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Selby Retail and Leisure Study

Final Report

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Contents

Appendices

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For and on behalf of GVA Grimley Ltd

1. Introduction

1.1 GVA was appointed by Selby District Council to undertake a Retail and Leisure Study. Given that the Selby District Core Strategy (2011 – 2027) was adopted in October 2013, the study is to provide an up-to-date and robust evidence base on retail, leisure and other town centre uses to underpin the development of the Council's future policies and site specific allocations in the emerging sites and policies Plan ('PLAN Selby').

1.2 The Council is currently at an early stage in the preparation of PLAN Selby with public consultation on the issues and options completed between November 2014 and January 2015. PLAN Selby will allocate sites for new development across Selby District, set out site specific policies and proposals, and development management policies necessary to deliver the overarching strategic framework set out in the adopted Core Strategy.

1.3 In wider terms, the study will further inform the work being undertaken by Selby Town Enterprise Partnership (STEP), a strategic public-private sector body focused on supporting economic growth in Selby[1]. Specifically, the study will inform the formulation of proposals by STEP to secure the role of the town as the primary service centre for the district and a destination of choice for shopping and leisure activities.

1.4 In summary, the terms of the study are as follows:

- To understand current convenience and comparison shopping and leisure visitation patterns across the district and in adjoining areas through commissioning a new up-to-date household telephone survey.
- To provide a comparative assessment of changes in shopping patterns, market share and overall performance against the 2009 Selby Retail, Commercial and Leisure Study findings.
- Provide a comparative review of the vitality and viability of three main centres in the district (Selby, Tadcaster and Sherburn in Elmet) through the completion of new floorspace / use surveys to establish changes in representation and vacancy within the three centres.

[1] We refer to the town of Selby as simply 'Selby', which denotes the urban extent of the town. 'Selby town centre' is used to refer to the shopping and commercial centre area of Selby, as defined by Selby District Council. 'Selby District' refers to the Selby District Council Local Authority area.

- To assess the future quantitative capacity and qualitative need for additional retail floorspace, having regard to new and planned developments / commitments within the district and wider sub-region.
- To confirm a robust forward development strategy for the main towns in the district, including defining appropriate retail frontages, boundaries and policy thresholds.

1.5 The study is informed by a number of detailed independent survey exercises, designed in conjunction with the district council, including:

- **Floorspace / Fascia Survey:** detailed surveys of Selby, Tadcaster and Sherburn in Elmet town centres were completed to establish the current amount and split of various types of floorspace (convenience, comparison, services and vacancies).
- **Household Telephone Survey:** a detailed survey establishing where residents within the district and adjacent areas (including Goole, Howden, Holme-on-Spalding-Moor, Boston Spa and surrounding rural areas) travel to for convenience and non-food shopping activities, as well as leisure purposes. The survey informs the quantitative component of the study, identifying the current market share performance of town centre, individual stores and retail park destinations.
- **In-Centre Survey:** a full shopper survey within Selby town centre to determine the profile of visitors and shoppers to the centre; the strengths and weaknesses of the centre in terms of the existing retail offer, wider facilities and physical environment; patterns of usage of the centre (i.e. Frequency of visits, modal split, dwell times); and suggested qualitative improvements which would persuade shoppers to visit the centre more frequently or stay for longer.
- **Retailer Business Survey:** surveys circulated to all retailers within Selby town centre to establish current trading performance; the relative strength and weaknesses of the centre; and specific initiatives that could be delivered to improve the performance and the overall attractiveness of the centre.

1.6 The results of the survey exercises are drawn together to provide a set of robust recommendations to enable the Council to proactively plan for future development. The study conclusions represent the current assessment of performance and opportunity. The quantitative need identified should be used to inform policy which will endure over the short to medium term as required. It will however be important that the Council continues to monitor the health of its main centres, revisiting the strategy to address changing circumstances as necessary.

Report Structure

1.7 The remainder of the report is structured as follows:

Part One – Background Detail and Context

- **Section 2 – Planning Policy Context** sets out the requirements of the NPPF and NPPG in terms of promoting competitive town centre environments and outlines the relevant local planning policy context.
- **Section 3 – Sub-Regional Overview** details the existing and emerging retail and leisure schemes in surrounding centres outside of the district which may impact on the future performance of Selby District's centres.
- **Section 4 – District Context** describes the current offer within the main three centres in the district followed by an overview of the demographic composition of the district.
- **Section 5 – Retail and Leisure Trends** summarises the current market conditions and developments within the retail and leisure sector.

Part Two – Methodology

- **Section 6 – Methodology** sets out the methodology underpinning the health check assessments of the three main centres, in-centre and retailer business surveys, and the quantitative capacity modelling exercise, including the household survey methodology.

Part Three – Summary of Findings

- **Section 7 – Summary of Findings** provides, for each of the districts three town centres, a SWOT analysis summarising the headline findings of the performance analysis and survey exercises, and a summary of the main findings of the retail assessment.

Part Four – Qualitative and Quantitative Assessment

- **Sections 8-10 – Selby, Tadcaster and Sherburn in Elmet Analysis** sets out for each of the three centres in turn: an assessment of the performance of the centre using a range of indicators of vitality and viability and drawing on the findings of floorspace/use and in-centre surveys as well as published data; a summary of the main headline findings of the in-centre survey exercise (for Selby only) and the household survey findings in relation to Tadcaster and Sherburn in Elmet; a summary of the main headline findings of the retailer business survey exercise; a review and comparative assessment of changes in the convenience and comparison goods market share and performance of Selby, Tadcaster and Sherburn in Elmet since the 2009 Study; a need / capacity analysis for new retail provision within the respective centre, having regard to projected population and expenditure growth as well as planned / emerging commitments; and a forward strategy for the centre.

- **Section 11 – Leisure Assessment** contains our assessment of leisure needs in Selby, Tadcaster and Sherburn-in-Elmet, drawing on the findings of our updated health check assessments and our analysis of current leisure spending patterns.
- **Section 12 – Hotel Assessment** provides an assessment of hotel uses across the district, drawing on published data and the findings of a high-level soft market testing exercise.

Part Five – Conclusions and Strategic Advice

- **Section 13 – Strategic Recommendations** contains advice on the most appropriate strategy for meeting identified needs for retail and leisure uses, along with recommendations to the Council on proposed changes to town centre boundaries, frontage policies and local impact thresholds.

1.8 The next section therefore sets out the planning policy context of the study.

2. Planning Policy Context

2.1 Given that the Selby District Core Strategy was adopted in October 2013, the study is to inform the emerging Selby District sites allocations and policies plan, PLAN Selby. PLAN Selby is to be prepared in compliance with the National Planning Policy Framework (NPPF), published in March 2012, and the associated National Planning Practice Guidance (NPPG) first published online in March 2014. The key requirements of the NPPF and the NPPG are therefore summarised below.

2.2 The Selby District Core Strategy Local Plan (Core Strategy), together with the saved policies of the Selby District Local Plan (SDLP), comprises the current Local Plan for Selby District. A brief summary of the relevant retail and town centre policies set out in the Core Strategy and relevant saved SDLP policies are further set out below.

National Planning Policy Framework (NPPF)

Town Centre Vitality and Viability

2.3 Paragraphs 22 to 27 in Section 2 of the NPPF specify that planning policy should promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. Local Planning Authorities (LPAs) are directed to:

- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality.
- Define hierarchies and the extent of town centres and primary shopping areas.
- Promote competitive town centres that provide customer choice and a diverse retail offer which reflects the individuality of town centres.
- Retain and enhance existing markets, ensuring they remain attractive and competitive.
- Allocate appropriate in-centre sites which are not compromised by limited site availability. If it is not possible to ensure a sufficient range of suitable sites, appropriate, well connected edge of centre sites should be allocated.

- Where town centres are in decline, local authorities should plan positively for their futures and encourage economic activity.

2.4 The long-standing sequential test is retained in the NPPF[2] albeit that there is increased emphasis on LPAs to ensure an available supply of sites (plan to meet needs in full).

Evidence Base Requirements

2.5 The NPPF (paragraph 158) specifies that Local Plans should be based on adequate, up-to-date and relevant evidence. In relation to planning to meet business requirements, LPAs are required to have a clear understanding of business needs within the economic markets operating in and across their area. The NPPF (paragraph 161) further directs LPAs to use the evidence base to assess (amongst others):

- The needs for land or floorspace for economic development, including both the quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including for retail and leisure development.
- The role and function of town centres and the relationship between them, including any trends in the performance of centres; and
- The capacity of existing centres to accommodate new town centre development.

2.6 Ultimately, whilst the NPPF (paragraph 154) specifies that Local Plans should be aspirational, they are required to be realistic and deliverable. The quantitative and qualitative recommendations of this study are therefore grounded within this context.

2.7 NPPF constitutes a material consideration which LPAs should take into account from the date of publication in development management decisions.

National Planning Practice Guidance (NPPG)

2.8 The recently published NPPG amplifies the requirements of the NPPF. The main guidance of relevance to this study is set out within the category 'Ensuring the viability of town centres'[3] and is summarised below.

Town Centre Strategies

[2] Paragraph 24
[3] Current guidance published online 6 March 2014

2.9 The guidance[4] details that any strategy should be based on evidence of the current state of town centres and opportunities to meet development needs and support their viability and vitality. The Study will therefore, alongside other evidence of relevance, establish:

- What is the appropriate and realistic role and function of the main centres over the emerging PLAN Selby period;
- What the most appropriate mix of uses would be to enhance the overall vitality and viability of the respective centres;
- Whether the respective centres can accommodate the scale of assessed need for main town centre uses (as defined by NPPF). Any assessment should include consideration of expanding centres or development opportunities to enable new development or redevelopment of existing underutilised space; and
- What timeframe new development within the centres could be delivered.

2.10 In seeking to identify appropriate, sequentially compliant development site opportunities, it is necessary to complete a thorough assessment of the suitability, viability and availability of locations for main town centre uses. The NPPG[5] directs local planning authorities to take full account of relevant market signals when planning for town centres and keep land allocations under regular review.

Selby District Core Strategy Local Plan

2.11 The Selby District Core Strategy was adopted in October 2013 and covers a 16 year timeframe from 2011 to 2027. The Core Strategy sets out a spatial vision for Selby District and strategic objectives to achieve that vision, together with a development strategy which establishes:

- The context for designating areas where specific policies will apply, either encouraging development to meet economic and/or social objectives or constraining development in the interests of environmental protection.
- The identification of strategic development sites for housing and economic development to accommodate major growth in Selby and a district-wide framework for the subsequent allocation of sites for specific uses (including housing, retail, leisure and other activities); and

[4] Paragraph 3 of the ‘Ensuring the viability of town centres’ category (Reference ID: 2b-003-20140306)
[5] Paragraph 3 of the ‘Ensuring the viability of town centres’ category (Reference ID: 2b-004-20140306)

- Policies setting out the context for more detailed policies and guidance to be included in other local plan documents.

2.12 PLAN Selby, which this study informs, is currently under preparation will provide the detailed policies and proposals to deliver the vision, aims and objectives set out in the Core Strategy.

2.13 The key policies set out in the Core Strategy that are of most relevance to this study are contained in the chapter 'Promoting Economic Prosperity' (Chapter 6). This chapter sets out the Council's general approach to planning for a stronger economy in Selby District, focused on the main centres of Selby as the Principal Town, and Tadcaster and Sherburn in Elmet as Local Service Centres. The maintenance and enhancement of the role of the respective centres within the district as a focus for activities is emphasised as fundamental to the achievement of sustainable development.

2.14 Specifically, Policy SP14 *'Town Centres and Local Services'* identifies how the health and wellbeing of town centres and local shopping and service facilities will be maintained and enhanced with reference to the key strengths and opportunities for retail, commercial and leisure facilities within the three main centres in the district (Selby, Tadcaster and Sherburn in Elmet) as follows:

Selby Town Centre

- Focusing town centre uses on Selby including retail, commercial, leisure, entertainment, food and drink, offices, hotels, indoor sports, recreation, and arts and cultural uses; and
- Promoting the continued renaissance of the town centre through environmental improvements, floor space increases, and by diversifying the range of activities present.

Sherburn in Elmet and Tadcaster

- Strengthening the role of Sherburn in Elmet and Tadcaster by encouraging a wider range of retail, service, and leisure facilities, to meet the needs of the local catchment area, provided proposals are of an appropriate scale and would not have a detrimental effect on the vitality and viability of Selby town as the main focus for town centre uses.

Tadcaster

- Promoting the regeneration of the town centre; and
- Protecting and enhancing the attractive historic core.

Sherburn in Elmet

- Securing improved infrastructure and services, including a modest increase in retail floorspace, to support expanding employment activity and housing growth. This may entail an extension to and /or remodelling of the existing centre.

Selby District Local Plan (SDLP)

2.15 The Selby District Local Plan (SDLP) was adopted in February 2005 and under the provisions of the Planning and Compulsory Purchase Act 2004, a number of policies in the SDLP remain 'saved' until replaced by new policies.

2.16 The main saved policies of relevance to the study are:

- **Policy S3 (Local Shops)** which sets out development management criteria in relation to proposals for town centre uses outside of defined shopping and commercial centres.
- **Policy S4 (Retail Development in the Countryside)** which sets out development management criteria in relation to proposals for town centre uses in locations outside defined development limits.
- **Policy S5 (Garden Centres)** provides the development management requirements for garden centres.
- **Policy SEL/10 (Service and Commercial Uses in the Town Centre)** sets out the requirements in relation to proposals for commercial uses such as financial and professional services, public houses, cafes, restaurants and takeaways, within the defined shopping and commercial centre of Selby.

3. Sub-Regional Overview

Duty to Co-Operate

3.1 Selby does not operate in isolation and it is important to understand the nature of the existing and emerging retail and leisure offer in surrounding 'competing' centres given that planned improvements can materially impact upon shopping patterns (market share), future performance and overall vitality and viability. This section therefore summaries the existing and proposed changes to the retail and leisure offer of those centres within the wider sub-regional hierarchy of most importance to the residents of Selby District, namely York, Leeds, Doncaster, Pontefract, Castleford, Knottingley and Wetherby.

3.2 Our sub-regional retail and leisure review is informed by desk-based research that draws on published data including PROMIS Retail Reports and local authority local plan evidence base documents, together with consultation with neighbouring local authorities. All of the local authorities adjoining Selby District[6] were contacted to find out about retail planning issues and developments in neighbouring authority areas, which may affect Selby district. In particular, we discussed proposals in the pipeline within each respective local authority area that may impact on shopping patterns in Selby District and the performance of Selby's three town centres. This exercise forms part of Selby District Council's Duty to Cooperate in respect of this Retail and Leisure Study.

York

City Centre

3.3 York city centre is located approximately 10km to the north of Selby District and is highly accessible (public and private transport) to local residents in the northern parts of the district.

3.4 The city centre accommodates c. 139,000 m^2 of retail floorspace[7] and performs a regional shopping function with mainstream fashion retailers as well as upper end

[6] East Riding of Yorkshire Council, City of York Council, Harrogate Borough Council, Leeds City Council, Wakefield Metropolitan District Council and Doncaster Metropolitan Borough Council.
[7] York Promis Retail Report, PMA, created 9 September 2014

stores. The three department stores (Fenwick, Browns and Debenhams) have a number of upmarket fashion concessions. There are also two M&S stores in the centre as well as BHS[8].

3.5 Whilst a substantial extension to the city centre retail core at the Castle Piccadilly site has been proposed for a considerable period of time, limited new comparison retail development has come forward in the city centre. Indeed, City of York Council's recent retail study update (September 2014) confirms that comprehensive retail led regeneration on the Castle Piccadilly site is currently unviable, which is arguably considered to be the only potential development area that could enable the city centre to expand in retail terms. Consequently, given the historic constraints of the city centre, there has been significant out-of-centre retail development on the Outer Ring Road.

Out-of-Centre

3.6 The existing retail warehouse supply in and around York is estimated at c. 150,000 m² (gross)[9]. The largest retail park destination is Clifton Moor which is located in the north of the city and accommodates c. 40,000 m² of retail floorspace with a wide mix of operators including a Tesco superstore; bulky orientated stores such as Pets at Home, B&Q, Curry's, Carpetright; operators selling traditional high street goods such as Matalan, Argos and Toys R Us.

3.7 The redevelopment of the former Wickes store at the park was recently completed, creating five new retail units occupied by bulky retailers such as Wren Kitchens, DFS, Harvey's and Oak Furniture Land. The park also has a significant leisure offer including cinema, ten pin bowling alley and family orientated national chain restaurants.

3.8 Monks Cross shopping park is further located in the north-east of the city and accommodates c. 29,000 m² of retail floorspace[10]. The shopping park has an open Class A1 permission and this is reflected in the high concentration of high street multiples including River Island, H&M and Debenhams Desire.

3.9 York has recently benefitted from a significant enhancement in its retail offer following the opening of Vangarde Shopping Park in April 2014, adjacent to the existing Monks Cross Shopping Park. The Vangarde Shopping Park development delivered some

[8] York Promis Retail Report, PMA, created 9 September 2014
[9] York Promis Retail Report, PMA, created 9 September 2014
[10] York Promis Retail Report, PMA, created 9 September 2014

30,000 m^2 of floorspace and comprises a new John Lewis store, and larger M&S and Next stores following their relocation from Monks Cross Shopping Park, alongside a terrace of restaurants and cafes.

3.10 We consider that the scheme is likely to have significant impacts on existing shopping patterns in both Selby District and the wider region. The new John Lewis, expanded M&S and Primark stores in particular are significant retail attractions in the wider region. The scheme is also potentially likely to restrict commercial demand and requirements to locate in smaller centres in the region given the prominent shopping function that it will perform.

3.11 The smaller Foss Islands Retail Park on the Inner Ring Road comprises bulky orientated retailers including Homebase DIY and Dreams.

3.12 The York Designer Outlet Shopping Centre is located approximately 5km south of York city centre off the A64, around 5km north of Selby District. The shopping centre accommodates over 120 outlet-style stores and is a major fashion and shopping destination within the region. Operators include Reiss, Ted Baker, Next and Gap. A selection of primarily national chain cafes and restaurants are also represented at the shopping centre.

Foodstores

3.13 A number of large foodstores are located across York including Tesco Extra on Tadcaster Road and Aldi on Fulford Road, both in the south of the city, which are readily accessible to residents of Selby District, as well as the Asda and Sainsbury's stores next to Monks Cross Shopping Park. Morrison's and Waitrose stores are located on Foss Islands Road adjacent to the retail park.

Planned Development

3.14 Major retail development has recently been delivered in York through the Vangarde Shopping Park scheme, which has considerably improved the retail offer in the city as a whole.

3.15 The completion of Vangarde Shopping Park has paved the way for further development at Monks Cross, which has also been sanctioned. Planning permission was granted for the reconfiguration of existing units and mezzanine extensions to create two large new anchor stores at Monks Cross Shopping Park. The new units will be occupied by Primark and, we understand, Debenhams. Primark will take the store formed by merging the former Marks & Spencer unit, Laura Ashley and Sports Direct stores, with a new Debenhams store created by combining outlets currently occupied by WHSmith and Topman, Topshop, Miss Selfridge and Evans.

3.16 We understand that Sports Direct and WHSmith will be relocated within the park, while Laura Ashley will relocate to the nearby Julia Avenue. Topman, Topshop, Miss Selfridge and Evans will leave the park.

Leeds

City Centre

3.17 Leeds City Centre is located around 20km to the west of Selby District and is the main commercial centre for Yorkshire, with an estimated c. 213,000 m^2 of retail floorspace[11].

3.18 The Trinity Leeds scheme opened in March 2013 in the heart of the core shopping area and comprises c. 100,000 m^2 of floorspace across 120 units ranging from small pods to 10,000 m^2 department store anchors. The scheme has helped to strengthen the city's fashion offer, with mainstream retail anchors including Marks & Spencer, River Island, Primark and H&M.

3.19 A number of variety and departments stores are represented in the centre, including BHS, Debenhams, House of Fraser and Harvey Nichols. The centre also offers a good range of up-market and high fashion retailers, such as Hugo Boss, Diesel, Karen Millen and Reiss.

3.20 There is extensive leisure provision in Leeds City Centre, which includes a number of cinemas, theatres, and a wide range of eating and drinking establishments, including family orientated national chain operators.

Victoria Gate (Eastgate)

3.21 Outline planning permission was granted in September 2011[12] for a retail-led, mixed use development of land to the north-east of Leeds City Centre known as Victoria Gate (formerly the Eastgate Quarters). The scheme comprises c. 131,200 m^2 of

[11] Leeds Promis Retail Report, PMA, created 9 September 2014
[12] Leeds LPA Application Reference 11/01000/OT

development including up to c. 117,000 m^2 of retail floorspace (Class A1 – A5) and c. 3,500 m^2 of gym floorspace (Class D2) alongside a number of ancillary uses.

3.22 In October 2012, planning permission[13] was granted for an amendment to the scheme that allowed additional floorspace and uses including a casino up to c. 5,000 m^2 and open leisure use (Class D2) up to 11,000 m^2. With respect to the retail and leisure elements of the scheme, there are two large department stores (John Lewis to anchor one), a number of large multiple format stores and range of smaller units to encourage a varied retail environment.

3.23 The scheme is to be delivered in two phases with the first phase comprising around one-third of the overall scheme and includes the proposed John Lewis department store. Construction on site began in April 2014 and the proposed first phase is expected to be operational by autumn 2016 with the second phase to follow subject to necessary CPO negotiations with relevant parties.

Out-of-Centre

3.24 The White Rose Shopping Centre is located approximately 5km to the south of Leeds city centre near Morley, around 20km west of Selby District. The centre accommodates over 100 stores, with major tenants including Sainsbury's, Debenhams, Marks & Spencer, Next, WHSmith, HMV, BHS, Primark, Zara and H&M. Outline planning permission was granted in September 2014 for the expansion of the shopping centre to provide a cinema and new enlarged retail units for Primark, Debenhams and two other retailers (LPA ref. 13/01640/OT).

3.25 Crown Point Retail Park is located on the southern edge of the city centre and accommodates a mix of value retailers, high street names and bulky goods operators including Argos, TK Maxx, Poundland, Boots, Next, New Look, Pets at Home and Dreams.

3.26 Further retail warehousing in Leeds includes Junction One Retail Park located off the M621 around 3km south west of the city centre.

3.27 In the east of Leeds, around 10km from the city centre, are Killingbeck and Colton Retail Parks, both of which are easily accessible from Selby District. Killingbeck Retail Park is focused on bulky goods whereas Colton Retail Park encompasses high street

[13] Leeds LPA Application Reference 12/03002/OT

names, including Argos, Boots and Next. Cardigan Fields Leisure Park is located some 3km north west of Leeds and accommodates a cinema, bowling alley and range of restaurants.

3.28 A major concentration of retail warehousing is further located at Birstall to the south of Leeds, just outside of the Leeds area within Kirklees borough, comprising Birstall Shopping Park, Junction 27 Shopping Park and Spring Ram Retail Park, as well in neighbouring freestanding stores including Ikea. Centre 27 Leisure Park is further located near to the Birstall and Junction 27 Shopping Parks and encompasses a cinema and gym alongside a number of family orientated chain restaurants. The strong and varied offer in this location (c. 50,000 m^2), which includes many of the main ‘high street’ retailers as well as traditional bulky goods retail park operators make this location a key out-of-centre regional shopping destination.

Foodstores

3.29 A large number of major foodstores are located across Leeds. On the eastern side of the city these include Tesco in Garforth, Tesco Extra in Seacroft, Sainsbury’s at Colton Retail Park in Colton, Asda in Killingbeck and Morrisons in Rothwell.

Planned Development

3.30 Significant retail development is planned for Leeds. The Leeds City Centre, Town and Local Centre Study (2011) identified the requirement for substantial new retail floorspace in Leeds and Leeds City Council’s current aspirations for significant population growth are likely to further increase the need for additional retail development in Leeds.

3.31 Further to the extension of the White Rose Shopping Centre noted above, planning permission also remains extant for major retail development at Thorpe Park, as detailed below.

Thorpe Park

3.32 Outline planning permission was granted in September 2013 for an out-of-centre mixed-use development at Thorpe Park comprising c. 18,000 m^2 of Class A1 retail (9,000 m^2 foodstore with maximum of c. 1,800 m^2 of comparison), hotel, gym and food & drink outlets. The remaining c. 9,000 m^2 of retail proposed is to be provided over several retail units intended to be occupied by 'high end' retailers including TK Maxx, Next at Home, Boots and River Island.

3.33 Thorpe Park is located at junction 46 of M1 on the east side of Leeds and would therefore be readily accessible for local residents in Selby District.

Doncaster

Town Centre

3.34 Doncaster town centre is located around 15km south of Selby District and is identified as a sub-regional centre with c. 150,000 m^2 retail floorspace[14].

3.35 Retail provision in the town centre is focused on the Frenchgate Shopping Centre, which accommodates over 110 stores including a large number of major national multiples such as Debenhams, Wilkinsons, Next, Clas Olhson, Boots and BHS. Other major retailers in the town centre include Primark, Marks & Spencer's and a House of Fraser outlet store. The Waterdale Centre within the town centre has a significant number of vacant units but there are emerging proposals for its regeneration.

3.36 Overall, the town provides a largely mainstream fashion offer with a high number of lower and middle market retailers including Clarks, Miss Selfridge, New Look, River Island. However, representation of quality fashion multiples is extremely limited.

Out-of-Centre

3.37 The Wheatley Centre is the largest retail park in Doncaster and is located around 4km north east of the town centre. The centre accommodates a significant number of traditionally high street retailers, including Next, Argos, Boots, as well as stores such as Matalan and TK Maxx.

3.38 Danum Retail Park is Doncaster's second largest retail park and located off York Road around 1.5km to the north west of Doncaster town centre. Major occupiers include Mothercare, Currys and PC World.

3.39 Other notable out-of-centre retail destinations in Doncaster are Thorne Road Retail Park, located around 5km north east of Doncaster town centre; Centurion Retail Park,

[14] Leeds Promis Retail Report, PMA, created 9 September 2014

around 2km north of the town centre; and Lakeside Village Outlet Shopping Centre, some 3km south east of the town centre.

Foodstores

3.40 A large number of food superstores are located in and around Doncaster, including the Asda superstore at Carcroft which is easily accessible for local residents in the southern parts of Selby District.

Planned Development

3.41 As previously detailed, it is planned to regenerate the Waterdale Shopping Centre in the town centre.

Pontefract

3.42 Pontefract is located around 5km south west of Selby District. Pontefract is a principal town in the Wakefield district retail hierarchy and has a good mix of national multiples and local independents.

3.43 The mainstream convenience offer within the town centre comprises a medium sized Tesco store off Cornmarket as well as M&S Simply Food and Iceland. There are several independents as well as the popular town centre market. A full-range Morrison's foodstore is located just north of the main town centre shopping area. A small Asda store is located to the west of the town centre.

3.44 The comparison retail offer is primarily orientated towards day-to-day shopping needs and there is a strong representation of discounters.

3.45 There are two out-of-centre retail parks in the town at Parkside (north of town centre) and South Baileygate (east). Parkside is primarily bulky goods orientated (Wickes, Carpetright etc.) but does include a Home Bargains and Fitness First gym. South Baileygate is bulky orientated but includes an Aldi store.

Castleford

3.46 Castleford is located just outside of Selby District to the west of the A1(M) motorway, around 18 km south east of Selby. Castleford is a principal centre in the Wakefield district retail hierarchy and serves a relatively discrete primary catchment covering the north eastern extent of Wakefield district and southern parts of Leeds.

3.47 The convenience retail offer within town centre is limited to small discount orientated stores such as Iceland and independents / market. There are relatively small Aldi and Morrison's stores at the edge-of-centre Castleford Retail Park.

3.48 In terms of comparison retail provision, the town has a relatively limited offer with a small M&S within the Carlton Lanes Shopping Centre as the most notable attraction. The balance of the comparison provision is orientated towards the discount end of the market and local independents.

3.49 The most significant out-of-centre non-food retail destination in Castleford, however, is the Junction 32 Outlet Village at Glasshoughton, just off the M62 and around 5km from Selby District, which comprises around 90 national and international fashion multiple outlet stores, including Marks & Spencer outlet, Gap outlet and Next clearance.

3.50 A B&Q store and large out-of-centre Asda store, which provides the main convenience destination in Castleford, are also located nearby.

3.51 Adjacent to the Junction 32 Outlet is the out-of-centre Xscape leisure complex which is also a regional destination comprising a snow-dome, ten pin bowling, family orientated restaurants and evening entertainment (bars).

3.52 The major planned development in Wakefield District, adjacent to Xscape, is the out-of-town Five Towns Park scheme[15] which includes a new stadium for Castleford Tigers and a shopping park (c. 53,000 m^2) with a foodstore anchor and a large Next Home and Garden store (c. 6,500 m^2).

3.53 Planning applications have also recently been submitted for the redevelopment of B&Q on Aspen Way for a Sainsbury's foodstore, as well as for the development of a new discount foodstore nearby on Park Road.

Knottingley

3.54 Knottingley is located just outside of the western boundary of Selby District close to the strategic M62 and A1 (M) junction. The town centre retail offer is extremely limited aside from a full range Morrison's foodstore. Planning permission was however granted

[15] LPA ref. 14/01440/OUT

in November 2013 for the development of a new Lidl foodstore (1,606 m^2 gross)[16] in the town and work on site is expected to commence in early 2015.

Wetherby

3.55 Wetherby is a large market town located around 5km to the north east of Selby District. The convenience retail offer in Wetherby town centre is dominated by a large Morrison's store at the Horsefair Shopping Centre. An M&S Simply Food and Sainsbury's Local are also located in the centre. The comparison retail offer is relatively limited.

3.56 The out-of-centre Thorpe Arch Retail Park in Wetherby accommodates bulky goods orientated retail outlets including DFS, Bensons for Beds and a garden centre.

3.57 In terms of planned developments, outline planning permission has been granted for the development of a food superstore, along with 2,000 new homes, catering and a health club at Thorpe Arch Estate[17].

Goole

3.58 Goole town centre is located approximately 3km south east of Selby District. Convenience retail provision in Goole includes Morrisons and Tesco stores on Boothferry Road, as well as Co-op and Lidl foodstores. The comparison retail offer includes over 20 national multiple operators including Savers, Superdrug, Dorothy Perkins, New Look, Argos, Boots and Peacocks. An out-of-centre B&Q store is located around 1km east of Goole town centre.

3.59 The East Riding Town Centres and Retail Study - Retail Capacity Update 2013 identified a requirement for an additional 4,300 to 8,500 m^2 of comparison retail floorspace in the period up to 2028.

Implications for Selby District

3.60 As set out in the retail trends chapter, the ongoing pattern for operators to focus their representation towards sub-regional centres and out-of-town shopping destinations at the expense of smaller centres will have implications for the recommended forward strategy for the main centres in the district.

[16] LPA Application Ref. 13/02865/NMC
[17] LPA Ref. 13/03061/OT

3.61 We consider that the new out-of-centre Monks Cross / Vangarde scheme in York is likely to significantly impact upon non-food shopping patterns and further constrain operator demand for many smaller centres in the regional retail hierarchy given the higher order nature of the operators (John Lewis and M&S). The proximity and relative ease of access from the district to destinations in York is likely to significantly restrict operator demand in particular for representation within Selby and also the smaller centres of Tadcaster and Sherburn (as already acknowledged by the saved Local Plan hierarchy policies).

3.62 With respect to Selby, given the existing concentration of retail provision in the town and its role as the primary shopping and service (Council offices, Hospital etc.) role for the district and wider rural hinterland, there is a sufficient critical mass of activity and attraction to potentially support new retail and leisure provision within the town.

3.63 However, as detailed later in the report, the quantitative and qualitative retail needs assessment needs to be grounded in commercial reality so as to ensure that any proposed new development in the town is ultimately commercially credible and deliverable (NPPF requires local planning authorities to be aspirational but realistic).

4. District Context

4.1 It is increasingly important for Local Planning Authorities to ensure that the retail and leisure offer within its main town centre (or centres) reflects the requirements of its catchment. Therefore, in preparing an appropriate future strategy, it is important to recognise that the demographic profile of a particular catchment may influence the potential to attract higher order retailers and leisure operators necessary to deliver a step-change in future performance.

4.2 This section therefore introduces the existing offer within the main three centres in the district followed by an overview of demographic composition.

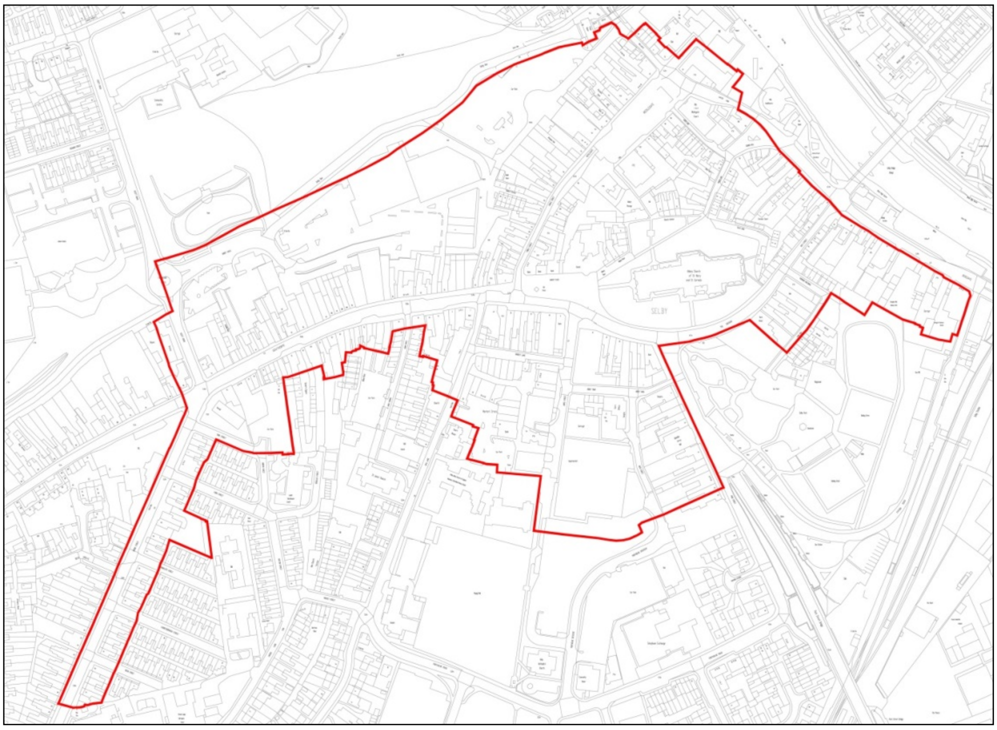
Selby

4.3 Selby is a historic market town located centrally within the district. As the principal town within the district hierarchy, it serves a large rural hinterland. Further to its role as the main shopping centre in the district, Selby is the primary focus for housing, employment, leisure, education, health, local government and cultural facilities.

4.4 The shopping and commercial centre of Selby, as defined in the Local Plan Proposals Map and shown in Figure 4.1 below, is focused on the historic streets of Gowthorpe (main linear shopping street), Finkle Street, Micklegate, The Crescent, Brook Street and Ousegate. More modern retail development has been focused to the immediate north of the town (Abbey Walk) and south (Market Cross) where there are freestanding mainstream foodstores.

4.5 As per the plan shown in Figure 4.1 below, the town is physically well defined with Selby Abbey providing a key physical and visual reference. The River Ouse is located east of the town centre (running broadly north to south) and Selby Dam wraps around Abbey Walk (west to east).

Figure 4.1 – Selby Town Centre



Retail Provision

4.6 The main retail area within the town centre is focused on the historic Market Place where the strategic Gowthorpe and Micklegate routes meet. The retail provision along these key routes comprises traditional terrace accommodation with a mix of local independent retailers (convenience and comparison) and services alongside national multiples such as New Look, Superdrug, Clarks, WHSmith, Boots and Shoe Zone.

4.7 The main concentration of national multiple retail provision in the town centre is found within the respective Abbey Walk and Market Cross shopping centres. Abbey Walk opened in 1998 and is located to the north of Gowthorpe beyond traditional terraced accommodation. The shopping centre comprises a Sainsbury's foodstore (1,625 m^2 net) with other notable retailers including Wilkinson's and Peacocks. M&Co recently relocated from a unit on Gowthorpe to a new larger store within the shopping centre. The surface car park is the key parking location for the town centre.

4.8 Market Cross shopping centre is located south of Market Place (again behind traditional shop frontages). The shopping centre accommodates around 20 retail and service units with prominent retailers including Home Bargains, Savers and Brighthouse. A Morrison's foodstore (2,475 m^2 net) is located further to the south of Market Cross.

4.9 Other key retail attractions within the town centre include the independent department store Wetheralls, which encompasses a range of concessions. As a historic market town, there are a number of popular markets including the weekly Monday market and monthly Farmers market.

Edge / Out of Centre Provision

4.10 Given the historic nature of the town centre, there has been some out-of-centre development outside of the core area. To the south of the town centre is a Tesco store (1,739 m^2 net)[18].

4.11 Approximately 1km to the south of the town centre is Three Lakes Retail Park, which is located on Bawtry Road. The retail park is predominantly bulky goods orientated with national comparison retail operators including Homebase, Argos, Pets at Home, Halfords, DW Sports, Brantano and Carpetright. An Aldi store (extended) is a key attractor whilst there are two restaurants (McDonalds and Frankie and Benny's).

4.12 Selby District Council's Civic Centre is located on the main A19 Doncaster Road to the south west of the town centre. The offices form part of a public services hub along with the rebuilt Memorial Hospital.

Leisure Provision

4.13 The town centre leisure offer comprises a mix of traditional evening economy uses including public houses and restaurants; these uses are primarily focused in the north and east of the town centre around Finkle Street, Micklegate and Ousegate.

4.14 Selby Town Hall accommodates a range of theatre, music, dance and other such events, as well as a community cinema. Other prominent cultural leisure destinations in the town centre include Selby Abbey and the traditional Selby Park. Barlow Common Nature Reserve is located approximately 4km south of Selby.

4.15 Profiles Health and Fitness Centre is located on Portholme Road, which provides gym equipment and exercise classes. The Abbey Leisure Centre was destroyed by fire in

[18] Whilst there is an extant planning permission (LPA ref. 2013/0291/FUL) to redevelop the existing Tesco store and adjacent land to provide a new larger store, it is apparent that Tesco no longer intends to implement the permission as detailed in Section 6.

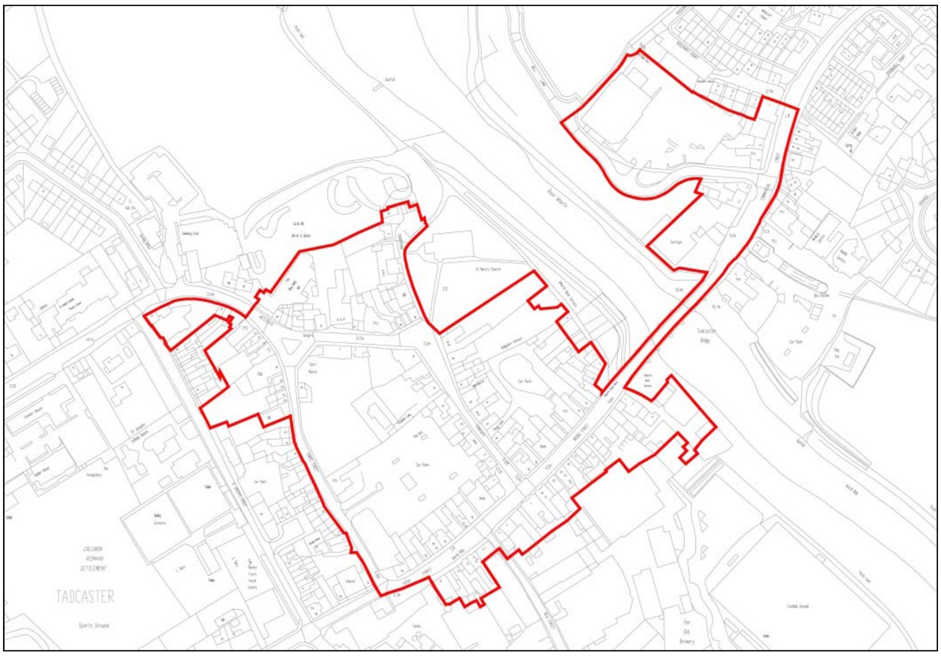
2012 and a new leisure centre is currently under construction on the site of the old leisure centre and expected to open in early 2015. The DW Sports at Three Lakes Retail Park also encompasses a gym.

Tadcaster

4.16 Tadcaster is market town located in the north west of the district approximately 20 km to the north west of Selby. The town provides the second largest centre in the district in terms of retail provision and is defined as a local service centre in the district hierarchy. For over a century the town has been synonymous with the brewing industry with John Smith's, Bass North and Samuel Smith's all major employers in the town.

4.17 The (linear) town centre is focused on the A659 Leeds Road/York Road and Kirkgate, and extends to include parts of Chapel Street and Westgate. The extent of the shopping and commercial centre of Tadcaster as defined in the Local Plan Proposals Map is shown in Figure 4.2 below.

Figure 4.2 – Tadcaster Town Centre



4.18 Tadcaster town centre primarily fulfils a local convenience shopping and services role. A Sainsbury's foodstore (906 m^2 net) is the main convenience retail destination in the town centre. A top-up orientated Costcutter is also located within the centre. The remainder of the retail offer is relatively limited, primarily independent operators and predominantly orientated towards local shopping and service needs. Tadcaster further benefits from a weekly (Thursday) market.

4.19 The town has a number of community facilities including a library, police and fire station, health centre, sports centre and swimming pool.

Sherburn-In-Elmet

4.20 Sherburn-in-Elmet is a town located in the west of the district, around 15km west of Selby and 10km to the south of Tadcaster. The town is identified as a local service centre within the district-wide hierarchy and is the third largest retail centre in the district.

4.21 The centre is focused around the junction between Finkle Hill / Low Street and Kirkgate / Moor Lane. The extent of the shopping and commercial centre of Sherburn in Elmet as defined in the adopted Local Plan Proposals Map is shown in Figure 4.3 below.

Figure 4.3 – Sherburn in Elmet Town Centre

4.22 The centre primarily fulfils a local predominantly top-up orientated convenience shopping and services role for local residents. The main convenience provision in the centre is a Co-Op store on Finkle Hill. However, planning permission was granted in September 2014 for the development of an Aldi store (1,537 m^2 gross) on Low Street[19].

4.23 A Tesco Express and Spar are also located in the town along with a range of other small and local independent shops.

4.24 Local services include a post office, bank, financial and legal services. The town also provides a wide range of community facilities including a library, ambulance station, community centre, clinic and police station.

[19] LPA ref. 2014/0692/FUL

5. Retail and Leisure Trends

5.1 It is essential that the future strategy for the district is formulated in the context of the wider economic climate. This section therefore considers the impact of the economic conditions on retail and leisure provision in Selby District and how wider economic and social trends are likely to influence both local resident and operator requirements in the future. Key trends and drivers for change in the retail industry are considered and those of particular relevance to Selby outlined below. The review draws on a range of published data from providers including Verdict, Mintel and Experian.

5.2 This section also provides a brief analysis of relevant government research and town centre strategies which have come forward over the last few years, partly in response to the retail trends identified, to promote a consistent policy objective which seeks to strengthen the respective centres.

Economic Outlook

5.3 The most recent advice published by Experian[20] identifies that, following on from the subdued economic recovery in the aftermath of the recession, a strong economic upswing in the UK began in early 2013 driven by consumer spending. More recent months have also seen a vigorous revival in business investment. Experian expects that as inflation remains low, high levels of consumer and business confidence and strong employment growth point to a period of sustained growth, though at a slower pace than in 2014. In this environment, households have benefitted from modest rises in disposable incomes over the past year accompanied by solid retail spending growth.

5.4 The consensus outlook for the medium term is for annual average GDP growth of about 2.4% over the next five years, which is slightly below the long term trend rate and less buoyant than before the recession. This is primarily due to pressure on government finances, weak bank lending and high household debt. Over the longer term the rate of economic growth is predicted to improve slightly, however, due to continuing fiscal restraint this growth is likely to be constrained.

[20] Experian Retail Planner 12.1 (October 2014)

5.5 Overall, consumers remain cautious with spending not only on discretionary items but also on needs, cutting wastage, which will impact on food & grocery volumes. There is an increased focus on buying efficiently. Big ticket and home-related purchases remain low.

5.6 As the housing market recovers, certain sectors (e.g. home furnishing and DIY) may benefit from increasing demand. However, it is anticipated that sales through the town centre will remain weak with online and out-of-centre retailers continuing to take a greater market share. Space and store numbers in town centre locations are also expected to decline as retailers drive efficiencies by closing underperforming space; these trends are discussed in more detail below.

Population Change

5.7 The rate at which the UK population is growing is accelerating; between 1971-1991 it increased by an average of just over 0.1% a year, whereas over the subsequent 20 years it increased by an average of almost 0.5% a year. Over the next 15 years (2014-29) it is expected to increase by an average of just over 0.6% a year, or 9.6% in total[21]. This population growth will vary between regions.

5.8 Advances in healthcare, medicine and lifestyles mean that people are living much longer. It will therefore be increasingly important for Local Planning Authorities to ensure that town centre retail and leisure offer matches its catchment demographic. An increasingly important demographic sector will be older consumers given that the proportion of the population aged over 65 is expected to increase from 17.7% of the total population in 2014 to 21.9% in 15 years' time; this a total growth rate of 35.6% and is more than triple the rate of total population growth (9.6%).

Retail Expenditure and Sales Efficiency Growth

Retail Expenditure Growth

5.9 Comparison goods expenditure is expected to grow at a much higher rate than convenience goods spending over the study period.

[21] 2012 ONS population growth estimates and projections sourced from Experian via its Micromarketer Online database

5.10 UK retail expenditure per head on comparison retail goods grew by 4.6% in 2013 and 5.6% in 2014 as estimated by Experian. Between 2014 and 2029 comparison expenditure growth is expected to be an average of around 3.3% a year.

5.11 For convenience retail goods, UK spending per head declined slightly between 2013 and 2014. However, Experian estimate a return to positive expenditure growth in 2015, of an average of around 0.6% a year between 2014 and 2027.

5.12 To put these forecasts into historical context, comparison goods growth averaged 4.2% a year over the last 40 years, with stronger growth of 5.2% a year over the last 30 years and 5.6% a year over the last 20 years. Convenience goods growth has been much weaker, averaging 0.4% a year over the last 40 years and 0.3% a year over the last 20 years.

Online Spending

5.13 The popularity of online retailing has grown rapidly since 2008. As most retailers now have an online presence, however, it is expected that this growth will slow. Nevertheless, growth in online spending is expected to continue to outpace growth in total retail sales each year, with the non-store retailing market stare rising from 13.0% of all retailing in 2013 to 19.9% in 2027[22].

5.14 Internet spending and other forms of sales which are not derived from physical floorspace need to be taken into account when undertaking retail studies. Special Forms of Trading (SFT) includes all types of non-store retailing (internet and markets) and in 2014 was equivalent to 8.4% of total retailing (11.7% for comparison goods and 2.6% for convenience goods). In 2017, Experian predict that non-store sales will reach 10.3% of total retail, growing steadily until plateauing at c. 12.5% in 2022.

5.15 Not all of non-store sales reduce the need for physical floorspace (for instance click and collect and the fulfilment of many grocery internet orders through local stores). Therefore, as set out in the retail methodology section of the report, adjustments to account for SFT have been made so as to provide robust projections of quantitative need over the study period.

22 Experian Retail Planner 12.1 (October 2014)

Sales Efficiency Growth

5.16 The sales efficiency growth rate represents the potential ability of retailers to increase their productivity and absorb higher than inflation increases in their costs (e.g. rent, rates and service charges) by increasing their average sales densities.

5.17 Following the weak or negative overall sales growth during the recession and the growth of online shopping, many retailers have struggled to increase or maintain sales density levels and, together with other financial problems, this has forced some retailers into administration. As a result sales density growth is now significantly lower than the high rates seen during the boom of the latter half of the 1990s and first half of the 2000s.

5.18 The trend towards the demolition of inefficient stores and the provision of more modern stores with higher and more efficient sales densities is expected to result in less scope to increase comparison goods sales densities in the future. Accordingly, Experian expect an efficiency growth rate for comparison goods of c. 2.6% a year between 2014 and 2027.

5.19 Scope for increased sales densities is even more limited for convenience goods given that the majority of foodstores already drive high sales efficiencies and the significant expansion in store provision has led to an increase in the overlap of store catchments and a resultant 'cannibalisation' of existing sales. An efficiency growth rate of close to 0% a year between 2014 and 2027 is therefore recommended by Experian and these assumptions inform our approach.

Internet Growth and Multi-Channel Retailing

5.20 The online shopping population is beginning to reach saturation, with over 40 million online shoppers in the UK expected by 2017. Future growth in the market is likely to come from increased consumer spend driven by new technology and improved delivery options. Changes in technology are driving sales with the expansion of tablet devices which provide a better browsing experience. Quick Response codes (QR codes) for example have increased consumer and retailer interaction and engagement, enabling customers to gain direct access to the product website, marketing, competitions and product information.

5.21 Click and collect is forecast to be one of the most significant drivers of growth, with a rise of 62.7% in click and collect purchases expected between 2013 and 2018[23]. The service provides physical retailers with an important benefit over pure internet operators and creates opportunities for making additional purchases when customers collect orders from stores.

5.22 The growth in online sales has implications for bricks and mortar stores as it potentially reduces the need for so many outlets. However, trends indicate that online and in-store shopping channels are becoming more blurred as shoppers increasingly research items online or in stores before making purchases.

5.23 These trends, combined with the importance of 'click and collect' highlight that physical stores will still have a significant role in the multichannel shopping environment, although their size and format will differ from traditional stores. The advantages of physical stores, in terms of the shopping experience (in-store ambience), service and immediacy of products in a showroom setting, will see a network of key stores remain a fundamental component of retailer's strategies to provide an integrated multichannel retail offer.

5.24 Beyond Retail[24] identifies the need for 'digitisation' of town centres / high streets through a variety of initiatives, including:

- **Contextual marketing**: encouragement of the use of online learning platforms and support for independent retailers wishing to improve their online presence and digital skills. Twitter is identified as a valuable tool in promoting independent shops, events and new footfall.

- **Town centre website**: an important promotional and information platform for all stakeholders in order to promote footfall, loyalty and spend within towns. Free 'in-town' Wi-Fi is identified as a critical element to this in order to better engage with visitors. The provision of interactive maps and town centre applications are particularly important in the overall 'digital' offer.

- **Branding and PR**: it is critical that a town centre or high street destination is given a key Unique Selling Point (USP). A holistic approach should be adopted and the USP should not solely be focused on retailing and leisure; community facilities provide an important element of the overall attractiveness of the offer.

23 Verdict: Online & Remote Shopping, E Retail in the UK (August 2013)
24 Beyond Retail – *Redefining the shape and purpose of town centres (November 2013)*

5.25 Traditional centres and high streets, such as those within the district, will therefore need to effectively re-position themselves to complement rather than compete with multi-channel retailing. The future focus accordingly to Beyond Retail should be omni-channel retailing whereby mobile, on-line and in-store experiences complement each other. Town centres should therefore prepare for the requirements of the digital age.

Changing Retailer Requirements

Space Requirements

5.26 The retail sector has undergone significant changes over the last decade which has fundamentally altered how, where and when we shop. This has had major implications for retailers' space requirements, which combined with the recent recession, has changed the retail landscape of our towns and cities.

5.27 During the recession retailers' margins were squeezed, whilst other costs continued to rise and a raft of multiple and independent retailers either collapsed or have significantly shrunk their store portfolios. The decline in the amount of occupied retail space in town centre locations has not typically been offset by new retail developments. Many town centre schemes have been put on hold or significantly scaled down in size, and with 'fairly weak' expenditure growth forecast in the medium term, retailers are expected to remain cautious about store expansion.

5.28 The growth of the multi-channel retailing means that retailers no longer need stores in every town to achieve national coverage. Many retailers are therefore focusing their development programmes on the provision of large flagship stores in strategic locations, supported by smaller satellite stores and transactional websites.

5.29 The larger flagships accommodate full product ranges whilst smaller stores offer more select ranges, supplemented by internet kiosks allowing access to the full range. This offers many advantages to retailers including lower property costs, more efficient logistics and being able to open stores where there is a high level of demand despite space restrictions.

5.30 This polarisation of retailing will result in larger dominant centres on a sub-regional level continuing to attract key retailers (where space is available), with medium sized centres potentially struggling to attract investment. Local and neighbourhood centres should be less affected by this trend and are likely to retain their attraction for top-up and day-to-day convenience shopping and services. This changing retail structure needs to be considered carefully when analysing household survey results as it will have implications on how to plan for growth and change.

5.31 Retailers are opting to develop stores in the most strategic and cost effective locations; this has led to a notable resurgence in out-of-centre destinations which offer benefits of lower rents, larger retail units and in most cases, free car parking.

Out-of-Centre Pressures

5.32 According to Verdict, out-of-town retailing is the only form of retailing which has seen store numbers increase consistently since 2000. The Department for Business, Innovation and Skills (BIS) reports that the number of out-of-centre stores has increased by up to c.1,800 (25%) since 2000.

5.33 Many traditional town centre retailers have developed out-of-town store formats, including John Lewis, which has recently opened at Vangarde Retail Park in York, as well as other retailers such as Next, Primark and H&M.

The Role of the Town Centre

5.34 The town centre has traditionally been the main shopping destination. However, with weaker expenditure growth and the loss of trade to out-of-centre and online, its future role is set to change dramatically. Emerging trends suggest that many centres will be used increasingly for leisure and social activities as well as traditional retailing, with more bars, restaurants, food outlets and community spaces opening in vacant units.

5.35 As retailers improve their multichannel offer, the expectation is that town centre stores will be used increasingly as showrooms to support e-retailing (with click and collect points and safe drop boxes for customers to collect online orders, and in-store kiosks for customers to make online purchases). Towns will need to capitalise on the opportunities that click and collect services offer. Where overall demand for retail floorspace stabilises or declines, it is anticipated that more secondary and tertiary space, which suffers from lower levels of footfall, will increasingly be converted into alternative town centre and residential uses.

5.36 Enhancing the non-retail offer so that towns function as more than just retail locations will also help drive footfall and increase dwell time. Towns should promote unique attractions such as heritage assets, historic buildings and cultural features which can differentiate a centre and improve its attractiveness.

5.37 To ensure that town centres have a viable function moving forwards they must provide an attractive shopping and leisure experience which the internet is unable to match. The Council and other town centre stakeholders (e.g. The STEP) need to gain a better understanding of the catchment and what local people want from their town, to provide the right mix of outlets and services. A vital component of this will be making town centres as accessible as possible, with improved and cheaper car parking.

5.38 An important consideration for councils over the next few years will be that many retail leases are due to expire, which will enable retailers to easily exit properties in poorer performing locations. This situation needs to be monitored closely and reinforces the need to improve town centres.

5.39 Some of these trends have been identified and promoted by the Government in the Portas Review, the Government's Response and a Government supported industry taskforce report.

Retail Sector Trends

Food and Groceries

5.40 The top four supermarkets[25] continue to dominate the market and represent approximately 75% of the total convenience market[26]. With vast store networks and online offers, their coverage is reaching peak levels and the 'race for floorspace' has significantly diminished. Given weaker spending on convenience goods and the transfer of trade online, expansion plans are increasingly focused on redevelopment and refurbishment of existing stores rather than on delivering new floorspace through new superstore development. In some cases, for example Tesco, space within larger format stores is being sub-let to restaurants, gyms and children's play centres. There is also potential within larger format stores for existing non-food sales area floorspace to be occupied by non-food fashion concessions.

25 Tesco, Asda, Sainsbury's and Morrison's
26 Kantar Worldpanel, January 2015

5.41 The development of smaller convenience store formats for top up food shopping has become increasingly popular in response to consumers seeking to reduce waste by moving from weekly shops to more frequent smaller shops, or to avoid the high fuel prices associated with travelling long distances. As a result, many of the main operators are expanding their smaller concept stores - Tesco Express, Sainsbury's Local, M Local, Little Waitrose etc. Aldi and Lidl are also trialling smaller convenience store formats with a view to further expansion within this specific grocery sector.

5.42 The value/discount retailers are continuing to expand rapidly, having gained considerable market share during the recession. Aldi and Lidl have both succeeded in attracting customers who originally looked to trade down in price but not quality. Whilst this was initially viewed as a temporary response to the recession, it is clear that a more permanent shift in shopping preferences towards quality, value-orientated goods has occurred. This has placed significant pressure on the mainstream larger-format retailers who are now responding with substantial price cuts. Sainsbury's has also recently announced plans for a new Netto discount brand in the UK (new store recently opened in North Leeds) and is potentially looking at co-locating Netto stores within existing large superstores.

5.43 Food retailers are also continuing to develop online offers to meet increasing consumer demand for convenient food shopping, much of which is still fulfilled through existing store networks. Click and collect services are expanding into the grocery sector with some retailers developing 'drive-through' collection points for picking up online orders.

5.44 The significant forecast growth in 'click and collect' has been acknowledged by the Government in reforms to planning rules recently (April 2015) came into force, extending General Permitted Development Rights to enable shops to build new 'click and collect' facilities without the need for a planning application.

Clothing and Footwear

5.45 By 2017, Verdict estimates that the clothing and footwear sector will represent 15.9% of total retail spend (a marginal increase from 15.2% in 2012). The proportion of clothing sales transacted online is currently around 12.4% and is expected to rise to just over 20% by 2017 as browsing services improve.

5.46 Low levels of consumer confidence in addition to high prices are expected to keep clothing and footwear sales volumes low. Premium and luxury brands will continue to maintain their consumer appeal, whilst growth from value retailers will become more subdued as they seek to ensure their profitability.

Premium and Luxury Goods

5.47 More affluent consumers have been able to maintain a higher level of personal and discretionary spending during the recession and therefore the premium and luxury goods sector has remained relatively strong. There is still high demand for premium brands and goods across all retail sectors, from clothing and accessories to high tech items. In response to this trend, Verdict predict that the premium sector of the UK department store market will account for 43% of total department store expenditure in 2017 as midmarket department stores expand designer and luxury goods ranges (e.g. John Lewis, House of Fraser and Debenhams).

Electricals

5.48 The electrical sector has suffered as a result of the recession as households cut back on 'big ticket' items combined with the shift of spending online. Since 2008 the proportion of electrical spending which takes place online has more than doubled to 43%[27]. Casualties in the sector include Comet and Jessops, along with Best Buy who exited the UK market.

5.49 Growth remains strong however for smaller, high tech items such as tablets and premium electrical goods, with retailers such as Apple and John Lewis continuing to do well. There is also demand for 'value' ranges of electrical goods, much of which has been captured by the supermarkets. Over the medium-term at least, sales of big-ticket items are likely to remain subdued.

Homewares

5.50 Growth in the more traditional part of the homewares market (such as furniture and floorcoverings) is heavily reliant on the housing market and has been weak in recent years. Growth is expected to remain subdued in 2014, but will improve as the housing market strengthens. The softer end of the homewares market (i.e. smaller more

27 Verdict: UK Retail Review & Sector Forecasts to 2017

decorative items), has been more resilient as consumers look at cheaper ways to refresh their homes.

Music, DVDs and Books

5.51 Technology is removing the need for physical stores as consumers can now download/stream music and films online. As a result the music and DVD sector has shrunk significantly with negative growth in retail spending. Over three-quarters (78%) of music and video sales are now online and Verdict predicts that by 2017 online sales will account for 90% of the market.

5.52 The book sector has been heavily influenced by the growth of e-reader devices (e.g. Kindle), and the sector is increasingly moving from physical to digital products. By 2018 it is estimated that nearly three-quarters of the book market will be online, with almost half of the online market attributed to digital sales.

Relevant Government Research

The Portas Review

5.53 In May 2011, Mary Portas was appointed to lead an independent review into the future of the high street, in response to the effects of the recession on the retail industry and local high streets in particular.

5.54 The report suggested measures to tackle the further decline of the high street. Amongst 28 separate recommendations, there is a call to strengthen policy in favour of 'town centres first' following the publication of the (then draft) NPPF. In summary the recommendations aim to:

- Run town centres like businesses: by strengthening the management of high streets through 'Town Teams', developing the BID model and encouraging new markets;
- Get the basics right: by looking at how the business rate system could better support small businesses and independent retailers, encouraging affordable town centre car parking and looking at further opportunities to remove red tape on the high street;
- Level the playing field: by ensuring a strong town centre first approach in planning, introducing Secretary of State 'exceptional sign off' for out-of-centre

proposals and encouraging large retailers to show their support for high streets by mentoring local businesses;

- Define landlords' roles/responsibilities: by looking at disincentives for landlords leaving properties vacant, empowering local authorities where landlords are negligent and making proactive use of Compulsory Purchase Order powers; and
- Give communities greater say: by including the high street in neighbourhood planning and encouraging innovative community uses of empty spaces.

Government Response to Portas

5.55 The Government published its formal response to the Portas Review in March 2012, which accepted the majority of Portas' recommendations. It announced a number of 'Portas Pilot' towns, which were chosen to set up Town Teams to create plans for the future of their high streets. In addition, the Government announced their intention to provide investment to help Business Improvement Districts (BIDs) access loans for set-up costs and provide funding for a Future High Street X-Fund (now rebranded as the High Streets Renewal Fund) to reward towns which are delivering innovative plans to bring their town centres back to life. Other initiatives included an annual National Market Day; plans to double small business rate relief; community involvement in the redesigning the concept of their high streets to reinvigorate areas of decline, to increase footfall and encourage people to live in town centres.

5.56 One measure which did not receive Government support was the call to introduce Secretary of State 'exceptional sign off' for all new out-of-town developments and require all large new developments to have an 'affordable shops' quota. The Government stated that LPAs are best placed to understand local needs and 'exceptional sign off' is contrary to the Government's ethos of devolution. As such, the Government will continue to use the call-in power sparingly.

Beyond Retail

5.57 Arising from key recommendations in the Portas Review, the Government supported the establishment of an industry taskforce to analyse retail property issues relating to town centres. This taskforce published their report, Beyond Retail – Redefining the shape and purpose of town centres in November 2013. The principal recommendations for achieving rejuvenated town centres fit for the future requires:-

- Retail capacity models need to fully reflect impact of multi-channel retailing.
- Proactive use of Compulsory Purchase Orders (CPO) to enable regeneration of town centres, alongside an urgent review of the complexity and costs of such approach.
- Local authorities to take more risk in investing capital reserves now to help improve town centres, which can be repaid as the local economy recovers.
- Piloting the concept of a joint venture vehicle and associated high street property fund so that land assets can be pooled to overcome fragmented ownership.
- Town centres to develop an integrated digital strategy, incorporating mobile, social media and website, to encourage more shoppers and longer visits.
- The quality, quantity and cost of town centre car parking to be reviewed in relation to free out-of-centre provision. Flexible parking policies are needed to attract town centre visitors.

Overall Summary

5.58 Economic growth will continue to remain muted over the plan period, with relatively weak expenditure growth in the short-medium term.

5.59 It is evident that the traditional high street faces a number of challenges, not least from the impacts of the recession, including tightening of retail spending and changing consumer behaviour, but also from increasing competition posed by the internet, multichannel retailing and out of centre developments.

5.60 Town centre strategies which support the continued evolution of the high street are considered ever more vital. This may involve providing a high quality shopping 'experience', maximising the benefits of tourist trade, and improving the mix of retail and non-retail outlets to increase length of stay and spend. Continued growth in click and collect purchases provides town centres with an increasing opportunity for linked trips to other town centre destinations when customers collect orders from stores.

5.61 It will be important for town centres to be well positioned to be able to adapt to on-going changes in the retail and leisure sector over the development plan period and to reaffirm their Unique Selling Points which differentiate their retail offer from other centres.

5.62 The on-going pattern of polarisation suggests that larger centres are well placed to maintain and enhance their offer. However, this is dependent on continued investment to ensure the right mix of retailers and other services.

Implications for Selby District

5.63 The national market trends in retail and leisure detailed above will have specific and localised impacts upon the future of the main centres in Selby District.

5.64 The combined impact of increasing competition from multi-channel retailing (primarily the internet) and the rationalisation of operator representation towards sub-regional centres and out of town shopping destinations will impact on the future strategy for the main centres in Selby.

5.65 The district is located in close proximity to and surrounded by a number of large regional/sub-regional centres (and retail parks), namely, Leeds to the west, York to the north and Hull to the east. Therefore, it is likely to be difficult to attract the retailers and leisure operators necessary to deliver a step-change in the performance of the main centres in Selby, particularly given recent significant retail development at the main out-of-centre retail park destination in York (Monks Cross and Vangarde). The committed Thorpe Park scheme on the east of Leeds as well as the planned Five Towns scheme in Castleford further reduces potential retail demand for representation in the district and particularly Selby as a market town in the regional retail hierarchy.

5.66 Selby town centre serves the wider district and has the potential to sustain a critical mass of retail and leisure provision. However, any quantitative (physical) expansion of the retail offer in the town should be balanced with a strategy which seeks to qualitatively distinguish the centre from higher order retail locations by emphasising its Unique Selling Points with an emphasis on the local independent offer, quality of place and distinctive heritage assets.

5.67 With respect to both Tadcaster and Sherburn in Elmet, given that the limitations of the existing offer and that the centres serve highly localised catchments, the forward strategy should focus on adequately meeting daily shopping and service needs.

5.68 Given the fundamental ongoing changes within the retail sector, it will be important to embrace and not compete against multi-channel retailing. The retail strategy for Selby town centre should ensure that the centre is responsive to changes in technology and able to tap into opportunities such as the capability of town centres to act as 'click & collect' locations.

5.69 Planning policy should ensure flexibility, especially in relation to peripheral locations on the edge of the town centres, to allow the role of the town centre to adapt to the market trends identified in this section.

6. Methodology

Health Checks

6.1 The NPPF states that comprehensive up-to-date monitoring of town centre performance is essential to improve the vitality and viability of centres and effectively plan for the future.

6.2 We have therefore undertaken an assessment of the health of each of the district's three defined principal centres of Selby (Section 8), Tadcaster (Section 9) and Sherburn-in-Elmet (Section 10), using a range of indicators of vitality and viability in accordance with those set out in the NPPG[28]. The assessments are informed by on-foot surveys of each centre, together with desk-based research which draws on published primary and secondary data as well as information collected during the in-centre, business and footfall survey exercises. However, at the outset, it should be noted that published data is generally not as readily available for smaller centres, such as Tadcaster and Sherburn-in-Elmet. For these towns, the review of performance is based on the findings of the household surveys and retailer business surveys, as well as our on-site surveys of the centre.

6.3 As well as providing the base position for the future monitoring of town centre vitality and viability, this exercise identifies the key strengths of the three principal centres as well as deficiencies and areas that would benefit from improvement. We then use this information to inform the recommendations in subsequent sections of our report.

6.4 All of the health check data for Selby is contained in **Appendix 3**. All of the health check data for Tadcaster is contained in **Appendix 4**. All of the health check data for Sherburn in Elmet is contained in **Appendix 5**.

In-Centre Survey

6.5 In order to inform a wider qualitative review of performance, a total of 151 in-centre surveys were completed in Selby town centre across 6 days in November 2014[29]. The surveys covered both week and weekend, including the weekly market day, in order to capture a wide cross-section of regular town centre users and visitors.

[28] Paragraph 5 of the 'Ensuring the viability of town centres' category (Reference ID: 2b-005-20140306)
[29] Monday 3 November 2014 to Saturday 8 November 2014

6.6 As set out in the introductory chapter to this report, the survey was designed in conjunction with the Council to determine:

- The profile of visitors and shoppers;
- The strengths and weaknesses of Selby town centre in terms of the existing retail offer, wider facilities and physical environment;
- The usage of the centre (i.e. frequency of visits, modal split, dwell time); and
- Suggested qualitative improvements which would persuade shoppers to visit Selby town centre more often, or stay in the centre for longer.

6.7 The key findings of the in-centre survey are set in the following chapters of this report. Where appropriate, we have compared the findings of the in-centre survey with those of the previous in-centre survey completed as part of the 2009 SRCLS.

Retailer Business Survey

6.8 In assessing the health of the respective centres in the district, it is important to understand the current performance and requirements of local businesses.

6.9 Approximately 305 detailed retailer business survey questionnaires were therefore distributed in October 2014 to all of the retail and service sector businesses located within Selby, Tadcaster and Sherburn in Elmet centres[30]. The questionnaire sought to establish the views of local retailers and other town centre businesses on the respective centre's offer and potential. A copy of the questionnaire distributed is provided in **Appendix 6**. A pre-paid reply envelope was provided with each questionnaire to encourage a positive response rate. A total of 86 responses were received from businesses across Selby, Tadcaster and Sherburn in Elmet town centres.

Retail Capacity Assessment Methodology

6.10 The quantitative assessment adopts a conventional step-by-step methodology, drawing upon the results of a telephone survey of households, to understand existing shopping patterns and to model existing flows of expenditure available within the study area to the main retail destinations within the district and wider sub-region.

[30] Within the shopping and commercial centre area defined in adopted Local Plan Proposals Map

6.11 Having established the baseline position, the quantitative capacity modelling exercise considers the performance of Selby town centre, Tadcaster and Sherburn in Elmet local service centres, and separate retail stores and retail park destinations in the study area. The methodology, data inputs and assumptions adopted in the assessment exercise are set out below.

1) Study Area Definition

6.12 The study area for the survey is shown on the plan in **Appendix 1**. The study area is based on postcode sector boundaries, which facilitates the use of expenditure data from the Experian Micromarketer system.

6.13 The study area represents the catchment area of Selby town centre and is disaggregated into eight study zones, broadly encompassing the administrative area of Selby District (Zones 1 to 4) along with the adjacent rural areas to the north (Zone 5), Goole and surrounding rural areas to the east (Zones 6 and 7) and adjacent rural areas to the west (Zone 8), as shown in the at **Appendix 1.**

6.14 Zones 1 to 4 represent the Primary Catchment Area (PCA) of Selby town centre, with Zones 5 and 8 enabling the identification of expenditure inflows into Selby District from neighbouring areas.

6.15 Zones 1 to 5 and Zone 8[31] are broadly the same as the catchment zones adopted in the 2009 Study. Zone 6 and Zone 7 encompass the corresponding zones in the 2009 Study although the latter additionally encompasses Goole.

2) Household Telephone Survey

6.16 A total of **750 household telephone surveys** were completed across the study area by NEMS Market Research in August 2014; the number of surveys undertaken in each individual catchment zone is set out in the table below.

6.17 The survey questionnaire, which is provided under separate cover to this report, was designed to establish a detailed picture of residents' shopping and leisure habits, as well as the strengths and weaknesses of the respective main centres in the district.

[31] Note that Zone 8 corresponds to Zone 10 defined in the 2009 SRCL study.

Table 6.1 – Household Survey Zones, Postcode Sectors and Number of Surveys

Zone	Postcode Sectors	Number of Surveys
Zone 1 – Selby	YO8 3, YO8 4, YO8 5, YO8 6, YO8 8, YO8 9, YO19 6	200
Zone 2 – Sherburn in Elmet	LS25 5, LS25 6, WF11 9	100
Zone 3 – Tadcaster	LS24 8, LS24 9, YO23 7	100
Zone 4 – Eggborough/South Selby	DN14 0, DN14 9, DN6 9	100
Zone 5 – Northern Fringe	YO23 2, YO23 3, YO19 4	50
Zone 6 – North Eastern Fringe	YO42 4, YO43 4 (part)	50
Zone 7 – South Eastern Fringe	DN14 5, DN14 6, DN14 7, DN14 8	100
Zone 8 – Western Fringe	LS23 6, LS23 7, LS25 3, LS25 4	50

Retail Goods

6.18 The survey questionnaire sought to establish patterns of spending on categories of retail goods as follows:

Table 6.2 – Household Survey Categories of Retail Goods

Category	Sub-Categories
Convenience Goods	Main (Bulk) Food Top-Up (Daily)
Comparison Goods	Clothing, Footwear and Fashion Goods Books and Stationary Items, CDs and DVDs Chemist Goods (including Health and Beauty Products) Small Household Goods (including glassware, tableware and household utensils) Jewellery, Watches and Personal Effects Recreational Goods (Bicycles, Games, Toys, Sports and Camping Equipment and Musical Instruments) Furniture, Floors and Household Textiles DIY and Decorating Goods Major Household Appliances Large Electrical Goods (Audio-Visual etc.)

Category	Sub-Categories
	Gardens, Pets and Related Products
Leisure	Health & Fitness Cinema Socialising Eating Out Theatre

6.19 The results of the two types of food shopping questions are merged through the application of a weighting (75% main food; 25% top-up food shopping split), which reflects the estimated proportion of expenditure accounted for main (bulk) and daily top-up food shopping. This produces a composite pattern of convenience spending, enabling the identification of each main centre and foodstore market share.

6.20 With regards to comparison goods, the results of all these questions were merged using a weighting (Table 4B, **Appendix 8**) to reflect the amount of per capita expenditure in the survey zones for each of the different categories of goods.

Qualitative Questions

6.21 In addition to spending on retail goods and leisure activities, the household survey also sought to identify the following in relation to Selby, Tadcaster and Sherburn in Elmet town centres (residents of Zones 1, 2 and 3, respectively, only):

- The usage for the centre (i.e. purpose of visit, frequency of visits, and usage of the tourist attractions and centre markets);
- The strengths and weaknesses of the respective centre in terms of the existing retail offer, wider facilities and physical environment; and
- Suggested qualitative improvements which would persuade shoppers or other visitors to the centre to visit more often.

3) Data Variables

i) Population

6.22 Selby District Council's planned housing growth targets, which were set by the Council to meet its objectively assessed housing need in full, were used as the basis for our population projections over the local plan period, supplemented by ONS based population data sourced from Experian. An explanation of how the Council's planned housing growth figures and the ONS based population figures were used to estimate population growth across the district is set out below.

2014 Base Year

6.23 For Zones 1-4, which broadly corresponds to Selby District, the 2014 population estimates are based on the most up-to-date ONS based population estimates, which are for the year 2013, and completed housing development across Selby District between 2013 and 2014 (Table 1A at **Appendix 7 and 8**).

6.24 ONS based 2013 population estimates were sourced from Experian via its Micromarketer Online database. Data on completed housing development across the district was sourced from Selby District Council, and converted to a population growth estimate assuming an average household size of 2.38 as set out in Table 6.3 below (the average household size for Selby District at 2014 sourced from the Department for Communities and Local Government (DCLG)[32]).

6.25 For Zones 5-8, which broadly encompass the parts of the catchment area outside of Selby District, ONS based population projections for the 2014 base year were also sourced from Experian via Micromarketer Online (Table 1A at **Appendix 7 and 8**).

6.26 The Experian population data are based on trend-line projections from the 2011 Census results and are calibrated to Local Authority Targets based on the most recently available Government population data (ONS mid-year projections). Further details on the data sources for Experian's 2013 population estimates and population projections are set out in the Data Profiles at **Appendix 2**.

Forecast Years

6.27 Considerable housing growth is planned in Selby District over the Local Plan period up to 2027 as set out in the Selby District Core Strategy. The Core Strategy sets a target of a minimum of 450 dwellings per annum on average over the plan period to meet the objectively assessed housing need in full.

6.28 To take account of the high level of planned housing growth across Selby District over the Local Plan period, the population projections for Zones 1-4 in each of the forecast years

[32] Change in average household size, local authority districts and England, 2011- 2021, DCLG

are based on the planned housing development across Selby District sourced from Selby District Council as detailed below (Table 1A at **Appendix 7 and 8**).

6.29 For Zones 1-4, the 2014 housing estimates were projected forward to 2017 based on existing, deliverable commitments for new residential development within each zone from the 2014 five year land supply. We assumed that extant planning permissions for less than 15 dwellings will be delivered by 2017, and that the remaining extant permissions, for more than 15 dwellings, will be built-out in accordance with the delivery schedules provided by Selby District Council.

Table 6.3 – Selby District Average Household Size

Year	Selby District Average Household Size (Persons)[33]
2014	2.38
2017	2.37
2022	2.36
2027	2.36

6.30 The remainder of the total target housing growth over the period 2013-2027 (assuming an average of 450 dwellings per annum over the period 2013-2027) was assumed to be delivered at a constant rate over the period 2017 to 2027. We allocated the total target housing growth for the district to each of the Zones 1-4 according to the housing growth distribution set out in Policy SP5 of Selby District Core Strategy and reproduced in Table 6.4 below. The distribution by zone for the percentage of housing growth allocated to Designated Service and Secondary Villages in Policy SP5, which was not disaggregated to individual villages in Policy SP5, was estimated based on number of designated service and secondary villages in each zone.

6.31 The household projections for each of the forecast years were then converted to population projections assuming an average household size of for each of the forecast years as set out in Table 6.3 above. The Distribution by zone (estimated based on number of designated service/secondary villages in each zone)

[33] Average household size in Selby District for 2011, 2016 and 2021 sourced from 'Change in average household size, local authority districts and England, 2011- 2021', DCLG, 9 April 2013 and interpolated for average household size for 2014 and 2017. For 2027, we have assumed that the average household size will remain the same as at 2021.

Table 6.4 – Selby District Average Household Size

Location	% of Housing Growth
Selby	51%
Sherburn	11%
Tadcaster	7%
Designated Service Villages	29%
Secondary Villages	2%
Total	**100%**

6.32 For Zones 5-8, ONS based population projections for each of the forecast years were also sourced from Experian via Micromarketer Online (Table 1A at **Appendix 7 and 8**).

ii) Expenditure

Expenditure per Person

6.33 2013 Estimates of per person expenditure on convenience and comparison goods (in 2013 prices) were sourced from Experian via Micromarketer Online. The total expenditure figures for convenience goods are set out in Table 3 at **Appendix 7** and for comparison goods in Table 3 at **Appendix 8**.

Expenditure Growth Rates

6.34 Retail expenditure growth rates were sourced from the latest Experian Retail Planner briefing note[34], which was published in October 2014 and are summarised below.

6.35 Experian identifies that comparison expenditure growth returned to historic levels in 2013 and projects that convenience expenditure growth will reach a positive level in 2015. However, the ongoing legacy of the economic recession is a reduced amount of available convenience and comparison expenditure in the short term, which allied to slower growth projections over the medium and long term, have implications for forward quantitative capacity as highlighted later in the report.

34 Retail Planner Briefing Note 12.1, Experian, October 2014

Table 6.4 – Per Capita Expenditure Growth Rates

Period	Convenience Goods Per Capita Expenditure Growth	Comparison Goods Per Capita Expenditure Growth
2014-2017	0.5% per annum	3.5% per annum
2017-2022	0.6% per annum	3.1% per annum
2022-2027	0.7% per annum	3.3% per annum

Floorspace Efficiency

6.36 The Experian sales density projections (Briefing Note 12.1) are summarised in Table 6.5 below and are relatively static in the medium term due to the current economic conditions.

6.37 Note that we have assumed a convenience sales density growth rate of 0.0% for the period 2014 to 2017, rather than negative rate identified by Experian.

Table 6.5 – Sales Density Growth Rates

Period	Convenience Sales Density Growth	Comparison Sales Density Growth
2014-2017	-0.1%	3.4%
2017-2022	0.1%	2.5%
2022-2027	0.3%	2.2%

Special Forms of Trading

6.38 The proportion of spending on special forms of trading (SFT) (e.g. expenditure not available to spend in the shops - primarily internet sales[35]), was sourced from Experian as set out in Table 6.6 below.

6.39 Spending on SFT is projected to increase over the study period. It should however be noted that the current Experian projections identify that longer-term growth in non-store (i.e. internet) based sales are less strong than historically predicted, particularly for

35 Experian define SFTs as expenditure that does not take place in shops, such as that via mail order houses, door to door salesmen and stalls and markets. It also includes spending using digital TV and over the Internet.

convenience goods due to current logistical difficulties in servicing customer demand on line (main retailers are beginning to open 'dark' stores[36] to meet demand).

Table 6.6 – Proportion of Expenditure Spent on Special Forms of Trading

Year	Convenience Goods Expenditure Spent on SFT	Comparison Goods Expenditure Spent on SFT
2014	2.6%	10.4%
2017	3.3%	11.7%
2022	4.6%	14.0%
2027	5.1%	16.0%

6.40 As previously detailed in Chapter 5 (Retail and Leisure Trends), the overall trend for less expenditure being physically available to spend in traditional centres / stores poses significant challenges to traditional 'bricks and mortar' retailing and town centres as a whole. The amount of 'physical' spending capacity available is therefore reduced.

4) Commitments

6.41 In assessing the quantitative and qualitative needs for new retail and leisure provision in the principal centres, it is important to understand existing committed and emerging proposals which could materially influence future performance and thereafter forward strategy. A schedule of the committed retail developments in the district is provided in Table 6.7 below.

6.42 Full planning permission was granted in December 2013 for the redevelopment of the existing Tesco superstore in Selby (LPA ref. 2013/0291/FUL). The scheme proposes the demolition of the existing Tesco store and its replacement with a larger store together with associated remodelling of the car park, on the site of the existing Tesco store and adjacent land to the east and south comprising a former Civic Centre and depot. However, part of the proposed site (the former Civic Centre and depot land adjacent to the existing Tesco store) is currently being marketed for sale[37] via local property agents. It is therefore apparent that Tesco no longer intends to implement the existing planning permission for larger replacement store in Selby (as per the wider business decisions it has made recently against large format stores). We have therefore excluded the

36 Dark Stores are large warehouses with interiors laid out like supermarkets so staff can walk around to compile orders (Class B8 warehouse and distribution use rather than Class A1 retail). They are not open to the general public.
37 At January 2015

commitment for the redevelopment of the existing Tesco store from our assessment of need for new retail floorspace.

Table 6.7 Committed Retail Developments in Selby District

Scheme	Planning Application Ref.	Gross Retail Floorspace m²	Net Retail Sales Area Floorspace Total m²	Net Retail Sales Area Floorspace Convenience m²	Net Retail Sales Area Floorspace Comparison m²
Replacement of Tesco, Portholme Road, Selby	2013/0291/FUL	6,290	3,953	2,913	1,040
Mixed use development including foodstore and shops, Staynor Hall site, Selby	CO/2002/1185	up to 2,000	-	-	-
Mixed use development including foodstore, Olympia Park, Barlby Road, Selby	2012/0541/EIA	2,000	-	-	-
Mixed use development including shops, former Rigid Paper site, Denison Road, Selby	2012/0159/OUT	1,492	-	-	-
Aldi, Low Street (former Sissons Haulage site), Sherburn in Elmet	2014/0692/FUL	1,537	1,000	800	200

6.43 Outline planning permission was granted in June 2005 for the development of the Staynor Hall site in the southeast of Selby for a major mixed-used scheme (LPA ref. CO/2002/1185). The scheme comprises the erection of some 1,200 dwellings, hotel, offices, warehousing, and up to 2,000 m² gross floorspace for shops, which is expected to comprise a foodstore and other A1-A5 uses. The first phase of residential development is now complete. The business development also commenced as part of the first phase of development. The proposed shops will be provided as part of the third phase of development, which is expected to commence in a few years' time.

6.44 The Council resolved to approve outline planning permission[38] for the development of the Olympia Park scheme in January 2014 (LPA ref. 2012/0541/EIA), a mixed use urban extension to the east of Selby. The scheme includes some 950 dwellings, a public house/restaurant, a food retail unit, a fast food unit, primary school, public open space and landscaping.

[38] Subject to a S106 agreement

6.45 Outline planning permission was granted in July 2014 for the Rigid Paper site (LPA ref. 2012/0159/OUT). The scheme comprises the redevelopment of the site to provide a mix of residential, retail (indicatively 1,492 m^2 gross retail floorspace), leisure and a marina development.

6.46 Full planning permission was granted in September 2014 for the redevelopment of the former Sissons Haulage site on Low Street in Sherburn in Elmet for a 1,537 m^2 (gross) Aldi foodstore (LPA ref. 2014/0692/FUL).

6.47 Our assessment of the comparison and convenience goods turnover of each of the above commitments[39] that will be derived from residents of each of the zones in Selby District is provided in Table 8 at **Appendix 7** and Table 7 at **Appendix 8**, respectively. We have assumed that the Aldi scheme will be open and trading by 2017, and that the Olympia Hall, Staynor Hall and Rigid Paper site proposals will be open and trading by 2022.

5) Store Performance

6.48 In order to review the current turnover performance of the principal centres and anchor stores (particularly larger format foodstores) across the District, published benchmark data (estimates of trading at company average levels) have been compared against the survey–derived turnover figures identified in the capacity modelling assessment. The company benchmark (turnover) has been calculated based on company average sales density figures derived from Mintel's Retail Rankings and Verdict.

6) Capacity Review

6.49 The quantitative capacity is presented for the 2014 base year, 2017, and the every five year period up to 2027.

6.50 Having established the baseline capacity position, the next step is to allow for the future turnover requirements of commitments for new comparison and convenience retail floorspace, having made an assessment of how much of the commitments' turnovers will be derived from residents of Selby District. We then considering what may be achievable in terms of potential increases in market share.

6.51 It should be noted that the potential uplift in expenditure only represents actual capacity if retail proposals and operators that emerge can genuinely qualitatively add to the

[39] Excluding the Tesco redevelopment

existing retail offer of the town centre by strengthening its attractiveness so as to achieve the envisaged improvements in market share.

6.52 Any market share enhancement assessment should be viewed against the positive planning policy framework provided by NPPF. Therefore, should proposals emerge for the development of new retail facilities within the primary shopping area of one of the principal centres then the application should be considered on its merits.

6.53 In the same respect, the NPPF does not support the diversion of trade from sequentially preferable central locations to new provision which is out-of-centre and is likely to lead to the loss of trade and wider benefits including linked shopping trips and footfall within the defined centres.

7. Summary of Findings

7.1 In this section we provide a summary of the key findings for Selby, Tadcaster and Sherburn in Elmet as identified in our full assessments of each of these centres presented in Sections 8 to 10, respectively.

SELBY

SWOT Analysis

7.2 A summary of the key messages from the floorspace, in-centre shopper and business survey exercises for Selby is contained within the following table.

Strengths	Weaknesses	Opportunities	Threats
• Varied retail offer with mix of popular local independents and national multiples. • Town performs sub-regional service function (Selby District Council offices; Hospital). • Low vacancy rates (below the national average). Vacancy rate due to drop further with remaining vacant units at Abbey Walk occupied.	• Lack of family-orientated leisure offer. • Lack of national clothing and fashion retailers. Lack of department store anchors / attractors. • Traditional linear high street and market place with small terraced retail units. • Lack of potential to create integrated physical expansion to the town centre retail circuit given	• Critical mass of retail and leisure operators to potentially attract further operators to the town centre. • New comparison retail development to strengthen the existing town centre retail and leisure offer to address current deficiencies. • Improved marketing / promotion of the town, including 'digitisation' of the	• Car parking availability and charging regime. • High Street congestion. • Wider retail and leisure trends, including multi-channel competition and the polarisation of operators to higher order retail destinations (e.g. York and Leeds). • Recent retail development at York (Monks Cross / Vangarde) may impact on

Strengths	Weaknesses	Opportunities	Threats
• The town is acknowledged as the primary retail destination serving the district and outlying areas. • Popular town centre markets which attracts visitors. • Attractive and historic town centre environment. • Variety of mainstream foodstores which meet main food shopping needs and generate linked trips with the town centre. • Readily accessible by public and private transport. • Captive local catchment for convenience shopping and day-to-day comparison shopping needs.	historic core (conservation area, surrounding residential and infrastructure (roads and rivers)). • Perceived concentration of charity shops (retailer business survey results). • Car parking availability and location. • Traffic congestion within town centre at peak times. • Proximity and ease of access to higher order sub-regional retail destinations in York and Leeds. • Poor marketing and profile of town centre attractions to wider sub-region (and beyond). • Current closure of leisure centre as it is being re-built. • Selby District Council offices have relocated from in-centre to out-of-centre location; loss of important footfall generator.	High Street (Wi-Fi etc.). • Qualitatively distinguish the town centre offer from mainstream higher order regional retail destinations (York). • Planned increase in resident population (Urban extensions). • Former Civic Centre and depot site at Portholme Road, which is subject to extant planning permission for a new large Tesco foodstore has recently been marketed for sale. The site is a major relatively unconstrained opportunity for new retail-led mixed-use development in a relatively accessible location close to the town centre. • New leisure centre in close proximity to the town centre will support linked trips with the town centre.	comparison shopping and potential commercial demand. • Committed development at the out-of-centre Thorpe Park site to the west of the district may further restrain potential to attract new retail and leisure operators. • Proposed Five Towns retail and leisure scheme in Castleford (stadium development) has potential to draw local residents in southern part of district. Development may further restrict potential to attract new retail and leisure operators.

Retail Assessment

Convenience

Main Food Market Shares

- Selby town centre retains 35.7% (£27.3m) of the main food shopping expenditure arising within its immediate catchment (Zone 1), increasing to 82.2% (£62.8m) when the out-of-centre Tesco and Aldi stores are taken into account. This is a high market share given the relatively rural nature of the town's catchment zone.

- The greatest inflow of trade from other parts of the district is from Zone 4 Eggborough/ South Selby (33.6%, £9.6m), which is appropriate given the lack of retail centre / provision within this zone. It is anticipated that the current flow from Sherburn in Elmet will reduce (currently 14.2%, £3.5m) once the new Aldi permission is implemented.

- The inflow to Selby town from other areas surrounding the district is relatively limited, which could be expected given the good provision of foodstores in surrounding locations including Knottingley, Goole, Pontefract and York. Correspondingly, there is a degree of outflow (11.9%, £9.1m) from Selby to mainstream foodstores in York.

Top-Up Food Market Share

- The analysis identifies that whilst the town as a whole has maintained its top-up food shopping function since 2009, the top-up food shopping role of the town centre provision has declined over the period. Notwithstanding this there has been a modest growth in market share achieved by independent convenience stores in the town centre is a positive for the wider vitality, viability and overall diversity of the town centre.

- Given the relatively rural nature of the Selby town hinterland, there is a notable amount of top-up food expenditure inflow from other parts of the district, including notably from the Zone 4 Eggborough/ South Selby area.

- Overall 54.2% (£13.8m) of top-up-food expenditure arising in the Selby zone is retained within Selby.

Overall Food Market Shares

- The overall convenience expenditure pot within the immediate Selby catchment zone is projected to rise from £101.9m in 2014 to £127.0m in 2027.
- Existing convenience provision within Selby town retains a total of 75.2% (£76.6m) of convenience expenditure arising within its immediate catchment – an extremely positive retention. The overall town centre convenience market share is 35.0% with the out-of-centre Tesco, Aldi and Co-op stores retaining a further 40.2%.

Foodstore Performance

- Of the four main foodstores within Selby town, two (Tesco and Aldi) are trading substantially above their company average benchmark, one (Morrisons) is trading slightly above its company average, and one (Sainsbury's) is trading slightly below its company average.
- No lack of choice or competition to the benefit of local residents has been identified within the analysis. There is no one dominant store within the town. The new Aldi store in Sherburn in Elmet may reduce some of the current overtrading.

Convenience Retail Capacity Review

7.3 A summary of the convenience retail capacity identified in Selby is contained within the following table. The full assessment is presented in Section 8 (Selby Analysis).

Selby Convenience Retail Capacity

Scenario		2017 m² (net)	2022 m² (net)	2027 m² (net)
B	Selby (Zone 1, Post Commitments)	**240**	**-1,230**	**-660**
C	Selby (Zone 1, Post Commitments, Allowance for Over-trading)	**1,140**	**-340**	**215**

Comparison

Overall Comparison Goods Market Shares

- The total comparison expenditure pot within the Selby Zone 1 catchment area is projected to increase from c. £152.4m in 2014 to £260.6m in 2027.
- Selby town centre retains 37.9% (£57.7m) of all comparison goods expenditure arising within Zone 1, increasing by 5.8% (£8.9m) if the out-of-centre Three Lakes Retail Park is included. Given the current retail offer and competition from surroundings sub-regional destinations this is considered to be a relatively positive performance.
- Almost half of the available comparison retail expenditure arising within Zone 1 flows to retail destinations in York.
- Selby town draws a significant amount of trade from other parts of the district, including most notably from Eggborough / South Selby (19.5%, £10.9m). The proposals for a large out-of-town retail park scheme in Castleford (Five Towns) has the potential to reverse these inflows.

Individual Comparison Goods Market Shares

- The market share retention levels suggest that Selby town centre performs a secondary role for most types of comparison goods items with the exception of the health and beauty products (everyday items), and books, CDs and DVDs categories. The relatively low market shares reflect the current limitations of the offer in the town.

Comparison Goods Category	**2014 Selby Town Centre**	**2014 Selby Town**
Clothing & Shoes	14.7% (£6.5m)	15.1% (£6.7m)
Furniture, Carpets & Household Textiles	37.1% (£6.9m)	40.8% (£7.5m)
DIY & Decorating Goods	30.9% (£1.3m)	60.9% (£2.6m)
Major Household Appliances	45.9% (£2.6m)	61.8% (£3.4m)
Electrical Goods	41.2% (£5.1m)	53.7% (£6.7m)
Books, CDs & DVDs	68.1% (£6.1m)	71.2% (£6.4m)
Health & Beauty Products	77.4% (£17.2m)	77.4% (£17.2m)
Household Goods	50.4% (£2.7m)	52.8% (£2.8m)
Personal Goods	36.2% (£2.5m)	38.9% (£2.7m)
Recreational Goods	25.9% (£4.8m)	37.0% (£6.8m)
Gardening & Pet Products	41.6% (£2.4m)	66.4% (£3.8m)

Comparison Retail Capacity Review

7.4 A summary of the comparison retail capacity identified in Selby is contained within the following table. The full assessment is presented in Section 8 (Selby Analysis).

Selby Comparison Retail Capacity

Scenario		2017 m^2 (net)	2022 m^2 (net)	2027 m^2 (net)
A	Selby (Zone 1, Baseline)	**160**	**1,645**	**4,180**
B	Selby (Zone 1, Post Commitments)	**160**	**1,180**	**3,715**

Tadcaster

SWOT Analysis

7.5 A summary of the key messages from the floorspace, in-centre shopper and business survey exercises for Tadcaster is contained within the following table.

Strengths	Weaknesses	Opportunities	Threats
• Centrally located Sainsbury's foodstore generates linked trips with the town centre. • Attractive and historic town centre environment (Castle, River Wharfe). • Long-standing established independent retail offer. • Town centre market which attracts visitors. • Popular leisure offer including cafes, restaurants and public houses (reflecting brewing history of the town), and the nearby swimming pool. • Readily accessible by public and private transport.	• Significant number of vacancies within town centre. • Relatively modest sized Sainsbury's foodstore anchor. • Lack of competition and choice for local residents for main food shopping (Sainsbury's dominant albeit with reduced offer). • Limited range of national multiple comparison shops present within town centre (under provision in terms of numbers of units and floorspace quantum). • Limited retail services offer. • Town serves limited rural-based catchment which is constrained by York to the	• Improved marketing / promotion of the town, including 'digitisation' of the High Street (Wi-Fi etc.). • Qualitatively distinguish the town from mainstream higher order regional retail destinations (York and lesser extent Selby). • Improve physical environment / public realm works.	• Vacancies around Chapel Street / High Street could remain vacant in the long-term (declining vitality and viability). • Wider retail and leisure trends, including multi-channel competition and the polarisation of operators to higher order retail destinations (e.g. York). • New retail development at York (Monks Cross / Vangarde) may impact on comparison shopping and potential commercial demand.

Strengths	Weaknesses	Opportunities	Threats
	east.		

Retail Assessment

Convenience

Main Food Market Shares

- Tadcaster town centre retains nearly 50% (49.7%, £9.9m) of the main food shopping expenditure arising within its immediate catchment (Zone 3), which whilst an improvement from the 2009 level (linked to the Sainsbury's store opening) reflects the limitations of the existing convenience offer (the Sainsbury's store has a relatively small net sales area of 906 sqm).
- The greatest inflow of trade from other parts of the district is from Zone 8 Western Fringe (9.5%, £2.0m) including Boston Spa and surrounding rural areas. This is likely to reflect travel to work patterns as well as, potentially, brand loyalty.
- Tadcaster does not attract any main food inflows from any other zones either within or outside of the district.
- Significant levels of expenditure is drawn from Tadcaster to mainstream foodstores outside of the district including Morrison Wetherby (8.6%), Tesco Extra York (7.7%), Asda (Killingbeck) Leeds (6.5%), Asda York (5.8%), and Tesco Garforth (5.8%), likely in reflection of the limitations of the existing convenience provision in Tadcaster.

Top-Up Food Market Share

- The top-up food shopping role of town centre provision in Tadcaster has declined since 2009, however not to a scale of concern given that top-up shopping is by its very nature highly localised (either to home or work) and that the role of the town centre as a main food shopping destination has increased over the same period.
- Nevertheless, the decrease in top-up food market share of local independent shops in Tadcaster is of concern and correlates to the decline in number of independent convenience outlets in Tadcaster in recent years (reflected in the health check assessment).
- Convenience provision within Tadcaster town attracts a modest amount of top-up food expenditure from the neighbouring Zones 5 (Northern Fringe) and 8 (Western Fringe), both outside of the district.

Overall Food Market Shares

- Existing convenience provision within Tadcaster town retains a total of 53.6% (£14.3m) of convenience expenditure arising within its immediate catchment – correspondingly, high levels of convenience expenditure is spent elsewhere in Selby and outside of the district.

Foodstore Performance

- There is only foodstore in Tadcaster, Sainsbury's at Mill Lane, which is identified to be trading significantly above its company average benchmark. This level of overtrading reflects the lack of choice and competition for local residents – suggesting a potential qualitative need for new convenience provision in the town.

Convenience Retail Capacity Review

7.6 A summary of the convenience retail capacity identified in Tadcaster is contained within the following table. The full assessment is presented in Section 9 (Tadcaster Analysis).

Tadcaster Convenience Retail Capacity

Scenario		2017 m^2 (net)	2022 m^2 (net)	2027 m^2 (net)
E	Tadcaster (Zone 3, Increase in Market Share to 65 %, Allowance for Over-trading)	**590**	**915**	**1,005**

Comparison

Overall Comparison Goods Market Shares

- The total comparison expenditure pot within the Tadcaster town Zone 3 catchment area is projected to increase from c. £41.9m in 2014 to £69.1m in 2027.
- Tadcaster town centre retains just 7.5% (£3.1m) of all comparison goods expenditure arising within Zone 3, a decrease from the 9% identified in 2009. Given this extremely low retention level, there is a significant outflow of expenditure from the Tadcaster catchment. A total of 88.4% of expenditure is spent outside of the district, most notably to destinations in York.

Individual Comparison Goods Market Shares

- The limitations of the town's comparison retail offer is reflected in the relatively low retention rates for different types of comparison goods.

Comparison Goods Category	2014 Study Tadcaster
Clothing & Shoes	0.0% (£0.0m)
Furniture, Carpets & Household Textiles	14.2% (£0.7m)
DIY & Decorating Goods	3.9% (£0.1m)
Major Household Appliances	1.3% (£0.0m)
Electrical Goods	0.0% (£0.0m)
Books, CDs & DVDs	11.9% (£0.3m)
Health & Beauty Products	21.4% (£1.3m)
Household Goods	6.5% (£0.1m)
Personal Goods	15.4% (£0.3m)
Recreational Goods	3.3% (£0.2m)
Gardening & Pet Products	12.1% (£0.2m)

Comparison Retail Capacity Review

7.7 A summary of the comparison retail capacity identified in Tadcaster is contained within the following table. The full assessment is presented in Section 9 (Tadcaster Analysis).

Tadcaster Comparison Retail Capacity

Scenario	**2017 m² (net)**	**2022 m² (net)**	**2027 m² (net)**
A Tadcaster (Zone 3, Baseline)	**10**	**60**	**155**

SHERBURN IN ELMET

SWOT Analysis

7.8 A summary of the key messages from the floorspace, in-centre shopper and business survey exercises for Sherburn in Elmet is contained within the following table.

Strengths	Weaknesses	Opportunities	Threats
• Low vacancy levels well below the Goad national average. • Limited national multiple retailer representation (Co-Op and recently opened Tesco Express). • Niche independent retail offer. • Retailers identified strengths as being the street market and the range of shops.	• Car parking availability. • Lack / choice of shops. • Lack of national multiple retailers. • Negative perceptions of the street market. • Linear centre with busy through road generating traffic congestion (HGVs etc.). • Lack of foodstore anchor to better serve main food shopping needs and generate linked trips with the existing offer. • Lack of leisure facilities, particularly health and fitness facilities.	• New Aldi foodstore (planning permission granted) to perform anchor function for the centre and generate increased footfall / potential for linked trips. • Improved marketing / promotion of the town, including 'digitisation' of the High Street (Wi-Fi etc.). • Improve physical environment / public realm works. • Improve availability of parking to increase dwell time within the centre. (Aldi store potential).	• New Aldi foodstore generates enhanced competition – period of readjustment for the centre.

Retail Assessment

Convenience

Main Food Market Shares

- Sherburn in Elmet town retains 12.6% (£3.1m) of Zone 2 main food expenditure, a static position from the level identified in 2009. Over the period the main food market share of the Co-op has increased (more than doubled), whilst the market share of local independents has significantly declined.
- Given the relatively limited existing convenience offer within the town, it only draws a limited amount of inflow from the adjoining Tadcaster catchment area (Zone 3). There are no other inflows from any other zones either within or outside of the district.
- Aside from the foodstores in Selby, the main outflows of foodstore expenditure are to Morrison's in Knottingley (22.7%, £5.6m), followed by Aldi at South Baileygate Retail Park in Pontefract (11.5%, £2.8m), and Sainsbury's at Colton Retail Park in Leeds (11%, £2.7m).

Top-Up Food Market Share

- The top-up food shopping role of town centre provision in Sherburn in Elmet has declined since 2009 quite substantially (by some 19%) which raises significant concerns for the diversity and overall vitality and viability of the town centre, particularly given the centre's primary function as a local top-up food shopping destination.
- Convenience provision within Sherburn in Elmet town attracts a modest amount of top-up food expenditure from the neighbouring Zones 3 (Tadcaster) and 8 (Western Fringe).

Overall Food Market Shares

- Existing convenience provision within Sherburn in Elmet town retains a total of 20.5% (£6.7m) of convenience expenditure arising within its immediate catchment. A total of 65.1% of convenience expenditure from this catchment is spent outside of Selby.

Foodstore Performance

- The mainstream convenience destinations in the town (Co-op, Tesco Express) are broadly trading at expected benchmarks.

Convenience Retail Capacity Review

7.9 A summary of the convenience retail capacity identified in Sherburn in Elmet is contained within the following table. The full assessment is presented in Section 10 (Sherburn in Elmet Analysis).

Sherburn in Elmet Convenience Retail Capacity

Scenario		2017 m² (net)	2022 m² (net)	2027 m² (net)
C	Selby (Zone 1, Post Commitments, Allowance for Over-trading)	**0**	**55**	**115**

Comparison

Overall Comparison Goods Market Shares

- The total comparison expenditure pot within the Sherburn in Elmet town Zone 2 catchment area is projected to increase from c. £48.2m in 2014 to £79.9m in 2027.
- Whilst Sherburn town retains just 8.8% (£4.3m) of all comparison goods expenditure arising within Zone 2, this is a near double of the figure identified in 2009. A total of 84% of expenditure is spent outside of the district, most notably to destinations in Leeds and York.

Individual Comparison Goods Market Shares

- The limitations of the town's comparison retail offer is reflected in the relatively low retention rates for different types of comparison goods.

Comparison Goods Category	2014 Sherburn in Elmet
Clothing & Shoes	0.0% (£0.0m)
Furniture, Carpets & Household Textiles	6.5% (£0.4m)
DIY & Decorating Goods	2.6% (£0.0m)
Major Household Appliances	5.5% (£0.1m)
Electrical Goods	4.0% (£0.2m)
Books, CDs & DVDs	0.0% (£0.0m)
Health & Beauty Products	42.8% (£3.0m)

Comparison Goods Category	2014 Sherburn in Elmet
Household Goods	4.6% (£0.1m)
Personal Goods	8.6% (£0.2m)
Recreational Goods	2.0% (£0.1m)
Gardening & Pet Products	11.2% (£0.2m)

Comparison Retail Capacity Review

7.10 A summary of the comparison retail capacity identified in Sherburn in Elmet is contained within the following table. The full assessment is presented in Section 10 (Sherburn in Elmet Analysis).

Sherburn in Elmet Comparison Retail Capacity

Scenario		2017 m² (net)	2022 m² (net)	2027 m² (net)
B	Sherburn in Elmet (Zone 2, Post Commitments)	**-290**	**-230**	**-100**

8. Selby Analysis

Health Check Assessment

Diversity of Uses - Experian Goad Survey Area

8.1 Operator and floorspace data for Selby town centre was sourced from Experian Goad[40]. The most recent survey of Selby town centre available from Experian Goad was completed in January 2014, in accordance with best practice the Goad survey data was updated by GVA in October 2014.

8.2 The town centre area covered by the Goad survey and the diversity of uses in the centre is shown in the plan at **Appendix 3**. A summary of the operator type and floorspace within the Selby Goad survey area at October 2014 is set out in Table 8.1 below. Table 8.2 further sets out the change in the retail composition of Selby town centre since the 2009 Study[41].

Table 8.1 – Selby Town Centre Composition at October 2014 (Goad Boundary)

Operator Type	Units			Floorspace		
	Selby Units	Selby %	UK Average %	Selby sq. m	Selby %	UK Average %
Convenience Retail	20	8.8%	9.0%	12,080	28.1%	18.1%
Comparison Retail	83	36.4%	40.6%	16,947	39.4%	45.7%
Retail Services[42]	36	15.8%	11.7%	3,039	7.1%	5.7%
Restaurants, Cafes and Takeaways	34	14.9%	16.5%	3,783	8.8%	12.0%
Financial and Professional Services[43]	31	13.6%	8.6%	3,710	8.6%	7.0%
Miscellaneous[44]	1	0.4%	1.2%	481	1.1%	1.0%
Vacant	23	10.1%	12.5%	2,984	6.9%	10.5%
Total	**228**	**100.0%**	**100.0%**	**43,024**	**100.0%**	**100.0%**

[40] Experian Goad is a retail property intelligence system that offers comprehensive retail location plans and reports covering over 3,000 shopping areas in the UK and Ireland.
[41] As identified in the 2009 SRCLS
42 Hairdressing, Beauty and Health, Laundrettes and Dry Cleaners, and Travel agents
43 Banks and Financial Services, Building Societies, Estate Agents and Auctioneers
44 Employment, Careers, Post Offices and Information

Table 8.2 – Selby Town Centre Composition Change 2009-2014 (Goad Boundary)

Operator Type	Units			Floorspace		
	Selby Units	Selby % points	UK Average % points	Selby sq. m	Selby % points	UK Average % points
Convenience Retail	-2	-0.9	-0.5	-53	-0.2	0.9
Comparison Retail	-18	-7.9	-3.4	-2,377	-5.7	-4.2
Services[45]	17	7.5	1.3	1,787	4.1	0.4
Restaurants, Cafes & Takeaways	8	3.5	1.6	941	2.2	2.4
Miscellaneous[46]	-1	-0.5	-0.1	-160	-0.4	0.0
Vacant	-4	-1.7	1.1	20	0.0	0.7
Total	**0**	**0.0**	**0.0**	**159**	**0.0**	**0.0**

Convenience

8.3 Table 8.1 shows that the proportion of convenience retail units in Selby town centre (8.8%) is broadly in accordance with the Goad national average (9.0%). However, the amount of convenience floorspace is significantly above the national average due to the presence of Sainsbury's, Morrison's and Tesco foodstores within the Goad survey area; this is even though the Tesco store is outside of the town centre boundary defined in the adopted Local Plan.

8.4 There has been negligible change in the number of units and floorspace dedicated to convenience retailing since the 2009 Study.

Comparison

8.5 The Experian Goad figures, as updated, identify that the number of units and quantity of floorspace within the town centre dedicated to comparison retailing is significantly below the Goad national average. Comparison goods outlets account for 36.4% of the total number of units in Selby town centre and 39.4% of the total floorspace, which is below the UK averages of 40.6% and 45.7%, respectively. The relative under-provision of comparison retail provision is partially explained by the significant decrease in both units (-18 units) and floorspace (-2,377 m^2) since the 2009 Study. This decrease is likely to be reflective of the prevailing economic

45 Hairdressing, beauty and health, laundrettes and dry cleaners, travel agents, banks and financial services, building societies, estate agents and auctioneers.
46 Employment, careers, post offices and information

conditions and recent retail trends (retailers consolidating representation in larger sub-regional destinations at the expense of smaller centres) as discussed in Section 5 of this report.

Food and Drink Establishments

8.6 Restaurant, cafe and takeaway outlets account for 14.9% of the total number of units in Selby town centre which is just under the Goad national average of 16.5%. However, when measured in terms of floorspace rather than number of units, Selby is substantially below the Goad average; this is primarily due to most of the units being small (as reflecting the historic nature of the town centre).

Services

8.7 Selby town centre contains a broad service sector offer. The number of outlets and proportion of floorspace dedicated to retail services is above the UK average in both instances. Representation of financial and professional services in Selby town centre is above the UK average, most notably in terms the number of outlets.

8.8 Table 8.2 shows that 17 (net) additional service sector units have opened in the centre since the 2009 retail study, representing a significant increase in terms of both the number of units and floorspace dedicated to service uses. The increase in service uses broadly corresponds to the decrease in comparison retail offer discussed above.

Offices

8.9 Selby Town Hall and a number of Council offices are located within the town centre, including the Council's Access Selby office. Other businesses such as legal and financial services mainly operate from small-scale offices. A detailed assessment of office provision is provided within the separate Employment Land Review (ELR) report.

Diversity of Uses - Defined Shopping and Commercial Centre Survey Area

8.10 The Goad survey data is based on Experian's own interpretation of the extent of retailing within a centre rather than the town and shopping centre boundaries defined in the adopted Local Plan[47].

8.11 The shopping and commercial centre of Selby town centre as defined by SDC (the 'SCC boundary'), as shown in the plan at **Appendix 9**, excludes a handful of outlets in the south of

[47] The shopping and commercial centre boundary defined in the Selby Local Plan

the Goad survey area, most notably the Tesco store, and includes a small number of outlets in peripheral parts of the town centre that were omitted from the Goad survey area.

8.12 A summary of the operator type and floorspace within the defined SCC area[48] at October 2014 is therefore set out in Table 8.3 below.

Table 8.3 – Selby Town Centre Composition at October 2014 (SCC Boundary)

Operator Type	Units			Floorspace		
	Selby Units	Selby %	UK Average %	Selby m²	Selby %	UK Average %
Convenience Retail	19	8.1%	9.0%	9,160	22.5%	18.1%
Comparison Retail	87	37.0%	40.6%	17,235	42.3%	45.7%
Retail Services[49]	40	17.0%	11.7%	3,345	8.2%	5.7%
Restaurants, Cafes and Takeaways	33	14.0%	16.5%	3,733	9.2%	12.0%
Financial & Professional Services[50]	31	13.2%	8.6%	3,710	9.1%	7.0%
Miscellaneous[51]	1	0.4%	1.2%	481	1.2%	1.0%
Vacant	24	10.2%	12.5%	3,055	7.5%	10.5%
Total	**235**	**100.0%**	**100.0%**	**40,719**	**100.0%**	**100.0%**

8.13 In relation to the diversity of uses in Selby town centre, the only notable difference between the Goad and defined SCC areas is that the Tesco store (3,356 m² gross), which is included in the Goad survey areas, is located outside of the defined SCC boundary. Consequently, there is significantly less convenience floorspace within the SCC area compared to the Goad survey area and the overall level of convenience provision within the defined town centre is therefore more in line with the Goad national average.

Proportion of Vacant Street Level Property

8.14 The vacancy rate within the town centre is below the Goad national average in terms of both the number of vacant outlets and the quantity of vacant floorspace. Examination of the

48 GVA has assessed the operator and floorspace data within the defined SCC boundary using both the Goad survey data, updated to October 2014 by GVA, and GVA's own operator and floorspace survey data for areas located beyond the GOAD survey area.
49 Hairdressing, beauty and health, laundrettes and dry cleaners, and travel agents
50 Banks and financial services, building societies, estate agents and auctioneers
51 Employment, careers, post offices and information

locations of vacant units, as shown in the diversity of uses and vacancy plan of Selby town centre at **Appendix 3**, reveals that the town centre does not contain any significant concentrations of vacant premises.

8.15 The table above identifies that there has been a slight decrease in the number of vacant outlets in Selby town centre since July 2009, albeit that the overall amount of vacant floorspace in the centre has remained broadly the same.

8.16 Importantly, three of the vacant units on Abbey Walk, near to the Sainsbury's and Wilkinson stores, which were undergoing refurbishment at the time of our survey in October 2014 have since been occupied by M&Co, which relocated from its existing town centre unit on Gowthorpe. M&Co now occupies much larger premises in the centre and whilst M&Co's former unit remained vacant at December 2014, overall, the relocation has further reduced vacancy in the centre. The town centre is therefore performing well in relation to the key vacancy indicator.

Operator Demand

8.17 As of November 2014, the FOCUS database lists four retail and leisure operators with a published requirement for Selby. These are Premier Inn, Domino's Pizza, Halfords and KFC. The specific requirements for each of these operators as published on Focus are set out in **Appendix 3**.

8.18 The current number of published requirements for Selby is the lowest number recorded for the town in the focus database, which dates back to 1991, and a quarter of the peak of 15 requirements in April 2002[52]. This is not a particular cause for concern, however, given the recent economic downturn and the current difficulties faced by many retail operators.

Accessibility

8.19 Selby is well served by the strategic highway network, with both the A19 and the A63 providing direct connections with surrounding centres and the motorway network. The A19 provides a direct link between Selby and York to the north, as well as the M62 and Doncaster to the south. The A63 connects Selby west to the A1(M) and beyond to Leeds, and east to the M62 towards Hull.

8.20 Selby benefits from good accessibility by train. Selby Railway Station is located just outside the shopping and commercial centre of Selby, around a 300m walking distance from the town's

[52] Town Report on Selby, Focus, produced 17 November 2014.

core shopping frontage. At peak times, twice hourly direct train services are provided to York, Leeds and Manchester, as well as at least hourly services to Doncaster and London.

8.21 Selby is also reasonably well served by buses, which provide access to and from surrounding rural areas and beyond. Frequent bus services run from Selby Bus Station to York (4 an hour) and hourly bus services run to Wakefield (via Kellington and Pontefract). Less frequent services are also provided to Goole (2-4 services a day) and Harrogate (via Tadcaster and Wetherby, 1 a day).

8.22 Selby District Council provides a total of some 540 car parking spaces across 9 pay and display car parks in Selby. Further car parking is available at Abbey Walk (Sainsbury's) and at Portholme Road just to the south of the town centre. Up to 2 hours free customer car parking for is the Sainsbury's (Abbey Walk) and Morrisons stores in the town centre, and at the Tesco store on Portholme Road.

State of the Environmental Quality

8.23 We consider that Selby is a generally a pleasant and historic market town with a diverse and attractive town centre, the majority of which is designated as a conservation area.

8.24 The town centre contains a large number of listed buildings and scheduled ancient monuments, including the Grade I listed Selby Abbey which sits at the heart of the town centre and contains a rare 14th century Washington stained glass window.

8.25 The majority of buildings date from the 18th and 19th centuries. The core town centre area surrounding Selby Abbey, on Gowthorpe and Market Place, as well as Finkle Street and Micklegate contains a large number grade II listed buildings. The area to the south of Selby Abbey (The Crescent, Park Street and New Street) was redeveloped in the early 19th century and comprises large Regency style terraces.

8.26 In more recent years, the Market Cross shopping centre and Abbey Walks development have opened up; these developments are both good quality modern shopping schemes. Market Cross Shopping Centre was recently subject to a programme of improvements that began in 2010, which included the introduction of new hard wood shop fronts and a limestone facade at the Gowthorpe entrance to Market Cross.

8.27 The town centre street environment is also generally well maintained. Parts of the town centre have recently benefitted from a programme of environmental improvements, such as the Market Place and along the historic waterfront, which have further improved the quality of the town centre environment. However, in more peripheral parts of the town centre, such as at the western end of Gowthorpe and the eastern end of The Crescent, a number of buildings are less well maintained and landscaping is limited. In these areas the overall environmental quality is notably lower than in the town centre core.

8.28 Selby Park, adjacent to Selby Abbey, provides attractive open space close to the town centre and includes a children's play area, bowls green and mini golf. All of the Council operated pay and display car parks have the Park Mark safety accreditation. There is little evidence of any significant crime or anti-social behaviour within the centre.

8.29 As part of the in-centre survey, which is described in detailed later in this section, interviewees were asked about their perceptions of the environmental quality in Selby town centre. As shown in Table 8.9 below, some 19% and 52% of the respondents rated the quality of the environment as very good and good, respectively. The quality of the environment was rated as neither good nor poor by a further 19% of respondents, poor by 7% and very poor by 2% of respondents. Overall, therefore, perceptions of the quality of the environment in Selby are generally good, with 71% of interviewees rating the centre as either good or very good, and have improved since the 2009 study.

Perceptions of Safety

8.30 The findings of the in-centre survey indicate that safety and security is not a particular issue in Selby, with only a small proportion of respondents citing concerns in this area. As shown in Table 8.9, a total of 72% of respondents rated safety and security in Selby town centre as either very good or good. The safety of the environment was also identified as a main reason for liking Selby by 10% of respondents in the in-centre. Table 8.9, further shows that perceptions of safety in Selby have improved since 2009. However, improved policing/other security measures were mentioned as a potential improvement in Selby by 6% of respondents.

Selby Markets

In-Centre Survey Findings

8.31 The in-centre survey identified that 15.2% of respondents visit the markets in Selby once a week, 10.6% visit every 2 to 3 weeks and 11.3% visit monthly. A further 15.2% stated that the frequency of their visits to the markets varies. A total of 31.1% of respondents never visit the markets.

8.32 Of those that visit the markets in Selby, 82.7% normally visit the Monday Market, 3.8% visit the Bank Holiday Monday Market and 1.9% normally visit the monthly Farmers Market[53].

8.33 In relation to perceptions of the markets in Selby, 56.7% stated that they visit the markets due to the convenient location, 19.2% cited good/cheaper prices and 10.6% identified the quality of the goods as a reason that they visit the markets in Selby. Good quality stalls was identified by 7.7% of respondents and the range of goods by 6.7% of respondents.

8.34 The main responses respondents cited when asked what improvements to the markets would persuade them to visit the markets more often were an improved range of goods (26.5%), improved quality of goods (23.2%) and an increased number of market stalls (15.2%). Improved quality / appearance of the market stalls were cited by 7.9% of respondents. A total of 54.3% of respondents stated don't know/nothing.

Household Telephone Survey Findings

8.35 The findings of the telephone household survey[54] reveals that only 20.3% of respondents in the Selby zone (Zone 1)[55] regularly visit a market. Of these, 76.4% (15.5% of respondents in the Selby zone) most regularly visit Selby Monday Market and 6.2% (1.3% of respondents in the Selby zone) most regularly visit the Selby Farmers Market. Across the Selby, Tadcaster and Sherburn in Elmet zones (Zones 1, 2 and 3) 11.3% of respondents regularly visit Selby Monday Market and 0.8% regularly visit the Selby Farmers Market.

8.36 Of those respondents in the Selby Zone that regularly visit a market[56], 48.1% cited the convenient location as a reason they visit the market, 35.2% identified the range of goods, 13.6% identified the quality of the stalls and 7.9% the quality / range of the goods.

8.37 When asked what improvements to the market would persuade them to visit more often, of those respondents in the Selby Zone that regularly visit a market[57], 58.4% said nothing/don't know, 28.0% suggested an improved range of goods, 17.5% suggested improved quality/appearance of the market stalls and 13.5% stated improved quality of goods.

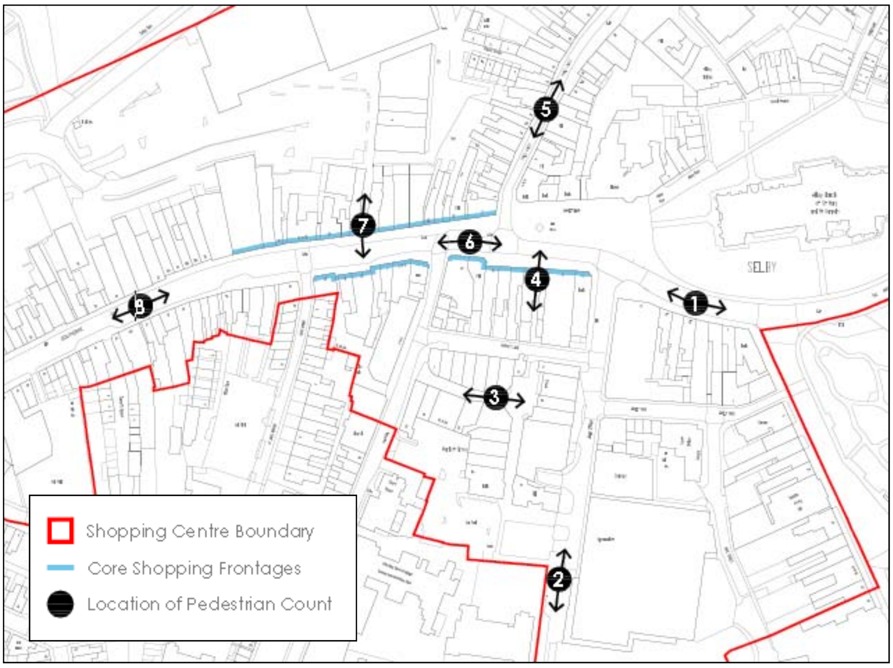
[53] Note that no in-centre surveys were undertaken on the day of a monthly Farmers Market to ensure that the in-centre surveys were representative of a typical week in Selby.
[54] See Section 6 (Methodology) for details of the household survey
[55] See Section 6 (Methodology) for details of the household survey and Appendix 1 for the study catchment / zone plan
[56] Note that of only 82.6% of these respondents relate to markets in Selby
[57] Note that of only 82.6% of these respondents relate to markets in Selby

Pedestrian Footfall Counts

8.38 Pedestrian counts were undertaken at 8 locations in Selby town centre in order to gain an insight into pedestrian levels and movement around the centre. A plan of the pedestrian count locations is provided at **Appendix 3**, part of which is shown in Figure 8.4 below.

8.39 The number of pedestrians passing in both directions was counted at each count location over a five minute period during the day (between 10 am and 4 pm) and was conducted over three days in November 2014 including a Monday market day, another weekday and a Saturday[58].

Figure 8.4 – Pedestrian Count Locations – Selby



8.40 The results of the pedestrian counts are set out in Table 8.5 below[59]. The results show that the busiest day in the town centre was the Monday, when a total of 1,811 people were counted across the count location points, slightly above the total of 1,780 people counted on the Saturday. On the Thursday, which represents a typical non-market weekday in Selby, the total pedestrian count of 615 was only around a third of that on the Monday and the Saturday.

[58] Monday 3 November 2014, Thursday 6 November 2014 and Saturday 8 November 2014
[59] No pedestrian counts were completed as part of the 2009 SRCL study. A comparative analysis with the findings of the 2009 SRCL study is not therefore provided.

Figure 8.5 – Pedestrian Counts – Selby

Location	Day of Count			Total Count	Total Index
	Monday	Thursday	Saturday		
1 The Crescent	104	17	49	170	21
2 Morrisons	271	115	233	619	76
3 Market Cross Shopping Centre	349	85	385	819	100
4 Market Cross Shopping Centre Market Place Entrance	287	45	310	642	78
5 Finkle Street	253	81	117	451	55
6 Market Place	221	96	302	619	76
7 Abbey Walk	199	143	246	588	72
8 Gowthorpe	127	33	138	298	36
Total	**1,811**	**615**	**1,780**	**4,206**	

8.41 It is unusual for town centre footfall on a weekday to surpass or even equal that on a Saturday, and the results of the footfall counts in Selby highlight the importance of the weekly Monday market in driving footfall in the town centre.

8.42 There was also substantial variation in the pedestrian counts across the individual count locations. The busiest overall count location was within the Market Cross Shopping Centre (Location 3), where a total of 819 people were counted across the three count days. Notably, the busiest count locations on the Thursday were at Abbey Walk (Location 7) followed by outside Morrisons (Location 2), rather than the Market Cross Shopping Centre, suggesting that on weekdays, food shopping at the Sainsbury's and Morrisons foodstores are the key drivers of footfall in the town centre.

8.43 Footfall declines quickly away from the core shopping area, the Market Cross Shopping Centre and Morrisons. The total footfall counts on The Crescent (Location 1) and east of the core shopping area on Gowthorpe (Location 8), which are both only around 50m from the edge of the core shopping frontages in Selby, are 21% and 36%, respectively, of that at the

Market Cross Shopping Centre. The total footfall at Finkle Street (Location 5) is higher at 55% of the Market Cross Shopping Centre.

Summary of Health Check

8.44 In summary, the town centre has a strong convenience retail offer with three key national foodstore attractors which are complemented by a range of independent retailers and market traders.

8.45 However, comparison retail provision is below the UK average both in terms of the number of units and floorspace. This comes after a significant quantitative decline in the comparison retail provision since the 2009 Study. The reduction is partially explained by prevailing economic conditions and retail trends.

8.46 Whilst the reduction in comparison retail provision is of concern, given that vacancies have remained relatively constant since the 2009 Study, it is apparent that former comparison retail floorspace has been actively re-used, particularly for service-based retail activities.

8.47 Overall, we consider that the town centre has a reasonably healthy mix of town centre uses which are in keeping with its role as an attractive, historic market town.

Selby Household Survey Findings

8.48 As detailed in Section 6, a telephone survey of 750 households was undertaken across the Selby District catchment area, of which 200 surveys were completed in the main Selby catchment zone (Zone 1) as shown in the plan at **Appendix 1**. Those respondents resident within the Selby zone were asked a series of questions in relation to Selby town centre regarding their frequency of visits, views on the centre and suggested improvements. The findings of the household survey in relation to Selby town centre are set out below.

Frequency of visits

8.49 The findings of the telephone household survey reveal that over four fifths (83.3%) of respondents in the Selby zone regularly visit Selby. When asked their frequency of visits to Selby town centre, 6.0% of respondents stated that they visit the town centre daily, 34.9% visit the town centre several times a week, 37.4% visit weekly and 5.0% visit once a fortnight. However, a fifth (20.0%) of respondents living in the Selby zone visit once every three weeks or less, and 4.7% never visit Selby.

Reason for Visit

8.50 Amongst those respondents that visit Selby town centre, the most popular main reasons for visiting the centre was the choice and range of shops, which was cited by half of respondents (49.9%), followed by that the centre is close to home (22.0%). Other main reasons identified for visiting the centre were the choice of financial services such as banks and building societies (7.4% of respondents), the choice of leisure facilities such as the pub or gym (4.4%) and that the centre is close to work (4.3%).

Main Likes

8.51 Those who visit Selby town centre were asked what they most like about the centre. Up to three responses for each interviewee were recorded. The most popular overall response was that Selby is near/convenient, which was cited by around two fifths of respondents (38.3%). Other likes identified were the selection of chain / national multiple shops (6.5%), the pedestrian friendly environment (5.6%) and ease of car parking (5.1%). However, nothing at all was cited by 27.2% of respondents.

Main Dislikes

8.52 Similarly, up to three 'dislikes' were recorded for those interviewees resident within the Selby zone, who visit Selby town centre. The most popular specific dislike identified was the poor choice of chain shops (23.3% of respondents) followed by the poor range of independent shops (13.5%), the unattractive environment (9.1%), a lack of car parking (7.8%), the cost of car parking (7.2%), too many empty shops (11.1%) and the poor choice of leisure facilities (4.4%). Nothing at all was cited by a third (32.2%) of respondents.

8.53 The dislikes cited by those residents that visit Selby town centre can represent barriers that prevent others from visiting the town centre or from visiting more often. However, travel to work patterns also play a part; those respondents resident in the Selby zone who never or infrequently[60] visit Selby town centre were less likely to work in Selby (5.7% of those that never or visit infrequently the centre work in Selby compared to 17.6% of all respondents) or from home (2.8% compared to 6.5% of all respondents) and more likely to work in York (19.6% compared to 7.6% of all respondents).

[60] Every three weeks or less.

Suggested Town Centre Improvements

Retail Provision

8.54 The main suggested retail improvements that would encourage respondents to shop in the town centre more often was more clothing and shoe shops. Specifically, more women's clothing shops was identified by 27.1% of respondents, more men's clothing shops (18.3% of respondents), more children's clothing shops (8.2%), more women's shoe shops (5.6%) and more men's and children's shoe shops (a total of 5.1%). Other main suggestions were for improved foodstore provision (13.9% of respondents), a Marks & Spencer store (6.4%) and another department store (5.4%). Of those questioned, 38.7% stated nothing in particular and 10.0% stated don't know.

Leisure/Entertainment Improvements

8.55 When asked what leisure improvements would persuade them to visit the town centre more often, the most popular suggested improvement was for a new / improved cinema (29.0%) followed by an improved youth / young adult facilities (8.1%) a new swimming pool (6.0%) and an improved range of health and fitness centres / gyms (5.9%). However, over half of respondents (54.1%) stated nothing in particular.

Environmental Improvements

8.56 When asked what improvements to the quality of the environment in Selby town centre would persuade them to visit the centre more often, the most popular suggestions were for clean shopping streets (11.8%) and improvements to the street furniture / floral displays (4.9%). However, three quarters of those questioned stated nothing in particular (74.5%).

Transport Improvements

8.57 The main suggestions for transport and accessibility improvements in Selby town centre were for improved public transport links (17.0%), more short and long stay car parking spaces (5.3% and 4.9%, respectively) and reduce road congestion (4.8%). However, nothing in particular was cited by 62.5% of respondents.

Summary of Household Survey Findings

8.58 The findings of the household survey indicate that the vast majority of residents in Selby and its surrounding rural catchment regularly visit Selby town centre. Whilst many residents choose to visit Selby because of the shops and facilities available in the centre, its proximity to home /

work was identified as the main reason for visiting the centre by around a quarter of residents and was the most popular reason for liking the centre, highlighting Selby's role as a convenient shopping destination for residents in the town and in its immediate catchment.

8.59 Conversely, those residents who travel to work in competing retail destination such as York are less likely to visit Selby; these residents can easily link their trip to work with visits to shops near their work.

8.60 The survey results indicate that residents are keen to see improvements to the town centre retail offer, most notably an increase in the number of clothing and footwear shops. Improved foodstore provision, a Marks & Spencer store and another department store were also popular suggested improvements, with the poor choice of chain shops identified as the main dislike.

8.61 There is also a desire to see enhancements in the leisure sector, most notably a new / improved cinema facility. We note that the opening of the new Selby Leisure Centre in 2015 will provide a new swimming pool and gym facility in Selby.

Selby In-Centre Survey Findings

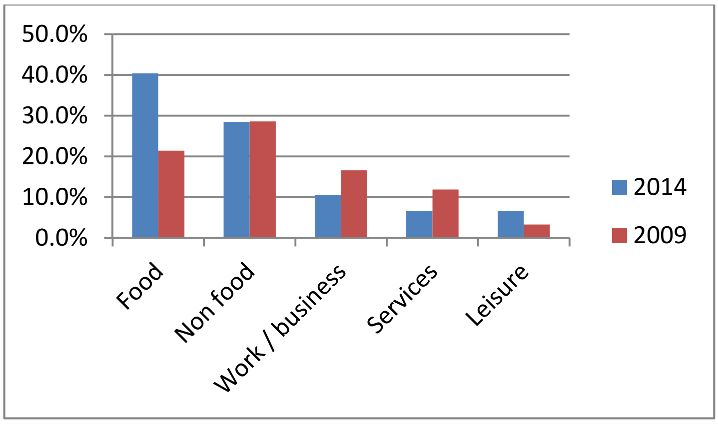
Main Reason for Visit

8.62 The most popular reason for visiting the town centre was for food only shopping (32.5%). Visiting the town centre for non-food shopping only the next most popular reason (20.5%), followed by both food and non-food shopping (15.9%). A significant number of respondents were visiting for work/business purposes (10.6%). A total of 13.2% of respondents were not intending to do any shopping in Selby.

8.63 Figure 8.6 below compares a summary of the main reasons for visiting Selby identified in the 2014 survey to the 2009 in-centre survey undertaken as part of the 2009 SRCLS[61]. Figure 8.6 indicates that food shopping has increased as the main reason for visiting Selby, as well as visiting for leisure purposes. Conversely, the proportion of respondents visiting for work related purposes and services has decreased.

[61] The 2009 survey did not include 'both food and non-food shopping' as a separate response. For the purposes of comparison with the 2009 survey results, we have assigned half of the respondents in this category to food only and half to non-food only.

Figure 8.6 – Selby In-Centre Survey, Main Reason for Visit



Length of Stay

8.64 The most popular length of stay was between ½ and 2 hours (57.6% of respondents), within roughly equal numbers of respondents planning to stay in Selby for each of the ½ hour periods within this overall time period. A further 15.2% of respondents were planning to stay for between 2 and 3 hours, and 13.9% planned to stay for over 3 hours. A total of 11.3% of respondents planned to stay for less than 30 minutes.

Frequency of Visit

8.65 When asked their frequency of visits to the town centre, 34.4% of respondents stated that they visit Selby town centre several times a week, 27.2% visit weekly and 16.6% visit daily.

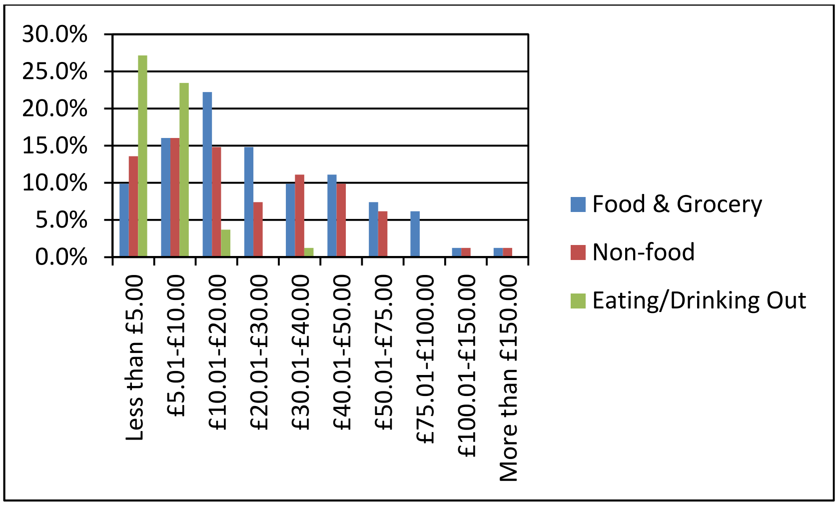
Expected Spend

8.66 A total of 65.9% of respondents expected to purchase food and grocery items during their visit to Selby, 53.7% expected to purchase non-food items and 36.6% expected to spend money on eating/drinking out.

8.67 Figure 8.7 below shows the amount respondents expected to spend on shopping and leisure items in Selby, excluding those respondents who expected to spend nothing or didn't know how much they might spend within a particular category.

8.68 Within the food and grocery category, almost half (48.1%) expected to spend under £20 and around a quarter expected (24.7%) to spend between £20 and £40. In the non-food sector, over half (54.5%) expected to spend under £20. A further 34.8% expected to spend between £20 and £50, and the remaining 10.6% over £75. Almost half (48.9%) of those expecting to eat/drink out[62] expected to spend less than £5, and a further 42.2% expected to spend between £5 and £10. Only 2.2% expected to spend over £20.

Figure 8.7 – Selby In-Centre Survey, Expected Spend in Selby Town Centre



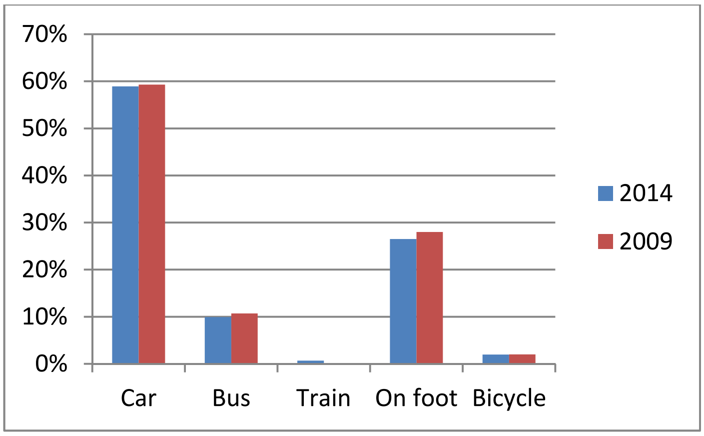
Travel

Mode of Travel

8.69 The survey identified that most respondents (58.3%) travelled to the town centre by car, either as a driver or passenger. This was followed by walking (26.5%) and travel by bus (9.9%). Figure 8.8 below shows that these results are broadly in accordance with the findings of the 2009 Study.

[62] Note that as interviews were undertaken during the daytime only, anticipated spending is likely to primarily represent spending in cafés and on snacks, rather than for the evening meal in restaurants, which is not likely to be captured by the survey.

Figure 8.8 – Selby In-Centre Survey, Mode of Travel



Car Parking

8.70 For those respondents who travelled to the town centre by car, almost half had parked in either the Sainsbury's or Morrisons car parks (25.0% and 23.9%, respectively), which both offer up to 2 hours free car parking for customers. A further 9.1% had parked on-street and 4.5% had parked in Tesco's car park.

8.71 Car parking locations and charges can impact on the use and vitality of a town centre. As we identified above, the majority of respondents intended to stay in the centre for less than 2 hours, indicating that the maximum 2 hour free parking at the town's supermarkets may be influencing length of stay in the centre.

Shopping

Main Shopping Likes

8.72 Of all the specific likes about Selby town centre, the most popular response was that Selby is near/convenient (49.0%). Other popular responses were cheap parking (12.6%), the selection of national chain shops (11.3%), the pedestrian friendly environment (10.6%), the safety of the environment (10.6%), that Selby is close to friends/relatives (9.9%), the selection of independent shops (7.9%) and ease of parking (6.6%). However, nothing at all was cited by 9.9% of respondents.

Main Shopping Dislikes

8.73 The main dislikes in respect of the town centre were the poor choice of national multiple shops (21.9% of respondents), followed by a poor range of independent shops (15.9%) and a lack of fashion retailers (13.9%). Other main dislikes identified were an unattractive environment (7.3% of respondents), a lack of car parking (6.0%) and that there are better facilities elsewhere (5.3%). A total of 26.5% of respondents stated that they did not like the centre, but with no particular reason why, and 17.9% stated don't know.

Leisure

Visitation

8.74 A total of 35.8% of respondents visit Selby town centre for leisure purposes, of which 39.9% only visit during the daytime (remaining 61.1% visit in the evening).

Reason for Visit

8.75 The most popular leisure activities undertaken by those respondents that visit for leisure purposes are to pubs/bars (50.0%), followed by visits to restaurants (33.3%), cafes (18.5%) and takeaways (14.8%). A small proportion of respondents visit sports/fitness facilities in Selby town centre (5.6%). This latter survey result is likely to increase over time once the town centre leisure centre re-opens in 2015.

8.76 These results differ significantly from the 2009 survey, when 75% of respondents stated that they visit pubs/bars, 35% visit restaurants and 25% visit nightclubs.

Leisure Likes

8.77 The most popular likes about leisure provision in the town centre was the good choice of cafes (11.9%), that Selby is close to home/easy to get to (11.3%), has a good choice of restaurants (7.9%) and the good quality of pubs/bars/nightclubs (7.3%). However, nothing in particular was cited by 43.0% of respondents and don't know by a further 14.6%.

Leisure Dislikes

8.78 When asked what they disliked about the leisure provision in Selby town centre too expensive was cited by 7.9% of respondents. However, the most popular responses were nothing in particular (61.6%) and don't know (19.9%).

Overall Town Centre Perceptions

8.79 Table 8.9 below summarises respondents' ratings of a variety of aspects of Selby town centre, ranging from poor to very good. A mean score is also calculated for each aspect of the town centre[63], and compared to the 2009 in-centre survey results. The mean score ranges from 1 (very poor) to 5 (very good), and a score of 3 therefore represents 'neither good nor poor'.

8.80 Table 8.9 shows that whilst perceptions of the town centre are mixed, all aspects of Selby town centre achieved a mean score of over 3.1, indicating that respondents overall perceptions of Selby town centre are good. Ease of circulation by foot, safety & security, eating & drinking, quality of environment, access by car and access by public transport achieved the highest mean ratings, of 3.8 or more.

8.81 However, whilst all aspects of the town centre achieved a mean score of 3.1 or above, a significant proportion of respondents rated Selby town centre as poor or very poor in relation to the choice of specialist shops (31.1%), toilet facilities (27.8%), choice of shops (23.2%), entertainment facilities (22.5%), events (21.9%), leisure facilities (19.2%), the market (18.5%) and facilities for children (16.6%); these aspects of the town centre achieved the lowest mean scores overall.

8.82 Nevertheless, Table 8.9 shows that overall perceptions of Selby town centre have improved since 2009, with mean scores achieved increasing in relation to all aspects of Selby town centre assessed.

Table 8.9 – Selby In-Centre Survey, Town Centre Perceptions

	Rating 2014						**Mean Score**		
	Very good	**Good**	**Neither good nor poor**	**Poor**	**Very Poor**	**(Don't know)**	**2014**	**2009**	**Change 2009-2014**
Choice of shops	6.6%	42.4%	25.2%	20.5%	2.6%	2.6%	**3.3**	2.9	**0.4**
Quality of shops	5.3%	55.6%	23.8%	11.3%	1.3%	2.6%	**3.5**	3.1	**0.5**
Specialist shops	2.6%	35.1%	25.8%	27.8%	3.3%	5.3%	**3.1**	2.7	**0.4**
Quality of environment	18.5%	51.7%	18.5%	7.3%	2.0%	2.0%	**3.8**	3.2	**0.5**
Access by car	12.6%	47.0%	21.2%	4.0%	0.0%	15.2%	**3.8**	3.1	**0.7**
Car parking costs & availability	12.6%	26.5%	25.8%	11.9%	2.6%	20.5%	**3.4**	3.1	**0.4**
Access by public transport	10.6%	39.1%	21.9%	2.6%	0.0%	25.8%	**3.8**	3.3	**0.5**

[63] Mean Score: Very good=5, Good=4, Neither good nor poor=3, Poor=2, Very poor=1

Facilities for children	2.6%	18.5%	19.9%	13.2%	3.3%	42.4%	**3.1**	-	**-**
Facilities for the disabled	3.3%	16.6%	17.2%	7.3%	1.3%	54.3%	**3.3**	-	**-**
Toilet facilities	7.3%	29.8%	18.5%	19.9%	7.9%	16.6%	**3.1**	-	**-**
Entertainment facilities	3.3%	25.2%	19.9%	16.6%	6.0%	29.1%	**3.1**	2.5	**0.5**
Leisure facilities	1.3%	28.5%	21.9%	15.9%	3.3%	29.1%	**3.1**	2.6	**0.5**
Eating & drinking	10.6%	62.3%	13.2%	4.6%	0.0%	9.3%	**3.9**	3.3	**0.6**
Events	4.0%	23.2%	23.2%	17.9%	4.0%	27.8%	**3.1**	2.7	**0.4**
Ease of circulation by foot	37.1%	51.0%	9.9%	1.3%	0.7%	0.0%	**4.2**	3.4	**0.9**
Safety & security	17.9%	54.3%	21.9%	2.6%	0.7%	2.6%	**3.9**	3.4	**0.4**
The market	4.0%	29.8%	31.1%	13.9%	4.6%	16.6%	**3.2**	2.9	**0.3**

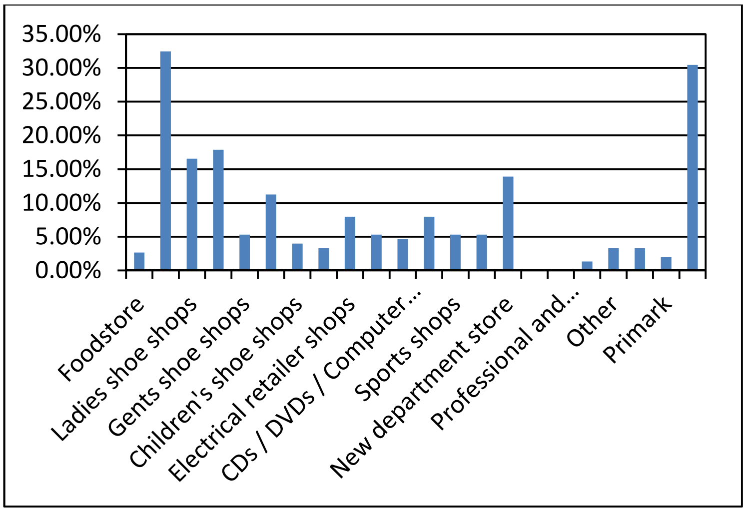
Suggested Town Centre Improvements

Retail Provision

8.83 The main suggested improvements that would encourage respondents to shop in the town centre more often were more women's clothing shops (32.5%), followed by men's clothing shops (17.9%), women's shoe shops (16.6%) and children's clothing shops (11.3%). The provision of a new department store was identified by 13.9% of respondents and electrical retailers by 7.9% of respondents.

8.84 In terms of specific operators, 3.3% stated that a Marks & Spencer store would persuade them to shop in Selby more often with a further 2.0% stating a Primark store.

Figure 8.10 – Selby In-Centre Survey



Leisure/Entertainment Improvements

8.85 When asked what improvements would persuade them to visit the town centre more often, 13.2% cited new/improved leisure facilities, 12.6% stated a new/improved cinema, and 9.9% identified an improved range of places to eat. An improved music/theatre provision was identified by 6.6% of respondents and improved / new facilities for young adults by 6.0% of respondents. Just under half of respondents (49.0%) had no opinion or stated nothing in particular.

Environmental Improvements

8.86 The most popular suggested improvements in relation to the quality of the environment in Selby town centre were improved street furniture/floral displays (15.2%), improved/new facilities for young adults (7.9%), pedestrianize the main shopping streets (7.3%). Attract more people/make Selby more lively and improve the number/attractiveness of meeting places were each cited by 6.6% of respondents, and clean shopping streets and improve policing/other security measures each by 6.0% of respondents. Half of respondents (50.3%) had no opinion or stated nothing in particular or don't know.

Transport Improvements

8.87 The main suggestions for transport and accessibility improvements in Selby town centre are more long stay car parking spaces (13.2%) and reduce road congestion (11.3%). However, the majority of respondents (60.9%) had no opinion or stated nothing in particular or don't know.

Greatest Improvements

8.88 When asked what would provide the greatest improvement to Selby town centre, the most popular suggestions were for a better range of shops (34.4%) and for more shops (24.5%), followed by more parking (15.9%), more department/larger stores (11.3%) and a better market (10.6%). Holding more events was also cited by 6.0% of respondents.

Summary of In-Centre Survey Findings

8.89 The survey results highlight the important role of the main convenience retail stores in Selby in attracting visitors to the town centre, as food shopping is the most popular reason for visiting Selby town centre. The non-food sector also remains an important attractor to Selby. Although dwell times in Selby are relatively modest many respondents visit the centre frequently; this may indicate why the convenient location of the town centre was the most popular reason for liking the centre.

8.90 Overall, 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.

8.91 The survey results indicate that there is a strong desire to see enhancements to the town centre retail offer, most notably an increase in the number and range of shops, particularly in the clothing and footwear sectors. 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/cafe provision in Selby would also be welcome.

Selby Retailer Business Survey

8.92 A total of 55 responses were received from the 205 retailer business surveys distributed in Selby town centre, a response rate of 27%.

8.93 The majority of responses were from non-food retailers (22%) and professional services (22%), followed by retail service operators (18%) and leisure services (18%). A further 7% of responses received were from food retailers and 15% from other services.

8.94 Approximately two-thirds of the responses (67%) were from independent operators and the remaining third (32%) were received from businesses that are part of a chain or national group.

Length of Time Trading

8.95 The majority of businesses (35%) have traded from their current premises for over 20 years with a further 27% having traded from their current premises for between 10 and 20 years; this suggests low levels of business turnover in the town centre and is a very positive trend given the current economic conditions.

Operator Requirements

8.96 In terms of whether local businesses are satisfied with their current premises, just over half (53%) of respondents confirmed that they are satisfied in relation to their trading location within the town centre and have no plans to alter their business in any way in the next 5 years. Six respondents (10%) stated that they plan to refurbish their existing premises in the next 5 years, and five (9%) indicated that they plan to relocate (of which 2 plan to relocate within Selby town centre and 3 plan to relocate elsewhere), and 5 respondents stated that they intend to close in the next 5 years. A small number of respondents to this question voiced plans to further develop their e-commerce and online trading profile as part of their future business development plans.

Ownership

8.97 With regards to current ownership status, the majority of businesses who responded (78%) occupied leased premises. The remainder, around a quarter of respondents, are owner-occupiers.

Trading Performance

8.98 A total of 40% of businesses stated that they had traded “moderately” over the last 12 months with an additional 38% stating that they had traded “very well” or “well”. However, 16% considered that they had traded poorly or very poorly. The survey results portray a moderate picture given that the wider economic climate remains in the initial stage of recovery following the recession.

8.99 Six businesses (11%) also operate in other centres in the district. Of those respondents that also operate elsewhere in the district, half stated that their other business traded the same as in Selby with the other half stating that it traded worse than in Selby. No businesses reported a better performance relative to its location in Selby.

8.100 A total of 38% of respondents expected their business to perform either well or very well over the next 12 months. However, 40% only expected trade to remain moderate/static and 16% expected their business to perform poorly or very poorly over the next 12 months. Overall, these results reflect an expectation of moderate to improved trading conditions in the town centre over the next 12 months.

Town Centre Perceptions

8.101 Local businesses within Selby were asked to rate the current quality of the town centre against a variety of indicators including: the range of services, environmental quality, public transport access, car parking availability, security and leisure provision. Table 8.11 below summarises respondents' ratings ranging from poor to very good. A mean score is also calculated for each aspect of the town centre[64]. The mean score ranges from 1 (very poor) to 5 (very good), and a score of 3 therefore represents 'neither good nor poor'. A score of 3.5 or above should therefore be considered good, whereas a score of 2.5 or less should be considered poor.

Table 8.11 – Local Business Perceptions of Selby Town Centre

	Rating						Mean Score
	Very good	**Good**	**Neither good nor poor**	**Poor**	**Very Poor**	**(Don't know)**	
Rents / rates	2%	16%	29%	24%	20%	9%	**2.5**
Availability of parking	7%	15%	15%	40%	22%	2%	**2.4**
Cost of parking	2%	9%	18%	20%	49%	2%	**1.9**
Traffic congestion	2%	11%	44%	18%	24%	2%	**2.5**
Bus services	4%	13%	20%	25%	13%	25%	**2.6**
Pedestrian connections	4%	24%	36%	7%	5%	24%	**3.2**
Safety / security	0%	27%	35%	22%	9%	7%	**2.9**
Range of shops and services	0%	20%	27%	33%	20%	0%	**2.5**
Quality of shops and services	0%	27%	24%	35%	15%	0%	**2.6**
Entertainment and leisure facilities	0%	7%	25%	25%	36%	5%	**2.0**
Marketing / promotion	0%	0%	22%	33%	31%	15%	**1.9**

64 Mean Score: Very good=5, Good=4, Neither good nor poor=3, Poor=2, Very poor=1, Don't Know=excluded from calculation of mean score

Liveliness / street life / character	0%	13%	9%	35%	35%	9%	**2.0**
The street market	2%	13%	31%	31%	22%	2%	**2.4**
Quality / number of places to eat / drink	9%	56%	20%	11%	2%	2%	**3.6**
Quality of public realm	2%	18%	38%	20%	9%	13%	**2.8**
General shopping environment	2%	20%	35%	35%	5%	4%	**2.8**

8.102 Table 8.11 shows that whilst local business perceptions of the town centre are mixed, nearly all aspects of Selby town centre rated achieved a mean score of 2.9 or less, of which over half scored less than 2.5, indicating that overall local business perceptions of Selby town centre are generally poor.

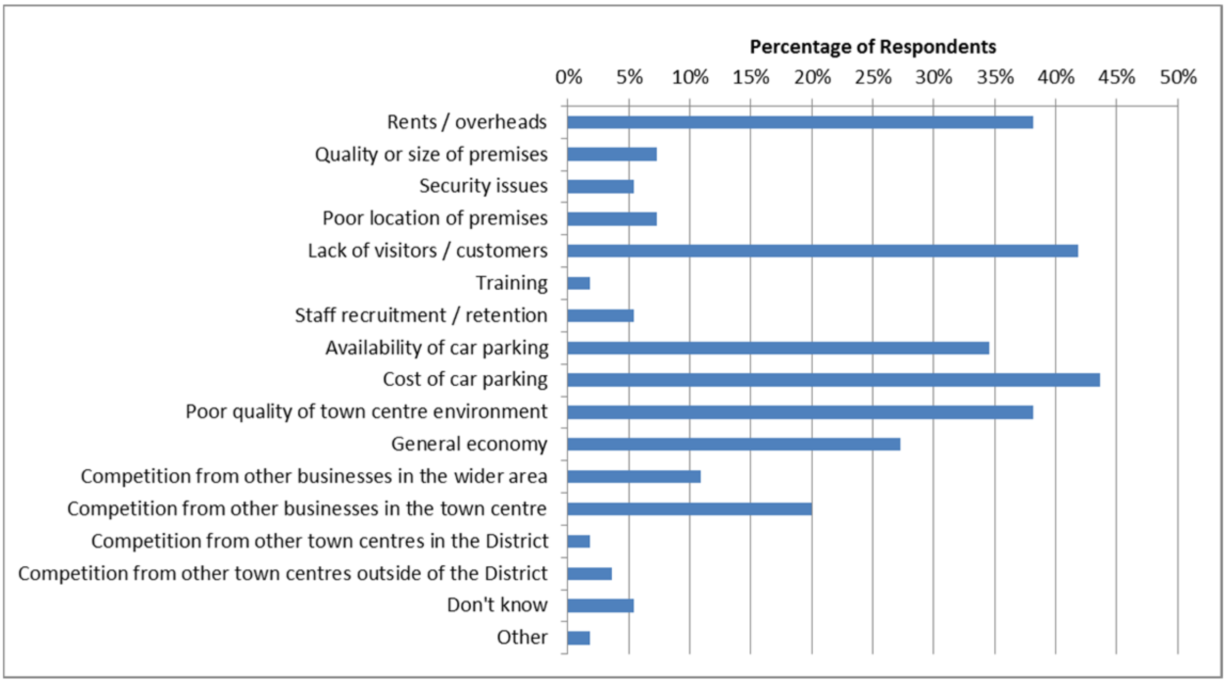
8.103 The aspects of town centre that achieved the lowest average ratings were the cost of car parking and marketing/promotion of the town centre (which both achieved a mean score of 1.9), followed by the provision for entertainment / leisure facilities (mean score of 2.0), the liveliness of the street environment (2.0). Other town centre indicators highlighted as poor were the availability of car parking, rents / rates, traffic congestion, the range of shops and services, and the street market, which all achieved a mean score of 2.5 or less. Local businesses thereby consider these aspects of the town centre to be the main issues facing Selby.

8.104 Only the quality / number of places to eat / drink and ease of circulation by foot achieved a mean overall score of over 3.0 that indicates positive overall perceptions in relation to these aspects of the town centre. Indeed, the town's quality and number of places to eat or drink was rated as good by 56% of respondents and very good by a further 9% of respondents. The ease of circulation in the centre was rated as good or very good by 28% of respondents, and as poor or very poor by only 12% of respondents.

Main Town Centre Issues

8.105 As Figure 8.12 below indicates, the cost of car parking was highlighted as the most significant issue affecting trading performance, with 44% of respondents identifying this as a concern; this is not dissimilar to the national picture as in our experience is a highly politicised issue. This primary issue was followed by concerns for a lack of visitors/customers (42%), rents / overheads (38%) and the poor quality of the town centre environment, which 38% of business respondents highlighted as detrimental to trading performance.

Figure 8.12 – Main issues identified by Businesses within Selby Town Centre

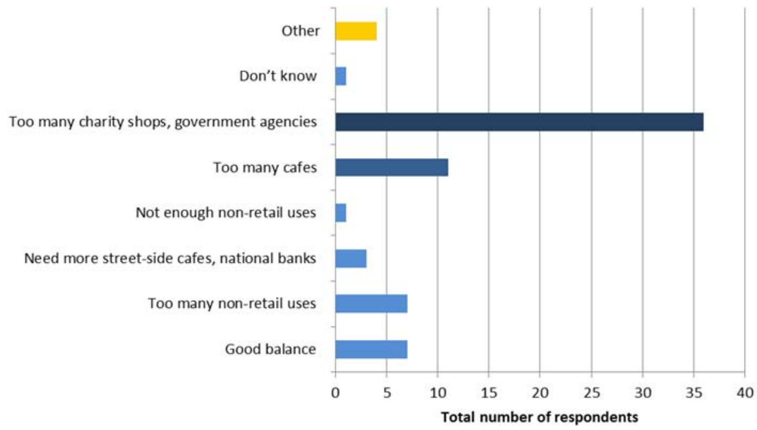


Range of Shops and Services

8.106 A significant majority of respondents (56%) considered that there are not enough shops within the town centre, with a further 24% considering the existing shopping mix to include too many small (independent) shops and not enough large chain stores.

8.107 A further 13% of responses from businesses considered there to be a good balance of shops within the town centre. It was however notable that there was substantial body of opinion from local businesses that there are too many charity shops in the area. This issue was identified both through formal response to the questions (36 respondents) and comments in additional opinion and 'other' sections throughout the survey.

Figure 8.13 – Local Business Opinion of the current mix of shops and other non-retail uses within Selby Town Centre.

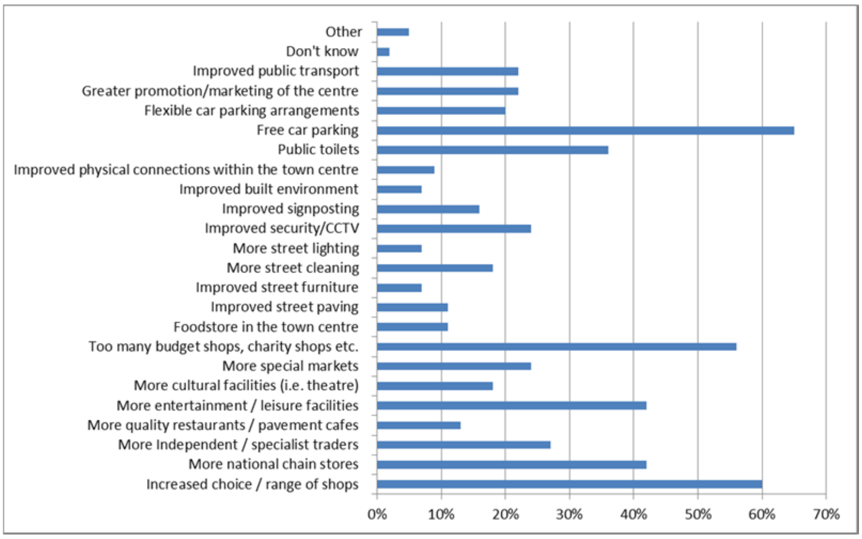


Suggested Town Centre Improvements

8.108 The most popular suggestions for the town centre improvements received from town centre businesses within Selby were for the provision of free parking (36 responses / 65%) and an increased choice/range of shops (33 responses / 60%) and fewer budget / charity shops (31 responses / 56%). A summary of the main suggested town centre improvements is provided below in Figure 8.14.

8.109 The suggestion to increase the choice / range of shops is particularly interesting given the potential competition that would be introduced in facilitating further expansion to the town centre retail offer; this is explored in more detail in the quantitative retail assessment section.

Figure 8.14 –Improvement measures suggested by local businesses within Selby Town Centre



Summary

8.110 The survey results indicate low levels of business turnover in the town centre, as a high proportion of businesses have traded in the centre for over 10 years, a very positive trend given the current challenging economic conditions. The results further suggest that trading conditions in Selby are moderate to good, particularly in the context of wider economic climate, which remains in the initial stage of recovery following the recession; Only a small proportion of respondents considered that they had traded poorly over the last 12 months, or expected their business to perform poorly over the next 12 months (16% in both cases).

8.111 However, local business perceptions of Selby town centre are generally poor. Local businesses consider the cost of car parking, and the marketing of the town centre, as well the leisure provision and a lack of visitors/customers to be the main issues facing Selby. Other aspects of Selby town centre highlighted as poor include the availability of car parking, traffic congestion, the range of shops and services, the street market and the poor quality of the town centre environment.

8.112 Nevertheless, the survey findings indicate positive overall perceptions amongst local businesses in relation to places to eat and drink and the ease of circulation by foot in the centre.

8.113 The most popular suggested improvements were the provision of free parking, an increased choice/range of shops and fewer budget / charity shops.

8.114 It is notable that perceptions of car parking costs and availability in Selby differed between local businesses, who considered this to be a key issue for the town, and shoppers/visitors, who on the whole considered car parking to be less of an issue.

8.115 As noted above, the locations and cost of car parking can impact on the use of a centre and the 2 hour free customer car parking at Selby's main supermarkets could be limiting length of stay in the centre. Car parking can further drive footfall in areas close to cheap of free car parking such as at the Sainsbury's and Morrisons stores in Selby, but potentially deterring visitors from other parts of the centre. Convenient and cheap on-street car parking can make it easier for visitors to access specific shops or parts of the town centre and help attract visitors to a centre.

Selby Retail Assessment and Strategy

Convenience Retail Shopping Patterns

8.116 Notwithstanding brand loyalty, shoppers usually travel to their nearest and most accessible main foodstore or town centre to undertake their main (bulk) shopping. Top-up shopping for daily perishables (milk, bread etc.) is even more localised in its nature with shoppers likely to buy daily goods from local convenience shops near to their home.

i) Main Food Market Shares

Immediate Catchment (Zone 1)

8.117 The main food expenditure pot (Table 4A, **Appendix 7**) within the immediate Selby catchment (Zone 1) is projected to rise from c. £76.4m in 2014 to £79.6m in 2017, £86.7m in 2022 and £95.3m in 2027 (£18.9m increase over period 2014 to 2027).

8.118 In terms of specific store destinations, the changes in main food market shares since the 2009 Study are detailed below[65]:

[65] Note '-' is used to indicate instances where the destination was not assessed as part of the 2009 study.

Table 8.15 – Selby Main Food Market Shares (Zone 1)

Destination/Foodstore	2009 Study Zone 1 Selby	2014 Study Zone1 Selby
Selby		
Morrisons, Market Cross, Selby Town Centre	33.5%	27.9% (£21.3m)
Sainsbury's, Abbey Walk, Selby Town Centre	6.8%	6.1% (£4.7m)
Farmfoods, Micklegate, Selby Town Centre	-	1.4% (£1.1m)
Local Independent Shops, Selby Town Centre	0.6%	0.4% (£0.3m)
Selby Town Centre Total	**40.9%**	**35.7% (£27.3m)**
Tesco, Portholme Road, Selby	35.8%	32.1% (£24.5m)
Aldi, Three Lakes Retail Park, Bawtry Road, Selby	0.0%	14.4% (£11.0m)
Co-op, Flaxley Road, Selby	-	0.0% (£0.0m)
Selby Total	**76.7%**	**82.2% (£62.8m)**

8.119 The main changes since the 2009 Study are as follows:

- A decline in the main food market share of Selby town centre of around 5 percentage points.
- A decline in the market shares of the Morrison's store in Selby town centre and the nearby out-of-centre Tesco store; this may be reflective in part of wider national trends (price sensitivity decreasing market share / brand loyalty). However, the two stores remain the most popular main food shopping destinations within Selby.
- The out-of-centre Aldi store in Selby town has significantly improved its main food market share primarily at the expense of the Tesco and Morrison's stores. The increase in the market share reflects a significant national growth in Aldi sales (and other deep discounters such as Lidl) and the fact that the store was being extended at the time of the 2009 Study.
- Local independent shops and smaller foodstores in Selby town centre perform a minor main food shopping function; the market share has however remained relatively constant since 2009.

8.120 Overall, Selby town centre retains 35.7% (£27.3m) of the main food shopping expenditure arising within its immediate catchment (Zone 1). Once the out-of-centre Tesco and Aldi stores are taken into account, the retention figure for the town as a whole increases to 82.2% (£62.8m); this is a high market share given that the Selby catchment zone includes a relatively large rural hinterland.

Inflow (From Inside District)

8.121 Convenience provision within Selby town (town centre and out-of-centre combined) also draws trade from other parts of the district as follows:

Table 8.16 – Selby Main Food Inflow (From Inside District)

Destination/Foodstore	2014 Study		
	Zone 2 Sherburn in Elmet	Zone 3 Tadcaster	Zone 4 Eggborough / South Selby
Selby	14.2% (£3.5m)	5.3% (£1.1m)	33.6% (£9.6m)

8.122 The greatest inflow is from the Eggborough / South Selby zone (Zone 4), which is appropriate given that this zone encompasses a rural area with no retail centre or provision. The current inflow from Sherburn in Elmet (Zone 2) is likely to significantly reduce once the new Aldi permission is implemented.

Inflow (From Outside District)

8.123 Selby also attracts some main food inflows from outside of the district. The inflow from survey zones 5 to 8 are:

Table 8.17 – Selby Main Food Inflow (From Outside District)

Destination/Foodstore	2014 Study			
	Zone 5 Northern Fringe	Zone 6 North-Eastern Fringe	Zone 7 South-Eastern Fringe	Zone 8 Western Fringe
Selby	2.0% (£0.4m)	6.0% (£0.7m)	6.2% (£3.0m)	0.0% (£0.0m)

8.124 The inflow to Selby town from areas surrounding the district is relatively limited, which is expected given the available main foodstore provision in surrounding centres just outside of the district including Knottingley, Goole, Pontefract and York.

Outflow

8.125 The main food leakage from the immediate Selby catchment is primarily to mainstream foodstores in York (11.9% / £9.1m) which is likely to reflect the proximity of local residents living in the northern part of the Selby zone to York as well as travel-to-work patterns.

ii) Top-Up Food Market Shares

Immediate Catchment Area (Zone 1)

8.126 The top-up food expenditure pot (Table 4B, **Appendix 7**) within the immediate Selby catchment (Zone 1) is projected to rise from c. £25.5m in 2014 to £31.8m in 2027, an increase of £6.3m over study period 2014 to 2027.

8.127 The survey results (Table 5B, **Appendix 7**) reveal the following changes in the top-up food shopping market shares since the 2009 study:

Table 8.18 – Selby Top-Up Food Market Shares (Zone 1)

Destination/Foodstore	2009 Study Zone 1 Selby	2014 Study Zone1 Selby
Selby		
Morrisons, Market Cross, Selby Town Centre	16.4%	6.2% (£1.6m)
Sainsbury's, Abbey Walk, Selby Town Centre	8.2%	9.1% (£2.3m)
Farmfoods, Micklegate, Selby Town Centre	1.5%	3.3% (£0.8m)
Local Independent Shops, Selby Town Centre	11.2%	14.2% (£3.6m)
Selby Town Centre Total	**37.3%**	**32.8% (£8.4m)**
Tesco, Portholme Road, Selby Town Centre	13.4%	8.4% (£2.1m)
Aldi, Three Lakes Retail Park, Bawtry Road, Selby	4.5%	10.2% (£2.6m)
Co-op, Flaxley Road, Selby	-	2.8% (£0.7m)
Selby Town Total	**55.2%**	**54.2% (13.8m)**

8.128 In comparative terms, the results highlight the following:

- The top-up food market share of Selby town as a whole has remained relatively static since 2009.
- The Aldi store has doubled its top-up food market share, attributable to a national increase in Aldi sales at the expense of the main foodstore operators as well as the expansion of the store and extension of its opening hours in July 2009.
- The top-up food market shares of the Tesco and Morrison's stores have declined substantially since 2009.
- The top-up food market share of local independent shops in Selby town centre has increased slightly since 2009.

8.129 Drawing the individual store market shares together, Selby town centre retains 32.8% (£8.4m) of top up food expenditure arising within the immediate Selby catchment (Zone 1; this is a minor decline on the 37.3% retention figure identified in 2009. Once the market share of the Tesco, Aldi and Co-op stores outside of the town centre are taken into account, the retention figure for Selby as a whole increases substantially to 54.2% (£13.8m).

8.130 The results indicate that whilst the town as a whole has maintained its top-up food shopping function since 2009, the top-up food shopping role of town centre provision has declined in the intervening period. Notwithstanding the declining top-up food shopping role of the main town centre foodstores, the modest growth in the market share achieved by independent convenience stores in the town centre is a positive for the wider vitality, viability and overall diversity of the town centre.

Inflow (From Inside District)

8.131 Whilst top-up shopping is generally highly localised, due to the largely rural nature of surrounding parts of the district, convenience provision within Selby town (town centre and out-of-centre combined) attracts a notably amount of top-up food expenditure from other parts of the district:

Table 8.19 – Selby Top-Up Food Inflow (From Inside District)

Destination/Foodstore	**2014 Study**		
	Zone 2 Sherburn in Elmet	**Zone 3 Tadcaster**	**Zone 4 Eggborough / South Selby**
Selby Town (centre, edge- and out-of-centre)	4.2% (£0.4m)	6.1% (£0.4m)	13.0% (£1.2m)

8.132 The most significant inflow is from the Eggborough / South Selby zone (Zone 4), which encompasses a rural area. Selby town attracts limited inflow from the Sherburn in Elmet zone (Zone 2) and the Tadcaster Zone (Zone 2) reflecting the presence of local convenience retail provision in Tadcaster and Sherburn in Elmet town centres.

Inflow (From Outside District)

8.133 As expected, the convenience retail provision in Selby town attracts an extremely limited amount of top-up expenditure from residents outside of the district, given that top-up shopping is highly localised, and attracts 2.9% (£1.0m) of top-up food expenditure from Zones 5 to 8 combined, most likely reflecting travel-to-work or leisure travel patterns.

Outflow

8.134 Further to the 54.2% of top-up food expenditure spent in Selby, 27.1% (£6.9m) of the top-up food expenditure arising in the Selby zone is spent in local centres in Selby District and 6.1% (£1.6m) is spent in other stores in Selby District. Overall, 87.4% (£22.3m) of top-up food expenditure arising in the Selby zone is retained within the District.

8.135 The remaining 12.6% (£3.2m) flows outside of Selby District with York being the main destination (2.5% / £0.6m of top-up food expenditure from residents of the Selby zone); this leakage is again likely to reflect travel to work patterns.

iii) Overall Food Market Shares (Main Food and Top-Up Food Combined)

Immediate Catchment Area (Zones 1)

8.136 The overall convenience expenditure pot (Table 3, **Appendix 7**) within the immediate Selby catchment (Zone 1) is projected to rise from c. £101.9m in 2014 to £127.0m in 2027 (£25.1m increase over period 2014 to 2027).

8.137 Taking the main and top-up food market shares together, the survey results (Table 6, **Appendix 7**) reveal that the existing convenience provision within Selby town retains a total of 75.2% (£76.6m) of convenience expenditure arising within its immediate catchment; this is an extremely positive retention level.

8.138 The overall town centre convenience market share is 35.0% (£35.7m) with the out-of-centre Tesco, Aldi and Co-op stores in Selby retaining a further 40.2% (£40.9m).

8.139 The main individual store destinations in Selby town are as follows:

Table 8.20 – Selby Overall Food Market Shares (Zone 1)

Destination/Foodstore	**2014 Study Zone1 Selby**
Selby	
Morrisons, Market Cross, Selby Town Centre	22.4% (£22.9m)
Sainsbury's, Abbey Walk, Selby Town Centre	6.8% (£7.0m)
Farmfoods, Micklegate, Selby Town Centre	1.9% (£1.9m)
Local Independent Shops, Selby Town Centre	3.8% (£3.9m)
Selby Town Centre Total	**35.0% (£35.7m)**
Tesco, Portholme Road, Selby Town Centre	26.1% (£26.6m)
Aldi, Three Lakes Retail Park, Bawtry Road, Selby	13.4% (£13.6m)
Co-op, Flaxley Road, Selby	0.7% (£0.7m)
Selby Town Total	**75.2% (£76.6m)**

8.140 Given the reasonably high retention levels across Selby town as a whole for both main food and top-up shopping, the expenditure leakage to destinations outside of the Selby zone is relatively modest. The main leakage is to foodstores located in York (9.6% / £9.7m). A total of 16.2% (£16.5m) is leaked to foodstore destinations outside of the district.

Foodstore Performance

8.141 We have compared the survey-based turnover estimates with the 'benchmark' turnover levels for the main foodstores within Selby District (Table 7, **Appendix 7**). The results of our trading performance analysis are summarised for the main convenience destinations in Selby below:

Table 8.21 – Selby Foodstore Performance

Destination/Foodstore	Benchmark	Survey Total	Difference
Selby			
Morrisons, Market Cross, Selby Town Centre	£27.0	£28.8	£1.7
Sainsbury's, Abbey Walk, Selby Town Centre	£12.9	£10.9	-£2.0
Tesco, Portholme Road, Selby	£18.2	£29.9	£11.7
Aldi, Three Lakes Retail Park, Bawtry Road, Selby	£6.6	£20.5	£16.0
Selby Town Total	**£62.0**	**£91.2**	**£27.5**

8.142 Our analysis indicated that of the four main foodstores within Selby town, two (Tesco and Aldi) are trading substantially above their company average benchmark, one (Morrison's) is trading slightly above its company average level, and one (Sainsbury's) is trading slightly below its company average benchmark.

8.143 The overall trading position of the respective stores does reflect any lack of choice or competition to the benefit of local residents. There is no overly dominant store within the town and all were observed on a number of site visits as viably trading. The recent approval of a new Aldi store in Sherburn-in-Elmet may actually reduce some of the current overtrading given that the existing main food inflow from the Sherburn catchment (c. £3.5m) may be reversed (via sustainable clawback).

Convenience Retail Capacity Review

8.144 Tables 9A to 9C at **Appendix 7** set out our convenience retail capacity assessment for Selby, which is based on the expenditure of residents within the town's immediate catchment (Survey Zone 1).

8.145 Three convenience retail capacity scenarios have been tested, as follows:

- **SCENARIO A** – we test the 'baseline' capacity position in Selby, taking account of projected population and expenditure growth and allowing for growth in floorspace efficiency and growth over time in SFT.
- **SCENARIO B** – as above but with an allowance for the expenditure claims of existing planning commitments in the town[66] (as per schedule in Table 8 at **Appendix 7**).
- **SCENARIO C** – as per scenario B but with some of the over-trading surplus of the main foodstores in Selby (50% of existing £27.4m identified overtrading assumed available) to support new provision.

8.146 The convenience retail capacity arising under each of the above three scenarios is summarised in Table 8.22 below. Our assessment considers the residual expenditure capacity potentially available for new retail floorspace, which is then converted to a net sales area floorspace requirement.

Table 8.22 – Selby Convenience Retail Capacity

Scenario		2017 m² (net)	2022 m² (net)	2027 m² (net)
A	Selby (Zone 1, Baseline)	255	775	1,350
B	Selby (Zone 1, Post Commitments)	255	-1,220	-650
C	Selby (Zone 1, Post Commitments, Allowance for Over-trading)	1,350	-130	425

8.147 As Table 8.22 above shows, there is only a positive quantitative need identified for the town under Scenario A in the short to medium term time period of the Local Plan.

[66] Excluding the commitment for the expansion on the existing Tesco store (LPA ref. 2013/0291/FUL)

8.148 Whilst c. 1,350 m² net floorspace capacity is identified by the end of the Local Plan period (2027), the baseline scenario (Scenario A) does not take account of the existing commitments for new convenience retail floorspace in Selby. When existing commitments are taken into account, as set out above in respect of the other two scenarios (Scenarios B and C), there is no significant quantitative need identified for new convenience floorspace in Selby over the Local Plan period to 2027.

8.149 As a sensitivity test, in Tables 14A to 14C at **Appendix 7** we further set out our convenience retail capacity assessment for Selby using ONS based populations projections sourced from Experian via Micromarketer Online for all of the study zones, rather than population projections based on Selby District Council's planned housing growth across the district[67]. The ONS based population growth projections for all zones are set out in Table 12A at **Appendix 7** and the convenience retail capacity arising using ONS based populations projections for all zones is summarised in Table 8.23 below.

Table 8.23 – Selby Convenience Retail Capacity Sensitivity Test

Scenario		**2017 m² (net)**	**2022 m² (net)**	**2027 m² (net)**
A	Selby (Zone 1, Baseline)	205	525	850
B	Selby (Zone 1, Post Commitments)	205	-1,470	-1,145
C	Selby (Zone 1, Post Commitments, Allowance for Over-trading)	1,300	-385	-75

8.150 Table 8.23 above shows that, under our sensitivity test, the qualitative need under Scenario A decreases in the periods up to 2022 and 2027. When existing commitments for new convenience retail floorspace in Selby are also taken into account, there remains no significant quantitative need for new convenience floorspace in Selby over the Local Plan period up to 2027 under both Scenarios B and C.

[67] A full explanation of the population projections used is provided in Section 6.

Convenience Retail Forward Strategy

8.151 There are no quantitative deficiencies in convenience provision in Selby, or qualitative deficiencies that will not be met by the existing commitments for new convenience retail floorspace in Selby.

8.152 Local residents have an appropriate choice of mainstream foodstore operators (Sainsbury's, Tesco and Morrison's) as well as a deep discounter (Aldi) and popular local independents / market in the town. Given that the main food retention level is identified to be c. 82%, which is relatively high for a market town serving an extensive rural hinterland, there are extremely limited prospects of further market share enhancement.

8.153 With respect to the planned housing growth in Selby, it is our understanding that the retail provision approved as part of the Staynor Hall and Olympia Park schemes is expected to actively serve the proposed residential-led urban extensions and particularly meet day-to-day top-up shopping needs. Our convenience retail capacity assessment identified no or limited quantitative capacity for new convenience retail floorspace in Selby over the period up to 2027, demonstrating that the foodstores committed as part of the Staynor Hall and Olympia Park schemes, will qualitatively satisfy the needs of Selby's growing population over the period up to 2027. Consequently, there is no overriding requirement for the Council to plan for new provision in accordance with planned residential growth over the period up to 2027.

8.154 We further emphasise that, whilst the extant permission for the redevelopment of the existing Tesco store to provide a new larger foodstore (LPA ref. 2013/0291/FUL) is no longer expected to be implemented, there is no material need for the Council to proactively plan for new convenience provision to replace the additional convenience floorspace permitted as part of the shelved Tesco redevelopment scheme. Nevertheless, if developer-led proposals emerge for a new discount foodstore (e.g. Lidl / Netto) or a higher-end store (M&S Simply Food, Waitrose etc.) as part of a mixed-use development on the Portholme Road site, or on an alternative in or potentially edge-of-centre site in Selby, then there is sufficient scope for the Council to support new provision on the basis that:

- The study has identified that the main convenience destinations in Selby, with the exception of Sainsbury's, are substantially overtrading; and
- A new discount foodstore in closer proximity to the town centre would provide an effective counter-balance to the significant growth in the popularity of the out-of-centre Aldi store at Three Lakes Retail Park (substantially overtrading).

8.155 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 Retail Shopping Patterns

8.156 In contrast to convenience shopping patterns which tend to be more localised in nature, comparison shopping is destination based with shoppers prepared to travel further to shop for clothing, fashion and personal items; these sectors are therefore key drivers and the primary determinants in choice of destination. Expenditure is therefore more mobile and less restricted to a local catchment or a particular centre.

8.157 As previously detailed in the sub-regional overview section of the report, whilst the existing comparison (non-food) retail offer in Selby is commensurate with its market-town status, the town actually serves a constrained catchment given its proximity / accessibility to sub-regional retail destinations in York (City Centre and out-of-centre shopping parks such as Monks Cross / Vangarde) and beyond (Leeds and the potential out-of-centre retail schemes at Thorpe Park and Castleford Five Towns).

Overall Comparison Goods Market Shares

Immediate Catchment Area (Survey Zone 1)

8.158 The total comparison expenditure pot (Table 3, **Appendix 8**) within the immediate Selby catchment (Zone 1) is projected to rise from c. £152.4m in 2014 to £170.0m in 2017, £207.5m in 2022 and £260.6m in 2027 (£108.2m increase over the period 2014 to 2027).

8.159 The assessment (Table 5, **Appendix 8**) identifies that Selby town centre retains 37.9% (£57.7m) of all comparison goods expenditure arising within the Selby zone (Zone 1). The out-of-centre Three Lakes Retail Park secures a further 5.4% (£8.2m) market share. Overall, Selby retains 43.7% (£66.6m) of comparison expenditure arising within its immediate catchment. This is a relatively positive performance having regard to the current retail offer and competition from surrounding sub-regional destinations.

8.160 The table below summarises changes in market share patterns of the main comparison retail destinations for residents of the Selby zone since the 2009 Study.

Table 8.24 – Selby Comparison Market Shares (Zone 1)

Destination/Foodstore	2009 Study Zone 1 Selby	2014 Study Zone1 Selby
Selby		
Selby Town Centre	38.2%	37.9% (£57.7m)
Three Lakes Retail Park, Bawtry Road, Selby	2.9%	5.4% (£8.2m)
Tesco, Portholme Road, Selby	-	0.4% (£0.7m)
Selby Total	**41.1%**	**43.7% (£66.6m)**
Outside Selby District		
York City Centre	45.0%[68]	25.7% (£39.2m)
Monks Cross Shopping Park, York	0.9%	8.6% (£13.1m)
Clifton Moor Retail Park, York	0.3%	4.3% (£6.6m)
York Designer Outlet, Fulford, York	0.5%	3.8% (£5.8m)
Other York Destinations	0.3%	2.3% (£3.4m)

8.161 The table highlights the following changes since the 2009 Study was completed:

- Selby town centre has broadly maintained its overall comparison goods market share (c. 38%).
- The comparison goods market share of Selby town as a whole (including edge and out-of-centre destinations) has increased slightly by c. 3%; this is largely attributable to the improvement in the comparison goods market share achieved by the out-of-centre Three Lakes Retail Park.

8.162 The maintenance of Selby town centre's market share is positive given current economic climate and wider national trends whereby national multiples are increasingly consolidating their presence in larger retail destinations at the expense of smaller traditional town centres such as Selby.

[68] Figure relates to the 'York' destination listed in the 2009 Study and may include York destinations outside of the city centre.

Outflow

8.163 As the above table identifies, c. 45% of the available comparison retail expenditure arising within the immediate Selby catchment flows to retail destinations in York; this leakage is likely to reflect the proximity / accessibility to York and the enhanced comparison retail offer within the city centre and increasingly in out-of-centre retail park destinations such as Monks Cross / Vangarde. Travel to work patterns are also likely to play a part, as indicated by the findings of the in-centre survey.

Inflow (from Inside District)

8.164 Comparison provision within Selby also draws a significant amount of trade from other parts of the district as set out in Table 8.25 below:

- Table 8.25 – Selby Comparison Inflow (from Inside District)

	Destination/Foodstore	Zone 2 Sherburn in Elmet	Zone 3 Tadcaster	Zone 4 Eggborough / South Selby
2009 Study	Selby	13.6%	2.5%	21.3%
2014 Study		5.9% (£2.9m)	1.4% (£0.6m)	19.5% (£10.9m)

8.165 The greatest comparison retail inflow is from the rural Eggborough / South Selby zone (Zone 4), highlighting the importance of Selby as a retail destination for residents of this zone. However, there are currently proposals for a large out-of-town retail park scheme (Five Towns) in Castleford which would be anchored by a Next at Home store and comprise c. 53,000 m² of retail floorspace; this has significant potential to reverse current inflows.

8.166 With respect to the Sherburn in Elmet and Tadcaster catchments, it is apparent that Selby only draws minor amounts of trade. This is likely to be due to the proximity of these centres to York, Leeds (via A1(M) corridor) and other centres surrounding the district (Harrogate, Wetherby, Castleford).

Inflow (from Outside District)

8.167 Selby serves a large rural hinterland which extends beyond the district administrative boundaries. This is reflected in the household survey which identifies the following inflows:

Table 8.26 – Selby Comparison Inflow (from Outside District)

Destination/Foodstore	2014 Study			
	Zone 5 Northern Fringe	Zone 6 North-Eastern Fringe	Zone 7 South-Eastern Fringe	Zone 8 Western Fringe
Selby	0.2% (£0.1m)	5.5% (£1.4m)	3.8% (£3.4m)	0.1% (£0.1m)

Individual Comparison Goods Market Shares

8.168 There is significant variance in the market share retention levels for specific types of comparison (non-food) goods. The table below presents a summary of the comparison goods expenditure arising within the immediate Selby catchment (zone 1) retained by Selby town centre and thereafter the town as a whole.

Table 8.27 – Selby Individual Comparison Categories Market Shares (Zone 1)

Comparison Goods Category	2014 Selby Town Centre	2014 Selby Town
Clothing & Shoes	14.7% (£6.5m)	15.1% (£6.7m)
Furniture, Carpets & Household Textiles	37.1% (£6.9m)	40.8% (£7.5m)
DIY & Decorating Goods	30.9% (£1.3m)	60.9% (£2.6m)
Major Household Appliances	45.9% (£2.6m)	61.8% (£3.4m)
Electrical Goods	41.2% (£5.1m)	53.7% (£6.7m)
Books, CDs & DVDs	68.1% (£6.1m)	71.2% (£6.4m)
Health & Beauty Products	77.4% (£17.2m)	77.4% (£17.2m)
Household Goods	50.4% (£2.7m)	52.8% (£2.8m)
Personal Goods	36.2% (£2.5m)	38.9% (£2.7m)
Recreational Goods	25.9% (£4.8m)	37.0% (£6.8m)
Gardening & Pet Products	41.6% (£2.4m)	66.4% (£3.8m)

8.169 The highest town centre market shares are for health & beauty products and books, CDs and DVDs, at 77.4% and 68.1%, respectively. Conversely, the town as a whole achieves an extremely low market share (c. 15%) for clothing and fashion; this shopping category in particular is an important determinant in a shopper's choice of destination to visit (as set out in further detail below).

8.170 The market share achieved in almost all of the remaining categories is also relatively low, most notably for the recreational goods (25.9%), DIY and decorating (30.9%), personal goods (36.2%) and furniture, carpets & household textiles categories (37.1%).

8.171 Overall, the market share retention levels reveal that Selby town centre performs a secondary role for most types of comparison goods items with the exception of the health & beauty products (every-day items) and books, CDs and DVDs categories. The relatively low market shares reflect the current limitations of its comparison retail offer in Selby town centre. Likewise, the relatively low market shares for bulky comparison goods categories[69] reflects the lack of retail warehousing within the town. The proximity to comparable provision in York and the current contraction in the market could further reduce potential future demand.

Clothing & Shoes Market Share

8.172 As previously detailed, comparison shopping is destination-based with shoppers prepared to travel further to undertake shopping for clothing and fashion items in particular; this sector is usually a key determinant in shoppers' choice of destination.

8.173 Our analysis of the changes in shopping patterns in the clothing goods category and the overall performance of Selby since the 2009 Study was completed are therefore set out below.

Table 8.28 – Selby Clothing & Shoes Market Shares (Zone 1)

Destination/Foodstore	**2009 Study[70] Zone 1 Selby**	**2014 Study Zone1 Selby**
Selby		
Selby Town Centre	17.0%	14.7% (£6.5m)
Three Lakes Retail Park, Bawtry Road, Selby	0.4%	0.4% (£0.2m)
Selby Total	**17.4%**	**15.1% (£6.7m)**

[69] Bulky goods defined as furniture, carpets & household textiles, DIY & decorating goods, major household appliances, electrical goods, and gardening & pet products

[70] Market shares identified in the 2009 study assuming a 60% / 40% weighting for 1st choice / 2nd choice destinations, as assumed in 2009 Study.

Outside Selby District		
York City Centre	52.5%[71]	38.9% (£17.2m)
Monks Cross Shopping Park, York	1.5%	16.3% (£7.2m)
York Designer Outlet, Fulford, York	1.9%	12.4% (£5.5m)
Other Retail Parks and Stores, York	-	2.8% (£1.3m)
Leeds City Centre	4.2%	4.2% (£1.8m)
White Rose Shopping Centre, Leeds	0.3%	3.2% (£1.4m)

8.174 The survey results indicate that the town centre market share has decreased moderately from c. 17% in 2009 to 14.7% at present. The main notable change has been the significant increase in competition from destinations in York in particular which has increased from an overall 54% market share in 2009 to c. 70%.

8.175 The relatively low market share which the town retains is reflective of enhanced competition but also the relatively limited clothing and fashion offer within the town at present, as indicated by the findings of our diversity of uses analysis and the in-centre survey in Selby.

Inflow (from Inside District)

8.176 Notwithstanding the limitations of the town centre clothing offer, the survey results indicate that Selby attracts some inflow from surrounding catchment zones in the district, most notably from the Eggborough / South Selby catchment (zone 4), as follows:

Table 8.29 – Selby Clothing & Shoes Inflow (from Inside District)

Destination/Foodstore	2014 Study		
	Zone 2 Sherburn in Elmet	Zone 3 Tadcaster	Zone 4 Eggborough / South Selby
Selby	3.3% (£0.5m)	0.0% (£0.0m)	6.9% (£1.1m)

8.177 As previously identified, the inflow from the Sherburn and Eggborough zones in particular may be reduced in time should the Thorpe Park (Leeds) and Five Towns (Castleford) retail schemes be realised.

[71] Figure relates to the 'York' destination listed in the 2009 Study and may include York destinations outside of the city centre.

Inflow (from Outside District)

8.178 Selby also attracts minor inflows from outside of the district.

Table 8.30 – Selby Clothing & Shoes Inflow (from Outside District)

Destination/Foodstore	2014 Study			
	Zone 5 Northern Fringe	Zone 6 North-Eastern Fringe	Zone 7 South-Eastern Fringe	Zone 8 Western Fringe
Selby	0.0% (£0.0m)	1.9% (£0.1m)	4.1% (£1.0m)	0.0% (£0.0m)

Comparison Retail Capacity Review

8.179 Tables 8A to 8C at **Appendix 8** set out our comparison retail capacity assessment for Selby, which is based on the expenditure of residents within the town's immediate catchment (Zone 1).

8.180 The assessment is based on two comparison retail capacity scenarios for Selby as follows:

- **SCENARIO A** – the 'baseline' capacity position in Selby, based on a constant market share and taking account of projected population and expenditure growth over the Local Plan period to 2027.
- **SCENARIO B** – as above but with allowance for the quantitative claims of existing planning commitments in the town.

8.181 The comparison retail capacity arising under the above two scenarios in terms of net sales area floorspace is summarised in Table 8.31 below.

Table 8.31 – Selby Comparison Retail Capacity

Scenario		2017 m^2 (net)	2022 m^2 (net)	2027 m^2 (net)
A	Selby (Zone 1, Baseline)	140	1,445	3,730
B	Selby (Zone 1, Post Commitments)	140	980	3,265

8.182 Table 8.31 shows that under the baseline scenario (constant market share plus projected growth) there is a need for c. 1,400 m^2 (net) comparison retail floorspace in the period up to

2022, rising to 3,700 m² (net) by 2027. This need diminishes slightly over the Local Plan period to 2027 when existing commitments[72] are taken into account.

8.183 As for our convenience retail capacity assessment, as a sensitivity test, we further test the above two scenarios using ONS based population projections for all of the study zones, rather than population projections based on the Council's housing growth targets (for Zones 1-4)[73]. The ONS based population growth projections for all zones are set out in Tables 11A to 11C at **Appendix 8**. Tables 13A to 13C at **Appendix 8** set out our convenience retail capacity assessment for Selby using the ONS based population projections, which are summarised in Table 8.32 below.

Table 8.32 – Selby Comparison Retail Capacity Sensitivity Test

Scenario		**2017 m² (net)**	**2022 m² (net)**	**2027 m² (net)**
A	Selby (Zone 1, Baseline)	5	790	2,375
B	Selby (Zone 1, Post Commitments)	5	325	1,910

8.184 Table 8.32 above shows that, using the ONS based population projections for all zones, the comparison floorspace requirements decrease significantly in the periods up to 2022 and 2027. Nevertheless, there remains a substantial quantitative capacity for new comparison retail floorspace in Selby in the overall study period up to 2027 under Scenario B, which takes account of existing commitments, of c. 1,900 m² of additional comparison sales area floorspace.

Comparison Retail Forward Strategy

8.185 It is recommended that the Council should proactively plan for up to 1,000 m² of comparison sales area floorspace in the period 2014 to 2022 rising to 3,300 m² 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.

[72] Excluding the commitment for the expansion on the existing Tesco store (LPA ref. 2013/0291/FUL)
[73] A full explanation of the population projections used is provided in Section 6.

8.186 Nevertheless, we consider our recommendations for new comparison retail floorspace to be on the conservative side, and that there is potentially future capacity to support a greater level of comparison retail development in the town, above our recommendations.

8.187 In estimating the likely turnover requirements of the non-food element of committed foodstore developments proposed as part of the residential-led urban extensions around Selby (Olympia Park and Staynor Hall), we assumed average food/non-food sales area floorspace splits and turnover levels of the 'Big 4' food and grocery operators (Tesco, Sainsbury's, Asda and Morrisons)[74]. However, both the proposed Olympia Park and Staynor Hall foodstores (both 2,000 m^2 gross floorspace) are relatively small in the context of the 'Big 4' operators. It is therefore likely that the level of non-food floorspace in the Olympia Park and Staynor Hall foodstores will be below company averages; the expenditure claims of these foodstores on available capacity will therefore be less. Moreover, the comparison retail offer within foodstores is typically limited, predominantly own brand, orientated towards value and geared towards impulse purchases carried out during main food shopping.

8.188 However, our sensitivity test indicates that if the planned level of housing growth across Selby is not delivered, the comparison retail capacity in Selby will be significantly lower (capacity for up to 1,900 m^2 of comparison sales area floorspace in the period up to 2027). Continued monitoring of housing growth against the Council's targets will therefore be essential, and a review of our assessment will be required for the latter study periods once planned residential developments and retail commitments have come forward.

8.189 Given the key NPPF requirement to ensure an appropriate supply of suitable sites to meet identified needs, it is important that the Council undertakes an immediate assessment of potential site opportunities given that the town centre is physically constrained (historic core, surrounding residential, River Ouse and Selby Dam).

8.190 At this time, and in advance of a full review of potential site opportunities in Selby, we note that one immediately available site opportunity in the town is the former Civic Centre and depot site on Portholme Road, which is currently subject to a marketing campaign. If no other deliverable sites available within sequentially preferable locations in the town centre come forward, then the Portholme Road site, which is permitted to accommodate an uplift in retail floorspace of c. 2,900 m^2 gross (c. 2,200 m^2 net), represents an opportunity for

[74] Both the Olympia Park and Staynor Hall foodstore proposals remain at the outline planning stage, and the specific operator and sales area floorspace that will be provided is not yet known

accommodating new comparison retail development (site immediately available; no requirement for land assembly, quantum of substantive development already approved).

8.191 However, any new retail provision which comes forward in Selby will be determined by operator interest in locating in the town. Whilst new provision which qualitatively enhances the existing comparison retail offer, particularly clothing and fashion, would best facilitate a step-change in the performance of the town as a shopping destination, it needs to be recognised that demand will be influenced by the proximity / accessibility to sub-regional destinations in York (city centre and out-of-centre retail parks).

8.192 The Council should therefore adopt a flexible approach in response to any proposals which come forward in Selby. As detailed later in the report, there is an identified requirement for a new hotel as well as new food and drink provision (drive-through restaurants etc.). It may be that a mixed-use development comprising retail (convenience and comparison if sufficient demand) as well as other town centre uses (leisure and accommodation) would be suitable to achieve regeneration benefits in the short to medium term.

8.193 Given the availability of the Portholme Road site, which is located in relatively close proximity to the town centre core and therefore could facilitate linked shopping trips, there is no need or justification for the Council to plan or support new retail (or leisure) development in inferior out-of-centre locations within the town.

9. Tadcaster Analysis

Tadcaster Health Check Assessment

Diversity of Uses - Experian Goad Survey Area

9.1 The most recent Experian Goad survey of Tadcaster town centre was completed in July 2013 and GVA completed an update in October 2014. The town centre area covered by the Goad survey is shown in the plan at **Appendix 4**. A summary of the operator type and floorspace within the Tadcaster Goad survey area is set out in Table 9.1 below.

9.2 No Experian Goad survey data of Tadcaster town centre is provided in the 2009 SRCLS[75].

Table 9.1 – Tadcaster Town Centre Composition at October 2014 (Goad Boundary)

Operator Type	Units			Floorspace		
	Tadcaster Units	Tadcaster %	UK Average %	Tadcaster m²	Tadcaster %	UK Average %
Convenience Retail	8	11.3%	9.0%	2,441	27.3%	18.1%
Comparison Retail	24	33.8%	40.6%	3,089	34.6%	45.7%
Retail Services[76]	6	8.5%	11.7%	641	7.2%	5.7%
Restaurants, Cafes and Takeaways	13	18.3%	16.5%	1,330	14.9%	12.0%
Financial and Professional Services[77]	4	5.6%	8.6%	579	6.5%	7.0%
Miscellaneous[78]	1	1.4%	1.2%	167	1.9%	1.0%
Vacant	15	21.1%	12.5%	683	7.6%	10.5%
Total	**71**	**100.0%**	**100.0%**	**8,930**	**100.0%**	**100.0%**

75 The 2009 SRCLS provides only an assessment of the diversity of uses in Tadcaster based on its own survey data and the shopping and commercial boundary of Tadcaster.
76 Hairdressing, Beauty and Health, Laundrettes and Dry Cleaners, and Travel agents
77 Banks and Financial Services, Building Societies, Estate Agents and Auctioneers
78 Employment, Careers, Post Offices and Information

Convenience

9.3 The survey shows that whilst the number of convenience retail units in the town centre is slightly above than the Goad national average, the quantum of floorspace is significantly above. This is primarily due to the presence of a Sainsbury's store, a variety of local independents (butchers, greengrocer, newsagents etc.) and the overall lack of retail services in the town centre in particular.

Comparison

9.4 The comparison retail provision within the town centre (in terms of unit numbers and floorspace) is below the Goad national average reflecting the limitations of the existing offer. Most comparison retail within Tadcaster is comprised of small independent stores, situated primarily along the High Street (A659) to the south west of Tadcaster Bridge.

Food and Drink Establishments

9.5 Restaurant, cafe and takeaway outlets account for 17.8% of the total number of units and 14.0% of the total floorspace in Tadcaster town centre; both are above the Goad national averages indicating that Tadcaster has a reasonable representation in the food and drink sector. A substantial number of pubs are also located in Tadcaster; a legacy of the town's brewing industry.

Services

9.6 Whilst the proportion of floorspace dedicated to retail services is slightly above the UK average, the number of retail service outlets within Tadcaster, such as hairdressers, is relatively limited with only six such operators are present in the town. Representation of financial and professional services sector is slightly below the UK average in terms of both the number of outlets and floorspace, which is expected in a small centre such as Tadcaster.

Diversity of Uses - Defined Shopping and Commercial Centre Area

9.7 As explained in Section 8 in relation to Selby, Goad survey boundaries are not based on the town centre boundaries defined in the adopted Local Plan[79].

9.8 The shopping and commercial centre of Tadcaster town centre as defined by the Council (the 'SCC boundary') and shown in the plan at **Appendix 9** includes a handful of outlets on Wharfe Bank Terrace alongside the River Wharfe that were omitted from the Goad survey

[79] The shopping and commercial centre boundary defined in the Selby Local Plan

area, and excludes a number of outlets located within the west of the Goad survey area as well as those on the eastern side of Commercial Street.

9.9 A summary of the floorspace provision within the defined SCC area of Tadcaster at October 2014 is therefore set out in Table 9.2 below[80].

Table 9.2 – Tadcaster Town Centre Composition at October 2014 (SCC Boundary)

Operator Type	Units			Floorspace		
	Tadcaster Units	Tadcaster %	UK Average %	Tadcaster m²	Tadcaster %	UK Average %
Convenience Retail	6	9.2%	9.0%	2,191	26.3%	18.1%
Comparison Retail	23	35.4%	40.6%	2,979	35.8%	45.7%
Retail Services	6	9.2%	11.7%	641	7.7%	5.7%
Restaurants, Cafes and Takeaways	12	18.5%	16.5%	1,280	15.4%	12.0%
Financial and Professional Services	4	6.2%	8.6%	579	7.0%	7.0%
Miscellaneous	1	1.5%	1.2%	167	2.0%	1.0%
Vacant	13	20.0%	12.5%	493	5.9%	10.5%
Total	**65**	**100.0%**	**100.0%**	**8,330**	**100.0%**	**100.0%**

9.10 In relation to the diversity of uses assessment of Tadcaster town centre, the differences between the Goad and defined SCC areas are minimal, as the vast majority of the units affected by the boundary change are not in use for retail, leisure or professional/financial services. Most notably, a couple of small convenience retail outlets, vacant buildings and a comparison retail outlet within the Goad survey area are located outside of the SCC area. Consequently, there are no significant differences between the diversity of use assessments based on the Goad survey and SCC areas.

9.11 Table 9.3 further sets out the change in the retail composition of Tadcaster town centre since 2009, using the town centre composition data set out in the 2009 SRCLS. Note that it was not

[80] GVA has assessed the operator and floorspace data within the defined SCC boundary using both the Goad survey data, updated to October 2014 by GVA, and GVA's own operator and floorspace survey data for areas located beyond the GOAD survey area.

possible to assess change for all operator types as the 2009 SRCLS categorises the operators in the centre based on its own definitions, rather than the Experian Goad definitions.

Table 9.3 – Tadcaster Town Centre Composition Change 2009-2014 (SCC Boundary)

Operator Type	Units	Floorspace
	Tadcaster Units	Tadcaster m^2
Convenience Retail	-1	-60
Comparison Retail	0	-444
Vacant	-9	-1,696

9.12 Table 9.3 shows that whilst there has been little overall change in Tadcaster in the convenience sector, the level of comparison floorspace has fallen by around 13%.

Proportion of Vacant Street Level Property

9.13 Table 9.1 above shows that the vacancy rate in Tadcaster in terms of the number of vacant outlets, of 20.0%, is substantially higher than the UK average of 12.5%. When measured by floorspace, the vacancy rate is 5.9% per cent, compared with the UK average of 10.5%, indicating that vacant units in the centre are small. Examination of the locations of vacant units, as shown in the Diversity of Uses and Vacancy figure at **Appendix 4**, reveals that many of the vacant units are located in the heart of Tadcaster town centre, on Bridge Street, High Street and Kirkgate. In this historic part of the town centre, unit sizes are typically small. We therefore consider that Tadcaster town centre is performing poorly in relation to the key vacancy indicator.

9.14 Table 9.3 above indicates that vacancy in the centre has decreased substantially since 2009. However, the 2009 SRCLS assessment included office and potentially other uses that are excluded from our diversity of uses analysis. The level of vacancy identified in the 2009 SRCLS could therefore include vacant offices and residential properties and may not therefore be directly comparable with our vacancy assessment.

Pedestrian Flows

9.15 As a traditional linear centre, the main pedestrian concentrations were observed during our survey of the centre around / between the Sainsbury's store and the main car parking areas to the rear of the High Street.

9.16 We identified from the findings of the retailer business survey detailed later in this section that a lack of visitors and customers together with the overall liveliness of the town centre are key issues for local businesses in Tadcaster. The perceptions of local businesses therefore suggest that the town centre is fairly quiet, which is supported by our own observations during our survey of the centre.

Accessibility

9.17 Tadcaster is well served by the A64 which lies to the south of the centre, providing direct connections with surrounding centres and the motorway network. This main arterial connection provides a direct link between Tadcaster and York to the east, as well as the A1(M) to the west.

9.18 Buses provide access to and from surrounding rural areas, as well as into Leeds and York. The town is a main stop on the Yorkshire Coastliner bus service route, which operates between Leeds and Scarborough, Bridlington, Filey & Whitby on the east coast, via York. The Coastliner operation provides frequent direct services from Tadcaster to both Leeds and York (3 services an hour in each direction at peak times). Less frequent bus services also run between Tadcaster and Sherburn in Elmet (approximately 7 services a day) and Harrogate (1 service a day)

9.19 Selby District Council provides a total of some 244 free car parking spaces across 2 car parks in Tadcaster. Further car parking is available on street within the town centre.

State of the Environmental Quality

9.20 Tadcaster town centre contains a number of listed buildings which front on to High Street and Bridge Street. Of notable importance are Tadcaster Bridge which is grade II listed, and the Church of Saint Mary which is grade II* listed. The scheduled ancient monument of Tadcaster Motte and Bailey Castle is also a significant historic factor, situated to the north of the town centre. Nevertheless, current vacant units within the town centre detract from its overall appearance.

Summary of Health Check of Tadcaster Town Centre

9.21 Whilst the town has an important (albeit small format) Sainsbury's store anchor, 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 and 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.

Tadcaster Household Survey Findings

9.22 As detailed in Section 6, a telephone survey of 750 households was undertaken across the Selby District catchment area, of which 100 surveys were completed in the main Tadcaster catchment zone (Zone 3) as shown in the plan at **Appendix 1**. Those respondents resident within the Tadcaster zone were asked a series of questions in relation to Tadcaster town centre regarding their frequency of visits, views on the centre and suggested improvements. The findings of the household survey in relation to Tadcaster town centre are set out below.

Frequency of visits

9.23 The findings of the telephone household survey reveal that nearly three quarters of respondents in the Tadcaster zone regularly visit Tadcaster. When asked their frequency of visits to Tadcaster town centre, 21.4% of respondents stated that they visit the town centre daily, 15.6% visit the town centre several times a week, 32.0% visit weekly and 4.6% visit once a fortnight. However, a total of 18.8% of respondents living in the Tadcaster zone visit once every three weeks or less, and 5.1% never visit Tadcaster.

Reason for Visit

9.24 Amongst those respondents that visit Tadcaster town centre, the most popular main reason for visiting the centre was that the centre is close to home (33.5%). Other main reasons identified for visiting the centre were the choice of financial services such as banks and building societies (22.4% of respondents), the choice and range of shops (17.7%), and the choice of leisure facilities, such as the pub or gym (14.3%).

Main Likes

9.25 Those who visit Tadcaster town centre were asked what they most like about the centre. Up to three responses for each interviewee were recorded. The most popular overall response was that Tadcaster is near/convenient, which was cited by over half of respondents (54.4%). Other likes identified were the selection of chain / national multiple shops (7.8%) and the nice environment (7.0%). However, nothing at all was cited by 16.8% of respondents.

Main Dislikes

9.26 Similarly, up to three 'dislikes' were recorded for those interviewees resident within the Tadcaster zone, who visit Tadcaster town centre. The most popular specific dislike identified was the poor choice of chain shops (33.5% of respondents) followed by the poor range of independent shops (25.2%), too many empty shops (11.1%), the unattractive environment (10.3%), the poor choice of bars / restaurants (10.3%), the general lack of facilities (7.6%) and the poor choice of foodstores (7.0%). Nothing at all was cited by 25.0% of respondents.

Suggested Town Centre Improvements

Retail Provision

9.27 The main suggested retail improvements that would encourage respondents to shop in the town centre more often was more clothing and shoe shops. Specifically, more women's clothing shops was identified by 26.5% of respondents, more men's clothing shops (19.0% of respondents), more children's shoe shops (15.1%), more men's and women's shoe shops (14.9% and 14.8%, respectively). Other main suggestions were for improved foodstore provision (14.2% of respondents) and a bakery (7.3%). Of those questioned, 22.3% stated nothing in particular and 13.6% stated don't know.

Leisure/Entertainment Improvements

9.28 When asked what leisure improvements would persuade them to visit the town centre more often, the most popular suggested improvement was for an improved range of places to eat (10.0%) followed by an improved range of pubs / night clubs (7.2%). However, over two thirds of respondents (67.3%) stated nothing in particular and 8.8% stated don't know.

Environmental Improvements

9.29 When asked what improvements to the quality of the environment in Tadcaster town centre would persuade them to visit the centre more often, the most popular suggestions were for clean shopping streets (5.7%) and pedestrianisation of the main shopping streets in the centre (5.0%). However, the vast majority of those questioned stated nothing in particular (70.9%) or don't know (11.0%).

Transport Improvements

9.30 The main suggestions for transport and accessibility improvements in Tadcaster town centre were for improved public transport links (21.0%), and increased frequency of public transport services in the evening (4.0%). However, the vast majority of respondents stated nothing in particular (70.4%).

Summary of Household Survey Findings

9.31 The findings of the household survey highlight the lack of retail provision in the town centre and the high level of vacancies as particular issues for Tadcaster. Indeed, the choice of shops was identified as the main reason for visiting the centre by less than a fifth of the household survey residents in the Tadcaster zone, which we consider to be low, even a small town centre such as Tadcaster. Moreover, the main dislikes focused on the limited provision of retail facilities as well as eating and drinking establishments, and the number of empty units in the centre. Residents are keen to see an increase in the provision of clothing and shoe shops in the centre, as well as improved foodstore provision. Nevertheless, local residents visit because the centre is close to home, and to access services.

Tadcaster Retailer Business Survey

9.32 A total of 14 responses were received from the approximately 62 retailer business surveys distributed to all retail, leisure and service businesses within Tadcaster town centre, a response rate of 23%.

9.33 Of these, most responses were from non-food retailers (5 respondents) and retail services (5 respondents). Three responses were received from leisure service operators and one from a food retailer.

9.34 All but one of the responses received (93%) were from independent businesses, with the remaining response received from a business that is part of a chain or national group.

Length of Time Trading

9.35 The survey results for indicate a broad range of business trading duration. Two businesses have traded for over 20 years, another three for between 10 and 20 years, and three for between 5 and 10 years. However, six businesses (43%) have traded in the town centre for under 5 years, of which three have traded for between 3 and 5 years, and one started up in the last 12 months. This suggests a level of business churn taking place in Tadcaster town centre that is higher than in Selby and Sherburn and Elmet town centre.

Operator Requirements

9.36 In terms of whether local businesses are satisfied with their current premises, 10 respondents (71%) confirmed that they are satisfied in relation to their trading location within the town centre, and have no plans to alter their business in any way in the next 5 years. A further three respondents (21%) stated that they intended to refurbish their existing premises in the next 5 years. The remaining respondent did not know.

Ownership

9.37 With regards to the current ownership status of businesses, 12 of the 14 respondents (86%) occupied leased premises, one was owner-occupied and one did not know.

Trading Performance

9.38 Five businesses (36%) stated that they had traded "moderately" over the last 12 months, and three stated that they had traded "well". No businesses stated that they had performed "very well" over the past twelve months whilst five businesses (36%) considered that they had traded poorly or very poorly. The survey results, in our view, portray a moderate picture given that the wider economic climate remains in the initial stage of recovery following the recession.

9.39 One of the businesses also operates in another centre in the district, which the respondent stated is performing the same as in Tadcaster.

9.40 Seven of the respondents (50%) expected their businesses to perform moderately well over the next 12 months with a further four (25%) expecting to trade well or very well. Two respondents (13%) expected their businesses within the centre to perform poorly during the next year.

Range of Shops and Services

9.41 Of the total 14 respondents, 13 considered that there are not enough shops within the town centre. Five of the respondents considered that the existing mix of shops and other non-retail uses to be of a good balance, whilst three were of the opinion that there are too many non-retail uses at present within Tadcaster.

Town Centre Perceptions

9.42 Local businesses within Tadcaster were asked to rate the current quality of the town centre against a variety of indicators including: the range of services, environmental quality, public transport access, car parking availability, security and leisure provision. Table 9.4 below summarises respondents' ratings ranging from poor to very good. A mean score is also calculated for each aspect of the town centre[81]. The mean score ranges from 1 (very poor) to 5 (very good) with a score of 3 therefore representing 'neither good nor poor'. A score of 3.5 or above should therefore be considered good, whereas a score of 2.5 or less should be considered poor.

9.43 Table 9.4 shows that local business perceptions of the town centre are mixed. Out of the 16 aspects of Tadcaster town centre rated, 7 achieved an average score of 3.5 or above, indicating that local business perceptions in relation to nearly half of the indicators considered are good. Conversely, 6 of the total 16 indicators (38%) received an overall score of 2.5 or less, and overall perceptions in relation to these aspects of the town centre are therefore poor.

Figure 9.4 – Local Business Perceptions of Tadcaster Town Centre

	Rating						Mean Score
	Very good	**Good**	**Neither good nor poor**	**Poor**	**Very Poor**	**(Don't know)**	
Rents / rates	15%	31%	15%	8%	8%	23%	**3.5**
Availability of parking	23%	46%	15%	15%	0%	0%	**3.8**
Cost of parking	85%	8%	0%	0%	0%	8%	**4.9**
Traffic congestion	0%	31%	54%	8%	0%	8%	**3.3**
Bus services	8%	62%	15%	8%	0%	8%	**3.8**
Pedestrian connections	0%	46%	46%	0%	0%	8%	**3.5**

[81] Mean Score: Very good=5, Good=4, Neither good nor poor=3, Poor=2, Very poor=1, Don't Know=excluded from calculation of mean score

	Rating						Mean Score
	Very good	Good	Neither good nor poor	Poor	Very Poor	(Don't know)	
Safety / security	8%	38%	46%	8%	0%	0%	**3.5**
Range of shops and services	0%	15%	23%	23%	38%	0%	**2.2**
Quality of shops and services	8%	38%	15%	15%	23%	0%	**2.9**
Entertainment and leisure facilities	0%	15%	38%	23%	23%	0%	**2.5**
Marketing / promotion	0%	0%	23%	31%	38%	8%	**1.8**
Liveliness / street life / character	0%	0%	31%	23%	46%	0%	**1.8**
The street market	0%	0%	23%	46%	23%	8%	**2.0**
Quality / number of places to eat / drink	8%	62%	23%	8%	0%	0%	**3.7**
Quality of public realm	0%	8%	54%	31%	0%	8%	**2.8**
General shopping environment	0%	0%	38%	38%	23%	0%	**2.2**

9.44 Table 9.4 highlights that local businesses consider the main issues facing the town centre to be the liveliness / character of the town (which achieved an mean score of 1.8), marketing and promotion (score of 1.8), the street market (score of 2.0) and the range of shops and services the range of shops and services available (score of 2.2). The provision of leisure / entertainment facilities also rated poorly overall (score of 2.5).

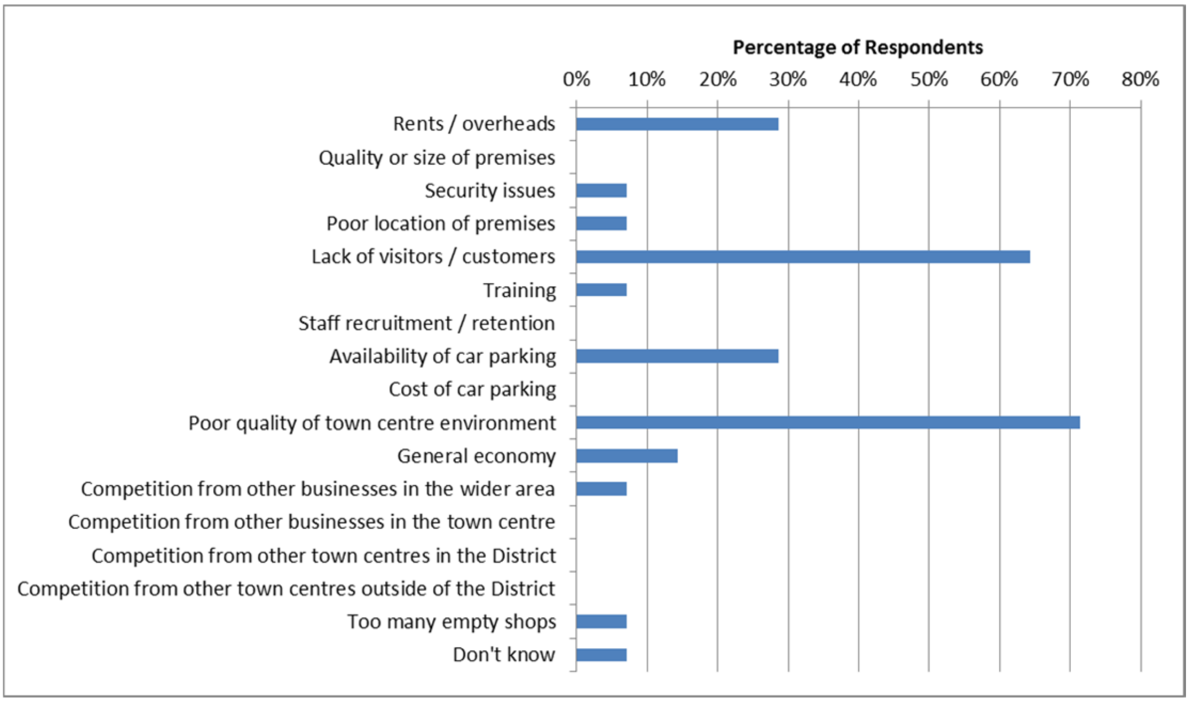
9.45 In terms of positive perceptions, local businesses consider the town's free car parking to be particularly good (mean score of 4.9 for cost and 3.8 for availability), as well as the provision of local bus services (score of 3.8) and the quality and number of places to eat and drink within the town centre (score of 3.7). Other town centre indicators highlighted as good were the rents / rates, pedestrian connections, safety and security in the centre (which all achieved a mean score of 3.5).

9.46 The remaining indicators relating to traffic congestion (score of 3.3), the quality of the public realm (score of 2.8) and the quality of shops and services (score of 2.9) all received moderate overall ratings.

Main Town Centre Issues

9.47 As indicated in Figure 9.5, the poor quality of the town centre environment and sheer lack of visitors to Tadcaster were cited as the most significant issues affecting trading performance by 71% and 64% of respondents, respectively. Rents and overheads and the availability of car parking, which were each cited by 29% of respondents, were also highlighted as concerns, along with the general economy (14%, 2 respondents).

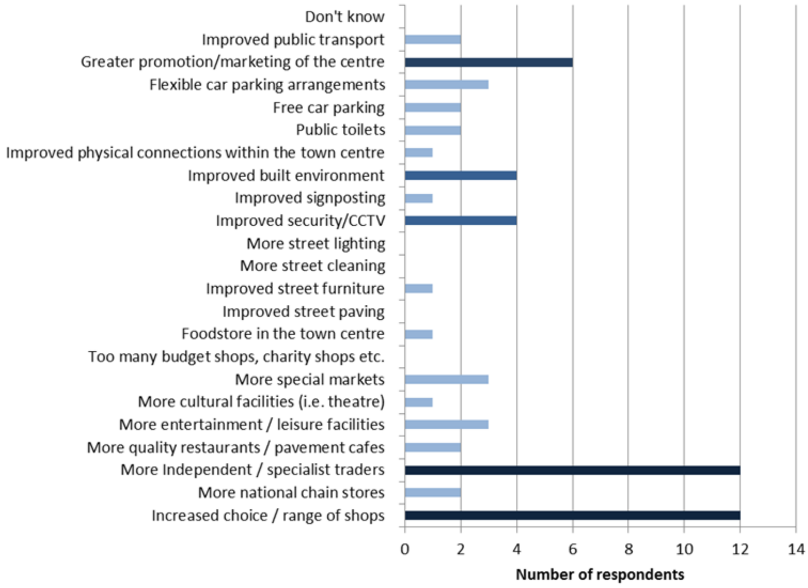
Figure 9.5 – Main issues identified by businesses within Tadcaster Town Centre



Suggested Town Centre Improvements

9.48 The most popular suggestions for the town centre improvements were for the provision of more independent traders (12 respondents) and an increase in the choice and range of shops (12 respondents). A summary of the main suggested town centre improvements is provided below in Figure 9.6.

Figure 9.6 –Improvement measures suggested by local businesses within Tadcaster Town Centre



Summary

9.49 The survey results indicate that trading conditions in Tadcaster are relatively poor, with over a third of businesses stating that they traded poorly over the last 12 months and a relatively high level of business churn identified in the town centre. Nevertheless, local businesses expect to see an improvement in poor trading performance over the next, with only 13% of respondents expecting to trade poorly during the next year.

9.50 Overall local business perceptions of Tadcaster town centre are mixed. Positive perceptions were identified in relation to the town's free car parking, the provision of local bus services and the quality and number of places to eat and drink, pedestrian connections, and safety and security in the centre. However, the poor quality of the town centre environment and sheer lack of visitors to Tadcaster were identified as the most significant issues for local businesses, as well as in relation to the promotion of the centre, the street market, and the range of shops and services.

9.51 Local businesses are keen to see an increase in the choice and range of shops, particularly independents.

Tadcaster Retail Assessment and Strategy

Convenience

i) Main Food Market Shares

Immediate Catchment (Zone 3)

9.52 The main food expenditure pot (Table 4A, **Appendix 7**) within the immediate Tadcaster catchment (survey zone 3) is projected to rise from £20.0m in 2014 to £24.1m in 2027, equating to a £4.1m increase over the period to 2027.

9.53 The survey results (Table 5a, **Appendix 7**) reveal the following changes in the main food shopping market share of the town since the 2009 study:

Table 9.7 – Tadcaster Main Food Market Shares (Zone 3)

Destination/Foodstore	2009 Study Zone 3 Tadcaster	2014 Study Zone 3 Tadcaster
Tadcaster		
Sainsbury's, Mill Lane, Tadcaster Town Centre	35.5%	48.7% (£9.7m)
Local Independent Shops, Tadcaster Town Centre[82]	1.1%	0.9% (£0.2m)
Tadcaster Town Centre Total	**36.6%**	**49.7% (£9.9m)**

9.54 In comparative terms, the results clearly show that the Sainsbury's store and thereafter the town centre as a whole has substantially improved its market share performance since the 2009 Study. The near 50% retention level reflects the limitations of the existing convenience offer (Sainsbury's store only has net sales area of 906 m^2).

Inflow

9.55 Convenience provision within the town attracts a modest amount of main food shopping expenditure from neighbouring catchments, as follows:

[82] The market share for local independent shops in Tadcaster includes that identified for Costcutter, Tadcaster in the 2009 study.

Table 9.8 – Tadcaster Main Food Inflow

Destination/Foodstore	2014 Study	
	Zone 2 Sherburn in Elmet	Zone 8 Western Fringe
Tadcaster Town Centre	0.7% (£0.2m)	9.5% (£2.0m)

9.56 The most significant inflow is from the Western Fringe zone which comprises Boston Spa and surrounding rural areas. Inflow from this zone is likely to reflect travel to work patterns as well as, potentially, brand loyalty; Sainsbury's operates only its 'Local' format stores in nearby Wetherby and Garforth, with the nearest other larger format Sainsbury's superstores in Leeds and York.

9.57 Tadcaster does not attract any main food inflows from any other zones either within or outside of the district.

Outflow

9.58 There is a minor level of leakage of main food expenditure from the Tadcaster catchment to main convenience store destinations in Selby[83] (5.3% / £1.1m). A significant quantum of expenditure is however drawn to mainstream foodstores outside of the district, as follows:

- Morrison's Wetherby - 8.6% (£1.7m);
- Tesco Extra York - 7.7%, (£1.5m);
- Asda (Killingbeck) Leeds - 6.5% (£1.3m);
- Asda York - 5.8% (£1.2m); and
- Tesco Garforth - 5.8% (£1.2m).

9.59 This leakage is likely to reflect the limitations of the existing convenience provision in Tadcaster (small Sainsbury's) as well as travel to work patterns.

[83] Includes in, edge and out of centre stores

ii) Top-Up Food Market Shares

Immediate Catchment Area (Zone 3)

9.60 The top-up food expenditure pot (Table 4B, **Appendix 7**) within the Tadcaster catchment (Zone 3) is projected to rise from c. £6.7m in 2014 to £8.0m in 2027, equating to a £1.4m increase over Local Plan period to 2027. The survey results (Table 5b, **Appendix 7**) highlight the following changes in the top-up food shopping market shares since the 2009 Study:

Table 9.9 – Tadcaster Top-Up Food Market Shares (Zone 3)

Destination/Foodstore	**2009 Study Zone 3 Tadcaster**	**2014 Study Zone 3 Tadcaster**
Tadcaster		
Sainsbury's, Mill Lane, Tadcaster Town Centre	58.2%	60.5% (£4.0m)
Local Independent Shops, Tadcaster Town Centre[84]	13.4%	5.0% (£0.3m)
Tadcaster Town Centre Total	**71.6%**	**65.4% (£4.4m)**

9.61 In comparative terms, the results highlight the following:

- The top-up food market share of Tadcaster town centre as a whole has decreased by c. 6% since 2009.
- The Sainsbury's store in Tadcaster town centre has slightly increased its top up food market share by c. 2%.
- The top-up food market share of local independent shops in Tadcaster town centre has decreased by c. 8% since 2009, which represents a substantial fall.

9.62 The results indicate that the top-up food shopping role of town centre provision has slightly declined since 2009. However, it is not considered that the decrease in market share is of significant concern given that top-up shopping by its very nature is highly localised (close to home or work) and that the role of the town centre as a main food shopping destination has increased over the same period.

[84] The market share for local independent shops in Tadcaster includes that identified for Costcutter, Tadcaster in the 2009 Study.

9.63 Nevertheless, the decrease in the top-up food market share of local independent shops in Tadcaster in particular is of concern and corresponds to the decline in the number of independent convenience outlets in Tadcaster in recent years, as identified in the health check assessment (Section 8).

Inflow

9.64 Convenience provision within Tadcaster town attracts a modest amount of top-up food expenditure from the neighbouring Zones 5 (Northern Fringe) and 8 (Western Fringe), both outside of the district:

Table 9.10 – Tadcaster Top-Up Food Inflow

Destination/Foodstore	2014 Study	
	Zone 5 Northern Fringe	**Zone 8 Western Fringe**
Tadcaster Town Centre	2.1% (£0.1m)	13.8% (£1.0m)

9.65 The most significant inflow is from the Western Fringe zone (Zone 8) where inflow is likely to reflect the proximity of parts of this zone to Tadcaster (Boston Spa etc.) as well as travel to work patterns. The town does not attract main food inflows from any other zones either within or outside of the district.

Outflow

9.66 The main outflow of top-up food expenditure from the Tadcaster zone to destinations elsewhere within Selby District, includes the Co-Op store in Sherburn in Elmet (9.8% / £0.7m) and stores in Selby[85] (6.1% / £0.4m). The main destinations outside of the district are Leeds (5.3% / £0.4m) and York (4.8% / £0.3m). This leakage is likely to reflect travel to work patterns.

iii) Overall Food Market Shares (Main Food and Top-Up Food Combined)

9.67 Taking the main and top-up food market shares together, the survey findings (Table 6, **Appendix 7**) show that the existing convenience provision within Tadcaster town centre retains a total of 53.6% (£14.3m) of convenience expenditure arising within its catchment. The overall

[85] Includes in, edge and out of centre stores

convenience goods market share of the main individual store destinations in Tadcaster are as follows:

Table 9.11 – Tadcaster Overall Food Market Shares (Zone 3)

Destination/Foodstore	**2014 Study Zone 3 Tadcaster**
Tadcaster	
Sainsbury's, Mill Lane, Tadcaster Town Centre	51.7% (£13.8m)
Local Independent Shops, Tadcaster Town Centre[86]	1.9% (£0.5m)
Tadcaster Town Centre Total	**53.6% (£14.3m)**
Selby	
Selby Town Total	**5.5% (£1.5m)**
Sherburn in Elmet	
Sherburn in Elmet Town Centre Total	**4.2% (£1.1m)**
Outside Selby District	
Outside Selby District Total	**36.7% (£9.8m)**

9.68 Given the c. 50% overall retention level, there is a significant quantum of convenience expenditure arising within the town's immediate catchment (survey zone 3) spent elsewhere.

Foodstore Performance

9.69 The results of our trading performance analysis (Table 8, **Appendix 7**) are summarised for the main convenience destination in Tadcaster below:

Table 9.12 – Tadcaster Foodstore Performance

Destination/Foodstore	**Benchmark**	**Survey Total**	**Difference**
Tadcaster			
Sainsbury's, Mill Lane, Tadcaster Town Centre	£9.7	£17.1	£7.5
Tadcaster Total	**£9.7**	**£17.1**	**£7.5**

86 The market share for local independent shops in Tadcaster includes that identified for Costcutter, Tadcaster in the 2009 study.

9.70 The assessment identifies that the Sainsbury's store is trading substantially above its company average benchmark. Whilst this is positive given that the store is centrally located within the town centre, the overtrading position also reflects the lack of choice and competition for local residents; this is an indicator of a potential qualitative need for new convenience provision in the town.

Convenience Retail Capacity Review

9.71 Tables 10A to 10E at **Appendix 7** set out our convenience retail capacity assessment for Tadcaster which is based on the expenditure of residents within Tadcaster's immediate catchment (Zone 3). Consistent with the capacity review for Selby, the assessment considers the residual expenditure capacity potentially available for new retail floorspace, which is then converted to a floorspace requirement.

9.72 A total of five retail capacity scenarios have been tested for Tadcaster, as follows:

- **SCENARIO A** – the 'baseline' position, based on a constant market share and taking account of projected population and expenditure growth over the Local Plan period to 2027.
- **SCENARIO B** – as above but with the market share increasing to 60% by 2022.
- **SCENARIO C** – as above with the market share increasing to 65% by 2022.
- **SCENARIO D** – as per Scenario B but with the £7.5m over-trading at the existing Sainsbury's Tadcaster put towards capacity for additional provision.
- **SCENARIO E** – as per Scenario C but with the Sainsbury's overtrading being made available to support new provision.

9.73 On the basis of the above scenarios, the net floorspace requirement[87] is summarised in Table 9.13 below.

Table 9.13 – Tadcaster Convenience Retail Capacity

Scenario		2017 m² (net)	2022 m² (net)	2027 m² (net)
A	Tadcaster (Zone 3, Baseline)	55	125	200

[87] Rounded to nearest 5 sq. m increment

Scenario		2017 m² (net)	2022 m² (net)	2027 m² (net)
B	Tadcaster (Zone 3, Increase in Market Share to 60%)	55	275	365
C	Tadcaster (Zone 3, Increase in Market Share to 65 %)	55	395	490
D	Tadcaster (Zone 3, Increase in Market Share to 60%, Allowance for Over-trading)	650	865	945
E	Tadcaster (Zone 3, Increase in Market Share to 65 %, Allowance for Over-trading)	650	985	1,070

9.74 Tables 9.13 above shows that there is a particularly limited quantitative comparison retail capacity identified under Scenario A over the Local Plan period to 2027. However this scenario assumes a constant market share (e.g. c. 50% of expenditure within the Tadcaster catchment continues to be spent outside of the town) and the continuing lack of choice and competition for local residents (Sainsbury's dominance). It is considered, having regard to the NPPF, which advocates meeting local needs through encouraging sustainability shopping patterns, that this scenario is not realistic as a policy response.

9.75 Whilst Scenarios B and C seek to address the unsustainable levels of outflow from the Tadcaster catchment through market share enhancement, it is clear that the quantitative capacity identified is still quite limited and would not facilitate any new convenience provision within the town of a scale which would provide effective choice and competition for local residents.

9.76 However, Scenarios D and E identify by the mid-to-latter phases of the Local Plan period a critical quantum of capacity (up to c. 1,100 m² net / 1,500 m² gross) which could address existing quantitative (c. 50% retention level allied to small Sainsbury's store) and qualitative (lack of choice and competition) deficiencies. It is recommended that the Council should plan for new convenience provision in Tadcaster in accordance with the floorspace range identified under these scenarios. A new store would facilitate clawback and increase the potential for more sustainable convenience shopping patterns in the Tadcaster catchment.

9.77 As a sensitivity test, in Tables 15A to 15E at **Appendix 7** we further set out our convenience retail capacity assessment for Tadcaster using ONS based population projections sourced from Experian via Micromarketer online for all zones, rather than population projections based on the Council's planned housing growth[88].

Table 9.14 – Tadcaster Convenience Retail Capacity Sensitivity Test

Scenario		2017 m² (net)	2022 m² (net)	2027 m² (net)
A	Tadcaster (Zone 3, Baseline)	40	100	160
B	Tadcaster (Zone 3, Increase in Market Share to 60%)	40	250	315
C	Tadcaster (Zone 3, Increase in Market Share to 65 %)	40	365	440
D	Tadcaster (Zone 3, Increase in Market Share to 60%, Allowance for Over-trading)	635	840	900
E	Tadcaster (Zone 3, Increase in Market Share to 65 %, Allowance for Over-trading)	635	955	1,020

9.78 Tables 9.14 shows that the quantitative comparison retail capacity identified under the sensitivity test for each of the five scenarios tested remains broadly the same as identified in Table 9.13.

Forward Strategy

9.79 On the basis of the above, it is important that the Council seeks to proactively plan for new convenience provision in the town to address existing deficiencies. Given that the Sainsbury's store is centrally located within the town centre and facilitates linked trips (shared car park etc.), it is essential that any potential site allocation made by the Council is not in a sequentially inferior location.

9.80 As identified in the health check assessment, it is apparent that the vitality and viability of the town centre is a cause for concern with a high number of vacancies in the centre. The lack of appropriate retail and service provision in the town centre was also identified in the retailer business survey as an important improvement necessary to enhance its future performance. A new foodstore could therefore potentially attract more local residents back into the town.

88 A full explanation of the population projections used is provided in Section 6.

9.81 We recommend that the Council actively look for site opportunities to accommodate a new foodstore through PLAN Selby.

Comparison

Overall Comparison Goods Market Share

Immediate Catchment Area (Survey Zone 3)

9.82 The total comparison expenditure pot (Table 3, **Appendix 8**) within the Tadcaster catchment (zone 3) is projected to rise from c. £41.9m in 2014 to £47.0m in 2017, £56.1m in 2022 and £69.1m in 2027 (£27.2m increase over the period 2014 to 2027).

9.83 The table below summarises changes in shopping destinations for local residents since the 2009 Study.

Table 9.15 – Tadcaster Comparison Market Shares (Zone 3)

Destination/Foodstore	2009 Study Zone 3 Tadcaster	2014 Study Zone 3 Tadcaster
Tadcaster		
Tadcaster Town Centre	9.0%	7.5% (£3.1m)
Outside Selby District		
York City Centre	57.5%[89]	35.8% (£15.0m)
Clifton Moor Retail Park, York	0.3%	13.0% (£5.5m)
Monks Cross / Vangarde Shopping Park, York	0.3%	12.4% (£5.2m)
Other York Destinations	1.3%	8.0% (£3.4m)
Leeds Destinations	15.5%	11.4% (£4.8m)

9.84 As the table identifies, the overall comparison goods market share which the town retains from its immediate catchment has only decreased slightly from 9% in 2009 to 7.5% at present.

Inflow

9.85 The survey results reveal minor inflows of comparison expenditure from neighbouring catchments to Tadcaster, as summarised below:

[89] This figure relates to the 'York' destination listed in the 2009 Study, and may include York destinations outside of the city centre.

Table 9.16 – Tadcaster Comparison Inflow

Destination/Foodstore	2014 Study		
	Zone 2 Sherburn in Elmet	Zone 5 Northern Fringe	Zone 8 Western Fringe
Tadcaster	0.2% (£0.1m)	0.3% (£0.1m)	0.7% (£0.3m)

Outflow

9.86 Given the extremely low retention level, there is significant outflow of comparison expenditure from the Tadcaster catchment. A total of 88.4% of expenditure (c. £37.0m) is spent outside of the district; this is broadly the same as identified in 2009 (87.4%).

9.87 As Table 9.17 above highlights, the main destination for local residents is York, which achieves a 69.2% market share; this is unsurprising given the proximity to the city and its higher order retail (and services) offer.

Individual Comparison Goods Market Share

9.88 The limitations of the town's comparison retail offer is reflected in the relatively low retention rates for different types of comparison goods, as set out in Table 9.17 below:

Table 9.17 – Tadcaster Individual Comparison Categories Market Shares (Zone 3)

Comparison Goods Category	2014 Study Tadcaster
Clothing & Shoes	0.0% (£0.0m)
Furniture, Carpets & Household Textiles	14.2% (£0.7m)
DIY & Decorating Goods	3.9% (£0.1m)
Major Household Appliances	1.3% (£0.0m)
Electrical Goods	0.0% (£0.0m)
Books, CDs & DVDs	11.9% (£0.3m)
Health & Beauty Products	21.4% (£1.3m)
Household Goods	6.5% (£0.1m)
Personal Goods	15.4% (£0.3m)
Recreational Goods	3.3% (£0.2m)

Comparison Goods Category	2014 Study Tadcaster
Gardening & Pet Products	12.1% (£0.2m)

Clothes & Shoes Market Shares

9.89 The shopping patterns of residents in the Tadcaster catchment in the clothing & shoes category (Table 6A, **Appendix 8**) are summarised in the table below.

Table 9.18 – Tadcaster Clothing & Shoes Market Shares (Zone 3)

Destination/Foodstore	2009 Study[90] Zone 3 Tadcaster	2014 Study Zone 3 Tadcaster
Tadcaster		
Tadcaster Town Centre	0.7%	0.0% (£0.0m)
Outside Selby District		
York City Centre	57.1%[91]	53.3% (£6.5m)
Monks Cross / Vangarde Shopping Park, York	0.0%	23.1% (£2.8m)
York Designer Outlet, Fulford, York	0.0%	5.5% (£0.7m)
Other York Destinations	0.0%	3.9% (£0.5m)
Leeds City Centre	26.7%[92]	6.5% (£0.8m)
Other Leeds Destinations	0.8%	4.1% (£0. 5m)

9.90 The table highlights that the town's market share has decreased and now does not effectively perform a notable shopping function in respect of clothing and shoes. The significant improvement in the market share of Monks Cross shopping park in York reflects the recent opening (April 2014) of a new John Lewis store in particular.

Inflow

9.91 There is no identified inflow of clothes & shoes expenditure from inside or outside of the immediate Tadcaster catchment.

[90] Market shares identified in the 2009 study assuming a 60% / 40% weighting for 1st choice / 2nd choice destinations, as assumed in 2009 Study.
[91] Figure relates to the 'York' destination listed in the 2009 Study and may include York destinations outside of the city centre.
[92] Figure relates to the 'Leeds' destination listed in the 2009 Study and may include Leeds destinations outside of the city centre.

Comparison Retail Capacity Review

9.92 Table 9 in **Appendix 8** sets out the comparison retail capacity assessment for Tadcaster, which is based on the expenditure of residents within Tadcaster's immediate catchment (Zone 3).

9.93 As in our retail capacity review for Selby, our assessment considers the residual expenditure capacity potentially available for new retail floorspace, which is then converted to a floorspace requirement.

9.94 We have tested one comparison retail capacity scenario for Tadcaster as follows:

- **SCENARIO A** – the 'baseline' position, based on a constant market share and taking account of projected population and expenditure growth over the Local Plan period to 2027.

9.95 The comparison retail capacity arising under the above scenario is summarised in terms of net sales area floorspace[93] in Table 9.19 below.

Table 9.19 – Tadcaster Comparison Retail Capacity

Scenario		2017 m² (net)	2022 m² (net)	2027 m² (net)
A	Tadcaster (Zone 3, Baseline)	10	55	140

9.96 Given the current limitations of the comparison retail offer within Tadcaster, notwithstanding projected population and expenditure growth in the town's catchment over the Local Plan period to 2027, the capacity assessment identifies an extremely limited floorspace requirement (of up to 140 m² by 2027) on a constant market share basis.

9.97 As a sensitivity test, in Table 14 at **Appendix 8** we further set out our comparison retail capacity assessment for Tadcaster using ONS based population projections sourced from Experian via Micromarketer online for all of the study zones, which is summarised in Table 9.20 below.

[93] Rounded to nearest 5 sq. m increment

Table 9.20 – Tadcaster Comparison Retail Capacity (Planned Housing Growth Policy On)

Scenario	2017 m² (net)	2022 m² (net)	2027 m² (net)
A Tadcaster (Zone 3, Baseline)	0	35	110

9.98 Table 9.20 shows that the quantitative comparison retail capacity identified under the sensitivity test remains broadly the same as identified in Table 9.19.

Forward Strategy

9.99 The baseline capacity is clearly insufficient to support any new substantive development that would generate a step-change in the town centre market share and performance. Whilst ordinarily there would be potential to enhance market share in quantitative terms, it is considered that there is limited realistic potential for Tadcaster to significantly improve its performance and attractiveness as a comparison retail destination given its size, the catchment it serves and its proximity / access to York (regional retail destination). Given the wider national trends whereby retailers are consolidating their provision in larger centres serving wider catchments, there is unlikely to be any substantive commercial demand for representation in Tadcaster.

9.100 It is expected that the town centre will continue to primarily meet local residents' daily comparison shopping needs (i.e. chemist and personal goods). However, a new foodstore in the town with an appropriate non-food offer would deliver some benefits in terms of enhancing the choice and range of comparison goods available (limited offer in the existing Sainsbury's store).

9.101 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. The strategy for the town centre should be based on qualitative grounds in terms of promoting Tadcaster as a distinguishable place in the wider retail hierarchy. Improvements to the town centre environment / public realm have been identified in both the health check and retailer business surveys and must be addressed going forward in order to enhance the vitality and viability of the centre; current vacancies and downgraded environment are detracting from the significant physical / environmental assets which the town has (Castle, River Wharf setting etc.).

10. Sherburn In Elmet Analysis

Sherburn in Elment Health Check Assessment

Diversity of Uses

10.1 As no Experian Goad survey data is available for Sherburn in Elmet, GVA undertook its own assessment of floorspace and operator type in the centre utilising OS data and the findings of the on-foot fascia survey of the centre completed in October 2014.

10.2 A summary of the main operator types and floorspace within the Shopping and Commercial Centre (SCC) boundary of Sherburn in Elmet defined in the adopted Local Plan proposals map is set out in Table 10.1 below. We have assessed the composition of the centre based on Experian Goad definitions for consistency with the Selby and Tadcaster assessments, as well as to ensure ease of comparison with any future assessments.

10.3 Table 10.2 further sets out the change in the retail composition of Sherburn in Elmet town centre since 2009, using the town centre composition data set out in the 2009 SRCLS. As for Tadcaster, it was not possible to assess change for all operator types as the 2009 SRCLS does not categorises the operators in the centre strictly based on the Experian Goad definitions. Table 10.2 indicates that there have been no significant retail changes in the centre since 2009.

Table 10.1 – Sherburn in Elmet Town Centre Composition at October 2014 (SCC Boundary)

Operator Type	Units			Floorspace		
	Sherburn Units	Sherburn %	UK Average %	Sherburn m²	Sherburn %	UK Average %
Convenience Retail	8	25.0%	9.0%	2,193	50.1%	18.1%
Comparison Retail	10	31.3%	40.6%	1,112	25.4%	45.7%
Retail Services[94]	6	18.8%	11.7%	401	9.2%	5.7%
Restaurants, Cafes and Takeaways	3	9.4%	16.5%	242	5.5%	12.0%
Financial and Professional Services[95]	3	9.4%	8.6%	283	6.5%	7.0%

94 Hairdressing, Beauty and Health, Laundrettes and Dry Cleaners, and Travel agents

Operator Type	Units			Floorspace		
	Sherburn Units	Sherburn %	UK Average %	Sherburn m²	Sherburn %	UK Average %
Miscellaneous[96]	0	0%	1.2%	0	0%	1.0%
Vacant	2	6.3%	12.5%	148	3.4%	10.5%
Total	**32**	**100.0%**	**100.0%**	**4379**	**100.0%**	**100.0%**

Table 10.2 – Sherburn in Elmet Town Centre Composition Change 2009-2014 (SCC Boundary)

Operator Type	Units		Floorspace	
	Sherburn Units	UK Average % points	Sherburn sq. m	UK Average % points
Convenience Retail	0	-0.5	-218	0.9
Comparison Retail	0	-3.4	307	-4.2
Miscellaneous97	0	-0.1	0	0.0
Vacant	0	1.1	-261	0.7

Convenience

10.4 The number of convenience retail units and quantum of floorspace is significantly above the Goad national averages and reflects the convenience orientated nature of provision at present (Co-op supermarket and Tesco Express store present). The predominance of convenience provision is to be further reinforced by the recent grant of planning permission for a new Aldi store.

Comparison

10.5 Whilst the comparison retail provision is substantially below the Goad national averages in terms of both number of units and quantum of floorspace, comparison retailing accounts for around one fifth of activity in Sherburn.

95 Banks and Financial Services, Building Societies, Estate Agents and Auctioneers
96 Employment, Careers, Post Offices and Information
97 Employment, careers, post offices and information

Food and Drink Establishments

10.6 The number of units and quantum of floorspace is below the Goad national average. However, the existing provision is reasonable considering the size of the town.

Services

10.7 Representation of retail services within Sherburn in Elmet is above the UK average in terms of both the number of units and floorspace, highlighting the important service role of Sherburn in Elmet.

Proportion of Vacant Street Level Property

10.8 The vacancy rate is low with only two small units vacant in the defined centre. Table 10.2 above further indicates that there has been a slight reduction in the amount of vacant floorspace in the centre since 2009.

Pedestrian Flows

10.9 During our survey of the centre, the main pedestrian concentrations were observed in the vicinity of the Co-op store and along Finkle Hill / Low Street in the vicinity of the Tesco Express and Fulton Foods stores.

Accessibility

10.10 Sherburn in Elmet is a small compact centre and is easily accessible to most local residents by foot. The centre is also accessible from the neighbouring villages of South Milford and Barkston Ash via Finkle Hill/Low Street which runs north-south through the centre. The A162 provides a direct north-south link to Tadcaster and the A64 to the north and the A63 to the south. Highway routes to the A1(M), Leeds and York are reasonably direct.

10.11 The centre also benefits from on-street car parking as well as a free car park provided by the Council on Church View. However, the Church View car park is not conveniently located within the centre. Parking is also available at the Co-Op store.

10.12 Bus service provision in Sherburn in Elmet is relatively limited. The only frequent bus service runs to Selby every 30 minutes at peak times (weekday daytime). Infrequent services also operate to Leeds, Garforth, Tadcaster, York, Knottingley, Pontefract and nearby villages.

10.13 Sherburn in Elmet train station is located approximately 1.5km to the east of Sherburn in Elmet town centre, providing around 9 services to York (Monday to Saturday), 7 trains to Selby (5 of which continue to Hull and 2 continue to Sheffield.

State of the Environmental Quality

10.14 The centre is characterised by a mix of one to two storey purpose-built shopping parades and units interspersed with traditional stone properties. We consider that a number of properties, built in the 60's and 70's, now look rather dated. Overall, however, the centre is pleasant and benefits from wide paving in many areas that create a pedestrian friendly environment.

Summary of Health Check of Sherburn in Elmet

10.15 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. Whilst there may be some short-term adjustment in retail provision within the town upon the opening of the new Aldi store (planning permission granted), there may be longer-term benefits by increasing footfall and shopping activity (e.g. increased propensity to use the centre and other shops benefit from linked trips).

Sherburn in Elmet Household Survey Findings

10.16 As detailed in Section 6, a telephone survey of 750 households was undertaken across the Selby District catchment area, of which 100 surveys were completed in the main Sherburn in Elmet catchment zone (Zone 2) as shown in the plan at **Appendix 1**. Respondents resident within the Sherburn in Elmet zone were asked a series of questions in relation to Sherburn in Elmet town centre in relation to their frequency of visits, views on the centre and suggested improvements. The findings of the household survey in relation to Sherburn in Elmet town centre are set out below.

Frequency of visits

10.17 The findings of the telephone household survey reveal that around three quarters of respondents in the Sherburn in Elmet zone regularly visit Sherburn in Elmet. When asked their frequency of visits to Sherburn in Elmet town centre, 16.8% of respondents stated that they visit the town centre daily, 24.8% visit the town centre several times a week, 31.7% visit weekly and 3.0%% visit once a fortnight. However, a total of 8.5% of respondents living in the Sherburn in Elmet zone visit once a month or less, and 14.4% never visit Sherburn in Elmet.

Reason for Visit

10.18 Amongst those respondents that visit Sherburn in Elmet town centre, the most popular main reasons for visiting the centre were identified as the choice and range of shops (27.3% of respondents) and that the centre is close to home (21.6%). Other main reasons identified for visiting the centre were the choice of leisure facilities, such as the pub or gym (8.7%); to use a service (8.5%); to see friends/family (6.9%); and the choice of financial services such as banks and building societies (6.8%).

Main Likes

10.19 Those who visit Sherburn in Elmet town centre were asked what they most like about the centre. Up to three responses for each interviewee were recorded. The most popular overall response was that Sherburn in Elmet is near/convenient (31.0%) followed by the selection of independent shops (16.9%). Other popular responses were the pedestrian friendly environment (11.8%), the selection of chain shops (9.4%), and that the centre feels safe (7.7%). However, nothing at all was cited by 23.9% of respondents.

Main Dislikes

10.20 Similarly, up to three 'dislikes' were recorded for those interviewees resident within the Sherburn in Elmet zone, who visit Sherburn in Elmet town centre. Nothing at all was cited by 47.6% of respondents. However, 11.6% of respondents stated that they did not like the centre, but with no particular reason. The main specific dislikes identified were the unattractive environment (10.4%), the poor choice of foodstores (8.0%), lack of car parking (7.5%), poor range of independent shops (7.3%) and poor choice of chain shops (5.8%).

Suggested Town Centre Improvements

Retail Provision

10.21 The main suggested retail improvements that would encourage respondents to shop in the town centre more often was improved foodstore provision, which was cited by 29.2% of respondents. More women's clothing shops was identified by 11.8% of respondents, followed by women's clothing shops (11.8%), the provision of a new department store (7.3%), women's shoe shops (6.9%) and men's clothing and shoe shops (8.7%). However, half (50.3%) of those questioned stated nothing in particular and 8.1% stated don't know.

Leisure/Entertainment Improvements

10.22 When asked what leisure improvements would persuade them to visit the town centre more often, the most popular suggested improvement was an enhanced range of health and fitness facilities / gyms (19.8%), followed by improved youth / young adult facilities (14.7%), a new swimming pool (10.6%), improved play areas for children (6.8%) and an improved range of places to eat (5.7%). Over half of respondents (56.1%) stated nothing in particular or don't know.

Environmental Improvements

10.23 The most popular suggested improvements in relation to the quality of the environment in Sherburn in Elmet town centre were clean shopping streets (8.6%) followed by attracting more people/increasing the liveliness of the centre. Almost three quarters of respondents (74.4%) stated nothing in particular or don't know.

Transport Improvements

10.24 The main suggestions for transport and accessibility improvements in Sherburn in Elmet town centre were for improved public transport links (22.2%), more short stay car parking spaces (7.9%) and improved car park layouts (5.8%). However, the majority of respondents (60.2%) stated nothing in particular or don't know.

Summary of Household Survey Findings

10.25 The findings of the household survey confirm Sherburn in Elmet role as a popular and convenient shopping and service centre for local residents; with the choice and range of shops and that the centre is close to home identified as the most popular reasons for visiting the centre. Residents like the selection of shops and pedestrian friendly environment in the centre. However, key issues highlighted by residents were the unattractiveness of the environment, and the poor choice of shops, in particular, foodstores. Indeed, many residents are keen to see an increase in the foodstore provision in the centre, as well as other retail provision. Other popular suggested improvements were for improved public transport links and an enhanced range of health, fitness and leisure facilities.

Sherburn in Elmet Retailer Business Survey

10.26 A total of 17 responses were received back from the estimated 38 retailer business surveys distributed within Sherburn in Elmet town centre, a response rate of 45%.

10.27 Of these, the majority of responses received were from professional services (6 respondents) and leisure services (4 respondents). Three responses were received from food retailers and two each from non-food and retail services.

10.28 Thirteen of the responses (76%) were received from independent businesses, and a further 3 stated that their business is part of a chain or national group.

Length of Time Trading

10.29 The survey results indicate a range in the length of time businesses have been trading. Only five out of the 17 respondents have traded in the centre for under 5 years, with the rest trading for over 5 years; this suggests low levels of business turnover in the town centre and is a very positive trend given the current economic conditions.

Current Unit Requirements

10.30 In terms of whether local businesses are satisfied with their current premises, 15 out of the 17 respondents confirmed that they are satisfied in relation to their trading location and have no plans to relocate in the next 5 years. Of these, three businesses indicated that they were considering refurbishing existing floorspace.

Ownership

10.31 With regards to the current ownership status of businesses, 15 of the 17 respondents occupy leased premises. The remaining two are owner-occupied.

Trading Performance

10.32 Ten of the businesses stated that they have grown either moderately or significantly over their time trading in the town. A total of 15 respondents reported that they have traded “moderately”, “well, or “very well” over the last 12 months. Only one business stated that it had performed “poorly” over the past twelve months. These results, accompanied with the length of time that businesses have been located in the town, indicate a relatively vital and viable trading climate.

10.33 One of the businesses also operates in another centre in the district, which the respondent stated is performing the same as in Sherburn in Elmet.

10.34 Ten of the 17 respondents anticipated their businesses to perform very well or well over the next twelve months, with another 6 anticipating moderate performance.

Town Centre Perceptions

10.35 Local businesses within Sherburn in Elmet were asked to rate the current quality of the town centre against a variety of indicators including: the range of services, environmental quality, public transport access, car parking availability, security and leisure provision. Table 10.3 below summarises respondents' ratings ranging from poor to very good. A mean score is also calculated for each aspect of the town centre[98]. The mean score ranges from 1 (very poor) to 5 (very good) with a score of 3 therefore representing 'neither good nor poor'. A score of 3.5 or above should therefore be considered good, whereas a score of 2.5 or less should be considered poor.

10.36 Table 10.3 shows that whilst local business perceptions of the town centre are mixed, out of the 16 aspects of Sherburn town centre rated, only three achieved a mean score of 3.0 of more, and half achieved an overall mean score of 2.5 or less, indicating that overall local business perceptions of Sherburn in Elmet town centre are relatively poor.

10.37 Local businesses considered the main issues facing the town centre to be the lack of entertainment and leisure facilities (mean score of 1.4), marketing/promotion of the centre (score of 1.6), the liveliness and character of the town (score of 1.8) and the street market (score of 1.9). The quality of the public realm, quality and number of places to eat and drink, availability of car parking and traffic congestion, which all received an overall rating score of less than 2.5, were also highlighted as issues in the centre.

10.38 In terms of positive perceptions, local businesses consider the cost of car parking in the town to be particularly good (mean score of 4.0), as well as the quality and range of shops and services available (score of 3.8 and 3.6, respectively).

10.39 The remaining indicators relating to rents/rates, provision of bus services, the general shopping environment, pedestrian connections and safety and security all received moderate overall ratings of between 2.8 and 2.9. Therefore, there remains significant room to improve perceptions in these areas.

98 Mean Score: Very good=5, Good=4, Neither good nor poor=3, Poor=2, Very poor=1, Don't Know=excluded from calculation of mean score

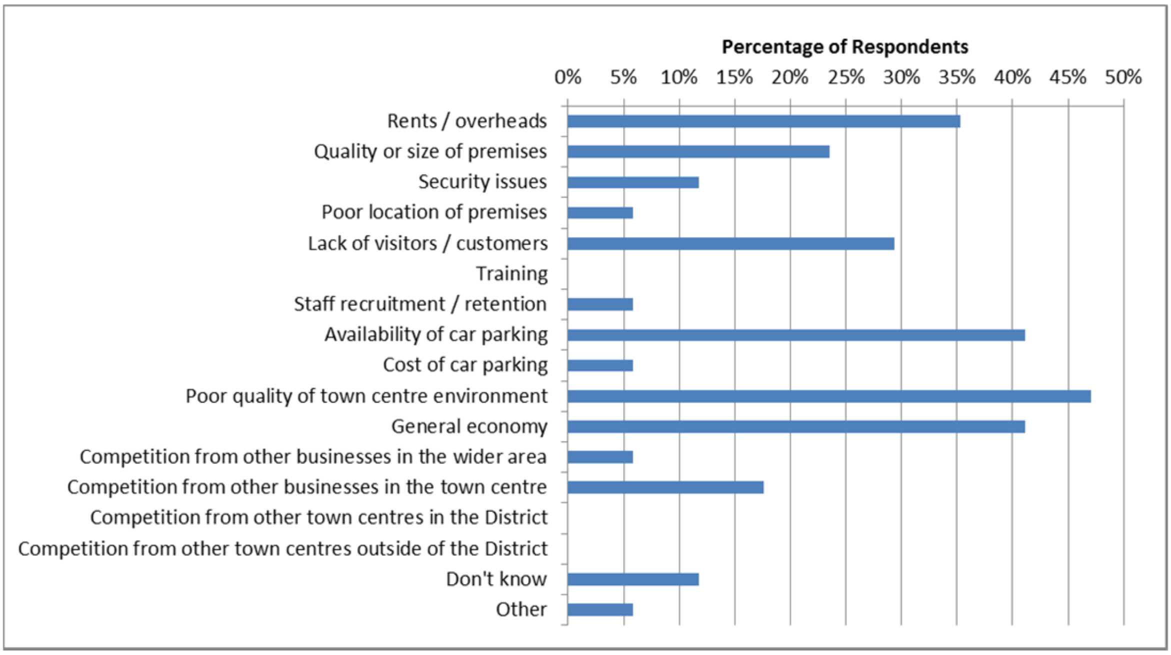
Table 10.3 – Local Business Perceptions of Sherburn in Elmet Town Centre

	Rating						Mean Score
	Very good	Good	Neither good nor poor	Poor	Very Poor	(Don't know)	
Rents / rates	2%	16%	29%	24%	20%	9%	2.9
Availability of parking	7%	15%	15%	40%	22%	2%	2.4
Cost of parking	2%	9%	18%	20%	49%	2%	4.0
Traffic congestion	2%	11%	44%	18%	24%	2%	2.5
Bus services	4%	13%	20%	25%	13%	25%	2.9
Pedestrian connections	4%	24%	36%	7%	5%	24%	2.8
Safety / security	0%	27%	35%	22%	9%	7%	2.8
Range of shops and services	0%	20%	27%	33%	20%	0%	3.6
Quality of shops and services	0%	27%	24%	35%	15%	0%	3.8
Entertainment and leisure facilities	0%	7%	25%	25%	36%	5%	1.4
Marketing / promotion	0%	0%	22%	33%	31%	15%	1.6
Liveliness / street life / character	0%	13%	9%	35%	35%	9%	1.8
The street market	2%	13%	31%	31%	22%	2%	1.9
Quality / number of places to eat / drink	9%	56%	20%	11%	2%	2%	2.3
Quality of public realm	2%	18%	38%	20%	9%	13%	2.2
General shopping environment	2%	20%	35%	35%	5%	4%	2.9

Main Town Centre Issues

10.40 As indicated in Figure 10.4, the poor quality of the town centre environment was identified by local businesses as the greatest concern. Further to this, a number of respondents identified the availability of parking and general economy as issues affecting business. Rents and overheads were a relatively large issue, as well as a general lack of visitors/customers to the area.

Figure 10.4 –Main issues identified by businesses within Sherburn in Elmet Town Centre



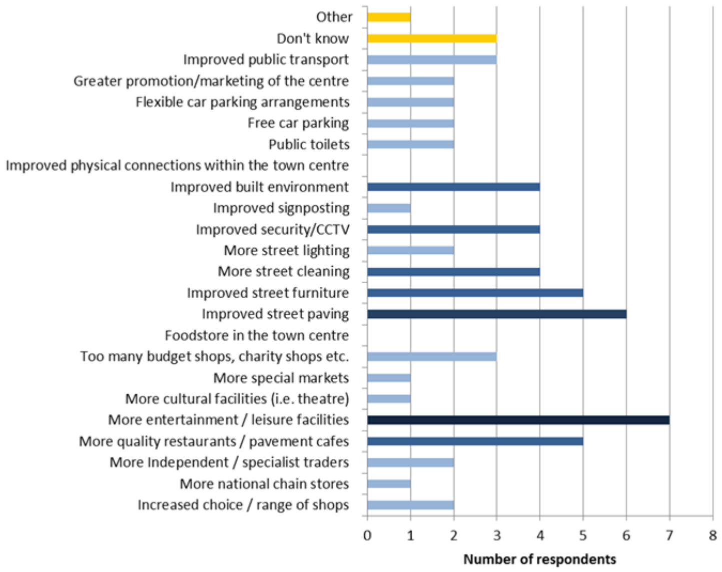
Range of Shops and Services

10.41 The vast majority of businesses were happy with the current shopping mix, with a total of nine businesses responding in this way. However, there were four businesses who stated that there were not enough shops in the town. Conversely, two respondents considered there to be too many large chain stores/not enough small independent shops. The new Aldi store is therefore viewed as both an opportunity and a threat.

Suggested Town Centre Improvements

10.42 The main suggested town centre improvements are shown in Figure 10.5 below. The most popular suggestions for the town centre improvements were for the provision of more entertainment / leisure facilities (7 respondents), improved street paving (6 respondents), improved street furniture (6 respondents) and more quality restaurants and cafes (6 respondents), as well as improvements to the built environment, security and level of street cleaning (each 5 respondents)

Figure 10.5 – Improvement measures suggested by local businesses within Sherburn



Summary

10.43 The survey results indicate low levels of business churn in the town centre, as a high proportion of respondents have traded in the centre for over 5 years and none of the respondents planned to relocate out of the centre in the next 5 year. The results further suggest that trading conditions in Sherburn in Elmet are good; only one respondent considered their business to have traded poorly over the last 12 months, and the majority of respondents expected their business to perform well over the next year. Overall, the survey findings suggest a very healthy trading environment, particularly in the context of current economic conditions.

10.44 However, local business perceptions of Sherburn in Elmet town centre are generally poor. Local businesses consider the poor quality of the town centre environment and availability of car parking to be the main issues facing Sherburn in Elmet. Other aspects of the town centre also highlighted as poor include a lack of leisure facilities, the marketing of the town centre, the street market, a lack of visitors/customers, the quality/number of places to eat and drink, and traffic congestion.

10.45 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.

10.46 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 cafe.

Sherburn in Elmet Retail Capacity Assessment and Strategy

Convenience

i) Main Food Market Shares

Immediate Catchment (Zone 2)

10.47 The main food expenditure pot (Table 4A, **Appendix 7**) within the Sherburn in Elmet catchment (zone 2) is projected to rise from c. £24.6m in 2014 to £29.5m in 2027, equating to a £4.9m increase over period 2014 to 2027.

10.48 In terms of specific store destinations, the changes in market share since the 2009 Study are detailed in Table 10.6 below[99]:

Table 10.6 – Sherburn in Elmet Main Food Market Shares (Zone 2)

Destination/Foodstore	2009 Study Zone 2 Sherburn in Elmet	2014 Study Zone 2 Sherburn in Elmet
Sherburn in Elmet		
Co-Op, Finkle Hill, Sherburn-in-Elmet Town Centre	4.2%	8.6% (£2.1m)
Tesco Express, Low Street, Sherburn-in-Elmet Town Centre	4.2%	4.0% (£1.0m)
Local Independent Shops, Sherburn-in-Elmet Town Centre	4.2%	0.0% (£0.0m)
Sherburn in Elmet Town Centre Total	**12.5%**	**12.6% (£3.1m)**

10.49 In comparative terms, the results highlight the following:

- The main food market share of Sherburn in Elmet town centre has remained static since 2009.

[99] Note '-' is used to indicate instances where the destination was not assessed as part of the 2009 study.

- There has been an increase in the main food market share of the Co-Op store in Sherburn in Elmet.
- The market share of local independents has significantly declined.

10.50 Overall, the town centre retains 12.6% (£3.1m) of the main food shopping expenditure arising within its immediate catchment (survey zone 2). This relatively low level of expenditure retention reflects the fact that the town centre is relatively small. Co-Op, which is the main convenience destination in the town centre for example, only has a net trading area of 681 m²; there is consequently a limited offer in terms of range of goods available.

Inflow

10.51 Given the limitations of the existing convenience offer, the town only draws a limited amount of inflow from the adjoining Tadcaster catchment (Zone 3).

Table 10.7 – Sherburn in Elmet Main Food Inflow

Destination/Foodstore	**2014 Study**
	Zone 3 Tadcaster
Sherburn in Elmet Town Centre	1.4% (£0.3m)

10.52 The inflow from the Tadcaster zone is most likely attributable to the proximity of residents in the rural south of the Tadcaster zone to Sherburn in Elmet.

10.53 There are no inflows from any other zones either within or outside the district.

Outflow

10.54 The main convenience shopping destinations for local residents in the Sherburn catchment are summarised below against the 2009 Study findings.

Table 10.8 – Sherburn in Elmet Main Food Outflow (Zone 2)

Destination/Foodstore	**2009 Study Zone 2 Sherburn**	**2014 Study Zone 2 Sherburn**
Selby District		
Selby Town Total	20.8%	14.2% (£3.5m)

Outside Selby District		
Morrisons, Marine Villa Road, Knottingley	23.6%	22.7% (£5.6m)
Aldi, South Baileygate Retail Park, Pontefract	1.4%	11.5% (£2.8m)
Sainsbury's, Colton Retail Park, Colton, Leeds	5.6%	11.0% (£2.7m)
Tesco, Aberforth Road, Garforth	4.2%	5.3% (£1.3m)
Outside Selby District Total	**66.7%**	**72.4% (£17.8m)**

10.55 As the table shows, aside from foodstore destinations in Selby, the main food leakage from the catchment is to Morrison's in Knottingley (22.7% / £5.6m),followed by Aldi at South Baileygate Retail Park in Pontefract (11.5% / £2.8m) and Sainsbury's at Colton Retail Park in Leeds (11.0% / £2.7m). This leakage is likely to reflect the proximity / access for local residents.

ii) Top-Up Food Market Shares

Immediate Catchment Area (Zone 2)

10.56 The top-up food expenditure pot (Table 4B, **Appendix 7**) within the Sherburn in Elmet catchment (zone 2) is projected to rise from c. £8.2m in 2014 to £9.8m in 2027, an increase of £1.6m over study period 2014 to 2027. The survey results (Table 5B, **Appendix 7**) reveal the following changes in the top-up food shopping market shares since the 2009 study:

Table 10.9 – Sherburn in Elmet Top-Up Food Market Shares (Zone 2)

Destination/Foodstore	2009 Study Zone 2 Sherburn in Elmet	2014 Study Zone 2 Sherburn in Elmet
Sherburn in Elmet		
Co-Op, Finkle Hill, Sherburn in Elmet Town Centre	15.0%	21.2% (£1.7m)
Tesco Express, Low Street, Sherburn in Elmet Town Centre	13.3%	6.4% (£0.5m)
Local Independent Shops, Sherburn in Elmet Town Centre	35.0%	16.4% (£1.3m)
Sherburn in Elmet Town Centre Total	**63.3%**	**44.0% (£3.6m)**

10.57 In comparative terms, the results highlight the following:

- The top-up food market share of Sherburn in Elmet has decreased substantially by c. 19% since 2009.
- The Co-Op store has increased its top-up market share by c. 6% since 2009 whilst the Tesco Express store has decreased by c. 7%.
- The top-up food market share of local independent shops in the town has declined substantially since 2009 (c. 19%).

10.58 Overall, the results indicate that the top-up food shopping role of Sherburn in Elmet has declined significantly since 2009. The substantial decrease in the top-up food market share of independent operators in particular raises significant concerns for the diversity and overall vitality and viability of the town centre, particularly given the centre's primary function as a local top-up food shopping destination.

10.59 The survey results do however identify that the two local centres of Monk Fryston / Hillam and South Millford within the wider Sherburn catchment retain c. 8.7% (£0.7m) of top-up expenditure. The overall top-up retention level is therefore c. 53% (£4.3m).

Inflow

10.60 Convenience provision within the town attracts a modest amount of top-up food expenditure from the neighbouring Tadcaster (zone 3) and Western Fringe (zone 8) catchments as follows:

Table 10.10 – Sherburn in Elmet Top-Up Food Inflow

Destination/Foodstore	**2014 Study**	
	Zone 3 Tadcaster	**Zone 8 Western Fringe**
Sherburn in Elmet Town Centre	12.4% (£0.8m)	2.9% (£0.2m)

10.61 The inflow from the Tadcaster catchment (zone 3) is attributable to residents in the rural south of the zone given that Sherburn provides the nearest convenience retail provision (easily accessible via A162).

Outflow

10.62 There are minor flows (4.2% / £0.4m) of top-up food expenditure arising to Selby. The Morrison's in Knottingley attracts 17.1% (£1.4m) whilst Sainsbury's at Colton Retail Park in Leeds and Aldi at

South Baileygate in Pontefract attract a further 5.2% (£0.4m) and 3.5% (£0.3m) of top-up expenditure respectively.

iii) Overall Food Market Shares (Main Food and Top-Up Food Combined)

10.63 Taking the main and top-up food market shares together, the survey findings (Table 6, **Appendix 7**) identify that the existing convenience provision within Sherburn retains a total of 20.5% (£6.7m) of convenience expenditure arising within its immediate catchment (zone 2).

10.64 The main individual store destinations are as follows:

Table 10.11 – Sherburn in Elmet Overall Food Market Shares (Zone 2)

Destination/Foodstore	2014 Study Zone 2 Sherburn in Elmet
Sherburn in Elmet	
Co-op, Finkle Hill, Sherburn in Elmet Town Centre	11.8% (£3.9m)
Tesco Express, Low Street, Sherburn in Elmet Town Centre	4.6% (£1.5m)
Local Independent Shops, Sherburn in Elmet Town Centre	4.1% (£1.3m)
Sherburn in Elmet Town Centre Total	**20.5% (£6.7m)**

10.65 A total of 14.4% (£4.7m) of convenience expenditure arising within the Sherburn in Elmet catchment (zone 2) is spent in foodstores located elsewhere in the district. The remaining 65.1% (£21.3m) is spent outside of the district.

Foodstore Performance

10.66 The table below (derived from Table 8, **Appendix 7**) indicates that the mainstream convenience destinations in the town are broadly trading at expected benchmarks.

Table 10.12 – Sherburn in Elmet Foodstore Performance

Destination/Foodstore	Benchmark	Survey Total	Difference
Sherburn in Elmet			
Co-op, Finkle Hill, Sherburn-in-Elmet Town Centre	£4.6m	£4.8m	£0.1m

Tesco Express, Low Street, Sherburn-in-Elmet Town Centre	£1.6m	£1.6m	£0.0m
Sherburn in Elmet Total	**£6.3m**	**£6.4m**	**£0.1m**

Convenience Retail Capacity Review

10.67 Tables 11A to 11C at Appendix 7 set out our convenience retail capacity assessment for Sherburn in Elmet, which is based on the expenditure of residents within its immediate catchment (Zone 2). As in our retail capacity reviews for Selby and Tadcaster, our assessment considers the residual expenditure capacity potentially available for new retail floorspace, which is then converted to a floorspace requirement.

10.68 We have tested three convenience retail capacity scenarios for Sherburn in Elmet as follows:

- **SCENARIO A** – the 'baseline' position, based on a constant market share and taking account of projected population and expenditure growth over the Local Plan period to 2027.
- **SCENARIO B** – as above but with allowance for the expenditure claims of existing planning commitments on capacity.
- **SCENARIO C** – as above but with an increase in market share from 20.5% in 2014 to 35% by 2017.

10.69 The convenience retail capacity arising under the three scenarios is summarised in terms of net sales area floorspace[100] in Table 10.13 below.

Table 10.13 – Sherburn in Elmet Convenience Retail Capacity

	Scenario	2017 m² (net)	2022 m² (net)	2027 m² (net)
A	Sherburn in Elmet (Zone 2, Baseline)	25	55	95
B	Sherburn in Elmet (Zone 2, Post Commitments)	-370	-340	-305
C	Sherburn in Elmet (Zone 2, Post Commitments, Increase in Market Share to 35%)	30	80	145

[100] Rounded to nearest 5 sq. m increment

10.70 Table 10.13 shows that there is insufficient capacity under all of the assessed scenarios to support significant new convenience provision within the town over the emerging plan period to 2027.

10.71 The lack of capacity is however not relevant in this instance given that the Council has recently granted planning permission for a new Aldi store in the town (LPA ref. 2014/0692/FUL). The approved store will have gross floorspace of 1,537 m^2 and a net sales area floorspace of 1,000 m^2, of which 800 m^2 will be dedicated to convenience goods. The store will significantly improve the convenience shopping offer in the town in both quantitative and qualitative terms.

10.72 As a sensitivity test, in Tables 16A to 16C at **Appendix 7** we further set out our convenience retail capacity assessment for Sherburn in Elmet using ONS based population projections sourced from Experian via Micromarketer online for all of the study zones, rather than population projections based on the Council's planned housing growth[101], as summarised in Table 10.14 below.

Table 10.14 – Sherburn in Elmet Convenience Retail Capacity Sensitivity Test

Scenario		2017 m^2 (net)	2022 m^2 (net)	2027 m^2 (net)
A	Selby (Zone 1, Baseline)	25	55	90
B	Selby (Zone 1, Post Commitments)	-370	-340	-305
C	Selby (Zone 1, Post Commitments, Allowance for Over-trading)	0	55	115

10.73 Tables 9.14 shows that the quantitative comparison retail capacity identified under the sensitivity test for each of the three scenarios tested remains broadly the same as identified in Table 9.13.

Forward Strategy

10.74 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

[101] A full explanation of the population projections used is provided in Section 6.

completed to assess future needs once the Aldi store has opened and regular trading patterns have been established.

10.75 Whilst there is significant potential for the new Aldi store to effectively anchor the town centre by increasing the propensity of local residents to visit (thereby increasing footfall and potential for linked trips), it is important that the Council proactively monitors the vitality and viability of the town centre. The opening of the Aldi store is likely to lead to some transition in terms of the retail offer within the town.

Comparison

Overall Comparison Goods Market Share

Immediate Catchment Area (Survey Zone 2)

10.76 The total comparison expenditure pot (Table 3, **Appendix 8**) within Sherburn in Elmet catchment (Zone 2) is projected to rise from c. £48.2m in 2014 to £54.6m in 2017, £65.1m in 2022 and £79.9m in 2027; this is equivalent to a £31.3m increase over the period 2014 to 2027.

10.77 Table 10.15 below summarises changes in market share patterns of the main comparison retail destinations for local residents since the 2009 Study.

10.78 Whilst Sherburn only retains 8.8% (c. £4.3m) of all comparison goods expenditure arising within its immediate catchment (survey zone 2), this represents a near doubling of market share since the 2009 Study.

10.79 In the context of the wider district, the survey results also indicate that the market share which Selby draws from the Sherburn catchment has nearly halved since 2009. This aligns with the significant outflow of expenditure to destinations, particularly in Leeds and York, outside of the district (84.2% / £40.9m); this reflects the higher order nature of provision in these regional centres.

Table 10.15 – Sherburn in Elmet Comparison Market Shares (Zone 2)

Destination/Foodstore	2009 Study Zone 2 Sherburn in Elmet	2014 Study Zone 2 Sherburn in Elmet
Sherburn in Elmet		
Sherburn in Elmet	4.5%	8.8% (£4.3m)
Selby		
Selby Town	13.6%	5.9% (£2.9m)
Outside Selby District		
Leeds City Centre	24.9%[102]	22.7% (£11.0m)
Other Leeds Destinations	0.8%	7.8% (£3.8m)
Pontefract Town Centre	12.2%[103]	12.7% (£6.2m)
York City Centre	21.4%[104]	9.3% (£4.5m)
Other York Destinations	1.1%	4.9% (£2.4m)
Junction 32 Outlet Shopping Village/B&Q, Glasshoughton, Castleford	0.6%	6.6% (£3.2m)
Castleford Town Centre	11.1%[105]	6.0% (£2.9m)

Inflow

10.80 Given the limitations of the existing comparison retail offer, the survey results reveal that the town attracts £0.9m from Zone 3 and negligible inflow from all other zones within and outside of the district (c. £0.0m in total).

Individual Comparison Goods Market Share

10.81 The limitations of the comparison retail offer is reflected in the relatively low retention rates for different types of comparison goods, as set out in Table 10.16 below.

10.82 As the table highlights, the town only retains a notable amount of trade in the health & beauty products category (everyday comparison goods item). Most local residents in the Sherburn in

[102] Figure relates to the 'Leeds' destination listed in the 2009 Study and may include Leeds destinations outside of the city centre.
[103] Figure relates to the 'Pontefract' destination listed in the 2009 Study and may include Pontefract destinations outside of the town centre.
[104] Figure relates to the 'York' destination listed in the 2009 Study and may include York destinations outside of the city centre.
[105] Figure relates to the 'Castleford' destination listed in the 2009 Study and may include Castleford destinations outside of the town centre.

Elmet catchment visit alternative destinations in Leeds, York, Pontefract and Castleford for their main comparison shopping needs.

Table 10.16 – Sherburn in Elmet Individual Comparison Categories Market Shares (Zone 2)

Comparison Goods Category	2014 Sherburn in Elmet
Clothing & Shoes	0.0% (£0.0m)
Furniture, Carpets & Household Textiles	6.5% (£0.4m)
DIY & Decorating Goods	2.6% (£0.0m)
Major Household Appliances	5.5% (£0.1m)
Electrical Goods	4.0% (£0.2m)
Books, CDs & DVDs	0.0% (£0.0m)
Health & Beauty Products	42.8% (£3.0m)
Household Goods	4.6% (£0.1m)
Personal Goods	8.6% (£0.2m)
Recreational Goods	2.0% (£0.1m)
Gardening & Pet Products	11.2% (£0.2m)

Clothing & Shoes Market Shares

10.83 The market shares secured by the town for clothing & shoes are summarised in the table below (Table 6A, **Appendix 8**).

10.84 The table highlights that Sherburn does not perform any clothing shopping function with the majority of local residents (95.8% / £13.6m) visiting destinations outside of the district such as Leeds and York.

Table 10.17 – Sherburn in Elmet Clothing & Shoes Market Shares (Zone 2)

Destination/Foodstore	**2009 Study[106] Zone 2 Sherburn in Elmet**	**2014 Study Zone 2 Sherburn in Elmet**
Sherburn in Elmet		
Sherburn in Elmet	0.0%	0.0% (£0.0m)
Outside Selby District		
Leeds City Centre	31.8%[107]	38.8% (£5.5m)
White Rose Shopping Centre, Leeds	0.7%	9.3% (£1.3m)
Other Leeds Destinations	0.7%	0.0% (0.0m)
York City Centre	28.5%[108]	16.3% (£2.3m)
Other York Destinations	-	7.5% (£1.1m)
Junction 32 Outlet Shopping Village/B&Q, Glasshoughton, Castleford	2.3%	8.1% (£1.2m)

Comparison Retail Capacity Review

10.85 Tables 10A to 10B in **Appendix 8** set out our comparison retail capacity assessment for Sherburn in Elmet, which is based on the expenditure of residents within its immediate catchment (Zone 2).

10.86 Two comparison retail capacity scenarios have been assessed, as follows:

- **SCENARIO A** – we test the 'baseline' capacity position assuming a constant market share but with future population and expenditure growth applied.
- **SCENARIO B** – as above but with allowance for existing planning commitments.

10.87 The comparison retail capacity arising under the two scenarios above is summarised in terms of net sales area floorspace[109] in Table 10.18 below.

[106] Market shares identified in the 2009 study assuming a 60% / 40% weighting for 1st choice / 2nd choice destinations, as assumed in 2009 Study.
[107] This figure relates to the 'Leeds' destination listed in the 2009 Study, and may include Leeds destinations outside of the city centre.
[108] This figure relates to the 'York' destination listed in the 2009 Study, and may include York destinations outside of the city centre.
[109] Rounded to nearest 5 sq. m increment

Table 10.18 – Sherburn in Elmet Comparison Retail Capacity

Scenario		2017 m² (net)	2022 m² (net)	2027 m² (net)
A	Sherburn in Elmet (Zone 2, Baseline)	15	70	190
B	Sherburn in Elmet (Zone 2, Post Commitments)	-295	-235	-120

10.88 Given the current limitations of the comparison retail offer within Sherburn, notwithstanding projected population and expenditure growth in the immediate catchment (Zone 2) over the Local Plan period to 2027, the capacity assessment identifies an extremely negligible floorspace requirement on a constant market share basis.

10.89 As a sensitivity test, in Tables 15A and 15B at **Appendix 8** we further set out our comparison retail capacity assessment for Sherburn in Elmet using ONS based population projections for all of the study zones, rather than population projections based on the Council's planned housing growth[110].

Table 10.19 – Sherburn in Elmet Comparison Retail Capacity Sensitivity Test

Scenario		2017 m² (net)	2022 m² (net)	2027 m² (net)
A	Sherburn in Elmet (Zone 2, Baseline)	0	50	150
B	Sherburn in Elmet (Zone 2, Post Commitments)	-310	-260	-160

10.90 Tables 10.19 shows that the quantitative comparison retail capacity identified under the sensitivity test for both of the scenarios tested remains broadly the same as identified in Table 10.18.

[110] A full explanation of the population projections used is provided in Section 6.

Forward Strategy

10.91 Consistent with Tadcaster, the baseline capacity identified is clearly insufficient to support any new substantive development that would generate a step-change in the town's market share and performance.

10.92 Whilst ordinarily there would be potential to enhance market share in quantitative terms, it is considered that there is limited realistic potential for Sherburn to significantly improve its performance and attractiveness as a comparison retail destination given its size, the catchment it serves and its proximity / access to Leeds and York (regional retail destinations). Given the wider national trends whereby retailers are consolidating their provision in larger centres serving wider catchments, there is unlikely to be any substantive commercial demand for representation in Sherburn.

10.93 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.

11. Leisure Assessment

11.1 This section reviews the existing leisure facilities, focusing in particular on the cinema, gym/health and fitness and evening economy provision (restaurants and bars). In order to inform the assessment, we have drawn upon the results of the household telephone survey exercise, which sought to establish where residents regularly visit for leisure activities.

11.2 Having established the principal leisure destinations for local residents, the surveys also asked what improvements to the quality and range of leisure facilities would persuade households to visit Selby, Tadcaster and Sherburn town centres more often. The main suggested improvements to leisure facilities inform a wider qualitative-based assessment of leisure provision.

Selby

Leisure Expenditure / Visitation Patterns

11.3 The amount of available leisure expenditure (as per specific leisure activity) within the Selby Catchment (Zone 1) is summarised below (sourced from Experian via Micromarketer Online):

Table 11.1 – Selby Leisure Expenditure (Zone 1)

Leisure Category	Average Expenditure per Person Zone 1 Selby	Total Expenditure Zone 1 Selby	Average Expenditure per Person UK
Restaurants/Cafes	£526 per annum	£27.3m	£522 per annum
Alcoholic Drinks	£306 per annum	£15.9m	£261 per annum
Cinema	£14 per annum	£0.7m	£18 per annum
Theatre / Concerts	£27 per annum	£1.4m	£33 per annum
Recreation and Sporting	£94 per annum	£4.9m	£98 per annum

11.4 With respect to current visitation patterns, the household survey results identifies that Selby retains a significant proportion of residents within its immediate catchment for leisure activities, as follows:

- **Cinema**: 50.8% of respondents within the immediate Selby catchment (zone 1) regularly visit the cinema. The majority (62.5%) most regularly visit the Cineworld at Xscape in Castleford, followed by the Vue cinema at Clifton Moor in York (24.3%). A limited number of local residents most regularly visit a variety of other cinemas including the City Screen Picturehouse (5.2%) in York. The Selby Globe at Selby Town Hall attracts only 0.7%.

- **Indoor Sports / Health & Fitness**: the results of the survey need to be tempered by the fact that the public leisure centre (Selby Leisure Centre) is currently being rebuilt following a fire in 2012. It is likely when the centre re-opens in 2015 that existing visitation patterns will substantially change. However, at present, the survey identifies that a total of 23.7% of local residents regularly use the gym with just over half (50.9%) most regularly using the DW Sports Fitness at Three Lakes Retail Park, followed by 24.2% using Profiles Health and Leisure Centre at Portholme Crescent and 11.4% to Selby Gym at Selby Business Park.

- **Restaurants**: nearly three quarters (71.4%) of local residents regularly visit restaurants. For these respondents, the most popular destination for eating out is York city centre (36.4%), followed by Selby town centre (30.9%). Riccall (8.9%), Xscape in Castleford (5.7%) and Sherburn in Elmet (4.9%).

- **Socialising**: a total of 60.0% of local residents regularly visit pubs and clubs. Selby town centre (43.4%) is the most popular single destination followed by York city centre (15.5%) and Riccall (12.7%).

- **Cultural**: 35.6% of local residents regularly visit arts and cultural facilities. Some three quarters of these residents most regularly visit facilities in York city centre. A further 8.9% regularly visit Leeds city centre and 4.4% visit Sheffield city centre. A limited number of local residents most regularly visit Selby Town Hall theatre (1.3%).

Forward Strategy

11.5 Whilst the new (rebuilt) Selby Leisure Centre, which is to open in 2015, will significantly enhance health and fitness provision within the town centre, thereby potentially increasing dwell time and activity, the wider town centre leisure offer is limited and commensurate with that of a traditional market town. The family orientated commercial leisure offer is extremely limited.

11.6 As part of the household survey exercise, local residents were asked about what improvements they would like to see to the leisure and entertainment offer in Selby town centre; the main suggestion was for a new / improved cinema (29.0%).

11.7 Given that the town is the primary retail and service centre in the district, there is a potential opportunity to enhance the town’s commercial leisure offer. A new dedicated cinema, accompanied by national restaurant chains would provide a genuine family orientated focus for the evening and weekend leisure offer in the town. However, as with retailing, mainstream cinema operators are continuing to focus on larger sub-regional centres which serve large catchments. Therefore, the proximity of Selby to York is likely to significantly constrain operator demand to locate within the town.

11.8 Therefore, the Council should actively seek to establish if there is prospective commercial interest in the town and if so the appropriate scale and format of provision so as to subsequently inform any site allocation exercise if necessary.

11.9 In the meantime, the Tesco (former Council offices) site on Portholme Road provides a short-term (deliverable) site development opportunity. As set out in the convenience analysis, any new scheme which comes forward on the site is likely to be led by operator demand. There is potential for food and drink uses (pub / restaurant / drive-through restaurants) to be included within a wider mixed-use scheme and the Council should allow sufficient flexibility for a market responsive scheme to come forward.

Tadcaster

Leisure Expenditure / Visitation Patterns

11.10 The amount of available leisure expenditure (as per specific leisure activity) within the Tadcaster catchment (zone 3) is summarised below:

Table 11.2 – Tadcaster Leisure Expenditure (Zone 3)

Leisure Category	Average Expenditure per Person Zone 3 Tadcaster	Total Expenditure Zone 3 Tadcaster	Average Expenditure per Person UK
Restaurants/Cafes	£597 per annum	£7.8m	£522 per annum
Alcoholic Drinks	£331 per annum	£4.3m	£261 per annum
Cinema	£16 per annum	£0.2m	£18 per annum
Theatre / Concerts	£30 per annum	£0.4m	£33 per annum
Recreation and Sporting	£106 per annum	£1.4m	£98 per annum

11.11 Tadcaster retains a relatively limited proportion of residents within its immediate catchment for many categories of leisure spending as follows:

- **Cinema**: just under a half (46%) of local residents within the catchment regularly visit the cinema. The most popular destinations are the Vue Cinema at Clifton Moor in York (41%) and the Cineworld at Xscape in Castleford (34%). A further 9% most regularly visit the City Screen Picturehouse in York.

- **Indoor Sports / Health & Fitness**: around a quarter of local residents regularly use the gym / health and fitness facilities. Of these, 38% most regularly use the facilities at Tadcaster Swimming Pool with a further 22% visiting Edge Gym in Leeds and 13% Tadcaster Leisure Centre.

- **Restaurants**: some three quarters of local residents regularly visit restaurants. The most popular destination for eating out is York city centre (48%) followed by Tadcaster town centre (20%) and Wetherby town centre (13%).

- **Socialising**: a total of 65% of local residents regularly visit pubs and clubs. York city centre (41%) and Tadcaster town centre (37%) are most popular destinations.

- **Cultural**: Nearly a third of local residents regularly visit arts and cultural facilities. Two thirds (66%) of these residents most regularly visit facilities in York city centre and a quarter (25%) said they most regularly visit Leeds city centre.

Forward Strategy

11.12 Tadcaster is a traditional market town located in close proximity to York. Consistent with the strategy recommendations for retailing, the commercial reality is that there is limited potential to deliver new commercial leisure uses to significantly improve the attractiveness or prominence of the town as a leisure destination.

11.13 The town does however have a significant brewing tradition and allied to its historic assets (Castle and River Wharfe setting) this should be maximised in marketing Tadcaster to visitors.

Sherburn in Elmet

Leisure Expenditure / Visitation Patterns

11.14 The amount of available leisure expenditure (as per specific leisure activity) within the Sherburn in Elmet catchment (zone 2) is summarised below:

Table 11.3 – Sherburn in Elmet Leisure Expenditure (Zone 2)

Leisure Category	Average Expenditure per Person Zone 2 Sherburn in Elmet	Total Expenditure Zone 2 Sherburn in Elmet	Average Expenditure per Person UK
Restaurants/Cafes	£514 per annum	£8.5m	£522 per annum
Alcoholic Drinks	£295 per annum	£4.9m	£261 per annum
Cinema	£15 per annum	£0.2m	£18 per annum
Theatre / Concerts	£26 per annum	£0.4m	£33 per annum
Recreation and Sporting	£93 per annum	£1.5m	£98 per annum

11.15 Sherburn in Elmet retains a relatively limited proportion of residents within its immediate catchment for many categories of leisure spending as follows:

- **Cinema**: a third of local residents regularly visit the cinema. The majority (84%) most regularly visit the Cineworld cinema at Xscape in Castleford most frequently. A further 7% visit the Vue cinema at Clifton Moor in York and 7% visit the Vue cinema at the Headrow in Leeds.

- **Indoor Sports / Health & Fitness**: a total of 16 of local residents regularly use the gym / health and fitness facilities. The most popular facilities are Fitness Motion in Sherburn (26%) and Fitness First in Clifton Moor, York (20.2%).

- **Restaurants**: around half of local residents regularly visit restaurants. The most popular destination for eating out is Leeds city centre (38%), followed by Sherburn (22%) and Castleford / Xscape (18%). A further 6% most regularly visit restaurants in York city centre.

- **Socialising**: around half (47%) of local residents regularly visit pubs and clubs. Sherburn (40%) is the most popular destination followed by Selby town centre (11%), South Milford (11%) and Leeds city centre (7%).

- **Cultural**: around a third of local residents regularly visit arts and cultural facilities. Almost half of these residents most regularly visit facilities in York city centre (48%) and a further 43% said they most regularly visit facilities in Leeds city centre.

Forward Strategy

11.16 As with Tadcaster, given the size of the town and its constrained catchment, allied to significant competition from regional destinations (York, Leeds and Xscape), the commercial reality is that Sherburn will continue to perform a limited role as a leisure destination.

11.17 However, it is noted that the findings of the household telephone survey identified that the most popular suggestions for improving leisure provision in Sherburn in Elmet were for an enhanced health and fitness centre, improved youth facilities and for a new / improved swimming pool. The provision of more entertainment / leisure facilities in Sherburn in Elmet were also identified as the most popular suggested town centre improvement in the retailer business survey. We therefore recommend that the Council consider the potential to provide enhanced public leisure facilities in Sherburn in Elmet.

12. Hotel Assessment

12.1 There are a range of factors and key criteria that will drive interest and delivery of hotel investment in Selby. Development will depend on whether or not developer / operator criteria can be met, but more importantly the overall strength and growth prospects of the local hotel market (e.g. the commercial proposition).

12.2 Prior to discussing the hotel opportunities which may exist in Selby, it is important to understand the key investment criteria of the major hotel operators. The general operator requirements are summarised below.

Market Overview

Boutique / Niche Hotels

12.3 Operators in this sector of the market are usually small boutique chains that are independently operated. Over recent years there has been a developing trend towards niche markets, in particular the recent emergence of ‘boutique’, ‘designer’, ‘townhouse’ or even ‘life-style’ hotels. These hotels are small and personal (typically no more than 50 bedrooms) and focus on design, service and excellent food and beverage but do not generally provide other facilities such as meeting rooms or health and fitness. Most boutique hotel operators require sites in historic, University towns and ‘up and coming’ locations within newly fashionable cities.

Budget & Limited Service Hotels

12.4 These hotels are ideal for attracting a good mix of family leisure, local business and overnight meetings. They do not necessarily require prime city centre locations but generally want prominent sites close to key transport hubs offering easy access and a strong visibility profile. Limited service brands tend to have similar facilities associated with the three-star full service hotels (i.e. food and beverage, meeting space, air-conditioning, satellite TV) and yet offer a modern, branded, consistent product at very competitive pricing.

12.5 This sector has consequently become exceptionally popular with both leisure and corporate users. In addition, their national coverage and central reservation systems enable high recognition and ease of booking thus making them extremely powerful brands. Their size and scale and slimmed down service enables them to achieve economies of scale and cost efficiency.

Three & Four-Star Hotels

12.6 These hotels usually provide high quality bedroom facilities, large conference suites, quality bars and catering and some form of leisure or health spa facilities. They tend to target the national and international business and conference trade and the short breaks leisure market. Such hotels need a strong base of corporate demand (including conferencing) as well as established leisure/tourism drivers to provide the balance of demand. The leading operators usually target key gateway locations, large metropolitan cities, international airports or large coastal resorts with an established conference industry. Strategic motorway locations are also considered and can be appealing to operators with a strong conference brand. A number have also been developed from former country houses and operate in the golf resort market.

Typical Site Requirements

12.7 Most of the major hotel operators have criteria that they normally require in terms of identifying sites for new hotel development. For most of the leading groups, the site must have:

- A minimum residential population of 50,000-100,000 (but generally 250,000 to 500,000 for major four and five-star metropolitan chains). This is less important for hotels located at strategic motorway / road locations;
- Good access from main routes/public transport and high visibility;
- Convenience to business demand generators;
- Respectable adjacent land uses and a reasonably attractive environment;
- Town centre budget hotels typically require a site area of up to 0.9 acres for a central site (with car parking), assuming three storeys and 1.5-2.5 acres for out-of-town sites;
- A three-star hotel typically requires 1-3 acres and a four-star needs at least one acre in town and up to 6 acres out of town. Requirements do, however, vary significantly;
- Operators are increasingly attracted to mixed-use developments – both city centre and out-of-town sites;
- The cost (value) of the land must match the economics of the development; and
- The increase in development costs is driving a number of changes in the sector – including the move towards larger hotels and the tailoring of the hotel product to the site.

Selby Assessment

Existing Provision

12.8 In order to inform a qualitative-based assessment, the AM:PM Hotel Database[111] was utilised, complemented by on-site GVA research, to identify provision across the district; the existing accommodation is summarised in Table 12.1 below.

Table 12.1 – Existing Hotel Provision in Selby District

Location	Hotel Name	Brand	Grade	Bedrooms
Selby	Loftsome Bridge Coaching House	Independent	3-star	17
Selby	Londesborough	Independent	3-star	27
Selby	The Wishing Well - New Country Inn	Independent	3-star	40
Selby	Owl	Marson's Inns	3-star	22
Tadcaster	Travelodge York Tadcaster	Travelodge	Budget	62
Tadcaster	Hazlewood Castle Hotel	Independent	4-star	32
Junction A1(M)/A63	Quality Hotel (Leeds Selby Fork)	Independent	3-star	93
Junction A1(M)/A63	Best Western Plus Milford Hotel	Best Western	3-star	44

12.9 As the table highlights, there is reasonable representation of branded and independently-operated hotels within Selby and Tadcaster at present. However, it is notable at the outset, with the exception of The Owl, there is a lack of branded, chain operator presence in Selby. More generally it would seem that there is presently a lack of good quality upper three star/ four star branded hotels serving the district.

12.10 In terms of current performance and occupation rates of existing hotels in the district, the main feedback is that Selby commands strong levels of demand both from leisure guests and corporate visitors alike. More specifically, the Loftsome House Hotel commented that, "*We do very well out of local businesses mid-week…we rely almost entirely on word of mouth and don't really need to advertise.*" Similarly, the Travelodge York Tadcaster Hotel has said that year round occupancy is on average 80% and that the majority of trade comes from events

[111] The AM:PM Hotel Database is an online hotel database of past, present and future of hotel supply in the UK & Ireland provided by AM:PM Hotel Ltd, a hotel data and analysis provider.

such as York races and weddings at Hazlewood Castle. This compares favourably with average Travelodge occupancy levels of 65-70% across the portfolio.

Demand

12.11 In order to assess current demand from hotel operators for presence within Selby district and more specifically the town itself, an initial high-level soft market testing exercise has been undertaken with a number of hotel operators to ascertain their current locational requirements.

12.12 Whilst operators acknowledged the attractive nature of Selby as a market town and the significant employment locations in and around the district (logistics, energy in particular), the initial feedback is that:

- Current demand for representation is limited given its proximity to York and its distance from the strategic A1(M) corridor; and
- If any realistic opportunity was to come forward in the short term, the offer is likely to be orientated towards a budget style hotel targeting corporate users.

12.13 In terms of specific operator feedback, whilst Premier Inn had a published requirement for representation in Selby on the FOCUS database (November 2014), the operator advised that this was a historic requirement and the operator is not currently looking for representation in the town (albeit the operator has Wetherby on its target list due to access to the A1(M)). Travelodge did however provide more positive feedback, indicating that it may consider a small format (sub 50 room) in the medium term.

12.14 Ultimately, it is considered that it would be difficult for the Council to proactively allocate a site in the Local Plan for a hotel use given the significant variance in locational and operational requirements (e.g. in-centre and out-of-town employment park models). Any new hotel provision is ultimately likely to be operator-driven.

12.15 However, as detailed in the retail strategy recommendations for Selby, the Tesco (former Council offices) site on Portholme Road could provide a short term opportunity for a new hotel to be delivered as part of a mixed-use scheme. The site is centrally located and in close proximity to the rail station. A flexible mixed-use allocation for the site will therefore be important to enable a commercially-deliverable scheme to be achieved.

13. Strategic Recommendations

13.1 The study has been commissioned to assess the future need for new retail and leisure provision within the main towns in the district. The study has been informed by robust primary research including a household telephone survey, in-centre shopper survey, retailer business survey and floorspace survey of existing centres.

13.2 The study provides a comprehensive evidence base for the Council and its regeneration partners to proactively plan for future growth. The main recommendations are set out below.

Need for Site Allocations

13.3 The retail needs of each specific town have been identified in the preceding sections (13 to 15). However, the main requirements are summarised below and in Table 13.1.

Table 13.1 – Summary of Identified Need for Site Allocations in Selby District

Location	Convenience	Comparison	Leisure
Selby	None	Need to plan for up to 4,700 m^2 gross new floorspace in the period up to 2027	Need for further investigations to identify market potential to deliver new provision
Tadcaster	Need to plan to accommodate a new foodstore	None	None
Sherburn in Elmet	None	None	None

Selby

Convenience

13.4 There is no quantitative or qualitative need for the Council to proactively plan for new convenience provision in the town given the existing offer (full competition and choice) and outstanding planning commitments.

13.5 However, given that the approved redevelopment of the Tesco store at Portholme Road is unlikely to proceed given current marketing activity and the Council should adopt a flexible approach whereby a discount foodstore or higher order convenience provision could be supported on the former Civic Centre and depot site at Portholme Road site if proposed as part of a mixed-use scheme.

Comparison

13.6 There is a quantitative and qualitative need for new provision in Selby over the Local Plan period. The Council should proactively plan to meet the need for up to 1,000 m^2 net / 1,400 m^2 gross in the period up to 2022, rising to 3,300 m^2 net / 4,700 m^2 gross in the period up to 2007. Given the NPPF requirement to ensure an appropriate supply of suitable sites, it is important that the Council undertakes an immediate assessment of potential sites.

13.7 Without prejudice to this necessary site search exercise, if no other deliverable sites are available within sequentially preferable locations in the town centre, then the former Civic Centre and depot site at Portholme Road represents a deliverable opportunity (site is immediately available; no requirement for land assembly; and substantive quantum of development already approved).

13.8 Whilst ideally Selby requires better clothing and fashion provision, given the proximity of the town to larger regional retail destination (York city centre and out-of-centre retail parks such as Monks Cross / Vangarde), it needs to be recognised that any scheme would be operator driven and the Council should therefore adopt a flexible mixed-use approach.

Leisure

13.9 The opening of the new Selby Leisure Centre in the town centre in early 2015 should make a significant positive contribution to overall vitality and viability by providing an important leisure anchor (increased dwell time, footfall etc.).

13.10 With respect to commercial leisure, the town has a limited family orientated offer; this is reflected in the survey responses whereby a new cinema was identified by local residents as a main improvement. Whilst the Council should investigate the potential for delivering new provision (along with associated family-orientated restaurants), the proximity to York may constrain operator demand.

13.11 Once again, the former Civic Centre and depot site at Portholme Road may provide a short term opportunity to deliver new leisure provision in the town as part of a mixed-use scheme.

Tadcaster

Convenience

13.12 Whilst the centrally located Sainsbury's store in the town retains nearly half of main food expenditure arising within the defined Tadcaster catchment, it is considered that there is a quantitative and qualitative need for the Council to proactively plan for new provision in order to achieve market share enhancement and increase competition and choice for local residents (Sainsbury's dominant and identified to be overtrading).

13.13 We recommend that the Council actively look for sites to accommodate a new foodstore through PLAN Selby.

Comparison

13.14 Tadcaster town centre performs a limited day-to-day top role for comparison shopping. Whilst ordinarily there would be potential to enhance market share in quantitative terms, it is considered that there is limited realistic potential for Tadcaster to significantly improve its performance and attractiveness as a comparison retail destination given its size and proximity / access to York (regional retail destination).

13.15 The study does not specifically recommend that the Council proactively plan for new provision. However, if a proposal came forward outside of the plan-making process then there is sufficient quantitative and qualitative support subject to ensuring that any scheme complies with the relevant retail planning policy tests (namely, the sequential and impact test set out in the NPPF).

Leisure

13.16 The existing public health and fitness facilities adequately meet local residents' needs. With respect to commercial leisure provision, it is considered in reality that there is limited potential to deliver new uses given the town's size and proximity to York. The brewing tradition of the town and its historic assets should be promoted to attract more visitors.

Sherburn in Elmet

Convenience

13.17 The quantitative and qualitative needs of local residents have largely been addressed by the recent grant of planning permission for a new Aldi store in the town. It is therefore considered that there is no overriding requirement for the Council to plan for new provision; a future update to this study will identify needs for the latter phase of the emerging Local Plan.

Comparison

13.18 Consistent with the conclusions in respect of Tadcaster, whilst ordinarily there would be potential to enhance market share in quantitative terms, it is considered that there is limited realistic potential to significantly improve the towns performance and attractiveness as a comparison retail destination given its size and proximity / access to York (regional retail destination).

13.19 However, if a proposal came forward outside of the plan-making process then there is sufficient quantitative and qualitative support subject to ensuring that any scheme complies with the relevant retail planning policy tests.

Leisure

13.20 The overall recommendations are the same as Tadcaster in that there is limited commercial potential for Sherburn to attract the necessary quantum and quality of mainstream leisure provision necessary to deliver a step-change in its performance. The Council should be aware that the survey results indicate a desire of local residents within Sherburn to have better access to enhanced gym / health and fitness facilities.

Town Centre Initiatives

13.21 In completing the study exercise, a number of overarching themes have arisen from the individual survey exercises (primarily the in-centre shopper and business survey) in terms of suggested improvements to the respective town centres which would enhance their attractiveness as retail destinations. Allied to this, the Government has recently sponsored new research to analyse retail property issues and town centre performance.

13.22 There are several initiatives which are not specific to any one particular market town; the main headline initiatives are summarised below:

- **Public Realm:** high quality public realm is essential in creating an attractive town centre and thus increasing dwell time. Given the historic nature of the market towns, it is important that the public realm reflects and enhances the character of the towns and therefore promotes their Unique Selling Point (USP). General initiatives to improve public realm include improving way-finding / signage, sufficient provision of street furniture and provision of ample street lighting and planting.

- **Digitising the High Street**: the recently published Beyond Retail[112] taskforce paper identifies the need to 'digitise' the high street and town centre offer in order to complement rather than compete with multi-channel (primarily internet) retailing. Potential initiatives could include online platforms for independent retailers, town centre websites and free 'Wi-Fi' and interactive town centre maps. There is an opportunity given the historic nature of the market towns (weekly markets, independent niche retail offer etc.) to better promote such initiatives.

- **Marketing & Promotion:** the business survey results identify that the market towns need to be subject to greater promotion and marketing. This corresponds with a key recommendation from the Beyond Retail taskforce paper whereby appropriate investments should be made in promoting the key USP of towns. Given the competition from sub-regional destinations (York), there is a significant opportunity to qualitatively distinguish the towns from higher order provision (e.g. historic environment, weekly markets, niche retail and leisure offer). It is however important that a holistic approach is adopted which emphasises the overall attractiveness of the offer rather than solely focusing on retail.

13.23 The following town centre initiative is suggested specifically for Selby:

- **Car Parking Regime:** the availability and cost of parking can be a critical determinant in where visitors decide to ultimately shop and the length of time that they spend in a particular centre. A more flexible car parking regime was identified in the business survey results for Selby as one of the main suggested improvements. The Council could review its car parking regime.

13.24 Drawing these overarching initiatives together, the Council should engage with local residents, commercial businesses and stakeholders in the respective towns to begin developing a cogent centre-specific strategy.

[112] Beyond Retail – Redefining the shape and purposes of town centres (November 2013)

Development Management Policies

13.25 On the basis of the identified 'centre specific' needs, allied to the publication of National Planning Policy Framework (NPPF) in March 2012, the suite of adopted planning policies within the Local Development Framework (LDF) has been reviewed; recommended changes are summarised below.

Boundaries / Frontage Policies

Town Centre Boundaries

13.26 **UPDATE**: the current adopted town centre boundaries in the Local Plan should be updated. On the basis of extensive on-site surveys, the recommended boundaries for the respective towns are set out at **Appendix 9** and correspond with the NPPF (Annex 2) definition of town centres which comprises the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area.

13.27 Taking the defined Shopping and Commercial Centre (SCC) boundaries Selby, Tadcaster and Sherburn in Elmet as a starting point for the town centre boundaries, we recommend that the existing boundaries should be tightened to exclude areas of established residential uses and those areas which are located some distance from the Primary Shopping Area and do not function as part of the town centres. In parts of Tadcaster and Sherburn in Elmet, we have further recommended the inclusion of small areas adjacent to but outside of the existing SCC boundary, that are predominantly occupied by main town centre uses and are well related to the existing SCC area.

Primary Shopping Area Boundaries

13.28 **UPDATE**: on the basis of the survey fieldwork, it is considered that Tadcaster and Sherburn in Elmet are too small in physical terms to robustly define a primary shopping area boundary. The study therefore only recommends the designation of a Primary Shopping Area for Selby and shown in the plan at **Appendix 9.**

13.29 The Primary Shopping Area refers to the area where retail development is concentrated. This will comprise the Primary Shopping Frontage and those areas that provide greater opportunities for a diversity of uses which are contiguous and closely related to the Primary Shopping Frontage.

Frontage Policies

13.30 **UPDATE:** given the continuing national policy direction towards supporting the re-use of existing retail units within town centre locations to non-retailing activities[113] (i.e. residential or wider commercial uses), it is recommended that the Council undertake a review of the adequacy and relevance of the existing defined Primary Shopping Frontage designations within Selby town centre. The Primary Shopping Frontage will include a high proportion of retail uses. The study recommends the designation of Primary Shopping Frontage for Selby as set out in the plan at **Appendix 9.** We consider that Selby is too small in physical terms to necessitate the definition of secondary shopping frontages

13.31 In the case of smaller centres, such as Tadcaster and Sherburn in Elmet, the town centre may not extend beyond the primary shopping area or indeed frontages. As such, we consider that Tadcaster and Sherburn in Elmet are too small to necessitate the definition of primary or secondary shopping frontages.

Implications for the Sequential Approach to Planning

13.32 The NPPF sets out two key tests that should be applied when planning for town centre uses which are not in an existing town centre (and which are not in accord with an up to date Local Plan) – the sequential test and the impact test.

13.33 The sequential test guides main town centre uses towards in-centre locations first, then, if no in-centre locations are available, to edge-of-centre locations, and, if neither in-centre locations nor edge-of-centre locations are available, to out-of-centre locations, with preference for accessible sites which are well connected to the town centre. It supports the viability and vitality of town centres by placing existing town centres foremost in both plan-making and decision-taking.

13.34 In plan-making, the sequential approach requires a thorough assessment of the suitability, viability and availability of locations for main town centre uses. It requires clearly explained reasoning if more central opportunities to locate main town centre uses are rejected.

13.35 The impact test determines whether there would be likely significant adverse impacts of locating main town centre development outside of existing town centres (and therefore whether the proposal should be refused in line with policy). It applies only above a floorspace threshold as set out in paragraph 26 of the NPPF.

[113] Greater flexibilities for change of use (August 2013)

13.36 The sequential location of a site, specifically, whether the site is in-, edge- or out-of-centre, provides the foundation of the sequential approach both in plan-making and decision-taking; it is of fundamental importance in determining the requirement for, and completing, the sequential and impact tests set out in the NPPF.

13.37 For retail purposes, the NPPG[114] defines locations within the primary shopping area (PSA) as in-centre. Edge-of-centre is defined as a location that is well connected and up to 300 metres of the PSA. For all other main town centre uses, locations within the town centre boundary are in-centre and edge-of-centre is defined as a location within 300 metres of the town centre boundary. In determining whether a site falls within the definition of edge of centre, account should be taken of local circumstances. All other locations are out of centre.

13.38 Our recommendations for the definition of a PSA and changes to the town centre boundary in Selby[115] as set out above and in the plan at Appendix 9, will therefore have implications in relation to the sequential approach, and the application of the sequential and impact test set out in the NPPF.

13.39 The PSA of Selby is not currently defined in the Local Plan[116]. Where the extent of the PSA is not defined, applicants and Council officers are likely to look to other defined boundaries, such as the primary shopping frontage and town centre boundaries, as well as any recommendations for boundary changes to identify the sequential location of a site. However, there remains considerable ambiguity over the sequential location of sites in Selby in retail terms.

13.40 If adopted, our recommended primary shopping area boundary will define the area of the town considered to be in-centre for retail purposes. Our recommended PSA encompasses a significantly wider area than the existing primary shopping frontages[117], but is smaller than the existing Shopping and Commercial Centre boundary. Potentially, parts of the existing Shopping and Commercial Centre area previously considered to be edge-of-centre in sequential terms may become in-centre, and vice-versa.

13.41 Roughly speaking, a 300m area from our recommended PSA boundary in Selby provides an indication of the broad ‘edge-of-centre area’ of Selby. This ‘edge-of-centre area’ extends to: the River Ouse and railway through Selby to the east; south of Portholme Road to include the

[114] NPPG, Annex 2: Glossary, 15 January 2015
[115] The town centre boundary of Selby is not currently defined in the Local Plan. However, the Council has confirmed that in practice, the defined Shopping and Commercial Centre Boundary of Selby is taken to be the town centre boundary of the town,
[116] The SDLP proposals map defines only a Shopping & Commercial Centre Boundary and Primary Shopping Frontages for Selby
[117] The NPPG (Annex 2: Glossary, 15 January 2015) defines the PSA as the area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).

Police Station, former Civic Centre and Tesco store: along Gowthorpe to Armoury Road to the west; and north on Scott Road to Scott Road Medical Centre. We emphasise, however, that whether a site is edge- or out-of-centre in sequential terms is dependent on the specific location of a site and its relationship with the PSA and is not strictly defined by distance from the PSA. Potentially, areas outside of the existing Shopping and Commercial Centre Boundary of Selby previously considered to be out-of-centre in sequential terms may become edge-of-centre, and vice-versa.

Impact Threshold

13.42 NPPF (paragraph 26) confirms that local planning authorities (LPAs) should require an impact assessment for any town centre proposals which are outside of a centre and not in accordance with an up-to-date Local Plan. The 'default' nationally set floorspace threshold of 2,500 m^2 should apply in the absence of any locally set floorspace threshold.

13.43 Currently, the adopted Core Strategy Local Plan does not identify a local threshold for assessment. We therefore consider the requirement for a local floorspace threshold for the assessment of impacts in Selby District.

Existing Floorspace in Centres

13.44 The existing gross convenience and comparison retail floorspace in Selby, Tadcaster and Sherburn-in-Elmet is summarised in Table 13.2 below.

13.45 Proposals for schemes comprising around 1,200 sq.m of gross convenience floorspace, or 1,700 sq.m of gross comparison floorspace, would therefore equate to 10 per cent of the total gross convenience or comparison retail floorspace in Selby, respectively. Schemes of around this size or larger should be considered large in relation to Selby.

13.46 Tadcaster and Sherburn in Elmet town centres both contain significantly less retail floorspace than Selby, and a scheme proposing around 250 sq.m of gross convenience floorspace should be considered large in the context of both centres, on the basis that this would represent about 10 per cent of the existing convenience retail floorspace in each centre. For comparison goods floorspace, around 300 sq.m gross would be large relative to Tadcaster, and 100 sq.m gross would be 'large' in the context of Sherburn in Elmet.

Table 13.2 – Size of All Units in Selby, Tadcaster and Sherburn in Elmet

	Total Floorspace (sq.m)		
	Selby	**Tadcaster**	**Sherburn**
Convenience	12,080	2,441	2,193
Comparison	16,947	3,089	1,112

Typical Unit Size in Centres

13.47 With respect to the average size of individual units within the main market towns, the Experian Goad surveys of Selby and Tadcaster and our own floorspace assessment of Sherburn in Elmet details the following floorspace composition[118]:

Table 13.3 – Size of All Units in Selby, Tadcaster and Sherburn in Elmet

DISTRIBUTION OF OUTLETS BY FLOORSPACE	SELBY		TADCASTER		SHERBURN	
	OUTLETS	% OUTLETS	OUTLETS	% OUTLETS	OUTLETS	% OUTLETS
< 1,000 sq. ft (93 sq. m)	106	46.9	31	44.3	21	52.5
1,000 sq. ft (93 sq. m) - 2,499 sq. ft (232 sq. m)	83	36.7	33	47.1	10	25.0
2,500 sq. ft (232 sq. m) - 4,999 sq. ft (464 sq. m)	20	8.9	4	5.7	6	15.0
5,000 sq. ft (464 sq. m) - 9,999 sq. ft (929 sq. m)	12	5.3	1	1.4	2	5
> 10,000 sq. ft (929 sq. m)	5	2.2	1	1.4	1	2.5

[118] The floorspace composition is based on the Goad survey boundaries for Selby and Tadcaster and on the defined SCC boundary for Sherburn in Elmet.

Table 13.4 – Size of Convenience Retail Units in Selby, Tadcaster and Sherburn in Elmet

	SELBY		TADCASTER		SHERBURN	
DISTRIBUTION OF OUTLETS BY FLOORSPACE	**OUTLETS**	**% OUTLETS**	**OUTLETS**	**% OUTLETS**	**OUTLETS**	**% OUTLETS**
< 1,000 sq. ft (93 sq. m)	5	25%	3	27%	3	38%
1,000 sq. ft (93 sq. m) - 2,499 sq. ft (232 sq. m)	10	50%	6	55%	1	13%
2,500 sq. ft (232 sq. m) - 4,999 sq. ft (464 sq. m)	1	5%	1	9%	3	38%
5,000 sq. ft (464 sq. m) - 9,999 sq. ft (929 sq. m)	1	5%	0	0%	0	0%
> 10,000 sq. ft (929 sq. m)	3	15%	1	9%	1	13%

Table 13.5 – Size of Comparison Retail Units in Selby, Tadcaster and Sherburn in Elmet

	SELBY		TADCASTER		SHERBURN	
DISTRIBUTION OF OUTLETS BY FLOORSPACE	**OUTLETS**	**% OUTLETS**	**OUTLETS**	**% OUTLETS**	**OUTLETS**	**% OUTLETS**
< 1,000 sq. ft (93 sq. m)	37	44%	11	50%	8	80%
1,000 sq. ft (93 sq. m) - 2,499 sq. ft (232 sq. m)	30	35%	9	41%	1	10%
2,500 sq. ft (232 sq. m) - 4,999 sq. ft (464 sq. m)	9	11%	1	5%	1	10%
5,000 sq. ft (464 sq. m) - 9,999 sq. ft (929 sq. m)	7	8%	1	5%	0	0%
> 10,000 sq. ft (929 sq. m)	2	2%	0	0%	0	0%

13.48 Table 13.3 above highlights that the property offer in Selby District's three main towns is characterised by relatively small units. Across the three towns, around 85% of units have a gross floorspace of less than 232 m^2 and 47% are below 93 m^2 gross. Tables 13.4 and 13.5 further show that 80 per cent or more of the convenience retail units in Selby, Tadcaster and Sherburn in Elmet, and at least 90 per cent of comparison units in each of the three centres, have a gross floorspace of 464 sq.m or less.

Local Floorspace Threshold Recommendations

13.49 It is therefore recommended that this Council actively proposes a floorspace threshold via PLAN Selby given that:

- All three of Selby District's three town centres are relatively small, both in terms of their total retail floorspace and the average size of individual units.

- There has been a significant increase in small format convenience stores operated by the mainstream retailers (Asda, Morrison's (M-Local), Tesco (Express) and Sainsbury's (Local)); the average size of these smaller format stores is c. 370 m^2 (3,000 sq. ft) gross. Such stores serve top-up convenience shopping needs and could (if located outside of the respective towns) impact upon existing top-up shopping function of the respective centres.

13.50 Drawing together the survey evidence, it is recommended that the Council should adopt the following local floorspace thresholds for planning applications for retail development:

- **CONVENIENCE**; a minimum local floorspace threshold of 500 m^2 net for assessment.

- **COMPARISON;** a minimum local floorspace threshold of 300 m^2 net for assessment.

13.51 The proposed local thresholds would enable the Council to make a balanced planning assessment of the likely trading impacts of new provision on smaller centres. A separate floorspace threshold for offices is recommended in the Employment Land Review (ELR) which is being prepared alongside this report.

Planning for New Local / Neighbourhood Centres

13.52 Following the advent of NPPF there is no formal definition of what comprises a 'local centre' within national policy; the only definition of what comprises a 'local centre' is provided in the now cancelled PPS4 guidance (Annex B), as follows:

'a range of small shops of a local nature, serving a small catchment. Typically a local centre might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a takeaway and a laundrette'.

13.53 In order to ensure that future proposed new local centres associated with large strategic residential sites predominantly serve local needs and do not function as retail destinations which could compete with existing provision in defined town centres, it is important that the Council:

- Establishes the potential quantitative needs likely to be generated by proposed new residential provision; and

- Constructs appropriate policy framework so as to ensure that new provision solely serves local needs.

13.54 The expenditure capacity arising from a planned strategic housing site allocation can be established by calculating the resident population (based on average household size) and applying an appropriate expenditure (per capita) figure. The overall 'headline' capacity figure should however be treated with caution as it effectively assumes that 100% of all expenditure arising from a planned residential scheme would be available to solely support a new local centre.

13.55 Whilst it is possible to identify the quantum of Class A1 convenience and comparison floorspace, it is difficult to quantify the need for (Class A1) retail service uses such as hairdressers, pharmacies and dry cleaners (amongst others) given the lack of expenditure data available. In addition to retail and service uses, as per the (now cancelled) PPS4 definition, a new local retail centre may also include Class A2 premises (bookmakers, banks etc.), Class A3 / A5 outlets (i.e. takeaway outlet) and possibly a doctor's surgery and dentist (depending on PCT requirements).

13.56 Therefore, it is recommended that the Council should consider the following when constructing future site-specific policies for new local centres as part of new large / strategic residential developments:

- **Convenience Floorspace**: the maximum Class A1 convenience floorspace within the scheme should be specified.
- **Range of Uses**: the range of uses (Classes A1 – A5, D1 etc.) which would create a viable local centre offer should be set out.
- **Maximum Unit Size**: the maximum floorspace (square metres gross) size for an individual unit should be specified so as to ensure that large units are not created.
- **Phasing**: policy should set out the quantum of residential development which should be constructed prior to commencement of trading so as to ensure that the local centre does not come forward in advance or isolation of the residential it is intended to serve.

13.57 The headline policy framework would enable the Council to control the nature of local centre provision that comes forward whilst enabling a viable scheme to emerge and respond to commercial market interest.

Monitoring

13.58 The NPPF (and extant PPS4 practice guidance) requires Local Planning Authorities (LPAs) to undertake continuous monitoring of their plans and policies, assessing whether the policies in local development schemes are being achieved. Local Planning Authorities are required to produce annual monitoring reports (AMRs), assessing whether policies are meeting targets, the impact of policies and the need to change policies to reflect changes in national planning policy.

13.59 Future (annual) monitoring activity by the Council should specifically include:

- The floorspace and fascia composition of the town centres;
- A schedule of planning permissions granted for retail and leisure proposals in the district (a minimum floorspace may be appropriate);
- Retail and leisure commitments and proposals in the competing centres in the wider sub-region (of a scale to materially influence sub-regional shopping patterns); and
- Development opportunity sites.

13.60 In performing its annual monitoring function, the Council will need to consider the extent to which any changes within the district and its main centres will impact on the adopted LDF policy position and this emerging retail and leisure strategy.