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Selby Retail and Leisure Study

Executive Summary

May 2015

Access Selby
A new approach to public service

SELBY
DISTRICT COUNCIL
Moving forward with purpose

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Contents

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For and on behalf of GVA Grimley Ltd

Executive Summary

Introduction

1.1 GVA was appointed by Selby District Council to provide an up-to-date Retail and Leisure Study, to inform the development of the emerging Sites and Policies Local Plan ('PLAN Selby'). The study will further inform the development of future proposals for Selby by the Selby Town Enterprise Partnership (STEP).

1.2 Our work is based on the latest available data inputs and the findings from an in-centre survey of Selby; retailer business surveys in Selby, Tadcaster and Sherburn in Elmet; and a district-wide household survey of shopping patterns.

Health Checks

1.3 Health checks have been conducted for Selby, Tadcaster and Sherburn in Elmet. The assessments are informed by on-foot surveys of each centre and a footfall survey exercise completed in Selby, together with desk-based research using primary and secondary data. This exercise provides the baseline position for the future monitoring of the vitality and viability of the district's three defined town centres and also identifies the centres' key strengths, deficiencies and areas for improvement. The summary findings are as follows:

Centre	Conclusions
Selby	Selby is a reasonably healthy centre with a strong convenience offer, comprising three key national foodstore operators and a range of independent retailers and market traders. However, comparison retail provision is below the UK average, both in terms of the number of units and floorspace. The proportion of comparison retail provision has decreased since the 2009 Retail & Leisure Study. Despite this decrease, the vacancy rate has remained relatively constant since 2009.
Tadcaster	The town has an important, albeit small format, Sainsbury's store anchor; however, the remainder of the town centre is displaying signs of poor vitality and viability with a high proportion of vacant units and a relatively limited service-based provision. The overall retail offer in the centre has remained fairly static since 2009, indicating that whilst Tadcaster has maintained its position in the face of recent economic conditions, the poor performance of the centre has persisted for a number of years.

Sherburn in Elmet	Overall, the retail offer is commensurate with the role of Sherburn and the relatively discrete catchment that it serves. The low vacancy rate suggests a vital and viable centre. The opening of the new Aldi store may result in short-term adjustment in retail provision, however there may be longer-term benefits by increasing footfall and shopping activity (e.g. increased propensity to use the centre may benefit other shops due to linked trips).

Town Centre Surveys

1.4 A total of 151 in-centre surveys were completed in Selby town centre across 6 days in November 2014. The surveys covered both weekdays and the weekend, including the weekly market day, in order to capture a wide cross-section of regular town centre users and visitors. Household surveys were conducted for Tadcaster and Sherburn in Elmet.

1.5 In addition, in October 2014 approximately 305 detailed retailer business surveys were distributed to all retail and service sector businesses located in Selby, Tadcaster and Sherburn in Elmet.

1.6 The main summary conclusions from the different surveys are as follows:

Centre	In Centre / Household Survey	Business Survey
Selby	The findings of the in-centre survey emphasise Selby's role as primarily a convenient food shopping and local day-to-day comparison shopping destination for residents in the town and in its immediate catchment. There is a strong desire to see enhancements to the town's retail offer, notably an increase in the number and range of shops, particularly in the number of clothing and footwear retailers. The lack of fashion retail provision potentially reflects national trends (gravitation of such higher order comparison retailers towards larger regional centres). Improved cinema and restaurant/café provision in Selby would also be welcomed.	The survey results indicate low levels of business turnover in the town centre; a very positive trend given the current challenging economic conditions. The results suggest that trading levels are moderate to good. However, local business perceptions of Selby town centre are generally poor. Identified issues include the cost of car parking, poor marketing of the town centre, lack of leisure provision and a lack of visitors. Ease of circulation by foot and the number of places to eat and drink are recognised as positive aspects of the town. Suggested improvements include free parking, increased range of shops and fewer charity shops.

Tadcaster	Reasons for visiting the centre include its proximity to home and access to services. There is a perceived lack of retail facilities and eating/drinking establishments in Tadcaster. The high level of vacancies is also a recognised issue. Residents are keen to see an increase in the provision of clothing and shoe shops in the centre, as well as improved foodstore provision.	The survey indicates that trading conditions in Tadcaster are relatively poor, with a relatively high level of business churn identified in the town centre. Nevertheless, local businesses expect to see some improvement in trading performance in the future. Positive aspects of the town include free parking, provision of bus services, quality and number of places to eat and drink and a feeling of safety and security. The retailers identified the lack of visitors and the poor town centre environment as the main negative issues. The retailers proposed an increase in the choice and range of shops, particularly independent retailers.
Sherburn in Elmet	Sherburn in Elmet is regarded as a popular and convenient shopping and service centre for local residents. Positive aspects include the pedestrian friendly environment and the selection of shops. The main shopping dislike is the unattractiveness of the environment and the lack of foodstores. Residents propose an increase in foodstore provision in the centre, improved public transport links and an enhanced range of leisure facilities.	Overall, the survey findings suggest a very healthy trading environment, particularly in the context of current economic conditions. The poor quality town centre environment and lack of car parking are considered to be the main issues in Sherburn in Elmet. Nevertheless, the survey findings indicate positive overall perceptions amongst local businesses in relation to the cost of car parking and the quality and range of shops and services. Local businesses are most keen to see improvements to the quality of the environment in Sherburn in Elmet, such as improved paving and street furniture, as well as more leisure facilities and more quality restaurants and cafes.

Town Centre Surveys

1.7 This aspect of the study is informed by detailed household telephone surveys and follows national guidance to quantify retail capacity and need across the three centres. The summary findings are as follows:

Centre	Convenience	Comparison
Selby	Selby town centre retains 35.7% of main food shopping expenditure arising within its immediate catchment, which increases to 82.2% when out of centre supermarkets are taken into account. The greatest inflow is from Eggborough / South Selby (33.6% / £9.6m). There is a degree of outflow from Selby to mainstream foodstores in York (11.9%). In terms of top-up shopping, 54.2% of top-up food expenditure is retained within Selby. Due to the rural nature of the district, there is a notable amount of top-up food expenditure inflow from other catchments, including Eggborough / South Selby. Overall, Selby retains 75.2% (£76.6m) of convenience expenditure arising within its immediate catchment, when taking account of the out-of-centre foodstores. The overall convenience expenditure pot within the immediate Selby catchment is anticipated to rise from £101.9m (2014) to £127.0m (2027). Tesco and Aldi are trading substantially above their company benchmark. However, it is anticipated that the new Aldi store in Sherburn in Elmet may reduce current overtrading. On the basis of existing provision and committed developments, there is no quantitative need for additional convenience floorspace.	Selby town centre retains 37.9% of all comparison goods expenditure arising within its catchment. Almost half of the available comparison expenditure within this catchment is lost to retail destinations in York. However, Selby still draws a significant amount of trade from other catchments in the district, most notably from Eggborough / South Selby (19.5% / £10.9m). However, it is anticipated that proposals for a large out-of-centre retail park in Castleford may reduce these inflows. The total comparison expenditure pot within the Selby catchment is projected to increase from £152.4m (2014) to £260.6m (2027). Once existing planning commitments are taken into account, there is a future need for c. 1,200m² (net) of comparison retail floorspace in the period to 2022, which will increase to 3,700m² (net) by 2027.
Tadcaster	Tadcaster town centre retains nearly half (49.7%) of the main food shopping expenditure arising within its immediate catchment. The greatest inflow of trade from other catchments is from Zone 8, Western Fringe, which includes Boston Spa and surrounding rural areas (9.5% / £2.0m). There is significant leakage from the	Tadcaster town centre retains just 7.5% of all comparison goods expenditure arising within its immediate catchment. There is significant outflow, equating to 88% of comparison expenditure. The main recipient destination is York. The total comparison expenditure pot in the Tadcaster catchment (Zone 3) is projected to increase from £41.9m

	Tadcaster catchment to mainstream foodstores outside the district, including Morrison, Wetherby; Tesco Extra, York; Asda, Killingbeck Leeds; and Asda, York. The top-up food shopping role of Tadcaster town centre has declined since 2009, however the role of the town centre as a main food shopping destination has increased over this time. Existing convenience provision in Tadcaster town centre retains 53.6% (£14.3m) of overall convenience expenditure arising within its immediate catchment. The Sainsbury's at Mill Lane is trading significantly above its average benchmark. This level of overtrading reflects the lack of choice and competition for local residents, suggesting a potential quantitative and qualitative need for local residents. The capacity analysis indicates there is a floorspace requirement for up to 900m² convenience floorspace by 2022, rising to 1,000m² by 2027.	(2014) to £69.1m (2027). The capacity analysis indicates there is a very limited floorspace requirement of up to 155m² comparison floorspace by 2027.
Sherburn in Elmet	Sherburn in Elmet town centre retains 12.6% of the main food expenditure arising within its immediate catchment. This represents little change from the 2009 position. However, between 2009 and 2014 the food market share of the Co-op has more than doubled, whilst the market share of the local independents has significantly declined. There is a limited inflow from the adjoining Tadcaster catchment (Zone 3) and no other inflows from other catchments either within or outside the district. The main outflows of main food expenditure are to Selby foodstores, Knottingley, Pontefract and Colton Retail Park, Leeds. The top-up food shopping role of Sherburn in Elmet has significantly	Sherburn in Elmet town retains just 8.8% of all comparison goods expenditure arising within its catchment; albeit this is near double the retention figure identified in the 2009 study. A total of 84% of comparison expenditure from Zone 2 is spent outside the district, notably in Leeds and York. The total comparison expenditure pot for the catchment of Sherburn in Elmet (Zone 2) is projected to increase from £48.2m (2014) to £79.9m (2027). The capacity assessment identified no floorspace requirement once planning commitments for new comparison floorspace are taken into account.

	declined since 2009. Overall Sherburn in Elmet town retains 20.5% of total convenience expenditure arising within its immediate catchment. A total of 65.1% of convenience expenditure from this catchment is spent outside Selby. The existing foodstores are trading at expected benchmarks.	

Retail and Leisure Strategy

1.8 Based on the findings of the Retail and Leisure Study, the following summarises the recommended strategy for each centre:

Selby

- **Convenience:** Overall, on the basis of existing convenience provision in the town and committed developments, it is concluded that there is no need for the Council to proactively allocate a site for convenience retail development in Selby over the Local Plan period.
- **Comparison:** It is recommended that the Council proactively plan for up to 1,000m^2 of comparison sales area floorspace in the period 2014 to 2022, rising to 3,300 m^2 in the longer term period to 2027, in addition to the new comparison retail floorspace committed as part of the Staynor Hall and Olympia Park foodstores and the Rigid Paper site scheme. Our recommendation takes into account the level of planned housing growth in Selby District as set out in the Selby District Core Strategy. There is potential for this need to be met in in-centre locations.
- **Leisure:** There is potential for an enhanced commercial leisure offer in Selby, such as a new cinema and national restaurant chains. The proximity of Selby to York may constrain operator demand to locate within Selby town centre. The Council should therefore actively seek to establish if there is prospective commercial interest in Selby and, if so, establish the appropriate scale and format of provision so as to subsequently inform any site allocation exercise if necessary.

Tadcaster

- **Convenience:** The Council should proactively plan for new convenience provision to address existing qualitative and quantitative deficiencies. The Council should actively look for sites to accommodate a new foodstore through PLAN Selby. It is essential that any potential site allocation made by the Council is not in a sequentially inferior location to that of the Sainsbury's store.

- **Comparison:** There is no specific requirement for the Council to proactively plan for new comparison retail provision in the town over the Local Plan period. A new foodstore in town, with an appropriate non-food offer would deliver some benefits, in terms of enhancing choice and range of comparison goods available.
- **Leisure:** The commercial reality is that there is limited potential to deliver new commercial leisure uses in Tadcaster. The town does however have a significant brewing tradition, which allied to its historic assets (Castle and River Wharfe setting) should be maximised in marketing Tadcaster to visitors.

Sherburn in Elmet

- **Convenience:** On the basis of the recent approval of the Aldi store in the town centre, it is considered that there is no need for the Council to proactively plan for new convenience provision in the short to medium term period of the Local Plan. A future quantitative update to this study should be completed to assess future needs once the Aldi store has opened and regular trading patterns have been established. It is important that the Council proactively monitors the vitality and viability of the town centre.
- **Comparison:** Consistent with Tadcaster, the baseline capacity identified is insufficient to support any new substantive development that would generate a step-change in the town's market share and performance. The recently approved Aldi store in the town should however assist in improving the range of comparison goods available (20% of net sales area) and therefore local residents' daily comparison shopping needs will potentially be better met. Overall, it is concluded that there is no specific requirement for the Council to proactively plan for new comparison retail provision in the town over the Local Plan period.
- **Leisure:** Local residents and businesses are keen to see improvements to the leisure provision in the town, including enhanced health and fitness, youth and swimming facilities. We therefore recommend that the Council consider the potential to provide enhanced public leisure facilities in Sherburn in Elmet.

Strategic Recommendations

1.9 The main strategic recommendations are as follows:

- **Town centre initiatives**: including improvements to public realm, digitising the high street and marketing and promotion of the three market towns would be beneficial, as well as a review of the car parking regime in Selby.

- **Town centre boundary definitions:** the Council should update the existing town centre boundaries for Selby, Tadcaster and Sherburn in Elmet to reflect on the ground reality, and define a primary shopping area for Selby.
- **Frontage policies:** taking account of recently published government guidance on increasing the flexibility for changing uses, existing defined frontages should be reviewed. In Selby, primary shopping frontages should be retained. However, it is recommended that primary and secondary frontages in the remaining towns and secondary shopping frontages in Selby are not required.
- **Impact threshold:** on the basis of the existing convenience and comparison retail floorspace and the average size of units within the three town centres, a local floorspace threshold for the impact assessments is recommended, of 500 m^2 net for convenience retail floorspace and 300 m^2 net for comparison retail floorspace.
- **Plan for local retail provision** the quantitative need arising from any further large scale residential-led development proposed should be established in order to define the quantum of retail provision to be delivered. Appropriate conditions which fix the number of units, maximum unit size and phasing should be considered by the Council so as to ensure future local / neighbourhood centre provision genuinely meets localised top-up orientated shopping needs and does not compete with existing town centres.
- **Monitoring and managing:** the Council should continue to actively monitor its centres through, amongst other methods, regular on-site surveys and by maintaining a schedule of planning commitments.