrease in the Geographical Size of the Catchment Area

Comparison Goods Sector

- 5.28 A town centre's performance in the comparison goods sector is the prime determinant of its place in the retail hierarchy. It is important to recognise, therefore, that our analysis of comparison goods spending patterns and market shares - as described in Section 4 of our report and shown in Figures 4.2 and 4.3 - suggests that there has been a shrinkage in the geographical size of Bolton's overall catchment area and a reduction in Bolton town centre's comparison goods market share since publication of the Bolton Retail Study in November 2001²⁰. The geographical shrinkage and loss of market share would seem to have been caused, in large part, by the competition from Manchester City Centre, the Trafford Centre, Middlebrook and Wigan town centre.
- 5.29 Nevertheless, the catchment area shown in Figures 4.1 to 4.4 of our report covers the whole of the administrative area of Bolton Council and spreads into the neighbouring authorities of Bury, Salford, Wigan, Chorley and Blackburn-with-Darwen. Thus, for the purposes of assessing need in the LDF process - and with no assistance in the emerging RSS as to which of the town centres identified in Policy W5 are to be the focus of particular growth - we consider that the catchment area shown in Figure 4.1 in Volume 2 is reasonable.

²⁰ See the Catchment Area Map contained in Appendix 2 of the Bolton Retail Study 2001.

Table 5.4 Comparison of Survey-based Turnover Estimates with Benchmark Turnover Estimates for Food Superstores in Bolton Borough

Zone	Main Foodstores Within Bolton Borough	Location of Store (in, edge-of-centre or out-of-centre)	Net Floorspace - Convenience Goods Only (sq.m)	Benchmark Sales Density (£ per sq.m)	Benchmark Turnover (in £m)	Actual Convenience Goods Turnover 2008 (in £m)	Quantum of Under /Over Trading (in £m)
14	Tesco Extra, Mansell Way, Horwich	Out	4,575	13,560	62.0	64.2	2.16
8	Asda, Brackley Street, Farnworth	In	2,327	13,699	31.9	47.7	15.82
2	Wm Morrison, Mornington Road, Bolton	Out	3,181	11,672	37.1	47.5	10.37
2	Asda, Astley Bridge, Bolton	Out	1,962	13,699	26.9	43.2	16.32
3	Wm Morrison, Lea Gate, Harwood, Bolton	In/Edge	1,805	11,672	21.1	33.8	12.74
2	Wm Morrison, Blackhorse Street, Bolton	In	3,057	11,672	35.7	30.8	-4.88
6	Asda, Manchester Road, Bolton	Out	2,601	13,699	35.6	30.8	-4.84
14	Asda, The Linkway, Horwich	Out	2,940	13,699	40.3	29.9	-10.37
4	J Sainsbury, Trinity Street, Bolton	Edge	3,281	8,316	27.3	26.6	-0.68
TOTAL					317.9	354.5	36.6

- 5.30 Furthermore, emerging regional policy does not provide justification for a geographical expansion of Bolton's catchment area; however, nor is there any justification for further shrinkage in Bolton's catchment area, given the town centre's position in the regional hierarchy. Thus, in seeking to develop a strategy for Bolton to recover some lost ground in the comparison sector, the appropriate sensitivity test is to increase the town centre's market share of expenditure generated by residents within the existing catchment area, rather than to increase the geographical size of the catchment area. Such an increase in market share is particularly justified in those zones shown in Figure 4.4 of Volume 2 for which there is no dominant centre and where Bolton's comparison goods market share is currently in the range 20 to 40 per cent (the pink areas of Figure 4.3 of Volume 2).

Convenience Goods

- 5.31 PPS6 seeks to ensure that people's every day needs, such as convenience shopping, are met on as localised basis as possible. As a consequence, Bolton's overall catchment area is defined, primarily, on the basis of comparison goods spending patterns, where the very existence of the retail hierarchy demands that people travel to higher order centres for their higher order goods and services.

Changes to the Retention Level

Comparison Goods Sector

- 5.32 In the comparison goods sector, we have concluded that there is no justification for making any adjustment for under-trading or over-trading and that there is no case for amending the geographical size of Bolton's overall catchment area. Thus, we turn now to the explanation of our sensitivity testing of changes to the comparison goods retention level.
- 5.33 In Spreadsheet 10b, the overall retention level increases by 5 percentage points from 68.3 per cent in the year 2008, to 73.3 per cent in 2021, and remaining at 73.3 per cent up to 2026. The increase of 5 percentage points in the comparison goods retention rate in the period up to 2021 increases the amount of retained expenditure by £135m, compared to the constant market share scenario. This is considered to be eminently reasonable given that the turnover of the major commitments - Central Street and the Market Hall redevelopment - are projected to have a combined turnover of £232.2m in the year 2021.
- 5.34 In Spreadsheet 10c, the overall retention level drops 4 percentage points from 68.3 per cent in 2008, to 64.3 per cent in 2026. Such a scenario would reflect a continuing contraction in the market share of the town centres located within the catchment area and it would reflect a position whereby developments outwith the

catchment area are so competitive as to more than offset the beneficial impacts of development undertaken within the catchment area. However, this may be an unlikely scenario given that Spreadsheet 10c also assumes implementation of the major commitments at Central Street and at Market Hall, the latter already being well underway.

Convenience Goods Sector

- 5.35 In the convenience sector we adopt a different approach. The aggregate level of retention shown in Spreadsheet 17a - at 92 per cent - is already very high and there is no case either for increase or decrease. Thus, in the convenience sector we start with the analysis shown in Spreadsheet 17a (without an allowance for over-trading) and in Spreadsheet 17b (with an allowance for over-trading). However, we then move on to make adjustments to the localised retention levels in the three zones, identified in Table 4.15 and paragraph 4.53, where the localised retention level is considered to be inadequate. The changes we have made to the localised retention rates are shown in Table 5.5.

Table 5.5 Changes to the Localised Retention Rates in Zones 6, 11 and 15

Zones	Area	Existing Localised Convenience Goods Retention Rate in 2008 (%)	Future Localised Convenience Goods Retention Rate in 2016 (%)
6	Little Lever	38.4	60.0
11	Westhoughton	14.3	66.7
15	Egerton-Edgworth	9.8	33.3

Findings in Relation to Quantitative Retail Need

Comparison Goods Sector

- 5.36 Spreadsheets 10a, 10b and 10c, set out the quantitative comparison goods retail need for the static retention, increased retention and declining retention scenarios, respectively. These quantitative needs, as set out in Row I of the spreadsheets in terms of gross floorspace, are summarised in Table 5.6.

Table 5.6 Quantitative Need in the Comparison Goods Sector (Sq.m Gross)

	Static Retention	Increase in Retention	Decline in Retention
2008-11	-10,100	-5,500	-14,700
2011-16	-4,100	13,900	-9,500
2016-21	54,000	60,500	46,700
2021-26	61,200	65,700	51,900
2008-16	-14,200	8,400	-24,200
2008-21	39,900	68,900	22,500
2008-26	101,100	134,600	74,300

- 5.37 Table 5.6 confirms that the aggregate retention rate across the catchment area has to increase if there is to be a positive residual requirement for more comparison floorspace in the period up to 2016, beyond existing commitments. Under the static and declining retention scenarios, the growth in retained expenditure up to 2016 is not sufficient to support the turnover requirements of existing commitments.
- 5.38 Thus, for the reasons explained more fully in Section 6, it is essential that the aggregate retention rate increases if Bolton town centre is to recover the ground it has lost since the mid 1990s. The best way to achieve an increase in market share is to secure high quality comparison goods development of sufficient scale and critical mass for it to generate its own need by increasing the attractiveness of Bolton town centre, vis-à-vis the competing centres outside the catchment.
- 5.39 Under the increasing retention scenario, the cumulative need position in the comparison goods sector, after allowing for commitments to be implemented, is 8,400 sq.m gross in the period up to 2016, by which time it is assumed that the Central and Bark Street development will be fully operational. Thus, it seems clear that implementation of the existing commitments, which include Central Street and Market Hall, will meet most of the need in the comparison goods sector in the period up to 2016. However, further substantial need arises in the period 2016 to 2021, so that another major development opportunity may need to be identified in the LDF process to meet the need arising after 2016.

Convenience Goods Sector

- 5.40 Spreadsheets 17a and 17b set out the quantitative convenience goods retail need for a static aggregate retention level of 92 per cent, but with Spreadsheet 17a making no allowance for over-trading and with Spreadsheet 17b making an allowance for over-trading at stores in edge-of-centre and out-of-centre locations. These quantitative needs, as set out in Row I of Spreadsheet 17a and Row J of Spreadsheet 17b, in terms of gross floorspace, are summarised in Table 5.7.

Table 5.7 Quantitative Need in the Convenience Goods Sector (Sq.m Gross)

	No Allowance for Over-trading	With Allowance for Over-trading
2008-11	-900	1,000
2011-16	-1,500	-1,500
2016-21	5,900	5,800
2021-26	5,700	5,700
2008-16	-2,400	-500
2008-21	3,400	5,300
2008-26	9,200	11,000

- 5.41 Table 5.7 confirms that the residual convenience goods need from 2008 up to 2016 is negative, if no allowance is made for current levels of over-trading in stores located in edge-of-centre and out-of-centre locations. However, if an allowance is made for over-trading, then there is almost sufficient quantitative need to meet the existing commitments at Westhoughton and at Central Street. Indeed, the convenience component of the Central Street redevelopment is not expected to commence trading until after 2011.
- 5.42 Table 5.7 confirms, however, that further need in the convenience goods sector arises between 2016 and 2021, and between 2021 and 2026.
- 5.43 Moreover, given the need for convenience goods provision to be met on as localised basis as possible, we have assessed the impact of a short-term increase in the localised retention rate in those zones for which the existing rate is considered to be inadequate. Thus, despite the small negative residual across the catchment area as a whole, in the period up to 2016, we consider it important to meet these localised needs in the short-term. Meeting these localised deficiencies will also have the benefit of reducing over-trading in out-of-centre stores elsewhere in the catchment, so that the increases in localised market shares for Little Lever, Westhoughton and Egerton/Edgworth will be partly at the expense of reductions in convenience retention levels in the other 13 zones.
- 5.44 Thus, the application of the changes in the localised retention rates shown in Table 5.5 results in a convenience goods capacity in these three zones as set out in Table 5.8.

Table 5.8 Localised Quantitative Need in the Convenience Goods Sector

Zone	Area	Localised Retention Rate in 2008 (%)	Localised Retention in 2008 (£m)	Localised Retention Rate in 2016 (%)	Localised Retention in 2016 (£m)	Increase in Retained Expenditure 2008-2016 (£m)
6	Little Lever	38.4	12.37	60.0	21.60	9.23
11	Westhoughton	14.3	6.32	66.7	32.88	26.56
15	Egerton-Edgworth	9.8	2.60	33.3	9.86	7.26

- 5.45 Most of the increase in localised retention in Westhoughton will be met by the J Sainsbury commitment, which has an estimated convenience goods turnover in 2016 of £21.2m. For Little Lever and Egerton the increase in retained convenience goods expenditure would be sufficient to support a smaller supermarket of the sort operated by Somerfield, Aldi, Lidl, Netto or the Coop, together with small stores operated by independent traders.

Qualitative Retail Need

- 5.46 Paragraphs 2.35 to 2.37 of PPS6 provide advice on the considerations LPAs should take into account in assessing qualitative needs in their development plan documents. Paragraph 2.35 states that the key consideration for an LPA is to provide for consumer choice, by ensuring that:
- i) an appropriate distribution of locations is achieved, subject to the sequential approach; and that
 - ii) provision is made for a range of sites for shopping, leisure and local services so as to allow for genuine choice and meet the needs of the whole community, particularly in deprived areas.

Comparison Goods Sector

- 5.47 In the comparison goods sector, the over-riding requirement is to improve the quality of Bolton town centre's offer vis-à-vis competing centres. This is particularly so in relation to Manchester City Centre, the Trafford Centre, Middlebrook and Wigan town centre, which have all experienced significant investment since the mid 1990s, and in relation to Bury town centre, which will benefit in the near future from the opening of the 69,000 sq.m mixed-use development, known as The Rock.
- 5.48 We have noted, in Section 3 that Bolton town centre achieves only a 'middle' rating for fashion in MHE's Shopping Index. In part, this 'middle' ranking reflects the relative absence in Bolton town centre of the high profile retailers listed in Table 5.9. Manchester City Centre secures representation from 60 of these retailers, and has 4 department stores (each of which count 5 points, because of the high profile

concessions typically contained within them) giving a total high profile score of 80. The Trafford Centre has secured representation by 26 of these high profile retailers and has 3 department stores giving a total high profile score of 41. In contrast, Bolton, Stockport and Wigan town centres have secured high profile scores of only 7, 6 and 6, respectively (but Bolton's score excludes Whitakers of Bolton, which is an independent department store). Moreover, only two of the high profile stores are on the Focus database for Bolton town centre, these being Zara and Bang & Olufsen.

Table 5.9 High Profile Store Representation

	Bolton	Manchester	Stockport	Trafford Ctr	Wigan
High Profile Stores					
Adolfo Dominguez		1			
All Saints		1		1	
Armani		1			
Aspecto		2		1	
Austin Reed		1			
Bally		1			
Bang & Olufsen		1			
Betty Barclay		1			
Blazer					
Boodle and Dunthorpe		1			
Burberry's					
Calvin Klein		1			
Carte Blanche					
Carvela					
Christian Lacroix					
Country Casuals	1	1			
Crabtree and Evelyn		1		1	
Cruise		1			
Daisy and Tom					
Daks					
David M Robinson		1			
Diesel		1			
DKNY		1		1	
Droopy and Browns					
Dune				1	
Emma Somerset/French Dressing		1			
Emporio Armani		1			
Episode					
Escada					
Fired Earth		1			
Flannels		3			

	Bolton	Manchester	Stockport	Trafford Ctr	Wigan
Formes		1			
French Connection		1		1	
Gant		1			
Geese		1			
Gieves and Hawkes					
Hermes		1			
High and Mighty		1			
Hinds				1	
Hobbs		1			
Hope and Glory					
Hugo Boss		1		1	
Jacques Vert	1			1	
Jaeger		1			
Jane Norman				1	1
Jane Shilton				1	
Jigsaw		2			
Jones Bootmakers		1		1	
Joseph					
Karen Millen		2		1	
Kurt Geiger		1			
Lacoste				1	
Life					
Links of London					
L K Bennett		1			
Long Tall Sally		1			
Mango				1	
Mappin and Webb		1			
Mexx				1	
Miss Sixty		1		1	
Molton Brown					
Muji		1			
Mulberry		1			
Nine West					
Oilily		1			
Paul Smith		1			
Pied-a-terre					
Planet		1		1	
Press and Bastyan					
Proibito					
Racing Green					
Ralph Lauren				1	
Reiss		2		1	
Russell and Bromley		1			

	Bolton	Manchester	Stockport	Trafford Ctr	Wigan
Space NK		1		1	
Ted Baker		1		1	
The Pier				1	
Thomas Pink		1			
Tommy Hilfiger		1			
Urban Outfitters		1			
USC			1	1	
Versace					
Vicky Martin					
Vivienne Westwood		1		1	
Viyella		1			
Watches of Switzerland		1			
Whistles		1			
Wolford					
Zara		1		1	
Total High Profile Stores*	2	60	1	26	1
Department Stores					
Debenhams	1	1	1	1	1
Harvey Nichols		1			
House of Fraser		1			
John Lewis				1	
Selfridges		1		1	
Total Department Stores**	1	4	1	3	1
TOTAL HIGH PROFILE & DEPARTMENT STORES	3	64	2	29	2
Total Indexed Score (department stores score 5)	7	80	6	41	6

*The list of high profile stores is RTP's in-house basket of such stores which we update regularly.

**The department stores score 5 points because such stores normally contain high profile concession traders and these are not double counted. Please note, however, that the independent Whitakers of Bolton department store is not included in the above analysis.

Convenience Sector

- 5.49 In the convenience sector, it is clearly important that needs are met on as localised basis as possible, so that an important part of the LDF process is to remedy deficiencies in local shopping and other essential services facilities, so as to assist in reducing social exclusion (paragraphs 2.55 to 2.58 of PPS6).
- 5.50 Thus, in the convenience sector, we consider that qualitative need is most pronounced in Westhoughton, Egerton-Edgworth and Little Lever.

- 5.51 In Westhoughton, the qualitative need will be addressed by implementation of the extant consent for a new store for J Sainsbury.
- 5.52 In Little Lever, we have already noted, in Section 3, the relatively high satisfaction rating derived from the survey of pedestrians in relation to existing retail provision, and this rating may have been improved by the acquisition and improvement of the Somerfield store by Tesco. Nevertheless, we consider that convenience provision would be further enhanced by a new store of appropriate scale, and we note Aldi's interest in Little Lever as an investment location.
- 5.53 In the Egerton-Edgworth area (Zone 15), only 9.8 per cent of the convenience expenditure is retained in the local area, with two-thirds of the convenience goods expenditure flowing to stores in Zones 2 and 3, and particularly to the Asda at Astley Bridge and Morrisons at Harwood.
- 5.54 Another qualitative consideration in the convenience goods sector is to seek to ensure easy access to local facilities on the part of the most deprived residents in the Borough. In Figure 5.3 of Volume 2, we have superimposed the locations of the network of centres identified under Policy S3 of the UDP, together with the freestanding food superstores, on a map of the Index of Multiple Deprivation. Thus, the super-output areas which fall within the worst 3 per cent in England that are not currently well served are Bolton 025D, 012B, 013B and 013A. Other super-output areas not currently well-served that are within the 3 to 10 per cent most deprived are 019E, 022B and 026D.

Need in the Leisure Sector

Forecast Increases in Leisure Expenditure

- 5.55 The approach taken by consultants to the assessment of quantitative need in the leisure sector is less well developed than in the retail sector. Furthermore, property development in the leisure sector has historically been very market-led, and it is only since the publication of PPS6 in March 2005 that leisure has been brought firmly into the range of uses covered by the sequential approach.
- 5.56 Nevertheless, MapInfo²¹ now supplies information on per capita leisure spending in six COICOP (Classification of Individual Consumption by Purpose) categories and the data for the Bolton catchment area, compared to the UK averages, are set out in Table 5.10

²¹ MapInfo, *2004 Leisure Goods & Services Expenditure at Output Area Level: Product Guide* (March 2007), and associated leisure expenditure dataset

Table 5.10 Breakdown of Leisure Spend in the UK and in the Overall Bolton Catchment Area in 2005

		UK		Bolton Catchment	
COICOP Categories	Description	Spend Per Capita (£)	% of Total Leisure Services Spend	Spend Per Capita (£)	% of Total Leisure Services Spend
11.1.1	Restaurants, cafés, bars, etc	1,106	61.1	1,085	59.6%
9.4.2	Cultural services	231	12.8	223	12.3%
9.4.3	Games of chance	161	8.9	176	9.7%
11.2	Accommodation services	113	6.2	160	8.8%
9.4.1	Recreational and sporting services	116	6.4	102	5.6%
12.1.1	Personal services (hairdressers etc)	85	4.7	73	4.0%
TOTAL 'LEISURE SERVICES' SPEND		1,811	100	1,819	100.0

5.57 Table 5.10 shows that total per capita spending on leisure services in the overall Bolton catchment area is very similar to the UK average. Moreover, we note that COICOP category 11.1.1 (*'restaurants, cafés and the like'*) accounts for around three-fifths of the average per capita spend on leisure services in both the Bolton catchment and in the UK. *'Cultural services'* and *'games of chance'* are the second and third highest spend categories, and these account for 12.3 per cent and 9.7 cent, respectively, of spending on leisure services within the Bolton catchment area. Furthermore, commercially-oriented property developments, such as cinemas, account for only a small fraction of spend on cultural services (5.1 per cent)²², with bingo halls and casinos accounting for just 7.2 per cent and 9.5 per cent of spend, respectively, of expenditure on games of chance²³.

5.58 Bearing in mind the structure of current spend on leisure services, our next step in the assessment of leisure need is to calculate the growth in leisure spend for residents of the Bolton catchment area in the period 2008 to 2021. We sourced year 2005 per capita leisure expenditure data from our in-house MapInfo dataset for residents of the same 16 zones that we used for the retail forecasts (as depicted in Figure 4.1 of Volume 2). The projected growth in expenditure on leisure services, is set out in Spreadsheet 18; we have used Experian's recommended UK growth rate for spending on leisure services of 1.1 per cent, per capita, per annum for the period

²² The remaining spend on cultural services is accounted for by theatre visits, DVD/Video rentals, social subscriptions, photographic processing and a plethora of other items, which together account for three-fifths of the spending on cultural services.

²³ Betting accounts for the greatest proportion of 'games of chance' expenditure (36.5 per cent at 2007, according to the Leisure Industries Research Consultancy).

2007 to 2016²⁴ and the ONS revised 2004-based population forecasts. For completeness, we also project leisure spend forward to 2026. However, for the purposes of planning for commercial leisure needs, we caution against looking beyond 2021.

- 5.59 Spreadsheet 18 reveals that the total spending on leisure services in the Bolton catchment area is projected to grow from £996.0m in 2008 to £1,037.3m by 2011, to £1,113.1m by 2016, to £1,194.9m by 2021 and to £1,279.0m by 2026. Projected growth in spending on leisure services from 2008, therefore amounts to 20 per cent in the period up to 2021 and to 28 per cent in the period up to 2026. This far exceeds the total projected population growth in these periods - using the ONS projections - of 4.1 per cent and 5.4 per cent, respectively.
- 5.60 In absolute terms, the growth in leisure services spend within the catchment area from 2008 up to 2021 amounts to £198.9m, and to £283.0m by 2026. Applying the 2005 base year leisure spend shares (from Table 5.10 above), just under 60 per cent of the growth in leisure spending can be expected to be absorbed by restaurants/cafés, pubs/bars and take-away outlets (ie £118.6m by 2021 and rising to £168.7m by 2026). In contrast, the growth that would be absorbed by *'cultural services'* would amount to just £24.4m by 2021 and to £34.8m by 2026. Similarly, the growth in expenditure on *'games of chance'* up to 2021 would amount to just £19.2m by 2021 and to £27.5m by 2026. Furthermore, commercial facilities such as cinemas will absorb only a proportion of the expenditure growth in cultural services and casinos and bingo halls will absorb only a proportion of the expenditure growth in games of chance.

Conversion of Expenditure Increases to Additional Leisure 'Requirements'

Food and Drink

- 5.61 Given the localised nature of spending on food and drink, it is reasonable to anticipate that much of the projected growth in expenditure on food and drink - of £118.6m by 2021 - will be retained within the catchment area. However, not all of the growth in retained expenditure would be available for new restaurants/cafés,

²⁴ Experian, *Retail Planner Briefing Note 5.1*, Table 3.2 (we do not have access to the corresponding MapInfo forecasts). Experian's forecasts for the UK do not go beyond 2016; in the absence of any better information we have therefore also applied the 1.1 per cent, per annum forecast growth rate to the post-2016 period. Experian does not supply regional forecasts of growth in spending on leisure services, but given the similarity between per capita spend levels between Bolton and the UK (as shown in Table 5.10), we consider it to be entirely appropriate to use the UK forecast.

pubs/bars and take-away outlets. In the same way that an allowance is made in the retail sector for existing operators to improve their turnover efficiency, it is reasonable to assume that some of the growth in available food & drink expenditure should be directed to existing operators (to allow them to grow their business, re-fit their premises, and so on). Unlike in the retail sector, however, there is a dearth of published advice on what proportion of expenditure growth in the food & drink sector should be ring-fenced for existing operators. In the absence of firm guidance, we have therefore allocated half of the growth in food & drink expenditure to existing restaurateurs and pub/bar operators.

- 5.62 The £59m 'residual' (half of the £118m growth in expenditure of food and drink up to 2021) would be sufficient to support a wide range of new, good-quality restaurants - which typically generate annual turnovers of around £850,000 to £1m, but with some high-profile restaurant operators taking in excess of £1m per annum - as well as several branded pubs/bars, which typically have annual turnovers of between £0.9m and £1.1m. Thus, in broad terms there would be sufficient to support around 55 to 60 new food and drink operators in the period up to 2021.

Cinemas

- 5.63 Data from Dodona suggest that the average multiplex screen accounts for an annual spend of £301k in ticket revenue, whereas an independent screen accounts for £148k per annum in ticket revenue. Thus, if cinemas were to increase their share of cultural services spend to 10 per cent, the consequential £2.44m increase in cinema revenue would support eight screens in a multiplex format in the period up to 2021 or, say, six screens in multiplex format, plus four independent screens.
- 5.64 However, it is not sufficient to simply convert the potential growth in cinema revenue to a notional 'requirement' for screens. Cinema operators make decisions 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 minutes²⁵. We have therefore analysed cinema provision within an 18-minute drive-time of Bolton town centre. The findings are reproduced in Table 5.11, and the location of cinemas within and surrounding the catchment area is shown in Figure 5.1 of Volume 2.

²⁵ Source: Caviar

- 5.65 Table 5.11 reveals that the population within an 18-minute drive-time of Bolton town centre is 472,771 persons²⁶. There are currently only two cinemas within the Bolton catchment area (and within the 18-minute drive-time area of Bolton town centre), although both are multiplexes, namely a 12-screen Vue Cinema at Middlebrook Retail and Leisure Park, and a 14-screen Cineworld at the Valley Leisure Park, Eagley Brook Way, Bolton.
- 5.66 Table 5.11 also indicates that the screen density within an 18-minute drive-time of Bolton town centre is 5.5 screens per 100,000 population, which is slightly lower than the North West average of 6.4 screens per 100,000 population, and the UK average of 5.8 screens per 100,000 population²⁷.

Table 5.11 Cinema Screen Density Within an 18-minute Drive-time of Bolton Town Centre

Town	No of Cinemas Within 18 Minute Drive-time	No of Screens Within 18 Minute Drive-time	Population Within 18 Minute Drivetime	Screen Density (i.e screens per 100,000 people)	North-West Average Screen Density	UK average Screen Density
Bolton	2	26	472,771	5.5	6.4	5.8

- 5.67 For completeness, Table 5.12 considers the screen density within a wider 25 minute drive-time of Bolton town centre (an isochrone which is also shown on Figure 5.1). There are currently seven cinemas within this 25-minute isochrone, providing a total of 78 screens and serving a population of 1.157m. Thus Table 5.12 indicates a screen density within the wider 25-minute isochrone of 6.7 per 1,000 population, which is higher than the North West and UK averages. Thus, a comparison of Tables 5.11 and 5.12 suggests that the cinema deficiency in Bolton is within an 18-minute isochrone from the town centre, rather than 25-minutes which extends the isochrone to cover part of Manchester City Centre.

Table 5.12 Cinema Screen Density Within a 25-minute Drive-time of Bolton Town Centre

Town	No of Cinemas Within 25 Minute Drive-time	No of Screens Within 25 Minute Drive-time	Population Within 25 Minute Drive-time	Screen Density (i.e screens per 100,000 people)	North-West Average Screen Density	UK Average Screen Density
Bolton	7	78	1,157,431	6.7	6.4	5.8

²⁶ Year 2005; source: MapInfo

²⁷ North West and UK screen density figures are sourced from the UK Film Council's 'Statistical Yearbook 2006/07' (whose statistics are based on Dodona Research RSU Analysis).

- 5.68 Clearly, our analysis has been undertaken on a broad basis and residents in some parts of the catchment area are close to cinemas in Wigan (which has an Empire Cinema); Bury (Vue Cinema); and Manchester (Odeon, Showcase, AMC, and Vue cinemas). Whilst residents within the core part of the study area currently benefit from a reasonable level of cinema provision, with two multiplex cinemas within an 18-minute drive-time, it is notable that both cinemas are located at out-of-centre retail parks, and Bolton town centre itself lacks a cinema facility. Furthermore, it is worth bearing in mind that not all young people - i.e. the main users of cinemas - have access to a car and might therefore find it difficult to access the out-of-centre cinemas, or visit cinemas in other towns.
- 5.69 In our assessment, therefore, Bolton town centre may be viewed favourably by some cinema operators as a potential location for additional cinema screen provision. There would seem to be potential for a medium-sized multiplex facility, or several independent cinema screens, and whilst further market testing would be required to confirm whether this is the case, our understanding is that the Church Wharf scheme is likely to include provision for around six cinema screens.

Bingo

- 5.70 There are four bingo clubs within the Bolton catchment area, these being a Mecca Bingo club in Bolton town centre, a Mecca Bingo at Brightmet Fold Lane, Bolton, a Gala Bingo in Chorley, and a Buckingham Bingo in Worsley/Walkden. Furthermore, Figure 5.2 of Volume 1, indicates that additional bingo facilities are located close to, but outside the catchment area, with two Gala Bingo clubs in Wigan, a BJ Luxury Bingo club just south of Leigh, a Cosmo Bingo in Eccles, and a Gala Bingo club in Salford.
- 5.71 Thus, on the basis of existing provision there is not much of a qualitative requirement for further provision of bingo facilities. Nevertheless, the projected growth of expenditure in bingo clubs would be sufficient to support an additional Gala or Mecca type club, which currently generate average net stakes of around £1.47m per club, or it could support two or three new neighbourhood clubs, for which annual net stakes average around £444,000 per branch. More targeted market testing would be required to ascertain whether operators of neighbourhood bingo clubs would consider locating in the catchment area.

Casinos

- 5.72 A traditional casino typically generates a turnover of around £4m per annum²⁸. Thus, casinos would need to double their share of expenditure on games of chance for a new traditional casino to be supported on the basis of expenditure growth.

Summary of Scope for Additional Commercial Leisure Facilities

- 5.73 Expenditure on leisure services in the Bolton catchment area is projected to grow by £198.9m in the period up to 2021. How this growth might be expended locally depends very much on what opportunities the market supplies - thus, current spending patterns can only provide a guide to what might happen in the future.
- 5.74 On the basis of current spending levels in the catchment area, just under 60 per cent of this spending growth (£118.6m) will go to eating and drinking establishments (restaurants, cafés, take-away outlets and pubs/bars). Capturing a sizeable proportion of this growth in expenditure through the provision of a better and more appealing choice of restaurants, cafés and pubs/bars will be vital to the future health of all of the town centres within the catchment area. Whilst Bolton town centre already has a reasonable food & drink offer, further appropriate facilities, including better quality establishments, should be welcomed.
- 5.75 The remainder of the growth in expenditure on leisure services will go to a wide range of activities, with no single activity capturing any significant market share. In our assessment, Bolton town centre may be viewed favourably by multiplex operators - or independent cinema operators - as a potential location for additional cinema provision.
- 5.76 Furthermore, there appears to be scope for an additional Gala or Mecca-type bingo club, or a couple of neighbourhood bingo clubs, at least in quantitative terms, although more targeted market testing would be required in order to gauge whether operators would be interested in the study area. However, we consider there to be little scope for casino development.
- 5.77 As we have stressed, the approach to the assessment of quantitative need in the leisure sector is less well developed than in the retail sector and so the quantitative 'needs' that we have identified should be treated as an indicative guide. Furthermore, the leisure sector is dynamic, changing and operator-led. Thus, if an investor feels capable of attracting customers by diverting spending from other

²⁸ Source - The Gambling Commission

facilities, the planning system does not seek to prevent additional development, provided such development meets the tests in PPS6.

Conclusions in Relation to Need

Comparison Goods

- 5.78 The existing comparison goods retail commitments will meet most of the quantitative need likely to arise in the period up to 2016. Indeed, unless projects like the Market Hall redevelopment and Central Street succeed in raising the overall retention of comparison goods expenditure, the projected growth in expenditure up to 2016 will not be sufficient to meet the turnover requirements of all of the existing commitments (Table 5.6).
- 5.79 Nevertheless, our analysis suggests that a considerable quantum of comparison goods need is likely to arise from 2016 up to 2021. Thus, the cumulative growth from 2008 to 2021 is sufficient to support new floorspace in the range 22,500 sq.m gross (under the declining retention scenario) to 68,900 sq.m gross (under the increase in retention scenario). This cumulative need is over and above the existing commitments, so that a further major site is likely to be required to be developed in the period up to 2021, but only after Central Street has been developed and established itself as a successful trading location.
- 5.80 Moreover, whilst a considerable amount of further quantitative need for comparison goods is likely to arise in the longer term, from 2021 to 2026, such long term forecasts are fraught with difficulty and provision for needs after 2021 should be the subject of a plan, monitor and manage process. The immediate priority is to deliver the town centre projects which will meet the comparison goods need that is more certain to arise in the period up to 2016.
- 5.81 Furthermore, so far as qualitative need is concerned, the overarching requirement is to improve the quality of Bolton town centre's comparison offer, not only in relation to Manchester City Centre and the Trafford Centre, but also in relation to Middlebrook, Wigan town centre and Bury town centre.

Convenience Goods

- 5.82 The quantum of convenience goods need arising across the whole of the catchment area in the period up to 2016 is not quite sufficient to meet the turnover requirements of the commitments at Westhoughton and at Central Street. Table 5.7 confirms, nevertheless, that further need in the convenience goods sector arises in the period from 2016 to 2021, and between 2021 and 2026. Indeed, the cumulative

need in the convenience sector, up to 2021, ranges from 3,400 sq.m gross to 5,300 sq.m gross, over and above existing commitments.

- 5.83 Moreover, there is a short term, urgent requirement to meet localised deficiencies which exist in Westhoughton, Little Lever, and Egerton-Edgworth. The J Sainsbury commitment will meet the immediate needs of Westhoughton and Aldi is currently expressing interest in Little Lever.
- 5.84 Another consideration in the convenience goods sector is the need to ensure easy access to local facilities on the part of those residents facing social exclusion and deprivation. Thus, Figure 5.3 of Volume 2 shows that the super-output areas which fall within the worst 3 per cent in England that are not currently well served by convenience stores are Bolton 025D, 012B, 013B and 013A. Other super-output areas not currently well-served that are within the 3 to 10 per cent most deprived are 019E, 022B and 026D.

Leisure Services

- 5.85 Expenditure on leisure services in the Bolton catchment area, is projected to grow by £199m in the period up to 2021. On the basis of current spending levels on leisure services by residents of the catchment area, just under 60 per cent of this spending growth (£119m) will go to eating and drinking establishments. Thus, capturing a sizeable proportion of this growth in expenditure through the provision of a better and more appealing choice of restaurants, cafés and pubs/bars will be vital to the future health of all of the town centres within the catchment area. Whilst Bolton town centre already has a reasonable food & drink offer, further appropriate facilities, including better quality establishments, should be welcomed.
- 5.86 The remainder of the growth in expenditure on leisure services will go to a wide range of activities, with no single activity capturing any significant market share. In our assessment, Bolton town centre may be viewed favourably by multiplex operators - or independent cinema operators - as a potential location for additional cinema provision and Church Wharf would seem to provide an ideal opportunity.
- 5.87 Furthermore, there appears to be scope for an additional Gala or Mecca-type bingo club, or a couple of neighbourhood bingo clubs, at least in quantitative terms, although more targeted market testing would be required in order to gauge whether operators would be interested in the study area. However, we consider there to be little scope for casino development.

6 STRATEGIES FOR MEETING RETAIL AND LEISURE NEEDS

Introduction

- 6.1 In Section 2 of our report, we set out the requirements that PPS6 imposes on Regional Planning Bodies (RPBs) and Local Planning Authorities (LPAs) in preparing the development plans; these include the need to consider:
- i) whether there is a need to avoid an over-concentration of growth in the higher level centres;
 - ii) the need for investment in those centres requiring to be regenerated; and
 - iii) the need to address deficiencies in the network.
- 6.2 Thus, in preparing their development plan documents within the context set by the RSS, LPAs, in turn, must:
- i) select appropriate existing centres to accommodate growth, making the best use of existing land and buildings, but extending the centres where appropriate using tools such as the Action Plans, CPOs and strategies to improve transport, land assembly, crime prevention and design;
 - ii) manage the role of existing centres through the promotion of specialist activities, or specific types of uses; and
 - i) plan for new centres of an appropriate scale in areas of growth, or where there are deficiencies in the existing network
- 6.3 In paragraph 2.50 and 2.51 of our report, we refer to the new test of soundness introduced by PPS12. This new test requires the Council to demonstrate that its chosen strategy is the most appropriate, when considered against reasonable alternatives, and secondly, that the chosen strategy is effective and deliverable.
- 6.4 Thus, in assessing strategies for meeting retail and leisure needs, we have dismissed those which would clearly not accord with national and regional policy, such as trying to meet most of the need in existing out-of-centre retail parks, or through the creation of a new centre in an out-of-centre location.
- 6.5 Moreover, we anticipate that the Council may wish to consider a change to the Policy S3 hierarchy; for example, it may wish to reflect on whether there should be a transfer of Little Lever from the 'Local Town Centres' group to the 'District Centres' group. In RTP's assessment, Little Lever does not function, or perform, at the same

level as Farnworth, Westhoughton and Horwich. Nevertheless, we appreciate the political sensitivities arising from any change to the hierarchy of centres; for example, there may be a danger that a transfer of Little Lever to the 'District' category may be perceived as some form of 'relegation', rather than merely a move to what RTP would consider to be a more appropriate classification for the centre, bearing in mind that policy will continue to seek to sustain and enhance all of the Borough's district centres.

6.6 Finally, we should state at the outset that all reasonable strategies will provide for localised convenience and service needs in line with the principles set out earlier in Section 5.

6.7 Thus, we have focused our initial evaluation on just three alternative strategies, as follows:

- i) seeking to meet almost all of the comparison retail and commercial leisure needs in Bolton town centre, with convenience retail and food and drink needs met as described in Section 5;
- ii) seeking to channel most of the comparison retail and commercial leisure needs to a combination of Bolton town centre and Middlebrook Retail Park, but again with convenience retail and food and drink needs met as described in Section 5; and
- iii) seeking to rebalance the network of centres in the Bolton catchment area, by channeling comparison retail and commercial leisure needs to a combination of Bolton town centre, the smaller town centres of Farnworth, Westhoughton and Horwich and to Middlebrook Retail Park.

Strategy 1 - Meeting Most of the Comparison Retail and Commercial Leisure Needs in Bolton Town Centre

6.8 In the first section of our report, we refer to various ongoing initiatives that will have important implications for Bolton town centre. These ongoing initiatives build on some of the projects which are foreshadowed in the adopted UDP, but which have not yet been implemented, together with identification of new regeneration opportunities. The major ongoing, committed or potential projects for various town centre uses and mixed-use schemes, in different parts of the town centre, are described below.

Civic and Retail Core

6.9 In the civic and retail core the important projects include:

- i) Market Hall - a £90m redevelopment, which is well underway, to provide for an additional 9,000 sq.m gross of retail floorspace, which is 80 per cent pre-let to retailers that include H&M, Zara and Lush, and scheduled to open in the autumn of 2008.
- ii) Victoria Plaza - a £1.5m refurbishment of retail property which is nearing completion and for which lettings have been secured to Sports World, Optical Express, Orange, O2 and Costa Coffee.
- iii) Knowsley House - a mixed-use scheme which will incorporate refurbished office space and some 3,700 sq.m of retail use.

St Helena

6.10 St Helena represents the major expansion area for the retail core and the main projects currently identified or committed are:

- i) Bark Street - a 5,500 sq.m office development which is nearing completion in an eight-storey building with integral car parking;
- ii) Central Street - which is the jewel in the crown project in the core of the town centre and represents a mixed use scheme for which planning permission exists (ref 71649/05) for approximately 33,400 sq.m gross of new retail space (to be anchored by a Tesco department store), together with ancillary food and drink uses and 150 residential apartments.
- iii) Conversion of the Post Office - this is a residential scheme comprising 132 apartments through new build and conversion of the Post Office, and with the post office use remaining at ground floor level.
- iv) St Edmonds Street - a £17m scheme which will deliver 90 apartments overlooking the River Croal and the listed St Helena Mill, together with open space and riverside walkways.
- v) Deansgate/Kings Street - the Council has prepared a development brief which details the opportunity for a retail-led mixed-use scheme along the Deansgate frontage.

Urban Village

6.11 The Urban Village is a residential-led initiative which aims to broaden the mix of housing and help to link Queens Park into the town centre; the main projects are:

- i) Urban Village Masterplan - the Masterplan envisages an eco-village of family, executive and affordable homes, with immediate access both to the core of the

town centre and to Queens Park, through an enhanced entrance along the River Croal.

- ii) 5Twenty2 - this is a scheme providing for 22 luxury apartments with views overlooking the River Croal, which is currently under construction.

Little Bolton

6.12 Much of the opportunity in Little Bolton is for residential, hotel and other mixed-use projects, which include:

- i) Renaissance - this is an ongoing development of 53 apartments surrounding a private court yard within the St George's conservation area, which is a project anticipated to play a key role in the transformation of Little Bolton.
- ii) 110 St George's Road - planning permission has been granted for a 6-storey apartment complex and further development on this key site with prime frontage in the St George's conservation area.
- iii) Georgian Hotel - planning permission has been granted for a 4-storey hotel with access to Bath Street and Central Street and located in the prime frontage of St George's conservation area.
- iv) St George's Place - this will be a development of 19 bespoke apartments with approximately 900 sq.m of retail use on the ground floor and is due for completion in 2009.
- v) Little Bolton Town Hall - this is a conversion of the listed Little Bolton Town Hall and adjacent property for bar, restaurant and office uses.
- vi) Bath Street Multi-storey Car Park - this is the preferred site for Phase 1 of the Council's car parking strategy and will comprise a new multi-storey car park of contemporary design which serves Little Bolton and the north of the town centre via access onto the nearly pedestrianised Bath Street.
- vii) Clarence Street - this is a new opportunity for a residential-led, mixed-use scheme, on a gateway site.

Church Wharf

6.13 The Council has appointed ASK-Bluemantle to develop the Church Wharf area and it is envisaged that the mixed-use scheme will include: a new office quarter providing for approximately 32,000 sq.m of Grade A business accommodation; a new leisure zone with cinema, retail, food and drink and hotel uses; and around 700 new apartments. Indeed, an outline planning application (ref: 79736/08) has recently been submitted for a scheme with a total floorspace up to 45,000 sq.m

including: A2 (Financial and Professional Services), A3 (Restaurants and Cafés), A4 (Drinking Establishments), A5 (Takeaways), B1 (Offices), D2 (Leisure), C2 (Hotel) and up to 720 residential units.

St Peters

6.14 The St Peters area contains a lot of listed buildings and large-scale redevelopment is difficult. Nevertheless, ongoing and committed projects include:

- i) Picture House - where the Irwell Valley Housing Association has recently delivered 44 shared-ownership apartments together with a striking modern restaurant.
- ii) Anvil - a recent completion of 26 apartments including a sixth floor penthouse.
- iii) 85-93 Bradshawgate - where planning permission has been granted for a mixed-use development comprising 1,400 sq.m of Grade A office space within a converted building, fronting Bradshawgate, with the ground floor available for retail use and a 6-storey apartment complex to the rear.

Merchant's Quarter

6.15 The Merchant's Quarter is an office area where the Council is seeking to encourage further Grade A office floorspace. Major projects include:

- i) Merchant's Place - which represents a two-phase office development by the Charles Topham Group, with 1,795 sq.m completed in 2007 and with a further 7,600 sq.m scheduled to be available this year.
- ii) Merchant's Quarter Masterplan - the Council is working with the Charles Topham Group to develop a masterplan for this 10 hectare area, which is expected to deliver a 24-hour business destination, with up to 46,000 sq.m of office development, together with restaurants, cafés and hotel uses.
- iii) Brightmet Street Multi-storey Car Park - this is a preferred site for Phase 1 of the Council's car parking strategy that will provide for a multi-storey car park of high quality design, which will provide improved access to Merchant's Quarter and to the town centre.

Bolton Innovation Zone

6.16 The Bolton Innovation Zone is a major regeneration initiative with the potential to have a significant impact on the regional economy. Indeed, the zone is expected to be a key economic driver for the town centre, generating around 4,000 jobs and approximately £300m of private investment. The creation of the zone results from a number of key public sector developments including: the expansion of Bolton

University, a core partner in the Manchester Knowledge Capital initiative; the co-location of two major colleges; the development of a new transport interchange; and the creation of a new cultural quarter. The Innovation Zone offers a range of site-specific opportunities and will also provide for two major public sector developments - a Knowledge Centre and a performance space.

- 6.17 The Bolton Innovation Zone is divided into two broad parcels: the Trinity Gateway, which will provide for the new multi-modal interchange; and the Knowledge Campus and Cultural Quarter. The prime development opportunity within the latter arises through the proposal to relocate the bus station, which will create an opportunity for a family focused leisure and cultural offer that will link the civic core to the Knowledge Campus. This area may also offer opportunity for specialist retail uses, but a key issue relates to the future of the market and whether it can be enhanced in-situ, or whether it requires relocation to another site in the Innovation Zone.

The Contextual Background Which Appears to Support Strategy 1

- 6.18 In paragraphs 1.4 to 1.20 of the introductory section, we set out the contextual background to the current study and, in particular, we referred to the Community Strategy, with its twin-aims of narrowing the gap between the most and least well-off sectors of society, and ensuring economic prosperity. We also referred to the role of Bolton town centre in driving economic prosperity and promotion of social inclusion as a result of its accessibility to the whole community and because of the diversity and agglomeration of the activities it supports.
- 6.19 We have also outlined many opportunities in sequentially preferable locations which can provide for significant amounts of development for various town centre uses. Indeed, as we have noted already, it is clear that existing opportunities and commitments will be able to meet much of the need for comparison retail and commercial leisure development that arises in the period up to 2016. Thus, we have a background where there is concerted development and regeneration strategy which recognises that:
- i) there is a plethora of development opportunities within and adjacent to Bolton town centre which can provide for a range of town centre uses;
 - ii) there is a need to halt and reverse the decline of Bolton town centre in the regional and national retail hierarchy; which, in turn, leads to;
 - iii) a requirement to secure a number of key anchor projects, such as Central Street and Church Wharf, which are of sufficient critical mass and design quality so as to be able to attract a better profile of comparison retail and leisure operators in the middle and upper market sectors.

- 6.20 These circumstances would seem to offer significant support for Strategy 1 and such a strategy would clearly fit well into the national and emerging regional policy framework. Moreover, the catchment area's needs for localised convenience and service operators can be met in the manner suggested in Section 5 of our report.

Strategy 2 - Channelling Comparison Retail and Commercial Leisure Needs to a Combination of Bolton Town Centre and the Middlebrook Retail Park

- 6.21 This second strategy would provide for most development in the comparison retail, and commercial leisure sectors to be provided in Bolton town centre, but would accept Middlebrook Retail Park's role in providing for some of the needs through an expansion of its retail and leisure functions.
- 6.22 The Middlebrook Retail Park clearly achieves high customer satisfaction ratings and its existence is a matter of fact which will not go away. Nevertheless, it is clear - from a comparison of our Figure 4.4 (see Volume 2), with the Catchment Area Plan set out in Appendix 2 of the Bolton Retail Study of November 2001, and in Table 3.8 of Appendix 3 of that study - that Middlebrook has reduced the size of the town centre's primary catchment area and the market shares it achieves in the western part of the overall catchment area. As a consequence, we are certain that further expansion of retail and commercial leisure development at Middlebrook would make it harder to achieve the necessary transformation in Bolton town centre's overall performance. Moreover, any further material expansion of Middlebrook for retail and commercial leisure development purposes would not sit easily with national planning policy, or with the emerging RSS.
- 6.23 Thus, whilst Strategy 2 may be deliverable, commercially, it would sit ill-at-ease with the wider national, regional and local policy agendas.

Strategy 3 - Rebalance the Network of Centres in the Bolton Catchment Area, by Channelling Comparison Retail and Commercial Leisure Needs to a Combination of Bolton Town Centre, the Smaller Town Centres of Farnworth, Westhoughton and Horwich and to Middlebrook Retail Park.

- 6.24 At first sight, this third strategy may be perceived as having some merit in that it could be said to seek to spread opportunities and investment risk and to reflect the current balance in the network of centres. However, we consider that Strategy 3 suffers from two key drawbacks, the first of which relates to commercial property considerations, and the second of which relates to planning policy considerations.

- 6.25 Thus, the first fallback with Strategy 3 is that it would dissipate, geographically, the occupier demand which exists in the comparison retail and leisure sectors. Such dissipation of occupier demand would substantially increase the risk of failure to deliver key anchor projects in Bolton town centre. Thus, projects such as Central Street and Church Wharf require pent-up demand in the retail and leisure sectors to be channelled to these opportunities and for alternatives to be cut-off. Such an approach will reduce yields, increase investor confidence and maximise the chances for success.
- 6.26 The second drawback with Strategy 3 is the partial conflict with national policy and the emerging RSS in that it would involve some retail and leisure development in an out-of-centre location at Middlebrook, whereas we have already identified sufficient opportunities in sequentially preferable locations which can meet all of the comparison retail and commercial leisure needs expected to arise in the period up to 2016. PPS6 does not require the LDF process to allocate sites to meet needs throughout its lifetime and the needs which may arise after 2016 can be dealt with through the process of 'plan, monitor, and manage'.
- 6.27 Thus, in line with the advice in Paragraph 2.46 of PPS6, we consider that it will be necessary for Bolton's LDF to introduce phasing policies that ensure delivery of projects such as Central Street and Church Wharf, first, thereby allowing further time to assemble the sites which will be required to meet needs arising after 2016.

Conclusions and Implications for Emerging Local Policy

Conclusions

- 6.28 Our study suggests that the retail and commercial leisure needs we have identified will be best satisfied along the lines of Strategy 1, which would involve:
- i) meeting most of the comparison retail and commercial leisure needs, including food and drink, in Bolton town centre;
 - ii) channelling needs in the convenience, services and food and drink sectors to the local town centres of Farnworth, Horwich and Westhoughton, whilst rectifying localised deficiencies in Little Lever and Egerton/Edgworth and providing for small top-up stores in areas of deprivation;
 - iii) strictly limiting the amount of any further retail and commercial leisure development at Middlebrook, whilst recognising the popularity of this out-of-centre facility through encouragement of further improvements to public transport and by encouraging residential and employment uses on any land with development potential.

- 6.29 The physical opportunities exist in Bolton town centre for high quality development; there is a need to halt and reverse the decline of Bolton town centre in the regional hierarchy; and there is a need to boost investor confidence in the town centre by channelling occupier demand to flagship opportunities that are critical to the enhancement of the town centre's future vitality and viability.

Implications for Emerging Local Policy

- 6.30 This study is forward looking and is intended to assist the Council in the formulation of its Local Development Framework and, in particular, its Core Strategy Development Plan Document. The existing UDP was adopted in April 2005, but the evidence base to support it has become very dated. Indeed, paragraph 01.05 of the adopted UDP confirms its long gestation period, from January 1998 to April 2005. As a consequence, there is a clear need for a fundamental review of its strategy and the LDF provides the perfect process for this review.
- 6.31 So far as the Core Strategy, Issues and Options Paper of July 2007 is concerned, our study suggests that the option of consolidating retail floorspace at current levels is no longer acceptable given the need to halt and reverse Bolton's decline in the regional and national hierarchies. There is, however, a need for consideration of all of the strategies that we set out in Section 6 of our report. The recently published PPS12, requires that all reasonable alternatives are tested, even if they are subsequently rejected, and the onus will be on the Council to demonstrate that the preferred strategy is both justified and effective.

7 SUMMARY OF FINDINGS AND RECOMMENDATION

The Requirements of Existing National Policy

- 7.1 PPS6 reflects the Government's wider emphasis on the need to plan, monitor and manage, at both the regional and local planning levels; indeed the key changes in national policy emphasis that arose as a result of the publication of PPS6, in March 2005, were:
- i) a requirement for a much more proactive plan-led approach to planning for town centres through regional and local planning;
 - ii) much more emphasis on the need to develop a network and hierarchy of centres, at both the regional and local levels; and
 - iii) a much greater involvement on the part of the public sector in the management and implementation of changes in town centres and in the monitoring of their vitality and viability.
- 7.2 Where growth cannot be accommodated within existing centres, LPAs are to plan for the extension of the primary shopping area, if there is a need for retail provision, and for the extension of the town centre as a whole to accommodate other main town centre uses.
- 7.3 The five key considerations to apply in selecting sites for development are similar, whether in forward planning or in development control. However, the publication of PPS6 has caused more emphasis to be given to the issue of scale, so that LPAs are to consider setting indicative upper limits for the scale of development likely to be permissible within or on the edge of different types of centres.
- 7.4 PPS12 places more emphasis on the need for development plan documents to:
- i) *'...demonstrate that the plan is the most appropriate, when considered against reasonable alternatives'*. (Paragraph 4.38 of PPS12, our emphasis); and
 - ii) *'...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).

Potential Changes to National Policy

- 7.5 Paragraph 7.55 of the May 2007 White Paper, Planning for a Sustainable Future, announced the Government's intention to undertake a partial review of PPS6 so as

to *'...replace the need and impact tests with a new test which will have a strong focus on our town centre first policy, and which promotes competition and improves consumer choice avoiding the unintended effects of the current need test'*.

Similarly, paragraph 7.56 of the White Paper envisaged that any changes to PPS6 would also take account of the conclusions of the Competition Commission's investigation of the UK's grocery sector

- 7.6 However, the recently published Proposed Changes to PPS6 represents a half-way house, in that proposals are put forward in relation to a new *'impact test'*, but not in relation to the *'competition test'* advocated by the Competition Commission (because of the ongoing legal challenge to the latter's recommendations). Thus, before we summarise the Proposed Changes to PPS6, we first outline the Competition Commission's key recommendations.
- 7.7 We consider that the draft PPS6 has only limited implications for the preparation of the Council's forthcoming core strategy. If the Government's proposals are approved, need would remain an important consideration for development plan preparation purposes and it is arguable that need must remain a development control issue, because of the provisions of Section 38(6) of the Act and the logic outlined in the paragraph 2.70 of our report..

The Requirements of the Emerging RSS

- 7.8 Notwithstanding the Secretary of State's proposed changes, we consider that the emerging RSS is deficient in that it does not meet, fully, the requirements of PPS6. In particular, we consider that the emerging RSS, as proposed to be changed by the Secretary of State, does not:
- i) provide an adequate strategic framework for the development of a network and hierarchy of town centres, with all 26 centres in Policy W5 given equal status;
 - ii) give sufficient guidance about those town centres of sub-regional significance where growth is to be encouraged; and that
 - iii) it does not provide any guidance in relation to the overall quantum of new retail and leisure floorspace required across the region over the lifetime of the RSS, let alone for five-yearly periods within it.

Performance Analysis - the PPS6 Indicators

Performance of Bolton

- 7.9 Most of the health check indicators suggest a decline in Bolton town centre's overall vitality and viability since the mid-1990s, as a reflection of the fierce competition from high quality developments in Manchester City Centre, the Trafford Centre, Middlebrook Retail Park and the high quality Grand Arcade development in Wigan town centre.
- 7.10 Nevertheless, we are encouraged that Bolton town centre has retained an attractive retail and civic core and an impressive cultural offer in the form of the Octagon Theatre, the museum and art gallery, the Town Hall and the Albert Halls concert venue. Indeed, we note the high customer satisfaction ratings in relation to the quality of the town centre's buildings and townscape, and in relation to pedestrian vehicular safety issues.
- 7.11 Of most fundamental significance, however, are the ongoing regeneration initiatives and opportunities for high quality development across a range of town centre uses, including key flagship projects, such as Central Street, the Bolton Innovation Zone, Church Wharf, the proposals for the Merchant's Quarter, the proposals for the Urban Village and the ongoing commitments in Little Bolton.

Performance of Farnworth

- 7.12 Although Farnworth town centre's position in the national rankings has remained stable since the mid 1990s and although prime yields have improved, the weight of the evidence from the indicators suggests a decline in the town centre's overall vitality and viability. Vacancies have risen and occupier demand seems to be low. Moreover, although Farnworth benefits from a healthy convenience goods sector, the comparison goods sector is limited and very much focussed at the discount end of the market. Of most concern, however, is the relatively poor state of the environment of the centre and the need for substantial investment in refurbishing and modernising the precinct.
- 7.13 Moreover, the survey of pedestrians suggests that there is room for improvement across a whole range of environmental and accessibility issues and the overall customer satisfaction rating is very much one of being 'satisfactory', rather than on a more positive response.
- 7.14 We note, however, that there is an extant planning consent (ref 77546/07) for the redevelopment and refurbishment of Farnworth Market and part of the Precinct, implementation of which will improve not only the centre's retail offer, but also its

environmental conditions, thereby helping to reduce levels of anti-social behaviour that is caused by the open aspect of the current market.

Performance of Horwich

- 7.15 Despite the recent improvement in Horwich's position in the national retail rankings, there are indications of a decline in the centre's overall vitality and viability. The convenience and service offer is good, but the comparison sector offer is very limited - even more so than in Farnworth - and it is focussed on the discount end of the market. Moreover, vacancies have risen since the most recent GOAD survey, with some of the vacant units in prominent locations; operator demand is very limited; and footfall has declined.
- 7.16 Horwich town centre achieves quite a good customer satisfaction rating in relation to the cleanliness of the streets, personal safety issues, and the quality of its buildings. Horwich also scores well in relation to the location of, and security of, its car parks and its bus stops. Nevertheless, it is clear that the environment of the centre would benefit from some enhancement, particularly the Market Hall which appears to be in a state of disrepair. Moreover, the centre lacks a focal point, with the residential uses within the town centre boundary diluting the character of the shopping environment in parts of the centre.
- 7.17 We anticipate, however, that both Horwich town centre and Middlebrook Retail Park will benefit from the redevelopment of the 40 hectare Horwich Locomotive Works site, which will ultimately deliver around 1,600 new houses on half the site, with the other half developed for a range of employment uses.

Performance of Westhoughton

- 7.18 Overall, we conclude that Westhoughton is a pleasant, attractive, healthy town centre. Westhoughton serves, primarily, a localised role, in meeting residents' day-to-day retail and service needs. The centre contains a number of small restaurants and bars, including a JD Wetherspoon outlet. The environment of the centre is pleasant and generally well-maintained, and the centre offers a range of retail units, from small converted properties, to medium-sized purpose-built units. Although the convenience offer of Westhoughton is somewhat limited (with no major supermarket at present), this will be addressed following the approval of planning permission for a Sainsbury's supermarket on the edge of the centre.
- 7.19 We note that Westhoughton achieves a good customer satisfaction rating in relation to the cleanliness of its shopping streets and personal safety issues and that it also scores well in relation to the location of its train station, the location of its bus stops and the location and security of its car parks.

Performance of Little Lever

- 7.20 Little Lever is a small, linear centre, which performs an essentially localised role, catering primarily for service and top-up food shopping needs. However, our healthcheck has identified several indicators of decline in Little Lever, including a very high vacancy rate, low and static Zone A retail rents, limited operator demand for representation in the centre, and a relatively poor environment. Even the precinct, which could potentially form a focal point of the centre, lacks character and would benefit from comprehensive modernisation. However, despite the existence of a large number of vacant units, these are small and dispersed through the centre so that there are no obvious development opportunities for meeting the requirements of an operator such as Aldi. Thus, the focus in the future may well relate to consolidation and enhancement initiatives.
- 7.21 Indeed, we note that Little Lever currently attracts very low customer satisfaction ratings in relation to the cleanliness of its shopping streets, personal safety issues and shelter from the weather. Nevertheless, the customer satisfaction rating with the retail offer in Little Lever is high, perhaps as a result of the recent introduction of Tesco Metro. Little Lever also achieves good satisfaction ratings in relation to the location of its bus stops and the location and security of its car parks

Performance of Middlebrook

- 7.22 The out-of-centre Middlebrook Retail Park achieves the best customer satisfaction ratings in relation to cleanliness, personal safety issues and shelter from the weather. Middlebrook also scores well in relation to the security of its car parks and absence of parking charges, and there is little vehicular/pedestrian conflict within the Park itself, other than on match days.
- 7.23 So far as the relationship between Bolton town centre and Middlebrook is concerned, the modal response from the survey of pedestrians is that Middlebrook is generally complementary to the town centre. Nevertheless a significant minority perceive that Middlebrook competes with the town centre and has had a harmful effect on it. Middlebrook's main advantages over the town centre relate to the availability of plentiful free car parking and Sunday openings, whereas its key disadvantage is its restricted choice of retail offer.

Current Patterns of Retail and Leisure Spending

Comparison Goods Spending

- 7.24 Overall, some 64 per cent of the comparison goods expenditure of the residents of the catchment area is retained by town centres, retail parks, and freestanding stores located within the catchment. The main destinations within the catchment area are: Bolton town centre, which secures £504m of the residents' comparison goods expenditure; Middlebrook Retail Park, which secures £139m of the residents' comparison goods expenditure; and Bolton Gate Retail Park, which secures £42m of the residents' comparison goods expenditure.
- 7.25 Short-distance leakage to places like Manchester City Centre, the Trafford Centre, Bury town centre and Wigan town centre account for 23 per cent of the residents' comparison goods expenditure; SFT leakage accounts for 7 per cent; and the remaining 6 per cent of comparison goods expenditure is accounted for by longer distance leakage to places like Preston City Centre.
- 7.26 Bolton town centre secures a comparison goods market share in excess of 60 per cent in two zones, in excess of 50 per cent in five zones, in excess of 40 per cent in seven zones and in excess of 20 per cent in 11 of the 16 zones. Conversely, Middlebrook Retail Park's maximum comparison goods market share is 20 per cent in just one zone and in the range 10 per cent to 20 per cent in a further three zones. Thus, in 12 of the 16 zones Middlebrook Retail Park's comparison goods market share is less than 10 per cent.
- 7.27 Farnworth town centre achieves a maximum comparison goods market share of 12 per cent in Zone 8; Horwich town centre secures a maximum comparison goods market share of 20 per cent²⁹ in Zone 14; Westhoughton town centre achieves a maximum market comparison goods market share of 6 per cent in Zone 11; and Little Lever town centre secures a maximum comparison goods market share of just 3 per cent in Zone 6.
- 7.28 Bolton town centre secures an unopposed dominant comparison goods market share in excess of 40 per cent in four zones (Figure 4.4 of Volume 2) and although it secures a market share in excess of 40 per cent in a further three zones, it faces subsidiary competition in these zones from other centres which have a market share in the range 10 per cent to 40 per cent.

²⁹ We suspect that this market share is inflated by respondents who said 'Horwich' when they meant 'Middlebrook Retail Park'.

- 7.29 For seven of the survey zones, to the west and south of the catchment, there is no dominant comparison goods centre. This suggests that Bolton town centre's primary catchment area has shrunk since the time of CB Hillier Parker's Bolton Retail Study of November 2001, as a result of strong competition from Manchester City Centre, the Trafford Centre, Middlebrook Retail Park and Wigan town centre.
- 7.30 It is disappointing, however, that the overall retention rate (fourth row of percentages in Table 4.11) is lowest for clothes and shoes (59 per cent) and for specialist items (55 per cent). This is an important piece of evidence which suggests a need to promote quality developments - such as the Market Hall redevelopment - which are targeted at higher value middle and up-market comparison retailers. We have noted, already, that Market Hall has secured lettings to the likes of H&M, Zara, Warehouse, Lush and Principles, but our subsequent analysis in Section 5 (see Table 5.9, in particular), confirms that there are very many high quality comparison facias which are not yet represented in Bolton town centre, but are well represented at the Trafford Centre.

Convenience Goods Spending

- 7.31 Overall, 92 per cent of the convenience goods expenditure of residents of the overall catchment area is retained by town, district and local centres and freestanding stores located within the catchment area. Thus, as might be expected in the convenience sector, there is a minimal level of strategic leakage.
- 7.32 The household survey suggests that there has been a continuing polarisation trend in the convenience goods sector, in that the 18 superstores located within the catchment area, now account for 76 per cent of the aggregate convenience goods expenditure of the residents of the catchment area. Indeed, only 4 of the 16 zones lack a 'dominant' superstore which is defined as having a convenience goods market share in excess of 30 per cent.
- 7.33 The highest individual market shares are achieved by Asda in Farnworth, Asda in Radcliffe, Tesco in Walkden, Wm Morrison at Harwood and Tesco at Mansell Way Horwich. Nevertheless, there is no part of the overall catchment area for which there is a 10 minute isochrone with an individual operator having a convenience goods market share in excess of 60 per cent. It is unlikely, therefore, that there will be any failure of the competition test in the near future.
- 7.34 However, there are three parts of the catchment area where there is a localised deficiency in convenience goods provision; these are the Egerton/Edgworth zone, where the localised convenience goods retention rate is only 10 per cent; the Westhoughton zone, where the localised retention rate is only 14 per cent (but

which is being addressed by the J Sainsbury commitment at Cricketers Way); and the Little Lever zone, where the localised retention is only 38 per cent (but two-thirds of which is accounted for by the Asda at Burnden Park).

7.35 Moreover, the household survey confirms that most convenience goods purchases are undertaken on a highly localised basis and only four superstores have a convenience goods market share in excess of 10 per cent in three or more zones. The stores which do have the most diverse catchments are those located within, close to, Bolton town centre - these being the J Sainsbury store at Trinity Way, the Asda at Burnden Park, the Wm Morrison at Blackhorse Street, the Asda at Astley Bridge and the Wm Morrison at Morington Road.

Leisure Services Spending

- 7.36 Bolton town centre and Manchester City Centre are by far the most important location for spending at restaurants and cafés, but this type of spending tends to be quite localised and Westhoughton, Farnworth and Horwich town centres are all popular in their local zones: the same cannot be said for Little Lever.
- 7.37 Likewise, Bolton and Manchester are the top locations for spending in pubs and bars, but again, the pattern of spending is localised and Westhoughton and Horwich town centres perform well in their local zones.
- 7.38 So far as cinemas are concerned, there is a divide between the Valley Leisure Park which serves residents in the more densely developed core of the urban area and Middlebrook Retail Park which serves the Western part of the catchment.
- 7.39 Manchester City Centre is the most important location for visits to museums and art galleries, but Bolton town centre performs quite well for residents in the core of the catchment.
- 7.40 The Middlebrook Retail Park seems to reign supreme when it comes to expenditure in family entertainment centres, being dominant in 12 of the 16 survey zones.
- 7.41 Two-thirds of the respondents do not participate in health and fitness and Bolton town centre is the most important destination for those that do. Similarly, 84 per cent of participants do not participate in gambling in bingo halls, casinos, bookmakers and so on, and again for those that do Bolton town centre is the most important location.
- 7.42 Manchester City Centre is by far the most important location for visits to theatres and concert halls for residents of all 16 zones.

Quantitative and Qualitative Need in the Retail and Leisure Sectors

Comparison Goods

- 7.43 The existing comparison goods retail commitments will meet most of the quantitative need likely to arise in the period up to 2016. Indeed, unless projects like the Market Hall redevelopment and Central Street succeed in raising the overall retention of comparison goods expenditure, the projected growth in expenditure up to 2016 will not be sufficient to meet the turnover requirements of all of the existing commitments (Table 5.6).
- 7.44 Nevertheless, our analysis suggests that a considerable quantum of comparison goods need is likely to arise from 2016 up to 2021. Thus, the cumulative growth from 2008 to 2021 is sufficient to support new floorspace in the range 22,500 sq.m gross (under the declining retention scenario) to 68,900 sq.m gross (under the increase in retention scenario). This cumulative need is over and above the existing commitments, so that a further major site is likely to be required to be developed in the period up to 2021, but only after Central Street has been developed and established itself as a successful trading location.
- 7.45 Moreover, whilst a considerable amount of further quantitative need for comparison goods is likely to arise in the longer term, from 2021 to 2026, such long term forecasts are fraught with difficulty and provision for needs after 2021 need to be the subject of a plan, monitor and manage process. The immediate priority is to deliver the town centre projects which will meet the comparison goods need that is more certain to arise in the period up to 2016.
- 7.46 Furthermore, so far as qualitative need is concerned, the overarching requirement is to improve the quality of Bolton town centres comparison offer, not only in relation to Manchester City Centre and the Trafford Centre, but also in relation to Middlebrook, Wigan town centre and Bury town centre.

Convenience Goods

- 7.47 The quantum of convenience goods need arising across the whole of the catchment area in the period up to 2016 is not quite sufficient to meet the turnover requirements of the commitments at Westhoughton and at Central Street. Table 5.7 confirms, nevertheless, that further need in the convenience goods sector arises in the period from 2016 to 2021, and between 2021 and 2026. Indeed, the cumulative need in the convenience sector, up to 2021, ranges from 3,400 sq.m gross to 5,300 sq.m gross, over and above existing commitments.

- 7.48 Moreover, there is a short term, urgent requirement to meet localised deficiencies which exist in Westhoughton, Little Lever, and Egerton-Edgworth. The J Sainsbury commitment will meet the immediate needs of Westhoughton and Aldi is currently expressing interest in Little Lever.
- 7.49 Another consideration in the convenience goods sector is the need to ensure easy access to local facilities on the part of those residents facing social exclusion and deprivation. Thus, Figure 5.3 of Volume 2 shows that the super-output areas which fall within the worst 3 per cent in England that are not currently well served by convenience stores are Bolton 025D, 012B, 013B and 013A. Other super-output areas not currently well-served that are within the 3 to 10 per cent most deprived are 019E, 022B and 026D.

Commercial Leisure Facilities

- 7.50 Expenditure on leisure services in the Bolton catchment area is projected to grow by £199m in the period up to 2021 and by £283m by 2026. On the basis of current spending levels on leisure services by residents of the catchment area, just under 60 per cent of this spending growth will go to eating and drinking establishments (ie £119m by 2021, rising to £169m by 2026). Thus, capturing a sizeable proportion of this growth in expenditure through the provision of a better and more appealing choice of restaurants, cafés and pubs/bars will be vital to the future health of all of the town centres within the catchment area. Whilst Bolton town centre already has a reasonable food & drink offer, further appropriate facilities, including better quality establishments, should be welcomed.
- 7.51 The remainder of the growth in expenditure on leisure services will go to a wide range of activities, with no single activity capturing any significant market share. In our assessment, Bolton town centre may be viewed favourably by multiplex operators - or independent cinema operators - as a potential location for additional cinema provision and Church Wharf would seem to provide an ideal opportunity.
- 7.52 Furthermore, there appears to be scope for an additional Gala or Mecca-type bingo club, or a couple of neighbourhood bingo clubs, at least in quantitative terms, although more targeted market testing would be required in order to gauge whether operators would be interested in the study area. However, we consider there to be little scope for casino development.

Strategies for Meeting Retail and Leisure Needs

- 7.53 In paragraphs 1.4 to 1.20 of the introductory section, we set out the contextual background to the current study and, in particular, we referred to the Community

Strategy, with its twin-aims of narrowing the gap between the most and least well-off sectors of society, and ensuring economic prosperity. We also referred to the role of Bolton town centre in driving economic prosperity and promotion of social inclusion as a result of its accessibility to the whole community and because of the diversity and agglomeration of the activities it supports.

7.54 We have also outlined many opportunities in sequentially preferable locations which can provide for significant amounts of development for various town centre uses. Indeed, as we have noted already, it is clear that existing opportunities and commitments will be able to meet much of the need for comparison retail and commercial leisure development that arises in the period up to 2016. Thus, we have a background where there is concerted development and regeneration strategy which recognises that:

- i) there is a plethora of development opportunities within and adjacent to Bolton town centre which can provide for a range of town centre uses;
- ii) there is a need to halt and reverse the decline of Bolton town centre in the regional and national retail hierarchy; which, in turn, leads to;
- iii) a requirement to secure a number of key anchor projects, such as Central Street and Church Wharf, which are of sufficient critical mass and design quality so as to be able to attract a better profile of comparison retail and leisure operators in the middle and upper market sectors.

7.55 These circumstances would seem to offer significant support for Strategy 1 and such a strategy would clearly fit well into the national and emerging regional policy framework. Moreover, the catchment area's needs for localised convenience and service operators can be met in the manner suggested in Section 5 of our report.

7.56 Thus, our study suggests that the retail and commercial leisure needs we have identified will be best satisfied along the lines of Strategy 1, which would involve:

- i) meeting most of the comparison retail and commercial leisure needs, including food and drink, in Bolton town centre;
- ii) channelling needs in the convenience, services and food and drink sectors to the local town centres of Farnworth, Horwich and Westhoughton, whilst rectifying localised deficiencies in Little Lever and Egerton/Edgworth and providing for small top-up stores in areas of deprivation;
- iii) strictly limiting the amount of any further retail and commercial leisure development at Middlebrook, whilst recognising the popularity of this out-of-centre facility through encouragement of further improvements to public

transport and by encouraging residential and employment uses on any land with development potential.

- 7.57 The physical opportunities exist in Bolton town centre for high quality development; there is a need to halt and reverse the decline of Bolton town centre in the regional hierarchy; and there is a need to boost investor confidence in the town centre by channelling occupier demand to flagship opportunities that are critical to the enhancement of the town centre's future vitality and viability.

Implications for Emerging Local Policy

- 7.58 So far as the Core Strategy, Issues and Options Paper of July 2007 is concerned, our study suggests that the option of consolidating retail floorspace at current levels is no longer acceptable given the need to halt and reverse Bolton's decline in the regional and national hierarchies. There is, however, a need for consideration of all of the strategies that we set out in Section 6 of our report. The recently published PPS12, requires that all reasonable alternatives are tested, even if they are subsequently rejected, and the onus will be on the Council to demonstrate that the preferred strategy is both justified and effective.

Recommendation

- 7.59 We recommend that the Council consider a range of reasonable alternative strategies for meeting the retail and leisure needs that we have identified in its consultation on the emerging LDF. Our study suggests that Strategy 1 will score best in relation to the national, regional and local policy evaluation matrices, but the Council has to test reasonable alternatives and demonstrate - within the terms of PPS12 - that the favoured strategy is *'justified'* and *'effective'*.

