

Selby Town Centre, Retail and Leisure Study Full Report

Selby District Council

November 13, 2020

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1.0 Introduction

Background

1.1 Lichfields was commissioned by Selby District Council to prepare a Town Centre, Retail and Leisure Study.

1.2 The Council's previous Selby Retail and Leisure Study (SRLS) was completed in May 2015 and was based on information collated in 2014. The key aim of the new Study is to provide a robust and credible evidence base to inform the emerging Local Plan. The key objectives of the Study are to:

- provide an overview of the national planning policy position, including the national and economic trends, and their implications for Selby District;
- assess the future need and capacity for retail (which will also include food and beverage) floorspace for the period 2020-2040, over 5-year intervals. This assessment will use robust retail data, population growth estimates, taking account of recent national and economic trends;
- assess changes in circumstances and shopping patterns (through an updated household survey), not least the continuing difficult market conditions, Brexit and the increase in online shopping;
- assess the current and emerging state of the retail and leisure market, including current and emerging trends, and set out the implications of these;
- undertake a needs assessment for the main commercial leisure uses i.e. cinemas, casinos, bingo halls, bowling, theatres, health & fitness and other tourism development (but excluding offices and hotels);
- assess the role of main centres (Selby, Tadcaster and Sherburn in Elmet);
- advise on local planning policy, specifically commenting on the approach to main town centre uses and the designation of centre boundaries and shopping frontages. This will also include a review of impact thresholds and advice on the application of the sequential approach; and
- assess options on how the identified need can be accommodated in designated centres and the need to make development allocations (if necessary).

1.3 The findings of these elements of work have been drawn together to provide recommendations and conclusions, including a strategy for monitoring by the Council.

Report structure

1.4 Section 2 of this report examines relevant trends and the town centre hierarchy in the sub-region. Sections 3 and 4 set out the need assessment for retail and other town centre uses. Section 5 explores how projected growth can be accommodated. Section 6 sets out the strategic policy recommendations.

2.0 Trends and the town centre hierarchy

Introduction

2.1 This section outlines underlying trends that will influence the need for retail and town centre facilities in Selby District and the prospects for attracting new investment. It summarises current provision and an assessment of the hierarchy and role of centres within Selby District, and their relationship within the neighbouring authorities.

Implications of Covid-19 and trends

2.2 Historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. This growth fuelled demand for new retail floorspace. Since the last recession expenditure growth has been much slower and the demand for retail floorspace has reduced. Experian's latest forecasts suggest slower growth in the short-term and home shopping/internet spending is expected to grow at a much faster rate than traditional shopping. Experian's short-term expenditure growth projections (2020 and 2021) for retail and leisure now reflect the coronavirus pandemic.

2.3 The main implications of the Covid-19 crisis for the evidence base are likely to be as follows:

- impact on the reliability of demographic and economic projections i.e. population growth and Experian expenditure forecasts;
- short terms impact on the mix of uses and customer behaviour that are likely to distort the base year position; and
- longer terms structural impacts that could affect the nature of town centres and the way household shop, eat/drink out and participate in leisure activities.

2.4 The key uncertainties relating to the first two points are primarily the length of crisis/potential further lockdowns and likely recovery period. The longer term structural implications are harder to predict and quantify at this early stage.

2.5 In the short term, operators have faced elevated risk to cash flow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services have been hardest hit. Short term supply chain disruption could lead to inflationary pressure, which may have an impact of consumer demand. Retailers with infrastructure to fulfil on-line orders/home delivery are benefiting at least in the short term. There is likely to be a longer terms structural shift to multi-channel shopping, reducing the demand for physical space within town centres. Bearing these trends in mind, following the Covid-19 crisis there is likely to be a spike in town centre vacancies with unfortunately some businesses failing to re-open, particularly non-food retail operators and restaurants. Many national operators have already announced job losses and store closures.

2.6 The Covid-19 pandemic could have some short-term impact in terms of population migration levels and a pause in construction activity. Given that the focus of this update is to assess the long-term need over the plan period within five year interval projections (i.e. 2021 to 2026, 2026 to 2031, and 2031 to 2036), the development plan should assume population projections will return to projected levels by 2026. The first interval population projections at 2026, and certainly later years, should not be significantly affected by the Covid-19 crisis.

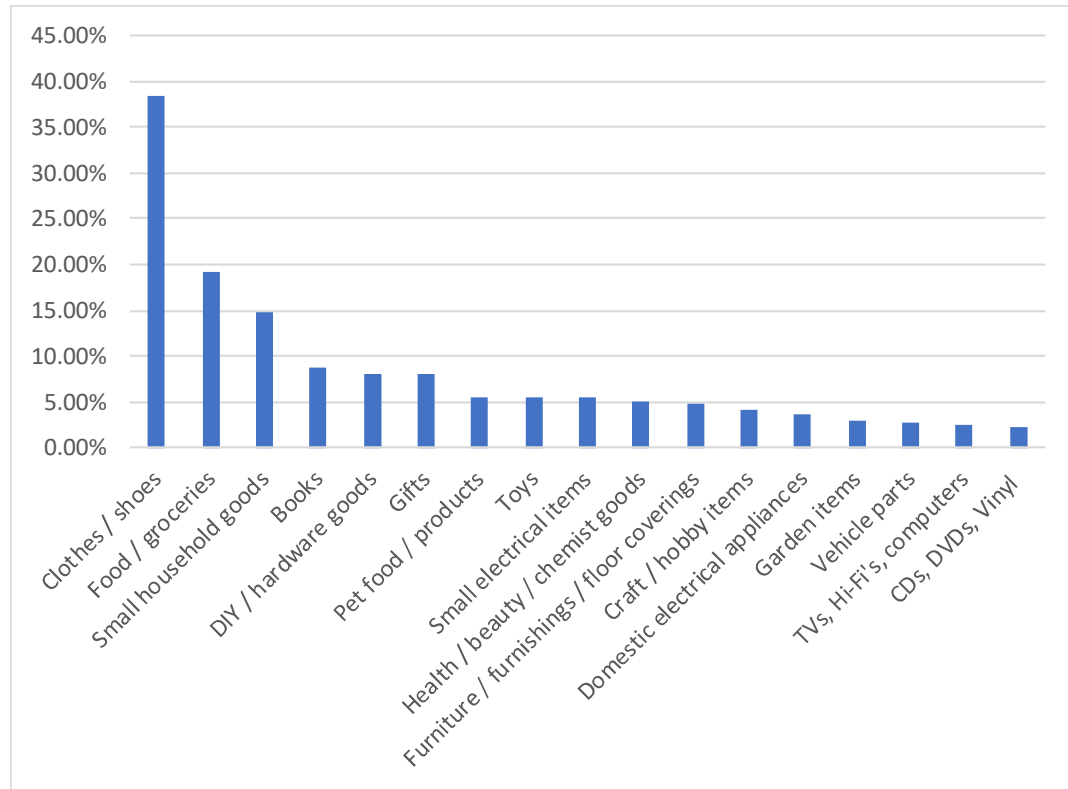
2.7 Office of National Statistic (ONS) monthly sales volume information for Great Britain indicates total retail sales volumes were over 22% lower in April 2020 compared with the pre-Covid-19 position in February 2020 (seasonally adjusted). However, the July, August and September

- 2020 sales volumes had recovered to pre-Covid levels, with the latest September figure now 5.5% higher than the pre-Covid figure in February. However, more recent localised restrictions are likely to have a negative impact on the figures for October.
- 2.8 The comparison goods (non-food) sector was particularly affected with a 50% drop in sales from February to April, whilst the food sector experienced 10% growth in sales during March in part due to panic buying at the start of the crisis. Food sales volumes have been consistently higher than the February level during March to September.
- 2.9 ONS data suggested on-line retail sales peaked at 69% higher than normal in May 2020 (i.e. levels in February 2020). The on-line sales figures for June, July, August and September 2020 dropped back to 58% above 'normal' in June reducing to 37% above in September. Food store on-line sales doubled during May and June but still represents a relatively small proportion of total sales in this sector, reaching about 11%; it remained over 10% during July to September. For the non-food sector on-line sales as a percentage of total sales nearly trebled between February and April, reaching 44% of sales. On-line sales in this sector remain over 47% higher in September 2020 than pre-Covid levels.
- 2.10 These Covid-19 affected trends are still at an early stage and it is difficult to predict the longer term implications for retail sales and the amount of on-line sales. Nevertheless, ONS's most recent data suggests retail sales should recover to previous levels of growth but the proportion of retail sales spent on-line is likely to represent a higher proportion of total sales, which will have an impact of traditional bricks and mortar retailing.
- 2.11 Experian's latest expenditure growth projections were published in October 2020 and assess the likely impact of Covid-19 and Brexit. In the longer term to 2026, 2031 and 2036, Experian recommends relatively modest levels of growth when compared with historic trends. These longer term forecasts should be monitored and kept under review.
- 2.12 Planning based on long terms expenditure growth projections has always had inherent uncertainties. Despite these uncertainties, the Local Plan must assume a return to reasonable rates of growth and relative normality, although the implications of the short-term impacts should not be ignored. It is better to plan for a return to growth and then modify the strategy later if levels of growth are lower than originally predicted, rather than not planning for growth because there are significant uncertainties. The latter approach is likely to fail to respond in time if higher levels of growth are achieved, and any growth will go elsewhere. Nevertheless, a cautious approach to expenditure growth should be adopted.
- 2.13 For convenience goods, Experian's latest forecasts (October 2020) anticipate limited growth (0.1% per annum after 2027). Experian expects slow growth in the future, but most of the growth will relate to non-store sales. Any need for new convenience goods retail floorspace in Selby District is likely to relate to population growth or qualitative areas of deficiency.
- 2.14 For comparison goods, higher levels of growth are expected in the future (between 2.9% to 3% per annum), still at a lower rate than previous pre-recession trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.
- 2.15 New forms of retailing (multi-channel and home shopping) have and will continued to grow. Home/electronic shopping and home delivery has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. Recent trends suggest continued strong growth in multi-channel activity. Experian's Retail Planner Briefing Note 18 (October 2020) states:

“After easing in 2021, we expect the SFT (special forms of trading (SFT) market share to continue to grow strongly in the mid-term, hitting around 30% in 2027. The pace of e-commerce is anticipated to moderate over the longer term, reaching 35% of total retail sales by 2040.”

- 2.16 The floorspace capacity assessment in this report makes an allowance for future growth in e-tailing based on Experian projections. Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the need assessment adopts relatively cautious growth projections for expenditure and an allowance is made for operators to increase their turnover/sales density, due to growth in home shopping and click and collect.
- 2.17 Reflecting these national trends, the Selby household survey results undertaken in October 2020, indicate that 80% of households regularly buy items from the internet for home delivery.
- 2.18 Before the Covid-19 crisis, 59% of households did non-food shopping online regularly (i.e. once a month or more often). During the Covid-19 lockdown the proportion of households doing regular online non-food shopping increased marginally to 64%. In the future, 59% of households anticipate they will regularly do non-food shopping on-line, which if correct, suggests the longer term impact of the Covid-19 crisis will not significantly increase non-food shopping on-line.
- 2.19 Before the Covid-19 crisis, only 18% of households did online grocery shopping regularly (once a month or more often). During the home Covid-19 lockdown, the proportion of households doing regular online grocery shopping increased to over 28%. In the future 30% of households anticipate they will do regular grocery shopping on-line, which if correct, suggests the Covid-19 crisis will have a more significant impact on online grocery shopping rather than non-food shopping.
- 2.20 Based on the household survey results, the main products regularly purchased via internet/delivery or via click and collect are shown in Figure 2.1. These results indicate that a wide range of goods are purchased via the internet. Clothing/shoes and food/grocery shopping are the items most often purchased via the internet.

Figure 2.1 Items regularly purchased via the internet (% of respondents)

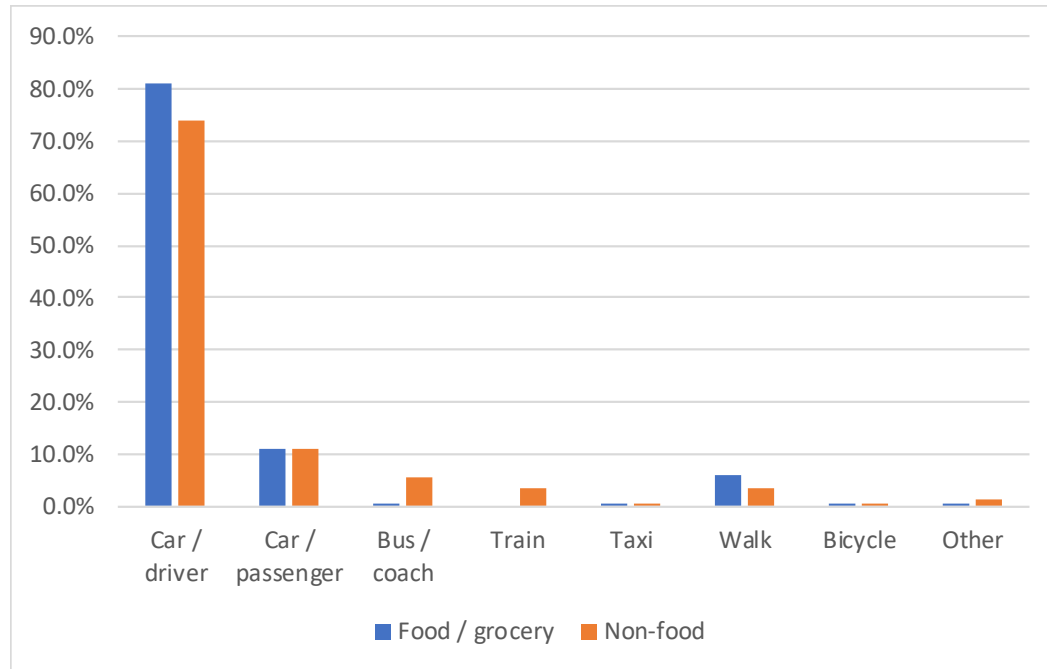


Source: NEMS Household Telephone Survey result October 2020

Mode of travel

- 2.21 Despite the increasing proportion of households shopping via the internet, the majority continue to travel to shopping destinations by a variety of means of travel. The results for food and non-food shopping (excluding internet/home shopping) indicated by the household survey results are shown in Figure 2.1.
- 2.22 Shopping by car (driver or passenger) is the most popular mode of travel for both food and non-food shopping trips. The vast majority of shopping trips are made by car. Car travel is slightly higher for food and grocery shopping. Public transport (bus, coach and train) are used more for non-food shopping, suggesting customers are prepared to travel longer distances for non-food shopping. More household walk to their local shops for food shopping than non-food shopping.

Figure 2.2 Mode of travel for food and non-food shopping (% of household respondents)



Source: NEMS Household Telephone Survey result October 2020

Demand for floorspace

- 2.23 Lower expenditure growth and deflationary pressures (i.e. price cutting) in the non-food sector have had an impact on the high street in the past two decades. Because of these trends and the last recession, the UK average shop vacancy rate (based on Goad Plan data) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates gradually improved to 11.8% in 2018 but have now increased to 12.4% in 2020. It is likely there will be a sharp increase in shops vacancies in most town centres at least in the short term, as and when the full impacts of the coronavirus pandemic are felt.
- 2.24 Data obtained in 2018 suggest there were 68 vacant shop units within the three main centres in Selby District, an average vacancy rate of 16.6%, higher than the Goad UK average of 12.4%. However, the vacancy rate varies centre to centre: Tadcaster had a very high vacancy rate (31.3%) suggesting the centre is performing poorly, whilst Sherburn in Elmet had a very low vacancy rate, only one unit (2.4%). The vacancy rate in Selby town centre (13.6%) was marginally higher than the national average, suggesting the centre was performing satisfactorily in challenging market conditions.
- 2.25 The combination of slower economic growth and multi-channel shopping described above, have had a significant impact on the retail and leisure sectors, and continuing uncertainties are still having an effect. Many high profile national operators have failed, leaving major voids within centres and retail parks. The latest operators to experience difficulties include Debenhams, House of Fraser, New Look, Carpetright, Prezzo, Chimichanga, Strada, Byron, Marks & Spencer and Jamie Oliver, which indicates current market conditions are challenging. It seems likely the coronavirus pandemic will result in further casualties both multiples and independents.
- 2.26 Many town centre development schemes have been delayed or cancelled and the demand for traditional bulky goods retail warehouse operators has also been affected. Even some of the

main food store operators have seen a reduction in growth, with discount operators taking market share from the main operators.

2.27 Property owners, landlords and funds have also come under increasing pressure with struggling occupiers seeking to renegotiate terms through company voluntary arrangement (CVA) i.e. an insolvency process designed to let a firm with debt problems reach an agreement with creditors to help pay off part or all of its debts. Elsewhere, retailers have been continuing to 'right size' their portfolios, with operators announcing store closures. These trends have impacted on rental income and the capital value of retail/ leisure assets. These trends are likely to be exacerbated by the coronavirus pandemic, at least in the short-term.

2.28 Whilst the CVA process has created headaches for landlords in terms of rent negotiations, at the same time newly freed-up space has opened up new opportunities. Vacated premises have been reconfigured and reused for food/beverage, trampolines, climbing and indoor golf.

Food store operators

2.29 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town and local centres (such as the Tesco Express/ Metro, Sainsbury's Local, Little Waitrose and Marks & Spencer's Simply Food formats).

2.30 The number of Tesco Express, Sainsbury's Local and Little Waitrose stores has increased significantly during the last decade. Taking Sainsbury's as an example, data provided by Mintel indicates that the number of Sainsbury's Local stores increased by 76% between 2011 and 2016.

2.31 Several proposed larger food stores have not been implemented across the country. There has been a move away from larger stores to smaller formats, reflecting changes in customers' shopping habits. The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. This trend is evident in Selby District with two Aldi stores (Selby and Sherburn) and a new Lidl store is under construction in Selby.

Comparison retailers

2.32 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including mergers and failures, and scaled down store sizes. Other traditional high street retailers have sought large out-of-centre stores, for example Next and M&S. Matalan also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon and Sports Direct expanded out-of-centre. These trends have slowed significantly and are unlikely to change for the foreseeable future.

2.33 The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, has been particularly weak in recent years. This has led to voids on retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods. This can lead to the relocation of retailers creating more vacant units in town centres. The retail warehouse sector is generally less well represented in Selby District due to the proximity of retail parks in larger centre. The Three Lakes Retail Park in Selby is the main concentration of retail warehouses in the District.

2.34 Within centres, many high street multiple comparison retailers have changed their format. For over two decades, high street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation into the larger regional and sub-regional centres. Many multiple retailers now require representation in fewer locations to service catchment areas. This trend is evident in Selby District with a limited number of comparison goods national multiples present.

2.35 In general operator demand for space has decreased since the last recession and, of those national multiples looking for space, many prefer to locate in larger or purpose-built centres, outside of the District. Centres in Selby District are at a lower level in the hierarchy and multiple operator demand may be lower in these centres in the future. Much of the occupier demand in many smaller centres has come from the discount and charity sectors or non-retail services, rather than higher order comparison goods shopping. Polarisation of investment in the larger centres e.g. Leeds and York is likely to continue in the future.

2.36 The continuation of these trends will influence future operator requirements in Selby District with smaller vacant units becoming less attractive for new multiple occupiers, and retailers increasingly looking to relocate into larger units in the main centres. However, smaller vacant units could still be attractive to independent traders and non-retail services, assuming a return to normal levels of growth following the coronavirus pandemic.

Charity and discount shops

2.37 The charity shop sector has grown steadily over the past 30 years and there is no sign this trend will end. Planning policies cannot control the amount of charity shops because they fall within same use class as other shops (now Class E). In many centres, charity shops have occupied vacated shop premises during previous recessions. This trend is evident in Selby District and the three main town centres have an above average provision of charity shops i.e. 14.4% of comparison goods shops compared with the UK average of 9.7%. All three centres have a higher than average provision of charity shops i.e. 14.8% in Selby, 11.5% in Tadcaster and 18.2% in Sherburn in Elmet. Charity shops can often afford higher rents than small independent occupiers because of business rate discounts. It does not follow that these charity shops will be replaced by traditional shops when the market recovers, particularly in secondary retail frontages.

Non-retail services

2.38 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. The non-retail service uses include the following Class E and Sui Generis uses:

- hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as takeaways), funeral parlours and post offices.
- banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies.
- restaurants, cafés and hot food takeaways.
- pubs/bars.

2.39 The growth of money lending/pay day loan shops, betting shops and hot food takeaways has raised concerns amongst many local planning authorities and has resulted in a change to permitted development rights to control the growth of these uses in town centres. This trend has been evident in Selby District with a similar proportion of betting shops and takeaways when compared with the national average.

2.40 Changes to the GPDO has had an impact on some town centres but the more recent changes to the UCO are likely to lead to more significant changes in the future. These measures allow for much greater flexibility for changes of use from retail to non-retail uses. To date these measures have not significantly changed the composition of most town centres.

The evening economy

- 2.41 Food/beverage, leisure and entertainment are fast moving and creative sectors, with a steady flow of new concepts emerging. Within these sectors there has been a significant increase in the number of national multiple chains which have sought to increase their geographical coverage, but primarily in larger centres.
- 2.42 Recently some restaurant chains have experienced difficulties resulting in closures, which suggests operators may have over-stretched. Demand has continued to increase for coffee shops, such as Starbucks, Costa Coffee and Café Nero. National branded pub/restaurant chains have invested heavily and not exclusively in larger centres. Themed restaurants have also expanded rapidly. This sector in town centres has been the most adversely affected by the coronavirus pandemic and the potential for growth in the short-term is uncertain.
- 2.43 The key categories for food and beverage offer are:
- **Impulse:** characterised by their produce range that is typically highly visual and hand-held so that it can be eaten “on the go”;
 - **Speed eating fast food:** food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;
 - **Refuel and relax:** a drink, snack and a short break in a pleasant environment rather than focusing on eating a main meal; and
 - **Casual dining/leisure dining:** incorporating several food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.
- 2.44 The proportion of non-retail uses within town centres across the country has increased significantly. This trend has been experienced in Selby District, but a reduction seems likely following the coronavirus pandemic.

Pop-up spaces

- 2.45 The increase in vacant space has led to an increase in premises available for temporary uses or pop-up uses including pop-up restaurants, pop-up bars, pop-up shops and pop-up galleries. Some landlords have opted for flexible leases, with changing attitudes towards short-term spaces. New independent brands have benefitted despite the lack of brand recognition. E-commerce brands have also sought physical presence, as an essential part of their marketing strategy and an effective way to engage with existing and new customers off-line. Brands have opened pop-up outlets in different locations in order to test and learn before committing to permanent stores. This trend may increase following the coronavirus pandemic.

Summary

- 2.46 These trends including the growth of home shopping are not new and have been affecting the high street for many years. In response to these trends, town centres have changed and diversified. The food and beverage, leisure and non-retail service sectors have been successful in occupying space no longer attractive to retail tenants. There have been cyclical trends in vacancy rates reflecting the macro economic trends, but in most cases, town centres recovered during periods of stronger growth. Many believe the most recent decline is structural rather than cyclical and a more flexible approach to town centre uses is required.
- 2.47 The most recent trends suggest vacancy rates have been slow to recover in weaker centres, and many high street retailers are still experiencing difficulties. The Goad national shop vacancy rate

increased to over 14% during the last recession but has not returned to pre-recession levels (around 8%). The national vacancy rate remains over 12% and is expected to increase following the Covid-19 crisis, and therefore a cautious approach to future growth is required.

- 2.48 Shopping behaviour will continue to change, and the high street must respond. All centres will need to focus on their advantages over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail and leisure experience for those looking for a “day out” or “evening out”.

Adopted Development Plan Hierarchy

- 2.49 The Selby District Core Strategy (2013) identifies three main town centres as follows:

- Selby;
- Tadcaster; and
- Sherburn in Elmet.

- 2.50 Selby town centre is described as being at the top of the District’s retail hierarchy, performing the role of a major district centre within the region. In terms of the settlement hierarchy, Selby is identified as the Principal Town (Core Strategy Map 4, Figure 6 - Key Diagram and Policy SP2) and Tadcaster and Sherburn in Elmet are Local Service Centres. Tadcaster and Sherburn in Elmet provide essential services and facilities meeting the needs of the local community and surrounding rural areas.

- 2.51 The assessment of the existing retail and service provision in the three main centres is set out in more detail in Appendix 3. A summary of retail and service provision is provided in Table 2.1.

Table 2.1 Existing retail and service in Selby District

Centre	Convenience goods retail units	Comparison goods retail units	Non-retail service units	Vacant units	Total units
Selby	16	81	139	37	273
Tadcaster	7	26	33	30	96
Sherburn in Elmet	7	11	22	1	41
	30	118	194	68	410

Source: Selby District Council Town Centre Surveys 2018

- 2.52 Selby is by some margin the largest town centre in the District with 273 units. This figure excludes the out-of-centre Three Lakes Retail Park. Tadcaster is a much larger centre than Sherburn in Elmet in terms of total units but has a high shop vacancy rate. Tadcaster has 66 occupied units compared with 40 in Sherburn in Elmet. The role of these two centres in terms of convenience (food and grocery) shopping and non-retail services is similar, although Tadcaster has more comparison goods shops. The description of centres in the Core Strategy is still accurate.

- 2.53 Selby town centre provides a good range of shops and facilities that serve residents with a district wide catchment area. It has a critical mass of retail facilities and a good range of non-retail services. Tadcaster and Sherburn in Elmet, as much smaller centres, serve more localised catchments, providing a more limited range of retail uses and services, particularly with regard to comparison goods shops.

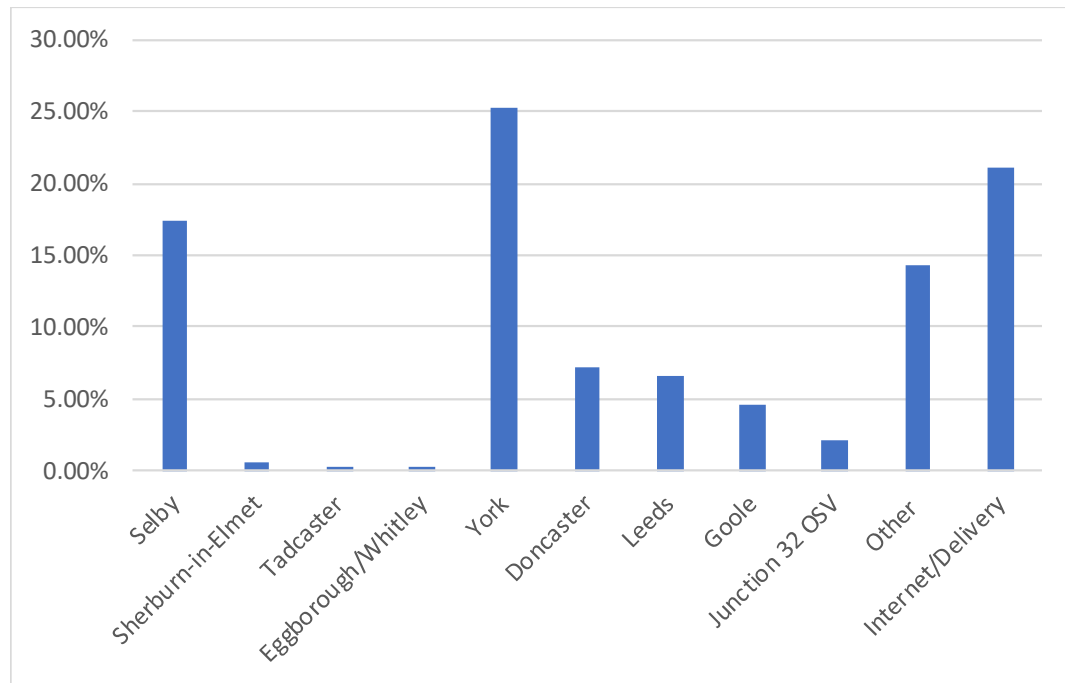
- 2.54 These town centres are supported by local shopping facilities including villages varying in size and levels of services and facilities. These perform a local shopping and service function, but usually with a limited choice of shops and services. The local facilities are important in

providing access to essential facilities, which is particularly important for less mobile households within rural areas. These local facilities are also beneficial in reducing the need to travel, resulting in more sustainable shopping patterns.

Main non-food shopping destinations

2.55 Household survey respondents were asked where their household buys most of its non-food shopping. The results are shown in Figure 2.3. These results indicate Selby is the main non-food shopping destination within the District and the other centres have a minor role for non-food shopping. Residents in the study area have a wide choice of shopping destinations and no single destination dominates.

Figure 2.3 Main non-food shopping destinations for households in the Selby study area



Source: NEMS household survey October 2020

Relative attraction of centres in the sub-region

2.56 Venuescore ranks the UK's top 3,000 retail destinations including town centres, malls, retail warehouse parks and factory outlet centres. The results for the District and other relevant centres are shown in Table 2.2 and on the plan overleaf.

2.57 Each shopping destination is given a weighted score for multiple retailers present. The score attached to each retailer is weighted depending on their overall impact on shopping patterns. The Venuescore usually correlates to the actual market size of the shopping destination in terms of consumer expenditure. Javelin also assesses the market position of the larger town centres based on the retailers present and the centre's relative position along a spectrum running from discount to luxury (i.e. lower, middle to upscale).

2.58 Consistent with Selby town centre's position at the top of the District's retail hierarchy, the Javelin index ranks Selby as the main shopping destination within the District, followed by the Three Lakes Retail Park in Selby. All other shopping destinations in the District are not included within Javelin's index because they have too few national multiple retailers.

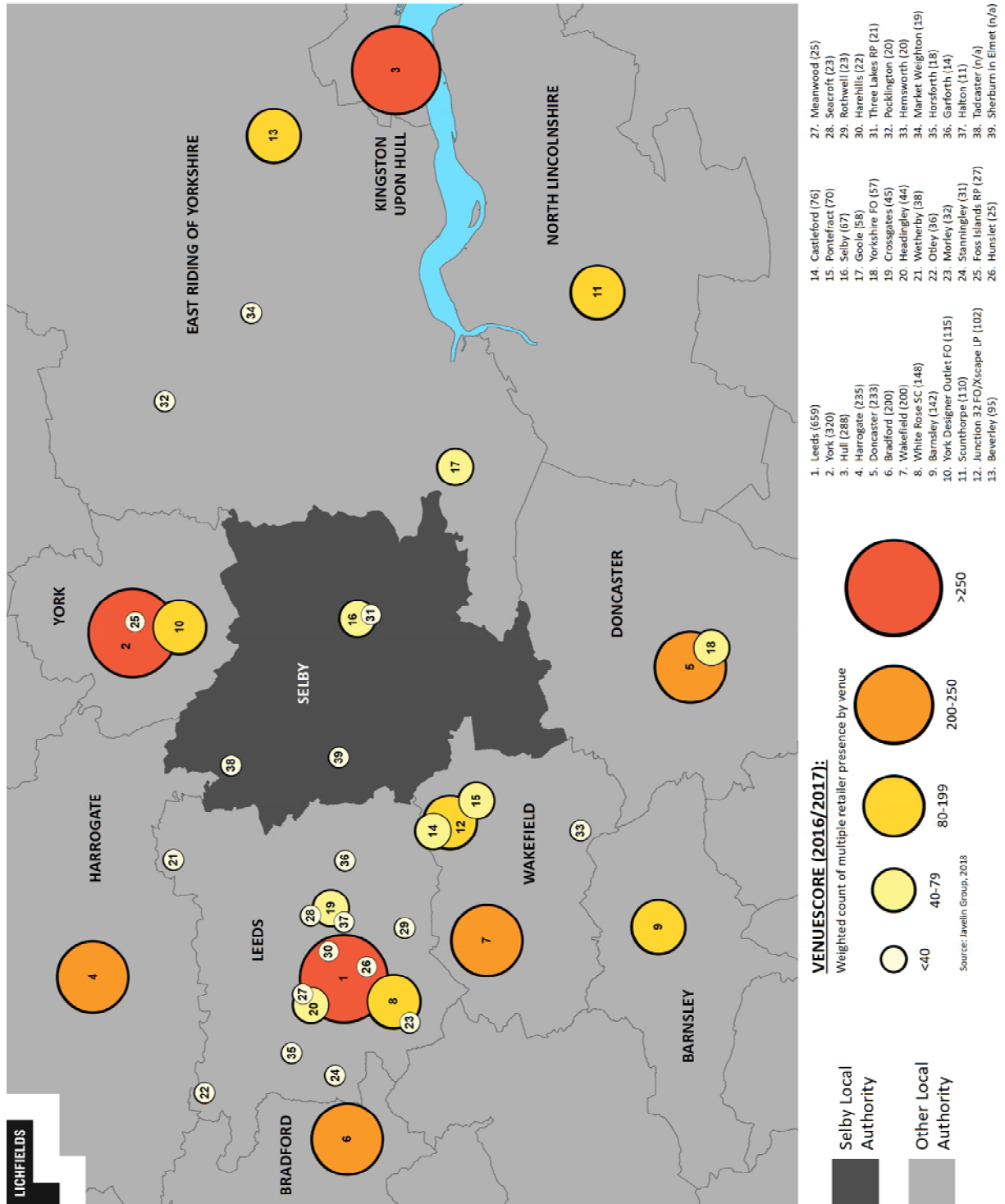
Table 2.2 Javelin's Venuescore UK shopping Index

Centre	UK Rank 2017	Venuescore 2017	Market position
Leeds	3 rd	659	Upper Middle
York	28 th	320	Upper Middle
Hull	37 th	288	Middle
Harrogate	51 st	235	Upper Middle
Doncaster	54 th	233	Middle
Bradford	= 80 th	200	Middle
Wakefield	= 80 th	200	Lower Middle
White Rose S C	150 th	148	Middle
Barnsley	163 rd	142	Lower Middle
York Designer F O	211 th	115	Upscale
Scunthorpe	225 th	110	n/a
Junction 32 F O/ Xscape L P	246 th	102	Upper Middle
Beverley	271 st	95	Upper Middle
Castleford	368 th	76	n/a
Pontefract	403 rd	70	Lower Middle
Selby	427th	67	Lower Middle
Goole	508 th	58	n/a
Yorkshire F O	520 th	57	Upper Middle
Crossgates	682 nd	45	n/a
Headingley	696 th	44	Middle
Wetherby	819 th	38	Middle
Otley	879 th	36	Lower Middle
Morley	1,008 th	32	n/a
Stanningley	1,044 th	31	Lower Middle
Foss Islands Retail Park	1,187 th	27	Middle
Hunslet	=1,276 th	25	Lower Middle
Meanwood	=1,276 th	25	Lower Middle
Seacroft	=1,368 th	23	n/a
Rothwell	=1,368 th	23	Lower Middle
Harehills	1,418 th	22	n/a
Three Lakes Retail Park	1,481st	21	Lower Middle
Pocklington	=1,559 th	20	Lower Middle
Hemsworth	=1,559 th	20	Lower Middle
Market Weighton	1,625 th	19	Lower Middle
Horsforth	1,696 th	18	Middle
Garforth	2,171 st	14	n/a
Halton	2,815 th	11	n/a

Source: Javelin Group 2017

2.59

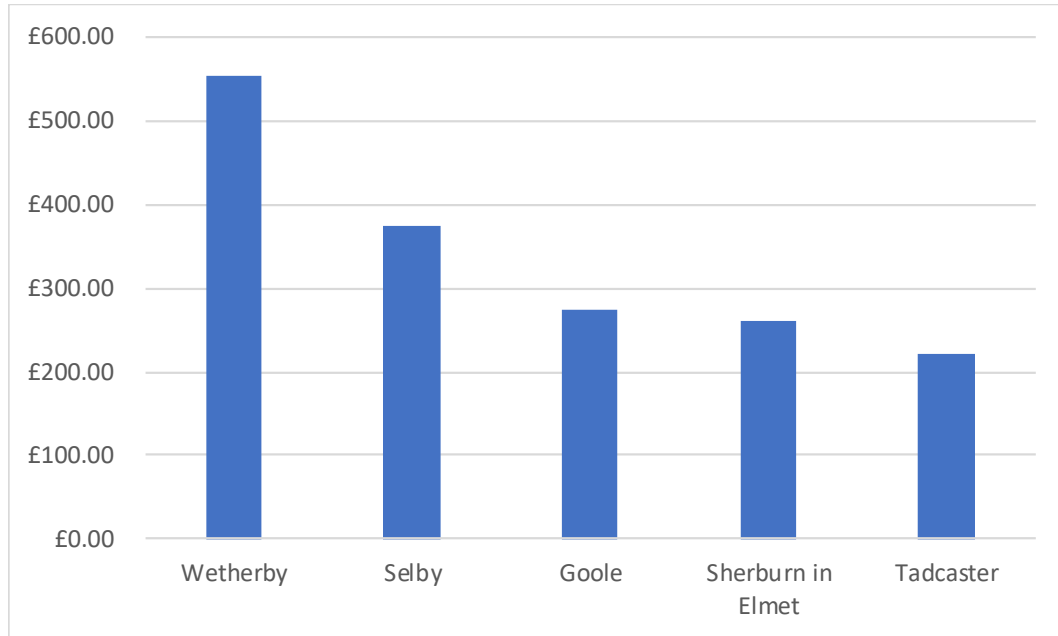
Leeds, York and Hull are ranked at the top of the hierarchy as the main regional and sub-regional shopping destinations. Selby District falls within the regional catchment area of Leeds and York. Leeds and York also have the higher market positions, with a focus on luxury rather than discount products. Selby's market position is considered to be lower middle by Javelin, comparable with the similar sized centre of Pontefract and most other smaller centres in the sub-region.



Property indicators

2.60 The relative performance and influence of retail centres can be demonstrated by commercial property values, for example Zone A rental levels achieved for retail property in each centre. Figure 2.4 below shows the prime Zone A rental values in £ per sq.m for the five main centres in the District and nearby competing centres.

Figure 2.4 Prime Zone A Rents – Selected Centres



Source: Valuation Office Agency

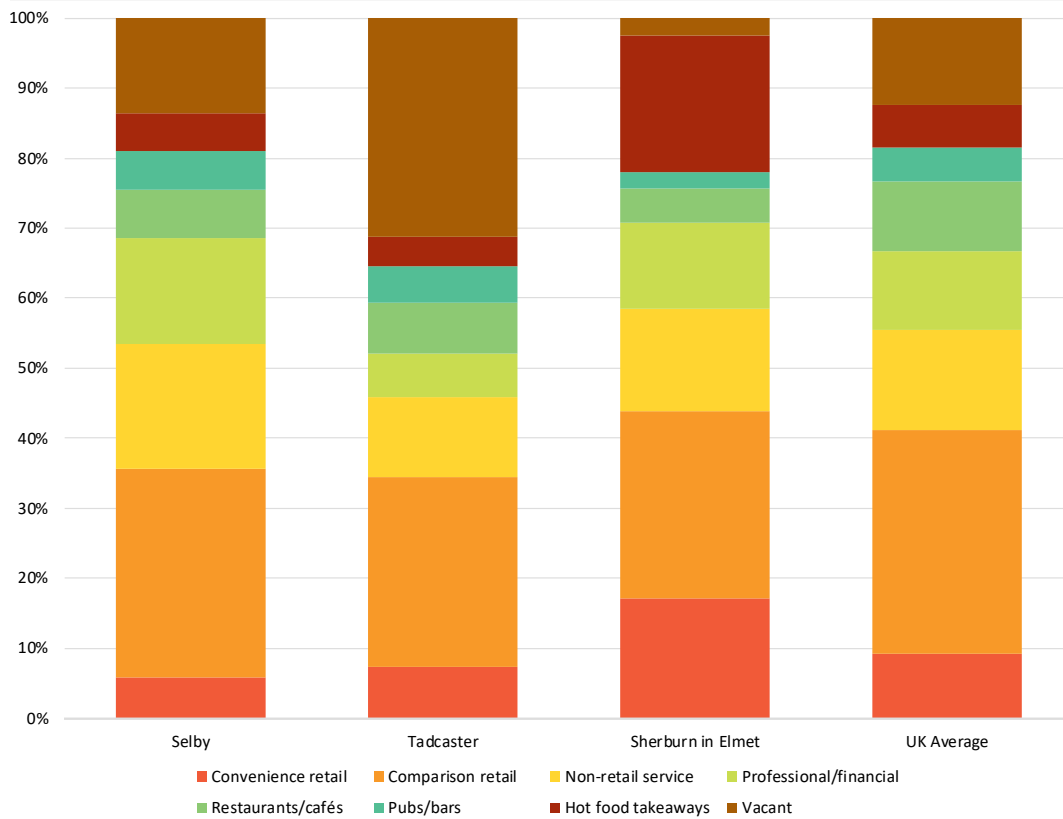
2.61 Figure 2.4 indicates that prime Zone A retail rents vary significantly depending on the size and location of centre. Prime Zone A retail rents tend to reflect a centre's position within the shopping hierarchy and footfall, therefore larger centres will tend to command higher rents. This trend is evident in across the UK. As a result, retail property values are generally linked to the size of the centre and its position within the hierarchy.

Diversity of main town centre uses

2.62 Figure 2.5 below shows the composition of the three main town centres in terms of the mix and proportion of different uses i.e. the proportion of shop units within each category. This is compared with the Goad Plan average mix for all centres across the UK.

2.63 The centres have a reasonable mix of uses, but Tadcaster suffers from a high vacancy rate and the overall number of occupied units in Tadcaster and Sherburn in Elmet is small. The mix of uses is similar within each category, but Sherburn in Elmet has a higher proportion of convenience retail outlets. Selby has the highest proportion of non-retail services, similar to the UK average. A more detailed analysis of provision within each centre is set out in Appendix 3.

Figure 2.5 Mix of retail and non-retail service uses



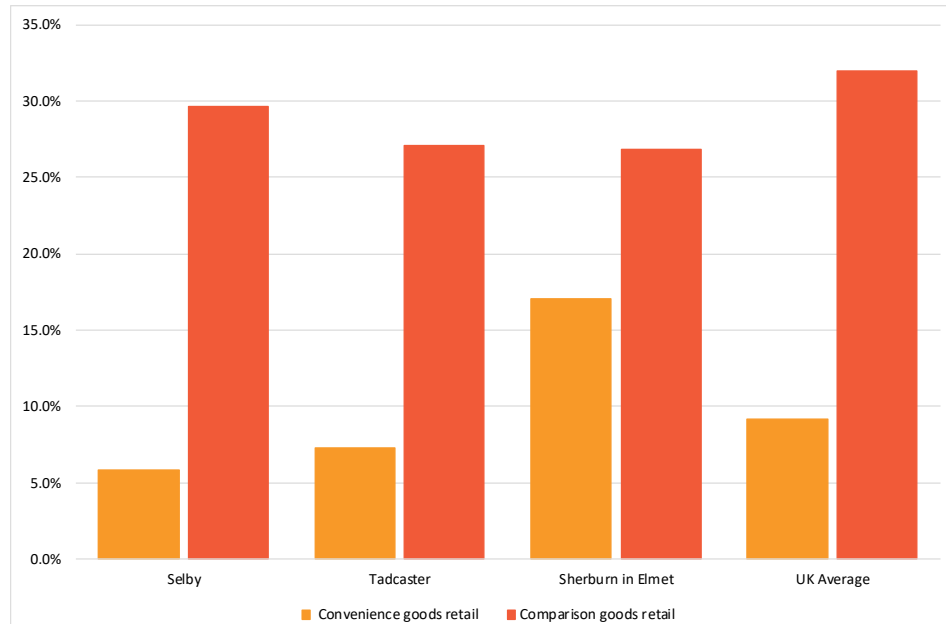
Source: Selby District Town Centre Surveys (2018) and Experian Goad Plans (2020)

Retailer representation

2.64 Figure 2.6 compares the proportion of convenience and comparison retail units within the three main centres compared with the national average. All centres have a slightly lower proportion of comparison goods retail units. Sherburn in Elmet has a high proportion of convenience goods retail units.

2.65 Generally larger centres have a higher proportion of comparison shop units than smaller centres. Larger centres tend to have a stronger focus on fashion shopping and therefore have a higher proportion of comparison shops. Smaller centres tend to have a higher proportion of convenience goods units and non-retail services, catering for the day to day needs of their local catchment area. This is broadly reflected in Selby District’s main centres, where convenience retail and non-retail services perform an important role catering for local needs.

Figure 2.6 Proportion of comparison and convenience retail (% total units)



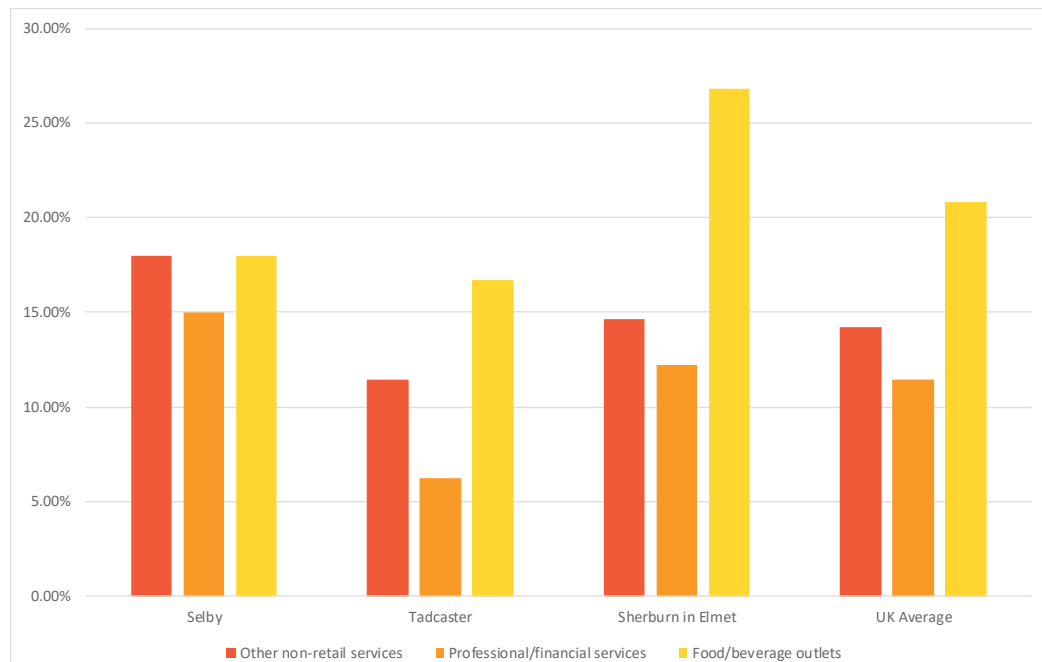
Source: Selby District Town Centre Surveys (2018) and Experian Goad Plans (2020)

Non-retail service uses

2.66

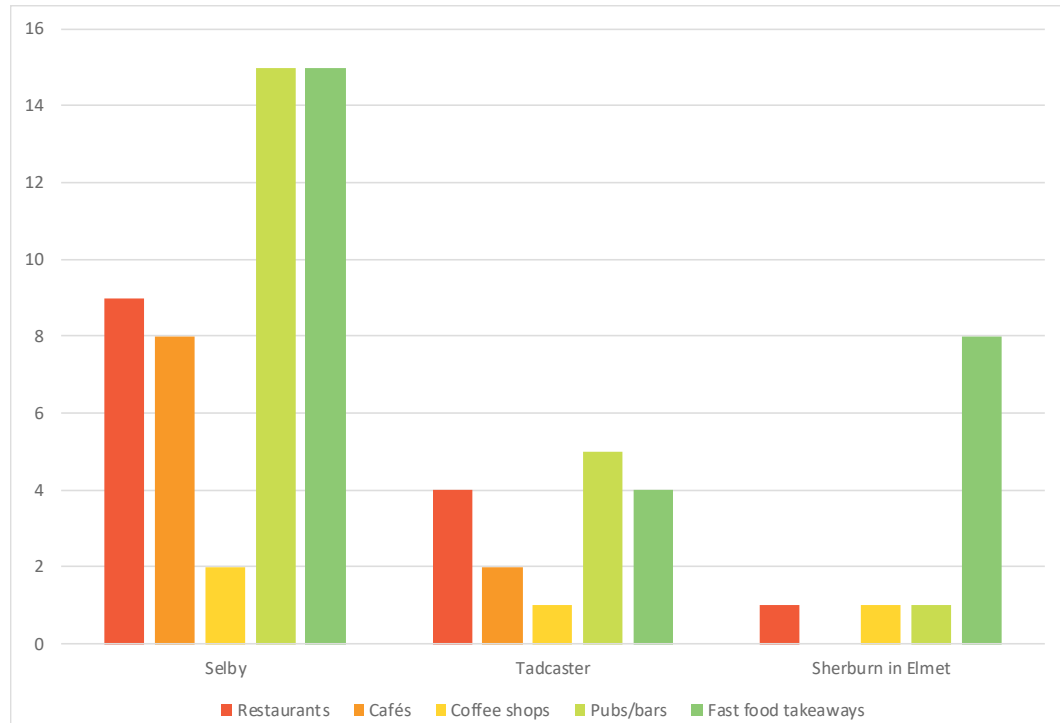
Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. Figure 2.7 below summarises the proportion of units in different service categories uses compared to the Goad national average. The number of food/beverage outlets is examined in more detail in Figure 2.8.

Figure 2.7 Proportion of retail and non-retail service units (% all units)



Source: Selby District Town Centre Surveys (2018) and Experian Goad Plans (2020)

Figure 2.8 Food and beverage facilities in the three town centre (number of outlets)



Source: Experian Goad Plan, updated by Lichfields May/June 2019, Goad Plan National Averages (2018)

- 2.67 All centres have a relatively high provision of non-retail services. The proportion of food/ beverage outlets is particularly high in Sherburn in Elmet. The provision of other non-retail services is high in Selby town centre.
- 2.68 The main centres have a reasonable mix of food/beverage outlets serving both the day-time and evening economies. Selby has the strongest provision of outlets serving the evening economy i.e. restaurants and pubs/bars. Sherburn in Elmet has the weakest evening economy with a limited number of restaurants, pubs and bars, but it has a high number of takeaways.

3.0 Retail need assessment

3.1 This section updates the quantitative scope for retail floorspace in Selby District in the period up to 2040. The methodology adopted is set out in Appendix 1.

3.2 The analysis is based on the same study area adopted in the Council's previous Selby Retail and Leisure Study (with Zone 5 excluded), which covers the catchment areas of the main shopping destinations in the District. The study area is sub-divided into seven zones as shown in Appendix 2. The zones have been defined using postcode-sector boundaries.

Population and expenditure

3.1 The study area population projections to 2040 are set out in Table 1 in Appendix 4. Small area population data has been obtained from Experian. Population within the study area is expected to increase between 2019 and 2040 by 6.8% (+10,836 people).

3.2 Selby District has a relatively older population (aged 35 to 85+) and lower proportions of children and younger people. This age structure is reflected within Experian's local expenditure estimates adopted in this study.

3.3 Table 2 in Appendix 4 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2040. Forecasts of comparison goods spending per capita are shown in Table 2 (Appendix 5).

3.4 As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 6.6% from £332.25 million in 2019 to £354.04 million in 2040, as shown in Table 3 (Appendix 4).

3.5 Comparison goods spending is forecast to increase by 57% between 2019 and 2040, increasing from £545.8 million in 2019 to £857.08 million in 2040, as shown in Table 3 (Appendix 5). It should be noted that comparison goods spending is forecast to increase more than convenience goods spending as the amount spent on convenience goods does not increase proportionately with disposable income whereas spending on non-food goods is more linked to income.

3.6 These figures relate to real growth and exclude inflation. The projections also exclude special forms of trading including home shopping through non-retail businesses.

Existing spending patterns

3.7 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates is based on the October 2020 household survey. The results of the household shopper questionnaire survey undertaken by NEMS have been used to estimate base year shopping patterns within the study area zones. The base year market shares for convenience goods and comparison goods shopping are shown in Table 4 in Appendix 4 and Table 4 in Appendix 5 respectively.

3.8 The total turnover of facilities within Selby District is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Global Data, which provides an indication of how individual retail stores are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

3.9 The results of the household shopper survey relating to main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The estimates of market share or penetration within each study area zone for convenience goods

shopping are shown in Table 4, Appendix 2. The market shares in Table 4 are a combined rate for both main and top up shopping based on a 70:30 split. This 70:30 split is based on Lichfields' experience and is widely accepted in retail studies of this kind.

- 3.10 The survey results suggest relatively high levels of convenience goods expenditure retention within the primary catchment areas of the three main towns, as shown in Table 3.1. Selby (Zone 1) retains a high proportion of convenience goods expenditure (over 80%). There are higher levels of leakage from Zone 2 (Sherburn in Elmet) and Zone 3 (Tadcaster) due to the proximity of large food stores within neighbouring authorities.

Table 3.1 Food and grocery trip retention (% of all trips in local zones)

Zone/main town	Main (1 st)	Main (other)	Top-up	Combined market share
Zone 1 – Selby	77.2	78.3	87.1	80.4
Zone 2 – Sherburn in Elmet	51.1	31.6	81.6	55.4
Zone 3 - Tadcaster	16.8	27.9	69.8	35.5

Source: NEMS household survey results October 2020

- 3.11 Selby District's overall market share of convenience goods expenditure in the study area is just over 44%, whilst facilities in Selby District retain 83% of expenditure generated in Zone 1. These figures indicate that the majority of Selby District residents tend to undertake their food and grocery shopping close to where they live.
- 3.12 The market shares for comparison goods shopping are shown in Table 4 in Appendix 5. This market share is based on a weighted average for each comparison goods category including within the household survey e.g. clothing/footwear, electrical, furniture, floorcoverings, DIY and health and beauty products. The survey results suggest lower levels of comparison goods expenditure retention within the primary catchment areas of the three main towns, as shown in Table 3.2. Selby (Zone 1) retains a high proportion of comparison goods expenditure (about 46%). There are higher levels of leakage from all three zones due to the proximity of larger shopping destinations.

Table 3.2 Non-food comparison trip retention (% of all trips in local zones – excluding internet shopping)

Good category	Zone 1 Selby	Zone 2 Sherburn in Elmet	Zone 3 Tadcaster
Clothing and footwear	18.8	0.6	0.9
Domestic electric appliances	50.6	4.2	1.5
Other electrical goods	39.7	2.1	0.0
Furniture, floor-coverings, household textiles	38.3	15.0	13.2
DIY / hardware and garden items	64.5	16.5	12.1
Health and beauty items	81.0	40.3	24.0
Books and stationery	67.4	9.7	17.6
Games, toys, sports, hobby items, pet products	62.4	13.0	22.3
Other non-food e.g. jewellery, glassware, household	45.0	3.6	17.6
Combined market share	46.1	10.6	10.9

Source: NEMS household survey results October 2020

- 3.13 The District's overall market share of comparison goods expenditure in the study area is much lower at under 24%, suggesting households are more likely to shop around and travel further for comparison goods shopping. This includes higher-tier destinations such as York and large, out-of-centre retail parks.

- 3.14 The level of convenience goods expenditure attracted to shops/stores in the District is estimated to be £147.03 million, as shown in Table 5 in Appendix 4.
- 3.15 The total benchmark turnover of the identified main food stores in the District is £105.13 million (Table 12 in Appendix 4). This figure does not include all convenience goods sales floorspace within the District. Table 12 does not include small convenience stores/shops in the town or village centres or freestanding shops.
- 3.16 When compared with the actual (survey-derived) turnover for the main food stores (£127.36 million) in the District, the figures indicate that the majority of stores are trading above the national average. The figures suggest there is a base year expenditure surplus of £22.23 million, with existing stores collectively trading 21% above benchmark. Convenience goods facilities in the District appear to be trading healthily, particularly in Selby and Tadcaster.
- 3.17 The estimated comparison goods expenditure currently attracted by shopping facilities within the District is £130.78 million in the base year, as shown in Table 5 in Appendix 5. This turnover is broken down as follows:
- Selby town centre £77.87 million;
 - Selby out of centre £32.36 million;
 - Sherburn in Elmet £7.48 million;
 - Tadcaster town centre £6.56 million and
 - Elsewhere in the District £6.51 million.
- 3.18 In terms of the three main town centres the average expenditure per comparison goods outlet is £960,000 in Selby town centre, £250,000 in Tadcaster and £680,000 in Sherburn in Elmet. These results suggest facilities in Selby and Sherburn are trading satisfactorily, but facilities within Tadcaster are under performing. For the purposes of the retail capacity assessment, it has been assumed that comparison goods facilities are trading at equilibrium in the base year i.e. there is no expenditure deficit or surplus.

Need for convenience goods floorspace

- 3.19 Table 6 in Appendix 4 shows future convenience goods expenditure patterns in 2025 based on constant market shares from the base year. However, the implementation of the Lidl food store retail commitment in Selby is expected to change future market shares. The expected convenience goods turnover of this commitments is £11.17 million, also shown in Table 7A. The expected trade draw of the commitment is shown in Table 7B (Appendix 4). The trade draw percentages from each zone have been informed by existing shopping patterns calculated from the household survey results. Convenience goods shopping patterns in 2025 have been re-assessed to reflect the implementations of the commitment, as shown in Table 7B (Appendix 5).
- 3.20 Taking this commitment into account, available convenience goods expenditure has been projected forward to 2030, 2035 and 2040 in Tables 9, 10 and 11, and is summarised in Table 13 in Appendix 4. Convenience expenditure available to facilities within the District is expected to increase from £147.03 million in the base year to £159.42 million in 2040.
- 3.21 Table 13 subtracts the expected turnover of existing and committed floorspace from available expenditure to calculate the amount of surplus/deficit expenditure. The floorspace projections assume surplus expenditure may be available to support further new development over and above the commitment. The implementation of the commitment is expected to reduce the base year expenditure surplus from £22.23 million to £16.68 million in 2025, which will increase to £19.37 million in 2030, £21.99 million in 2035 and £23.452 million in 2040. This District wide expenditure surplus is concentrated in Zone 1 – Selby and Tadcaster Zone 4.

- 3.22 The expenditure surplus projections have been converted into floorspace estimates in Table 14 (Appendix 4) and summarised in Table 3.1. Surplus expenditure is converted into floorspace estimates based on an assumed average sales density figure of £12,000 per sq.m, based on a generic average turnover density for main food supermarket operators. A net to gross ratio of 75% has been adopted. The projections suggest there is some modest scope for additional convenience goods floorspace concentrated in Selby (Zone 1) and Tadcaster (Zone 2).

Table 3.3 Convenience goods floorspace capacity (sq.m gross)

Zone	2025	2030	2035	2040
Selby (Zone 1)	583	803	1,012	1,128
Sherburn in Elmet (Zone 2)	1,341	1,398	1,459	1,492
Tadcaster (Zone 3)	-77	-59	-40	-28
Eggborough/South Selby (Zone 4)	7	10	13	14
Selby District total	1,853	2,152	2,444	2,605

Source: Table 14, Appendix 4

Qualitative need for convenience goods shopping

- 3.23 The household survey results indicate that most residents in the study area undertake both a main shopping trip and top-up shopping trips. The household survey results suggest that 91% of respondents travel to do their main food shopping by car (both driver and passenger), compared with 85% for non-food shopping.
- 3.24 For households that still undertake bulk food shopping trips, the availability of a wide range of products and car parking are still important requirements. Large supermarkets or superstores remain the usual destination for these types of shopping trip. A list of food stores and net sales areas is shown in Table 12 of Appendix 4.
- 3.25 There are three large food stores within the District with a sales area of over 1,000 sq.m net, the largest is the Morrisons at Market Cross in Selby town centre (2,475 sq.m net) with competition from Tesco (1,739 sq.m net) and Sainsbury's (1,625 sq.m net). These three stores are suitable for bulk food shopping and are concentrated in Selby. There are four medium sized stores of around 700 to 900 sq.m net, e.g. Aldi in Selby, Aldi and Co-op in Sherburn in Elmet and Sainsbury's in Tadcaster. These larger food stores are supported by a number of smaller convenience stores. Whilst residents in most parts of the District have reasonable access to food stores, those in the more rural areas – for example Zone 4 – are more dependent on stores elsewhere (e.g. Selby) to undertake both main-food and top-up shopping.
- 3.26 The discount food sector is represented with Aldi stores in Selby and Sherburn-in-Elmet. This will be complemented by the addition of Lidl at Bawtry Road, Selby, which is under construction. Tadcaster appears to be the most obvious locational gap in discount food store provision in the District. There are negative floorspace capacity projections in in the Tadcaster zone as shown in Table 3.3, but the level of expenditure retention is relatively low (35%). There may be potential to divert at least half of the surplus capacity identified at Sherburn in Elmet to Tadcaster, if Tadcaster can claw back expenditure leakage from Zone 3 to Sherburn in Elmet.

Need for comparison goods floorspace

- 3.27 Table 6 in Appendix 5 shows future comparison goods expenditure patterns in 2025 based on constant market shares from 2020.
- 3.28 There are no significant commitments identified within the District which are expected to tangibly change existing market shares. Commitments that remain extant are principally focused on ancillary comparison goods floorspace additions within the food stores identified in

Table 7A of Appendix 4, and expanded garden centre provision. These are expected to compete on a like-for-like basis with similar provision and are unlikely to significantly affect demand for space within town centres. They also represent a very small proportion of forecast expenditure growth in the study period. Impacts on comparison goods retail provision within existing centres within the District are expected to be negligible and would not alter shopping patterns.

- 3.29 As indicated above, it is assumed that existing facilities are collectively trading at equilibrium in the base year, with available comparison goods expenditure projected forward to 2025, 2030, 2035 and 2040 in Tables 6, 7 and 8, and is summarised in Table 10 in Appendix 5. Comparison goods expenditure available to facilities within the District is expected to increase from £130.78 million in the base year to £207.78 million in 2040.
- 3.30 Table 10 subtracts the projected turnover of facilities from available expenditure to calculate the amount of surplus expenditure that may be available for further new development. Whilst there is significant expenditure growth, the effects of this growth are offset by the forecast increase in sales densities as recommended by Experian and applied at 2025, 2030, 2035 and 2040 (i.e. expenditure growth is absorbed by existing floorspace).
- 3.31 Lower short term expenditure growth and the application of the sales density growth rates is expected to result in a small comparison goods expenditure deficit increasing to -£5.24 million by 2030, which will reduce only marginally to -£3.68 million in 2035 and to -£1.40 million in 2040.
- 3.32 The expenditure deficit projections have been converted into floorspace estimates in Table 11 (Appendix 5) and summarised in Table 3.3 overleaf. Expenditure is converted into floorspace estimates based on an assumed average sales density figure of £5,000 per sq.m at 2020, which is projected to grow in line with Experian's recommended growth rates. These figures represent an estimated long term over-supply of comparison goods retail floorspace in the District.

Table 3.3 Comparison goods floorspace capacity (sq.m gross)

Zone	2025	2030	2035	2040
Zone 1: Selby	-918	-948	-570	-167
Zone 2: Sherburn in Elmet	-88	-93	-59	-25
Zone 3: Tadcaster	-68	-78	-61	-39
Zone 4: Eggborough/S. Selby	-5	-5	-4	-3
Total	-1,078	-1,124	-694	-233

Source: Table 11, Appendix 5

Qualitative need for comparison goods shopping

- 3.33 An assessment of the shopping hierarchy is shown in Section 2 and a detailed analysis of shopping facilities within the main centres is shown in Appendix 3. Selby is the principal centre for comparison goods retailing within the District, reflecting a higher number of comparison shops (81) and retail sales floorspace than that at Sherburn-in-Elmet (11) and Tadcaster (26). It has the largest market share of comparison goods expenditure generated in its local area (40% in Zone 1).
- 3.34 Due to the size and offer of the District's main centres, there is significant leakage of comparison goods expenditure to larger shopping destinations outside the District, in particular the higher-order centre of York and the city's retail parks and also Leeds. These regional/sub-regional shopping destinations provide an excellent range and choice of comparison shops, including many national multiples and independent specialists.

- 3.35 Selby as the largest centre in the District still does not provide the same range and choice of comparison shopping facilities when compared with these higher-order centres, and it is expected that many residents will continue to shop at such destinations. Retail warehouse provision is largely limited to the Three Lakes Retail Park at Bawtry Road in Selby. The household survey indicates that this retail park along with other out of centre retail facilities attracts a market share of 12.5% within the Selby Zone 1.
- 3.36 Whilst comparison goods provision in Selby District is considered sufficient to meet residents' day-to-day needs, there could be potential to increase its market share and reduce expenditure leakage to destinations outside of the District by planning for additional floorspace in accessible locations which are either within or well-linked to town centres. However as indicated in Section 2, operator demand for space within the District may be limited, with national multiples looking to take space within the larger regional/sub-regional centres. As a result, a substantive uplift in comparison goods expenditure retention within the District is not considered to be appropriate or viable.

4.0 Other town centre uses

4.1 This section assesses the need for other main town centre uses including eating and drinking establishments and commercial leisure i.e. cinema/multiplex, tenpin bowling, bingo, theatres, nightclubs and private health and fitness clubs. Main town centre uses, as defined within the NPPF glossary, excludes less intensive sports and recreation uses such as swimming pools, sports halls and sports pitches, and therefore the need for this uses has not been assessed in this study. The demand for office uses needs to be assessed in the context of the wider need for Class B employment uses.

Food and beverage

4.2 An overview of the trends relating to the food/beverage sector is set out in Section 2.

4.3 National information available from Experian Goad Plans indicates that the proportion of non-retail uses within town centres has increased over the last decade as shown in Table 4.1. The proportion of retail uses in Goad town centres has decreased significantly between 2000 and 2019, whilst food and drink uses have significantly increased in proportional terms, despite the increase in shop vacancy rate.

Table 4.1 UK Goad Plan town centres use class mix

Use Class type	Proportion of total number of units (%)				
	2000	2005	2009	2012	2019
Retail	59.1	56.4	54.0	49.5	41.2
Non-retail services	18.5	19.9	20.1	20.8	25.6
Food and beverage	11.2	13.7	14.5	16.1	20.8
Vacant/under Const.	11.2	10.1	11.4	13.7	12.4
Total	100.0	100.0	100.0	100.0	100.0

Source: Experian Goad Centre Reports

4.4 Growth in food and beverage uses within town centres is likely to be affected by the Covid-19 crisis, but the longer term implications are unclear. The role of food and beverage uses is likely to continue to be important in the future, as town centres seek to broaden their attraction in response to the increase in multi-channel shopping.

4.5 In total, there are 76 identified food and beverage uses within the District's three main centres. Selby (17.9%) and Tadcaster (16.7%) have a lower proportion of food and beverage outlets when compared with the UK average (20.8%). Tadcaster's low proportion is partly due to the high vacancy rate. Sherburn (26.8%) has a higher proportion of food and beverage outlets, but most of the outlets are fast food takeaways.

4.6 The proportion of restaurants/café uses within all three town centres in Selby District are slightly below the national average (9.9%), but Selby (7%) and Tadcaster (7.3%) have higher provision of restaurants/café uses compared to Sherburn in Elmet (4.9%). The provision of pubs/bars is generally above the national average (4.8%). Selby (5.5%) and Tadcaster (5.2%) are slightly above the national average with the exception of Sherburn in Elmet (2.4%) which is significantly below the national average. The provision of fast food/takeaway is around the national average in Selby and Tadcaster but is significantly higher in Sherburn in Elmet (19.5%).

4.7 Experian's latest 2018 local expenditure figures have been adopted. Food and beverage expenditure per capita projections are shown in Table 2 in Appendix 7. Total food and beverage expenditure is shown in Table 3 in Appendix 7, based on population figures in Table 1 and average expenditure in Table 2. Food and drink expenditure within the study area as a whole is

expected to increase from £216.75 million in 2019 to over £262.27 million in 2040, an increase of 21%.

Base year food/beverage patterns

- 4.8 Existing food and beverage expenditure patterns have been modelled based on the household survey results within the study area zones. Base year penetration rates are shown in Table 4 in Appendix 6 and expenditure patterns are shown in Table 5.
- 4.9 Selby District's market share of all expenditure within the study area is about 35%. Selby District's existing facilities attract £76.62 million, of which £42.58 million is attracted to the three main town centres. As indicated above, there are 76 food/beverage outlets in the three town centres. Good quality restaurant/bars would be expected to achieve a turnover of at least £0.5 million. Food and beverage facilities (76 outlets) in Selby District's town centres appear to be trading healthily.

Capacity for food/beverage floorspace

- 4.10 Table 6 in Appendix 6 shows future food/beverage expenditure patterns in 2025 based on constant market shares from 2020. Projections to 2030, 2035 and 2040 are shown in Tables 7, 8 and 9 in Appendix 6.
- 4.11 Table 10 subtracts the turnover of existing facilities from available expenditure to calculate the amount of surplus expenditure that may be available for further new development. There is a small food/beverage expenditure deficit in 2025 of - £1.18 million, due to low short term expenditure growth. Continued growth will create a small surplus of +£3.17 million in 2030, increasing to +£4.15 million in 2035 and +£4.55 million in 2040.
- 4.12 The surplus expenditure projections have been converted into potential new floorspace estimates in Table 11 (Appendix 6) and summarised in Table 4.2. Surplus expenditure is converted into floorspace estimates based on an assumed average sales density figure of £5,000 per sq.m in the base year, which is projected to grow by 1% per annum up to 2040.

Table 4.2 Food/beverage floorspace capacity (sq.m gross)

Zone	2025	2030	2035	2040
Zone 1: Selby	-130	388	481	503
Zone 2: Sherburn in Elmet	-31	79	102	107
Zone 3: Tadcaster	-40	67	84	89
Zone 4: Eggborough/S. Selby	-20	34	41	40
Total	-222	569	708	738

Source: Table 11, Appendix 6

- 4.13 The surplus of available expenditure up to 2040 indicates that there is a small long-term requirement for additional food/beverage floorspace in the District of 738 sq.m gross at 2040.

Other non-retail service uses

- 4.14 The retail, food and drink floorspace projections do not include non-retail services. Based on the Goad national average, one would expect around 25% of shop premises to be occupied by these uses within centres, but a lower percentage of total floorspace.
- 4.15 The proportion of other non-retail services in the three main town centres is slightly higher (26.1%) than the national average. Selby has the highest provision (33%), followed by Sherburn in Elmet (27%) and lastly Tadcaster (18%). Given the current reasonable provision of non-retail

service uses in the District, any new town centre development within the District could provide around 15% of floorspace for these non-retail service uses.

Commercial Leisure

4.16 Residents in Selby have a relatively limited range of commercial leisure and entertainment uses within the District but have good access by car to facilities in neighbouring authorities e.g. within Castleford, Leeds and York. Major leisure facilities such as multiplex cinemas, ten-pin bowling centres, ice rinks and family entertainment centres require a large catchment population, and often benefit from clustering together on leisure parks. They are usually less accessible by public transport.

4.17 The main settlements in Selby District have limited catchment populations. This limited population and the proximity of major leisure facilities in surrounding local authorities will influence the potential for major commercial leisure facilities within the District.

Cinemas

4.18 Cinema admissions in the UK declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions reduced to 157.5 million in 2014 but increased slowly to 176 million in 2019 (Source: British Film Institute). Cinema trips have not increased significantly since 2002, despite population growth of 9.6% during this period (59.4 million to 66.6 million). The national average visitation rate is about 2.6 trips per person per annum. Clearly the number of trips during the on-going Covid-19 crisis will have reduced significantly. This cinema assessment assumes trip levels will return to pre-Covid levels in the future.

4.19 The Cinema Advertising Association identifies 771 cinema facilities with 4,115 screens. Lichfields' national CINeSCOPE model identifies approximately 800,000 cinema seats in the UK. The CINeSCOPE model assesses the provision of cinema screens/seats against projected customer cinema trips across the country, to identify areas of under and over-provision. The national average is about 40,000 cinema trips per screen per annum or 220 trips per seat per annum. Selby Globe Community Cinema screens films within the town hall (up to 150 seats) and is not a full time facility (showing twice a month). The nearest provision outside the District includes:

- Cineworld, Castleford (14 screens / 2,752 seats);
- Odeon Luxe, Leeds (10 screens / 915 seats);
- Wetherby Film Theatre (1 screen / 156 seats); and
- Cineworld, York (13 screens / 2,200 seats).
- Vue, York (12 screens / 922 seats)

4.20 The population within the Selby study area (Zones 1-7) in 2019 (159,778 people) would generate around 415,000 cinema trips per annum, based on the national average visitation rate (2.6 trips per annum). Experian's local expenditure data indicates the study area generates £5.2 million on cinema trips. This expenditure estimate appears to be consistent with the 415,000 cinema trip estimate i.e. an average of just over £12 per trip.

4.21 Adopting the national average population per cinema screen (40,000 trips per screen), implies that 415,000 trips generates demand for 10 cinema screens. In terms of seats, the national average (220 trips per seat) suggests 415,000 trips could support around 1,900 seats.

- 4.22 British Film Institute information suggest the participation rate for visiting cinemas is 52% for adults in the UK. The household survey results suggested a lower participation of 48% for household across the study area. These figures suggest a slightly lower average of 2.4 trips per person could be adopted in Selby study area, generating 380,000 trips in 2019.
- 4.23 The resident population in Sherburn in Elmet (Zone 2), Tadcaster (Zone 3) and Eggborough (Zone 4) ranges from about 13,600 to 19,200 people. These local catchment populations generate between 33,000 to 46,000 cinema trips per annum. The catchment population in these zones is insufficient to support a full-time cinema in Sherburn in Elmet, Tadcaster or Eggborough, even if 100% of cinema trips could be retained, which is unlikely due to nearby provision outside the District.
- 4.24 The resident population in Selby (Zone 1) is 54,100, which in theory could support 3 screens with about 600 seats, but it is unlikely Selby can retain 100% of cinema trips. The household survey results suggest most households in this zone visit cinemas in York (43%) and Castleford (35%).
- 4.25 Population within Zone 1 is projected to increase to 58,933 by 2040, generating 141,000 cinema trips in total based on the local participation rate of 2.4 trips per person per annum. If the cinema participation rate increase to the national average (2.6 trips per person per annum) and Selby could retain 50% of cinema trips in Zone 1 then there could be theoretical scope for a small cinema in Selby (about 2 screens with 350 seats). However, the longer term impact of the Covid-19 on the number of cinema trips may reduce this theoretical capacity.

Theatres / live music /cultural activities

- 4.26 The UK Theatre and Society of London Theatres (SOLT) indicated their member organisations (223) presented nearly 63,000 performances attracting over 34.35 million tickets visits, generating ticket revenue of £1.28 billion in 2018. The average ticket revenue per venue is £5.7 million. The UK average attendance per performance is 545.
- 4.27 The nightclub/live music sector (not including music halls) has struggled in recent years. IBISWorld (providers of global industry research) suggests these venues have lost their competitive advantage over pubs or bars, with lower prices and a more relaxed atmosphere.
- 4.28 Approximately one-quarter of nightclubs have closed in the past decade as operators have struggled to respond to new challenges from regulation, licensing, planning, business rates and policing. Selby District is accessible to Leeds and York. There does not appear to be qualitative need to provide further nightclub facilities in the District. However, the development strategy needs to be flexible to respond to emerging opportunities for attractive new facilities of this kind.
- 4.29 Experian's local expenditure data indicates the study area generates £10.9 million on live theatre, concerts and shows. Based on the average ticket revenue per venue (£5.7 million) the study area population generates demand for less than two venues.
- 4.30 The household survey indicated 41% of respondents in the study area visit theatres; 20% visit nightclubs/live music venues; and 32% visit museums and art galleries.
- 4.31 Most respondents visited theatres in York (35%), Leeds (21%) and London (12%). Selby Town Hall Theatre attracted less than 4% of trips from the study area. The household survey results suggests the retention of theatre trips within the study area is relatively low. Most households also visited nightclubs/live music venues in Leeds and York. Selby only attracted less than 9% of trips from the study area.

- 4.32 The close proximity of Selby District to York and Leeds suggest there is limited demand for additional theatre, music and nightclub facilities in the District. There is no clear need for additional provision in the District.

Health and fitness clubs

- 4.33 The 2019 State of the UK Fitness Industry Report reveals that the UK health and fitness industry is continuing to grow. There are now more than 10 million fitness members in the UK and the industry is worth £5 billion, and the penetration is now 15.6%. The sector has more clubs, more members and a greater market value than ever before. The 2019 report highlighted that the industry experienced growth over the twelve-month period to the end of March 2019, with an increase of 4.71% in the number of memberships and 2.9% growth in the number of facilities.
- 4.34 The Sport England/Active Places data indicates that there are 7 registered health and fitness suites in the District, with 389 fitness stations. Most of these fitness stations (329) are concentrated in Selby, with the remainder in Tadcaster (30) and Sherburn in Elmet (30). Four of these facilities are for registered members (204 fitness stations). The remaining facilities are open to the general public (pay and play). These registered facilities are as shown in Table 4.4.

Table 4.4 Selby District health and fitness suites (Active Places, June 2020)

Name	Type	No. Fitness Stations
Drax Golf Club, Selby	Registered Membership use	12
DW Sports Fitness, Selby	Registered Membership use	114
Selby Leisure Centre	Pay and Play	107
Selby Squash Club	Registered Membership use	48
Serendipity Ladies Health & Fitness, Selby	Pay and Play	48
Fitness, Motion, Sherburn in Elmet	Registered Membership use	30
Tadcaster Leisure Centre	Pay and Play	30
Total		389

- 4.35 The base year study area population is 159,778 people (2019). The household survey results suggest the health and fitness club participation rate is about 30% of households. Selby District's market share of health and fitness trips is about 70%, suggesting a health and fitness catchment population of about 112,000 in 2019. This population estimate indicates that Selby District has 3.5 fitness stations per 1,000 people (389 registered stations in total).
- 4.36 Demand for additional facilities within Selby District should arise from future population growth, increased participation rates and/or an increase in the District's market share of members.
- 4.37 Yorkshire and Humberside has 619 Sport England registered health and fitness suites with 41,605 fitness stations (average of 67 stations per facility). This existing provision equates to about 7.5 registered fitness stations per 1,000 people in the Yorkshire and Humberside region. Selby District's catchment population has a lower provision of fitness registered stations (3.5 per 1,000 people) than the Yorkshire and Humberside average (7.5 stations), suggesting lower participation rates.
- 4.38 The lower provision in Selby District may be due to the demographic profile of the District (lower participation rates). If Selby's provision increased from 3.5 stations per 1,000 people to 5 stations per 1,000 then the number of fitness stations would increase from 389 to 560 stations, an increase of 171 or about 3 medium sized facilities. This uplift would require an increase in both market share and participation rates and could be viewed as the maximum potential.

4.39 Growth in population between 2019 and 2040 in the study area is +10,836 people. This additional population could support 38 fitness stations based on the Selby District average or 81 fitness stations based on the regional average, about one medium sized facility, which could be viewed as the minimum potential.

4.40 The resident population in Sherburn in Elmet (Zone 2), Tadcaster (Zone 3) and Eggborough (Zone 4) ranges from 13,600 to 19,200 people. Based on the regional average of 7.5 fitness stations per 1,000 people and a 70% market share, these local catchment populations could generate demand for about 70 to 100 fitness stations. The catchment population in these zones is theoretically sufficient to support at least one health and fitness facility in each town. The resident population in Selby (Zone 1) is 54,100, which in theory could support 284 fitness stations, compared with the existing provision of 329 stations.

4.41 Based on the analysis above, there could be potential for up to 2 to 3 additional health and fitness facility in the District as a maximum over the plan period.

Tenpin bowling and family entertainment centres

4.42 The Selby Superbowl/family entertainment centre and the Summit Indoor Adventure are the only major facilities in Selby District. These facilities have:

- 18 tenpin bowling lanes;
- a laser zone;
- indoor climbing;
- soft play;
- indoor skate park; and
- indoor karting for 4 to 8 year olds.

4.43 The base year study area population (159,778 people) could theoretically support 13 tenpin bowling lanes, based on one lane per 12,000 people (national average). Population growth within the study area between 2019 and 2040 (+10,836 people) would increase the theoretical capacity to about 14 lanes.

4.44 There is no need for additional tenpin bowling/family entertainment facilities within the District.

4.45 Indoor trampoline centres are a relatively new leisure activity in the UK. In America outdoor trampoline centres were popular in the late 1950s and 1960s. This format first seen in America has been adopted and modernised and is now becoming a popular indoor leisure activity for a variety of age groups in the UK. The UK's first indoor trampoline centre was opened by Bounce in 2014.

4.46 Trampoline centres offer a new, recreational experience for both children and adults. They typically have over 100 interconnected trampolines on site, consisting of differing courts including a Main Arena, Dodgeball Court, Kids Court, Slam Dunk Area, Foam Pit, Airbag Jump, Touch Walls, Gladiator Pits and Tumble Tracks, as well as an arcade and party rooms.

4.47 There is a Gravity trampoline park at Xscape in Castleford and Energi trampoline park in York. There are also three trampoline parks in Leeds. This sector is still relatively new and its potential for continued growth is unclear. The future strategy should be flexible to respond to any emerging opportunities.

Bingo, Games of Chance and Gambling

- 4.48 Gala and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose-built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. However, the significant increase in on-line gambling has, and will continue to affect this sector.
- 4.49 The Gambling Commission indicates there are 650 bingo facilities in Great Britain (2018) and 152 casinos. This equates to approximately one bingo facility per 75,000 adults, and one casino per 330,000 adults. The adult population in the Selby study area is only sufficient to support one bingo facilities but not a casino. There are no full time bingo halls in Selby District.
- 4.50 The nearest Bingo facilities are Buzz and Ritz Bingo in Castleford, Mecca and Clifton Bingo in York and Mecca and Buzz Bingo in Leeds.
- 4.51 Whilst the study area population in theory could support one bingo hall, provision within surrounding authorities may restrict operator demand for a facility in Selby District.

Conclusions on commercial leisure facilities

- 4.52 The leisure, entertainment and cultural sectors are fragmented and innovative. In addition to the main leisure and entertainment uses outlined above, there are a larger number of other activities that could be promoted e.g. nightclubs, museums, art galleries, exhibition space, tourist attractions and new emerging leisure activities such as escape rooms and virtual golf centres. The representation of these emerging uses is relatively limited in Selby District. Given the fragmented nature of these sectors it is difficult to quantify the potential demand for these uses over the plan period.
- 4.53 A summary of the potential to improve provision in the District is set out below:
- be theoretical scope for a small cinema in Selby (2 screens with 350 seats); and
 - potential for 2 to 3 additional facilities in the District as a maximum over the plan period.
- 4.54 There is no clear need for other leisure and entertainment facilities. However, the development strategy should to be flexible to respond to emerging opportunities for new leisure, entertainment and tourist related facilities.

5.0 **Accommodating growth**

Introduction

5.1 The National Planning Policy Framework (NPPF, 2019) indicates that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres, for at least 10 years. To accommodate growth, local planning authorities should assess the need to expand town centres to ensure a sufficient supply of suitable sites. The NPPF indicates local planning authorities should apply a sequential approach for development.

5.2 There are several issues that influence the scope for new floorspace and the appropriate location for this development, as follows:

- major retail developments in competing centres;
- the re-occupation of vacant retail/leisure floorspace;
- the availability of land to accommodate new development;
- the reliability of long-term expenditure projections beyond 2030 due to greater margins of error and the implications of the coronavirus crisis and the speed of recovery from this;
- the effect of internet/home shopping on the demand for retail/leisure property;
- the level of operator demand for floorspace in lower tier centres, recognising the polarisation of investment within larger centres; and
- the ability to maintain existing market share of expenditure in the future in the face of increasing competition.

5.3 The expenditure projections in this study take account of home shopping made through non-retail businesses, because special forms of trading have been excluded. The study update adopts Experian's latest information and projections and assumes that special forms of trading will increase in the future, including the growth of internet shopping.

5.4 The assessment of the potential for new retail, food/beverage floorspace within the previous sections suggests there is modest long term scope for new development within Selby District, because short to medium term growth is expected to be absorbed by the implementation of commitments and increases in turnover efficiencies. This section examines the opportunities for accommodating long term projected growth and assesses potential to accommodate this floorspace.

5.5 Tables 5.1 and 5.2 below summarise the floorspace requirements in Selby District up to 2035 and 2040, over and above food store commitments. Table 5.1 indicates there is combined scope for 2,458 sq.m gross of new retail and food/beverage floorspace up to 2035. By 2040 it is projected this potential requirement increases to 3,111 sq.m gross.

5.6 These projections assume Selby District (post the implementation of commitments) can maintain its market share of expenditure within the study area. This approach recognises that additional development within the District could help to increase the District's market share, but this increase will be counter-balanced by development within surrounding centres. A balanced and sustainable approach has been adopted.

Table 5.1 Summary of retail and food/beverage floorspace requirements up to 2035 (sq.m gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/beverage (sq.m gross)	Total (sq.m gross)
Zone 1: Selby	1,012	-570	481	923
Zone 2: Sherburn in Elmet	1,459	-59	102	1,502
Zone 3: Tadcaster	-40	-61	84	-17
Zone 4: Eggborough/S. Selby	13	-4	41	50
Total	2,444	-694	708	2,458

Source: Table 14, Appendix 4; Table 11, Appendix 5; and Table 11, Appendix 6. (Totals may not add due to rounding).

Table 5.2 Summary of retail and food/beverage floorspace requirements up to 2040 (sq.m gross)

Zone	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food/beverage (sq.m gross)	Total (sq.m gross)
Zone 1: Selby	1,128	-167	503	1,464
Zone 2: Sherburn in Elmet	1,492	-25	107	1,574
Zone 3: Tadcaster	-28	-39	89	22
Zone 4: Eggborough/S. Selby	14	-3	40	51
Total	2,605	-233	739	3,111

Source: Table 14, Appendix 4; Table 11, Appendix 5; and Table 11, Appendix 6. (Totals may not add due to rounding).

- 5.7 The floorspace projection for Zone 2 (Sherburn in Elmet) primarily (95%) relates to convenience goods retail floorspace. The analysis of current shopping patterns indicates there is a significant amount of convenience goods expenditure leakage from Zone 3 (Tadcaster) to Sherburn in Elmet. If food store provision is improved in Tadcaster than there is potential to clawback expenditure leakage to Sherburn in Elmet, which suggests a significant proportion of the Zone 2 (Sherburn in Elmet) floorspace capacity projection could be redistributed to Tadcaster.

Strategy for accommodating growth

- 5.8 The sequential approach suggests that designated town centres should be the first choice for retail, leisure and main town centre uses. In the case of Selby District designated centres include town and village centres. In considering this important issue the following factors have been assessed:

- What is the locational area of need the development seeks to serve and what existing centre could potentially fulfil the identified area of need?
- Is the nature and scale of development likely to serve a wide catchment area extending beyond a localised area?
- Is a site available in one of the designated centres, including vacant premises and will this site meet the identified need?
- If the development has a more localised catchment area, is a site available in a local centre and will this site meet the identified need?

- 5.9 Some forms of retail or leisure facilities, which serve more localised catchment areas, may be more appropriate within village local centres, rather than the main town centres. However, development should if possible be appropriate in terms of scale and nature to the centre in which it is located.

5.10 The existing stock of premises should have a role to play in accommodating projected growth. The need assessment in this report assumes that existing retail and service floorspace can, on average, increase its turnover to sales floorspace densities. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.

5.11 There are 68 vacant shop units within the three main town centres, an average vacancy rate of about 16.6%, which is above the Goad national average (12.4%). Assuming an average of 100 sq.m gross per vacant unit, the amount of vacant floorspace would be about 6,800 sq.m gross.

5.12 Based on Lichfields' experience, the healthiest centres generally have a vacancy rate of around 5%, because there will always be an element of vacancies, reflecting the normal churn of occupiers. Vacant premises within Selby District should help to accommodate growth. If the existing vacancy rate reduced to 8% in the main town centres, the pre-recession 2008 national average, then there could be potential for re-occupied vacant space to accommodate the following new floorspace:

- Selby 1,500 sq.m gross (15 re-occupied units)
- Tadcaster 2,200 sq.m gross (22 re-occupied units)
- Sherburn in Elmet 0 sq.m gross (no re-occupied units)

5.13 Based on this assumed reduction in shop vacancy rates, reoccupied vacant units in total could accommodate up to 3,700 sq.m gross. This re-occupied vacant space could theoretically accommodate all of the combined retail and food/beverage floorspace projection for Selby District up to 2040 (3,111 sq.m gross), but this would require the redistribution of convenience goods retail capacity from Sherburn in Elmet to Tadcaster. As indicated above, improved food store provision in Tadcaster could clawback expenditure leakage to Sherburn in Elmet.

5.14 Whilst prioritising the reoccupation of vacant units within the designated in Selby and Tadcaster, the future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units. Some redevelopment, refurbishment and expansion may be required, ideally within designated centres to accommodate some future investment opportunities.

5.15 Major housing developments within the District may require local shops and services to provide day-to-day facilities within walking distance of the new homes. An element of the floorspace projection, particularly convenience goods retail floorspace, could be provided within major residential developments.

6.0 Strategic policy analysis

Overview

- 6.1 The revised NPPF (February 2019) consolidates a series of proposals that have been made in the last two and half years. In relation to town centres, the revised NPPF does not change the overall aims of policy, although there are some important modifications. For planning policies, local authorities are still required to support the role of town centres and the three main areas policies should focus on:
- defining a network and hierarchy of centres, allowing them to grow and diversify;
 - defining the extent of centre boundaries and primary shopping areas, making clear the uses permitted in these locations; and
 - allocating a range of suitable sites to meet the scale and type of development needed for at least 10 years ahead, site should be allocated consistent with the sequential approach i.e. town centre, then edge-of-centre followed by accessible out-of-centre sites.
- 6.2 The revised NPPF acknowledges the rapid changes that are affecting town centres. It recognises that diversification is key to the long-term vitality and viability of town centres, including the need for residential development. Accordingly, planning policies should clarify the range of uses permitted in such locations, as part of a positive strategy for the future of each centre.
- 6.3 The importance of a mix of retail and other town centre activity has increased in recent years and town centres increasingly need to compete with on-line shopping. Town centres need a better mix of uses that extend activity throughout the daytime and into the evenings.
- 6.4 The NPPF's presumption in favour of sustainable development remains. For plan-making this means that plans should positively seek opportunities to meet the development needs of their area and be sufficiently flexible to adapt to rapid change. It is widely accepted that very long-term projections have inherent uncertainties. In response to these uncertainties, local planning authorities are no longer required to allocate sites to meet the need for town centre uses over the full plan period. The need for new town centre uses over a minimum ten-year period reflects the complexities in bringing forward town centre development sites. In line with the Government's economic growth agenda, a positive approach to meeting community needs is still required.
- 6.5 As in the original NPPF, applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will be assessed against the sequential and impact tests.
- 6.6 The sequential test in both the NPPF indicates main town centre uses should locate in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered (para. 86). When considering edge of centre and out of centre proposals, preference should be given to accessible sites which are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale, so that opportunities to utilise suitable town centre or edge of centre sites are fully explored (para. 87).
- 6.7 The NPPF states that local planning authorities should require an impact assessment for applications for retail and leisure development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set floorspace threshold. If there is not a locally set threshold, the default threshold is 2,500 sq.m (para. 89). This should include an assessment of:

- the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
 - the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and the wider retail catchment (as applicable to the scale and nature of the scheme).
- 6.8 Where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on one of more of the above factors, it should be refused (para. 90).
- 6.9 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with on-line shopping. Online shopping is likely to grow faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a better mix of uses within town centre will become increasingly important. A broader mix of uses should extend activity throughout the daytime and into the evenings.
- 6.10 On 1 September 2020, the Use Classes Order (UCO) was significantly amended. Changes to town centre use classes now allow far greater flexibility for uses to change within town centres without the need to obtain planning permission. The UCO has significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses and retain specific uses previously protected e.g. Class A1 retail. Temporary changes to permitted changes of use up to at least July 2021 will provide further flexibility.
- 6.11 In relation to main town centre uses, as defined in the NPPF Annex 2 glossary, the UCO changes provide for three new use classes:
- Class E (Commercial, business and service);
 - Class F.1 (Learning and non-residential institutions); and
 - Class F.2 (Local community).
- 6.12 The UCO changes now combine: Shops (A1), financial/professional services (A2), cafés/restaurants (A3), indoor sports/fitness (D2 part), medical health facilities (D1 part), creche/nurseries and office/business uses (B1) into the new single Use Class E. The new Class E includes some uses that are not defined as ‘main town centre uses’ within the NPPF e.g. medical services and some light industrial uses.
- 6.13 Other changes potentially introduce more restrictions rather than flexibility. Partly in response to the impact of the Covid-19 crisis, there is added protection against the loss of learning, non-residential and community facilities, including museums public halls, sports facilities and local shops. These uses are now included in new Classes F1 and F2. Class F.2 also includes small isolated shops (at least 1 kilometre from a similar shop) selling essential goods including food.
- 6.14 Other potential ‘bad neighbour’ town centre uses have been placed in the list of Sui Generis uses, with no permitted changes of use e.g. pubs/bars (A4), takeaways (A5), cinemas and live music venues. The inclusion of these uses as Sui Generis appears to have a dual function i.e. controlling potential ‘bad neighbour’ uses such as pub/bars and takeaways, whilst protecting against the loss of other cultural facilities such as cinemas and music venues, most vulnerable to the impacts of Covid-19.
- 6.15 The previous distinction between Class A3, A4 and A5 uses will now become more critical, with Class A3 uses now having more flexibility in the new Class E, but more limited flexibility for Class A4 and A5 uses. Many Class A3 restaurants have offered a takeaway service during the Covid-19 crisis and the categorisation of bar/restaurants has always been arguable and will be a matter of fact and degree on a case by case basis. The Council will need to re-categorise existing

uses within the primary shopping area to reflect the new UCO before appropriate policy options can be considered.

- 6.16 The potential implications of permitted changes in use outside town centres may also have unintended consequences. In theory large out-of-centre B1 office buildings or D2 commercial leisure uses, with no restrictive conditions, could be converted to retail use without planning permission or an assessment of the impact on the town centre or application of the sequential test. Allowing retail uses to occupy out-of-centre buildings could run counter to the objective of maintaining and enhancing town centres. This change could have implications for the effectiveness of retail impact and sequential tests policies.

Hierarchy of centres

- 6.17 Continuing to identify the hierarchy of centres in the emerging Local Plan is important in terms of:

- ensuring the vitality and viability of town and local centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
- directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
- identifying a viable role and strategy for each centre.

- 6.18 The three main town centres (Selby, Tadcaster and Sherburn in Elmet) are identified in Core Strategy Policy SP14 and the boundaries of these centres (the Shopping and Commercial Centre boundaries) are clearly shown on the Proposals Plan (see below). The broad strategy for each centre is summarised in Policy SP14 and described in more detail in the supporting text. Core Strategy Policy SP14 also refers to important local shops and services outside established town centres.

- 6.19 Within the supporting text, Selby town centre is described as being at the top of the District's retail hierarchy, performing the role of a "major district centre" within the region. Sherburn in Elmet is described as functioning as a Local Service Centre. Policy SP14 implies Selby town centre, as the largest centre in the District, is a level above Tadcaster and Sherburn in Elmet.

- 6.20 The need assessment and audit of centres in this report confirms this hierarchy remains appropriate for emerging new Local plan policies. However, the town centre hierarchy should be cross related to the settlement hierarchy, i.e. Selby is identified as the Principal Town and Tadcaster and Sherburn in Elmet as Local Service Centres.

- 6.21 It should be noted that the reference to "district centres" within the NPPF Annex 2 Glossary's description for town centres appears to have a different meaning than the Selby Core Strategy. The NPPF refers to city, town, district and local centres (excluding small parades). In this NPPF context, a district centre is usually a suburban centre serving a district/area within a larger settlement, which supports the main city or town centre. The Core Strategy appears to refer to Selby town centre's district wide role. In order to avoid confusion, the emerging Local Plan should consider differentiating between the three towns centres by referring to Selby as the "main" or "principal" town centre in the District, and Tadcaster and Sherburn in Elmet as "minor" town centres.

- 6.22 The network of town centres and local facilities should continue to be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping patterns.

Floorspace projections and allocations

- 6.23 Development plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through the expansion of centres. The revised NPPF indicates that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres for at least 10 years. In this case projections at least up to 2035 could be considered allowing time for adoption. The need for development should not be compromised by limited site availability. To accommodate growth, local planning authorities should keep town centre boundaries under review.
- 6.24 The Selby Core Strategy supporting text refers to the Retail, Commercial and Leisure Study prepared in 2009, which assessed the need for further development up to 2026. The emerging Local Plan should update and roll forward the assessment of need over five year intervals up to 2035, with horizon figures for 2040. The updated floorspace projections should not be adopted as rigid targets or maximum or minimum requirements but should be used as broad guidance. The projections will provide a starting point for site-specific allocations and development management policies.
- 6.25 The capacity projections in this report suggest there is no pressing requirement to allocate sites for major retail and leisure uses within the emerging in local plan in order to accommodate projected growth for the foreseeable future. The priority in the short to medium term will be the reoccupation of vacant shop units in Tadcaster and Selby. Based on a reasonable reduction in vacancy rates, commitments and vacant floorspace could theoretically accommodate the need for new retail and food/beverage floorspace up to 2040. However, the projected capacity in Sherburn in Elmet (based on current market shares) cannot be accommodated within vacant units with the town centre.
- 6.26 The future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units or designated centres. In qualitative terms, convenience goods shopping provision is weakest in Tadcaster and the claw back of expenditure leakage from Tadcaster's catchment area to Sherburn in Elmet would be beneficial. Opportunities to improve convenience goods shopping provision in Tadcaster, enabling the redistribution of retail capacity currently attracted to Sherburn in Elmet, should be considered. A new food store in Tadcaster to serve any major residential allocations in the settlement could be an option.
- 6.27 Some redevelopment, refurbishment and expansion may be required in addition to the reoccupation of vacant units, ideally within town centres to accommodate some future investment opportunities.
- 6.28 Major housing led mixed use developments outside of town centres or new/expanded settlements may require an element of local retail and services, but these should be of an appropriate scale and type to serve the needs of the development. These developments should comply with the impact and sequential tests.

Impact test

- 6.29 The NPPF states that, when assessing applications for retail and leisure development outside of town centres which are not in accordance with an up-to-date local plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set threshold. If there is no locally set threshold, the default threshold is 2,500 sq. m gross. The PPG provides guidance on setting locally appropriate thresholds, and indicates it will be important to consider:
- the scale of proposals relative to town centres;
 - the existing viability and vitality of town centres;

- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- the likely effects of development on any town centre strategy; and the impact on any other planned investment.

6.30 The PPG also states that where authorities do not have their own floorspace thresholds for impact assessments in local development plans, national policy requires impact assessments to be submitted for retail and leisure developments over 2,500 sq.m gross. The PPG acknowledges that it may occasionally be relevant to consider the impact of proposals below this floorspace threshold, e.g. if they are large developments when compared with the size of a nearby centre, or likely to have a disproportionate effect or ‘tip the balance’ of a vulnerable centre. Maintaining the sequential and impact test will allow each proposal to be considered on its individual merits.

6.31 The NPPF minimum threshold of 2,500 sq.m gross is inappropriate as a blanket threshold across Selby District, because this scale of development would exceed the overall long term retail/food beverage/leisure projections for all centres/zones in the District. This floorspace threshold is also significant in relation to the scale of town centres in the District, particularly Tadcaster and Sherburn in Elmet. For example, development much smaller than 2,500 sq.m gross could have a significant adverse impact on a vulnerable under-performing centre such as Tadcaster.

6.32 Vacancy rates are relatively high in Selby and Tadcaster. Cumulatively with commitments, additional developments under 2,500 sq.m gross could have a significant adverse impact on the three main town centres. The Council should consider reducing the impact threshold in the emerging Local Plan. A reduced impact threshold of 400 sq.m gross, about 280 sq.m net consistent with the Sunday trading threshold could be adopted. However, if this approach is adopted, then policy should also indicate that impact assessments should be proportionate to the scale of development proposed.

6.33 Retail and leisure uses previously related to use classes A1 to A5 and D2 leisure uses. Changes to the UCO may lead to confusion, at least until the NPPF is amended to reflect the UCO changes. For example, not all uses within the new Class E are retail or leisure uses, requiring an impact assessment i.e. offices and medical uses. Bearing in mind the potential for confusion arising from the UCO changes and for consistency with the NPPF, future policy relating to the impact test should refer to retail and leisure uses rather than Class E within the new UCO.

Scale within centres

6.34 The NPPF does not require retail or leisure development within designated centres to be of an appropriate scale to that centre or require an impact assessment to be provided. However, 2005 policies for Tadcaster (TAD/4) and Sherburn in Elmet (SHB/5) required uses within the former Class A1 to A5 located in the centre boundaries to be of an appropriate scale and character to the centre. This approach is not consistent with the NPPF.

6.35 Town centre boundaries are relatively tightly drawn in the District, which should assist in controlling the appropriate scale of development within town centre. Furthermore, the distances between centres is significant and each centre has a relatively self-contained local catchment areas, therefore development within centres should not harm the hierarchy of centres. The need for continuing the scale policy criterion for in-centre development is questionable and should be reviewed. However, the scale of development is a relevant consideration in relation to development outside the town centre boundary when applying the sequential approach to site selection, i.e. in terms of the relevant area of search and centres that should be considered.

Sequential approach

- 6.36 Town centres are expected to be the focus for retail, leisure and other main town centre uses. The three main town centres in the District have the best prospects for attracting investment from developers and multiple operators. The continued classification of centres within the hierarchy is important in identifying which centres are relevant in the search for sequential sites.
- 6.37 The continued identification of town centre boundaries is important when applying the sequential approach, to direct retail and town centre uses to sustainable locations and determine whether a retail impact assessment is required. The revised NPPF continues to indicate that the first preference for retail and other town centre uses should be the primary shopping areas (PSA) for retail uses and the town centre boundary for other town centre uses. The first preference for leisure uses is normally the wider defined town centre, which usually includes the PSA and other parts of the town centre.
- 6.38 Policy regarding edge and out-of-centre development should be consistent with the NPPF in terms of the sequential and impact tests and should be worded to refer to the centre boundaries. The PSA normally comprises the core/primary shopping frontages and the contiguous secondary shopping frontages. In many small centres the PSA (primary and secondary frontages combined) and the town centre boundary may cover the same area and it may be unnecessary to designate two boundaries. A single boundary continues to be appropriate in Selby, Tadcaster and Sherburn in Elmet town centres because these centres do not have extensive areas beyond the PSA occupied by other main town centre uses. However, the need to designate Core Frontages, to control the mix of uses rather than the application of the sequential approach, is explored below.
- 6.39 The relatively low floorspace capacity projections and the high shop vacancy rates in Selby and Tadcaster suggest there is no need to extend the town centre boundaries to accommodate future growth.
- 6.40 Emerging Local Plan policy relating to the sequential approach should refer to main town centre uses rather than just retail. The NPPF does not refer to a minimum floorspace threshold where the sequential test will be applied in the same way as the impact test. However, a threshold could be adopted to allow the provision of appropriate local shopping provision outside the main town centres e.g. within villages.
- 6.41 The PPG suggests some certain main town centre uses have “particular market and locational requirements that mean they may only be accommodated in specific locations”, but robust justification must be provided. Emerging Local Plan policy could refer to some town centre uses having a market and locational requirements where there is a robust justification e.g. where it would serve a local need not currently served by facilities in the local area.

Frontage policies

- 6.42 A small area is designated as Core Frontages within Selby town centre. This area contains the main concentration of multiple retailers e.g. Boots, WH Smiths, Edinburgh Woollen Mill and Superdrug. Policy SEL/10 seeks to maintain the predominance of retail use in these frontages by preventing at ground floor level:
- more than two side by side non-retail uses at ground floor level;
 - more than a third of each frontage is devoted to non-retail uses.
- 6.43 The frontages covered by this policy are limited, 30 units or about 10% of all shop premises within the centre. There is a significant degree of flexibility in the remainder of the town centre.

- 6.44 There are four broad policy approaches that could be adopted, as follows:
1. strengthening shop frontages policies to provide more control over the loss of retail uses. This would usually involve extending the Core Frontages and/or increasing the restrictions on non-retail uses;
 2. retaining the existing approach to control the extent of non-retail uses within the Core Frontages;
 3. relaxing shop frontages policies to allow a more flexible approach to enable more non-retail uses. This would usually involve reducing the areas of Core Frontage and/or allowing more non-retail uses; or
 4. a laissez-faire approach that does not seek to protect retail and town centre uses, on the basis that the market will determine the appropriate mix of uses within town centres.
- 6.45 In light of current and likely future market trends; the revised retail floorspace capacity projections; and changes to the UCO described earlier, Option 1 is an unsound and unimplementable approach. The UCO changes prevent a more restrictive approach, recognising that the introduction of Article 4 directions can only remove permitted GPDO changes of uses but not movement within the same use class i.e. new Class E. The continuation of the current adopted policy approach (Option 2) will also be hampered by the UCO changes. As a result of these recent changes, Options 3 and 4 now appear to be the most likely approaches the Council should consider.
- 6.46 The number of vacant units in Selby town centre is slightly above the national average, but the vacancy rate in the Core Shopping Frontages based on the latest available information (January 2019) appears to be low. The proportion of units previously classified as A1 retail across the town centre as a whole is 53.5% which is only marginally lower than the national average (55.4%). Within the existing Core Frontage, Goad Plan data (January 2019) suggested there were 9 non-retail uses and one vacant unit. Just over a third of units were occupied by retail uses, which suggests the maximum one third threshold for non-retail uses had been successfully maintained. This evidence suggests Selby town centre does not have a harmful or disproportionately high level of non-retail uses at present. These figures do not suggest a radical change in policy approach is required but the changes to the UCO must be considered. These changes will have implications for Selby and the ability to control the mix of uses.
- 6.47 The introduction of restrictive shop frontage policies is now unenforceable due to the UCO changes. Furthermore, this would be inappropriate as it could lead to an increase in vacant units. Demand from retail occupiers has reduced and the updated comparison and convenience goods floorspace projections are lower.
- 6.48 Policy SEL/10 should be replaced with a new policy restricting non-Class E uses at ground floor level. The Core Frontages could be removed and then a replacement policy could include all uses at ground floor level within the town centre boundary as a whole. Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses could be assessed against similar criteria as currently set out in Policy SEL/10 i.e. relating to breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages. A similar policy could be established in the other town centres to ensure main town centre uses are retained.

7.0 **Conclusions and recommendations**

Accommodating growth

7.1 This study provides up-to-date projected capacity for retail and food/beverage floorspace. The projections suggest a mix of convenience goods retail and food/beverage floorspace is required up to 2040. The combined floorspace capacity projection totals about 3,100 sq.m gross by 2040.

7.2 Future policy should indicate this floorspace projection can be accommodated through the re-occupation of vacant floorspace in Selby town centre and Tadcaster town centre and new local shops and services providing day-to-day facilities within major residential developments.

Other policy options

7.3 The NPPF minimum threshold of 2,500 sq.m gross is inappropriate as a blanket threshold across Selby District, because much smaller development could have a significant adverse impact on the District's centre. The Council should consider reducing the impact threshold in the emerging Local Plan. A reduced impact threshold of 400 sq.m gross could be adopted, and policy should also indicate that impact assessments should be proportionate to the scale of development proposed. Future policy relating to the impact test should refer to retail and leisure uses rather than Class E within the new UCO. The need to control the scale of in-centre development should also be reviewed.

7.4 The continued classification of centres within the hierarchy and identification of town centre boundaries are important when applying the sequential and impact tests. A single boundary continues to be appropriate in Selby, Tadcaster and Sherburn in Elmet town centres. Future Local Plan policy relating to the sequential approach should refer to main town centre uses rather than just retail. A minimum floorspace threshold where the sequential test will be applied could be adopted to allow the provision of appropriate local shopping provision outside town centres. Future policy could refer to some town centre uses having a market and locational requirements where there is a robust justification.

7.5 The introduction of restrictive shop frontage policies in Selby or other town centres is now unenforceable due to the UCO changes. Policy SEL/10 should be replaced with a new policy restricting non-Class E uses at ground floor level. The Core Frontages could be removed and then a replacement policy could include all uses at ground floor level within the town centre boundary as a whole. Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses could be assessed against similar criteria as currently set out in Policy SEL/10 i.e. relating to breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages. A similar policy could be established in the other town centres to ensure main town centre uses are retained.

Appendix 1 Methodology

Floorspace capacity assessment – Methodology and data

Price base

All monetary values expressed in this update report are at 2018 prices, consistent with Experian's base year expenditure figures for 2018, which is the most up to date information available.

Retail and food/beverage expenditure

The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison, convenience goods and food/beverage for each of the study area zones for the year 2018 have been obtained.

Experian's latest EBS national expenditure information (Experian Retail Planner Briefing Note 18 – October 2020) has been used to forecast expenditure within the District. Actual (rather than projected) change in average expenditure per capita during 2017, 2018 and 2019 was as follows:

- convenience goods: +2.0%;
- comparison goods: +13.7%;
- leisure: -1.6%.

Experian's short term EBS growth forecast rates during 2020, 2021 and 2022 reflect current economic circumstances, including the current Covid-19 crisis. The forecast changes during this period are as follows:

- convenience goods: +14.1%;
- comparison goods: +1.2%;
- leisure: -12.6%.

These short term forecasts, particularly for comparison goods and leisure, are relatively cautious. In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's medium and long term growth average forecasts have been adopted, as follows:

- convenience goods: 0% per annum growth for 2023 to 2027 and +0.1% per annum after 2027;
- comparison goods: +3.0% per annum growth for 2023 to 2027 and +2.9% per annum after 2027; and
- leisure: +2.9% per annum growth for 2023 to 2027 and +0.9% per annum after 2027.

These growth figures relate to real growth and exclude inflation.

Experian's latest adjusted deductions for SFT (i.e. home and online shopping through non-retail businesses) in 2018 were:

- 3.8% of convenience goods expenditure; and
- 16.8% of comparison goods expenditure.

Experian's projections suggest that these percentages will increase to 5.4% and 22.5% by 2022 respectively. The long term Experian projections suggest an increase to 7.2% and 28.2% by 2036 respectively.

This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future to review future policies and development allocations.

On-line shopping has experienced rapid growth since the late 1990s. The latest available data suggests it now forms a significant percentage of total retail expenditure. Experian state that they expect that the SFT market share will continue to grow.

The growth in SFT has an will continue to reduce the demand for retail space. Some retailers operate on-line sales from their traditional retail premises e.g. food store operators. The growth in on-line sales may not always mean there is a proportionate reduction in the need for retail floorspace. However, on-line sales and click and collect activity will assist in allowing retail operators to increase their sales/turnover density rather than increasing the need for traditional floorspace. Given the likely continued growth in home/internet/click and collect shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure. Appropriate deductions for SFT have been made and growth in sales/turnover densities has been assumed, as recommended by Experian.

Market shares/penetration rates

The total turnover of shops and food/beverage outlets has estimated based on penetration rates. These turnover estimates are based on population and expenditure information.

For convenience goods shopping actual turnover estimates are compared with average company benchmark or average sales floorspace densities derived from GlobalData 2019 information, which provide an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

Turnover sales densities

Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Global Data. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

Information on sales floorspace within the main food stores has been obtained from the Institute of Oxford Retail Consultants (ORC) StorePoint database. Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures.

Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each centre and Lichfields' experience of trading levels of small independent shops informed by household shopper surveys elsewhere, an average sales density of £5,000 per sq.m net for convenience shops/stores has been adopted.

Increases in turnover densities

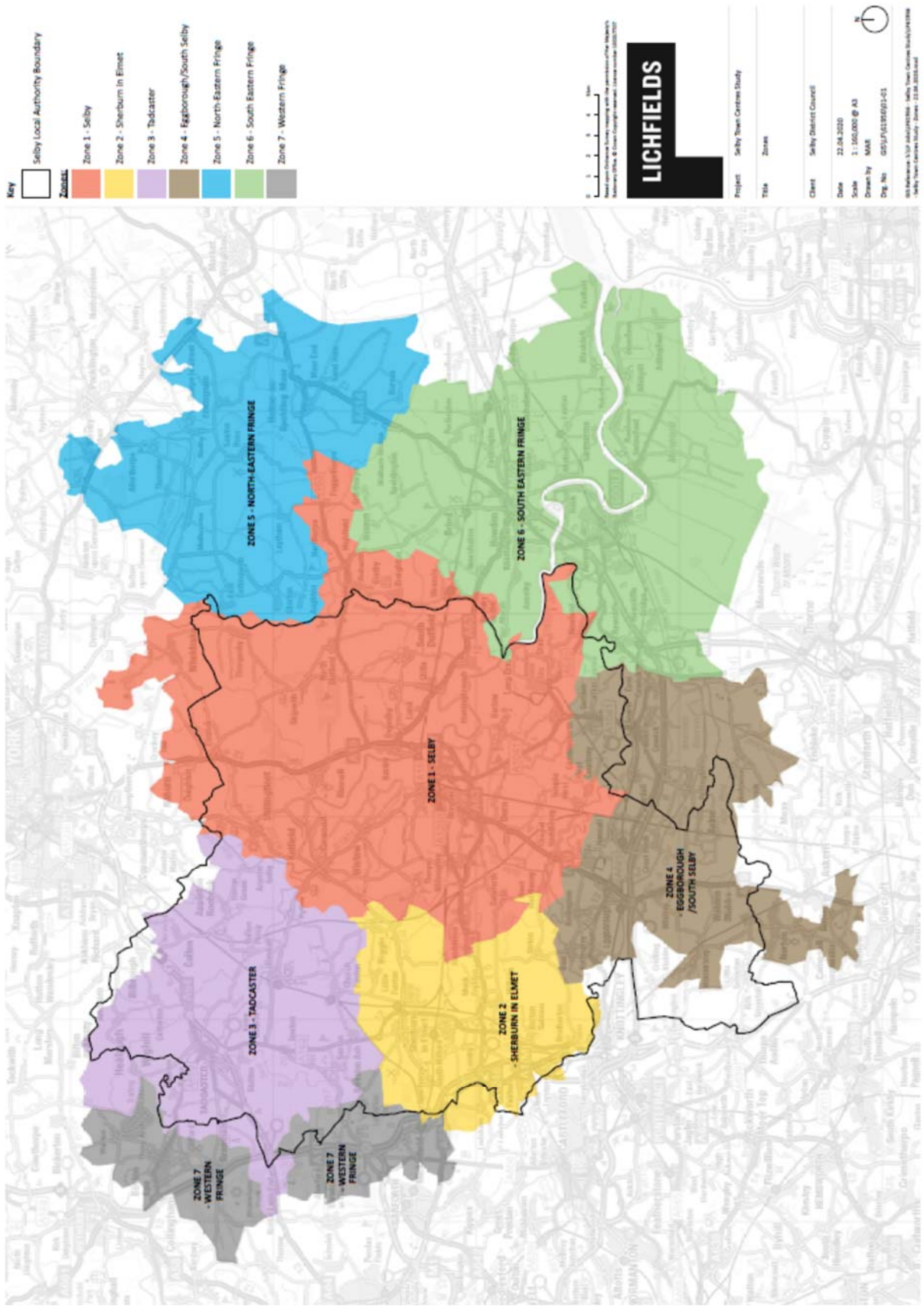
Experian's Retail Planner Briefing Note 18, October 2020 indicates comparison goods retail sales floorspace is expected to increase its average sales density by +2.9% between 2018 to 2022, but higher growth is envisaged in the medium term (+3.0% per annum during 2023 and 2027), and longer term (+2.6% per annum beyond 2027). These increases have been adopted and will

absorb much of the future expenditure growth. These growth rates are relatively high compared with historic forecasts but are consistent with the likely high increase in on-line/home shopping through retail businesses i.e. the total sales of retail businesses will increase at a much higher rate than the amount of physical sales floorspace they provide.

For convenience goods retail, Experian indicates a small decrease in sales densities between 2018 and 2022 and no predicted growth in sales densities thereafter.

Experian does not provide projections for food and beverage sales densities. An average growth rate of 1% per annum has been adopted, recognising that existing food and beverage businesses will need to increase their turnover in the future to cover increasing costs.

Appendix 2 Study area

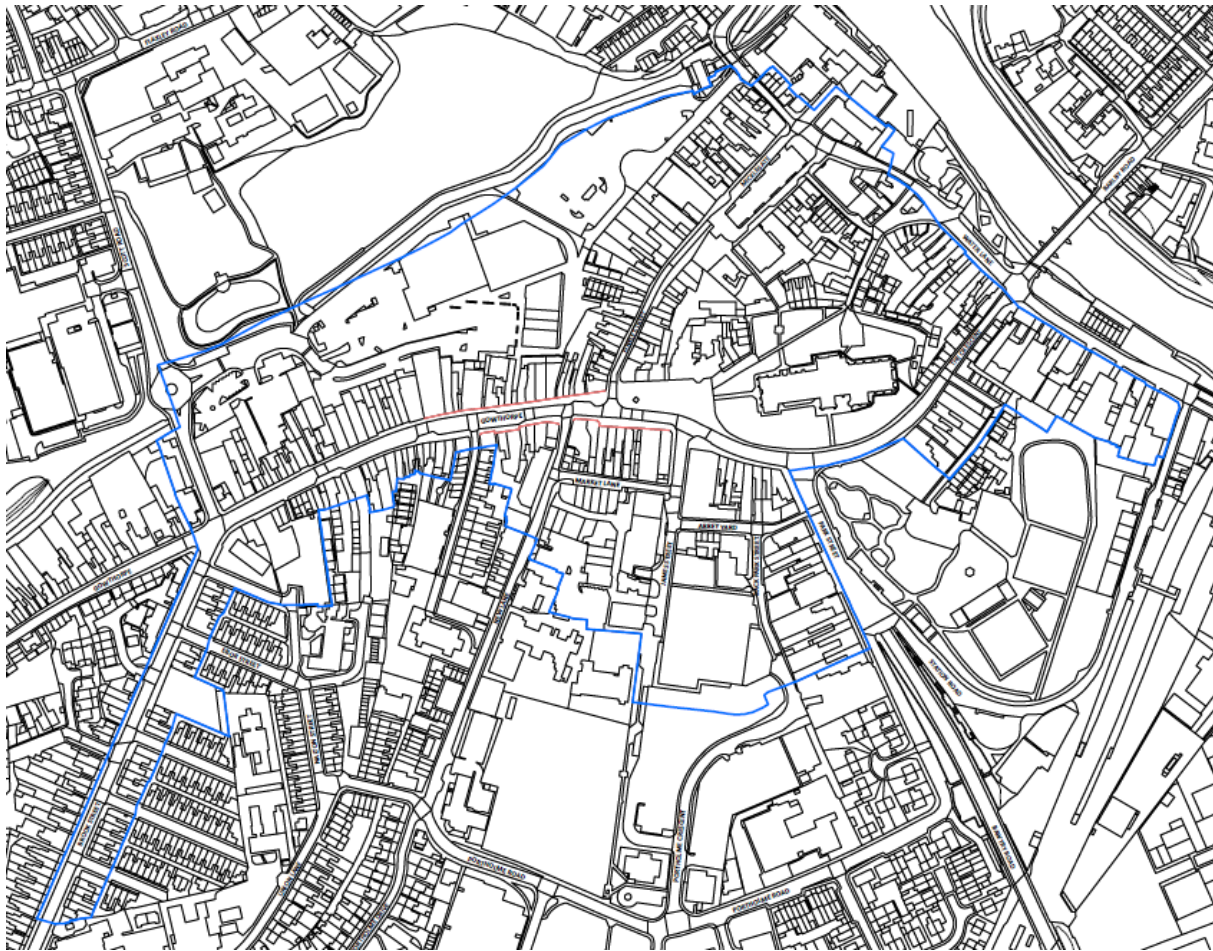


Appendix 3 Centre audits

Selby Town Centre

Selby is located in the east of the District and is identified as a 'District Centre' in The Selby District Core Strategy. The town centre is focussed 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 food stores. The designated centre boundary extends from the River Ouse to the east of the town centre and Selby Dam wraps around Abbey Walk (west to east). The centre is physically defined by Selby Abbey which is located in the centre of the principle shopping area. Selby town centre is bounded by residential areas to the west and south and the River Ouse to the east and north.

Selby Town Centre Boundary and Core Shopping Frontage



Selby town centre's key roles include:

- Convenience shopping – Morrisons and Sainsbury's stores suitable for main and bulk food shopping. These stores are supported by a baker, butcher, off licence and various farm shops.
- Comparison shopping – small independent specialist retailers and charity shops, with a limited number of multiple retailing shops selling a range of higher and lower order comparison goods;
- Services – a good range high street national banks/building societies, estate agent's, cafés, takeaways, travel agents, dry cleaners; and hairdressers/beauty parlours;
- Entertainment and evening economy – a good choice of restaurants and pubs/bars; and
- Community facilities – including two places of worship, a library, town hall, a nursery, doctors' surgery and dentists.

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.

Mix of use and occupier representation

Selby has a total of 273 retail, service and leisure uses. The diversity of units within Selby is set out in Table A1, compared with the Goad Plan national average.

Table A1 - Mix of uses in Selby

Type	Number units	% units	UK average
Convenience retail	16	5.9	9.2
Comparison retail	81	29.7	32.0
Non-retail services	49	17.9	14.2
Financial services*	41	15.0	11.4
Restaurants/cafés	19	7.0	9.9
Pubs/bars	15	5.5	4.8
Hot food takeaways	15	5.5	6.1
Vacant	37	13.6	12.4
Total	273	100.0	100.0

Source: Selby Town Centre Survey 2018 and Experian Goad Plan national averages. * includes betting shops now SG.

The mix of uses with Selby is broadly similar to the national average. It has a higher proportion of non-retail and financial service uses compared to the national average. The centre has a lower proportion of convenience retail units, but provision is concentrated in the Sainsbury's and Morrison stores.

There were 37 vacant retail units within Selby at the time of the Council's 2018 survey, a vacancy rate (13.6%), which is just above the national average.

Selby has a good selection of comparison shops (81) for a centre of its size, reflecting its role in the retail hierarchy, primarily as the main focus for housing, employment, shopping, leisure, health and cultural facilities serving a large rural catchment. Table A2 provides a breakdown of comparison units by category. There is a good range of comparison goods outlets with most of the Goad categories represented. Selby has a high proportion of clothing /footwear shops and charity shops for a centre of its size.

Table A2 - Mix of comparison goods uses - Selby

Type	Number Units	% units	UK Average
Clothing and footwear	18	22.2	22.9
Furniture, carpets and textiles	7	8.6	7.5
Books, arts, cards and stationers	5	6.2	7.6
Electrical, music and photography	11	13.6	9.4
DIY, hardware and homeware	4	4.9	6.4
Cars, motorcycles and accessories	2	2.5	1.2
Chemists, drug stores and opticians	10	12.3	11.3
Variety, department and catalogue	1	1.2	1.9
Florists, nurserymen and seedsmen	3	3.7	2.2
Toys, hobby, cycle and sports	4	4.9	5.2
Jewellers	3	3.7	5.0
Charity and second-hand shops	12	14.8	9.7
Other comparison goods retailers	1	1.2	9.7
Total	81	100.0	100.0

Source: Selby Town Centre Survey 2018 and Experian Goad Plan national averages.

The number of multiple comparison retailers (excluding charity shops) is relatively diverse and reflects Selby's size and role. The multiple comparison retailers include:

Table A3 – Selby's comparison multiples

Bonmarche	Edinburgh Woollen Mill	O2 Shop	Superdrug
Boots Chemist	EE Shop	Peacocks	Vision Express
Boots Opticians	Home Bargains	Savers	Vodafone Store
Card Factory	M & Co	Shoe Zone	W H Smith
Clarke Shoes	New Look	Specsavers	Wilko

Source: Selby Town Centre Survey 2018

Table A4 - Mix of service uses - Selby

Type	Number units	% units	UK Average
Restaurants/café's	19	15.2	24.1
Hot food/takeaways	15	12.0	14.7
Pubs/bars	15	12.0	11.5
Banks/other financial services	19	15.2	9.5
Betting shops/casinos/amusement	5	4.0	3.4
Estate agents/valuers	12	9.6	8.7
Travel agents	3	2.4	2.0
Hairdressers/beauty parlours	36	28.8	24.3
Launderettes/dry cleaners	1	0.8	1.8
Sub-total	125	100	100.0
Other	14		
Total	139		

Source: Selby Town Centre Survey 2018 and Experian Goad Plan national averages.

Selby Town Centre has a good range of service uses for its size (139 in total), as shown in Table A4. The representation of categories is similar to the national average. There is a higher proportion of banks/ other financial services and hairdressers and a lower proportion of restaurants/ cafés. However, the centre has reasonable provision of fast food takeaways and public houses.

Multiple food/beverage outlets include: Costa, Domino's Pizza and Subway.

Customer views

As part of the household survey, respondents were asked if they had used shops and services in Selby in the last year. Selby was the most visited centre in the District i.e. visited by 68% of respondents across the study area and 94% of local households within Zone 1.

Of those who had used shops/services in Selby, respondents were asked what they like and dislike about Selby town centre. Similar to the other two town centres, 31% like Selby because of its proximity to where they live. Only 14% suggested there was nothing they 'liked' about Selby town centre compared with 52% who indicated there was nothing they 'disliked' about the town centre, which implies higher levels of satisfaction rather than dissatisfaction. The main factors mentioned (5% of respondents or more) were:

- factors **liked**:
 - i good range of non-food shops (11%);
 - ii good layout/shops close together (10%);
 - iii easy to find a car parking space (8%);
 - iv attractive environment/nice place (7%);
 - v ability to get everything needed (6%);
 - vi good range of independent shops (5%); and
 - vii free/cheap car parking (5%).
- factors **disliked**:
 - i not enough car parking spaces (7%);
 - ii need more/better non-food shops (7%);
 - iii need more 'high street' retailers (6%);
 - iv too many charity shops (5%); and
 - v need more quality shops (5%).

The results suggest there are mixed views regarding the choice of shops and the adequacy of car parking.

Accessibility

The household survey results suggest Selby attracts the vast number of its customers by car. Mode of travel for food shopping with the local area (Zone 1) is similar to the study area average with the highest proportions doing their main food shopping by car (93%). For non-food shopping, Selby attracts a higher proportion of customers via bus (8% compared with only 1% for main food shopping). About 6% of customers walk to shop in Selby, which suggest the town centre is accessible on foot by residents in the settlement.

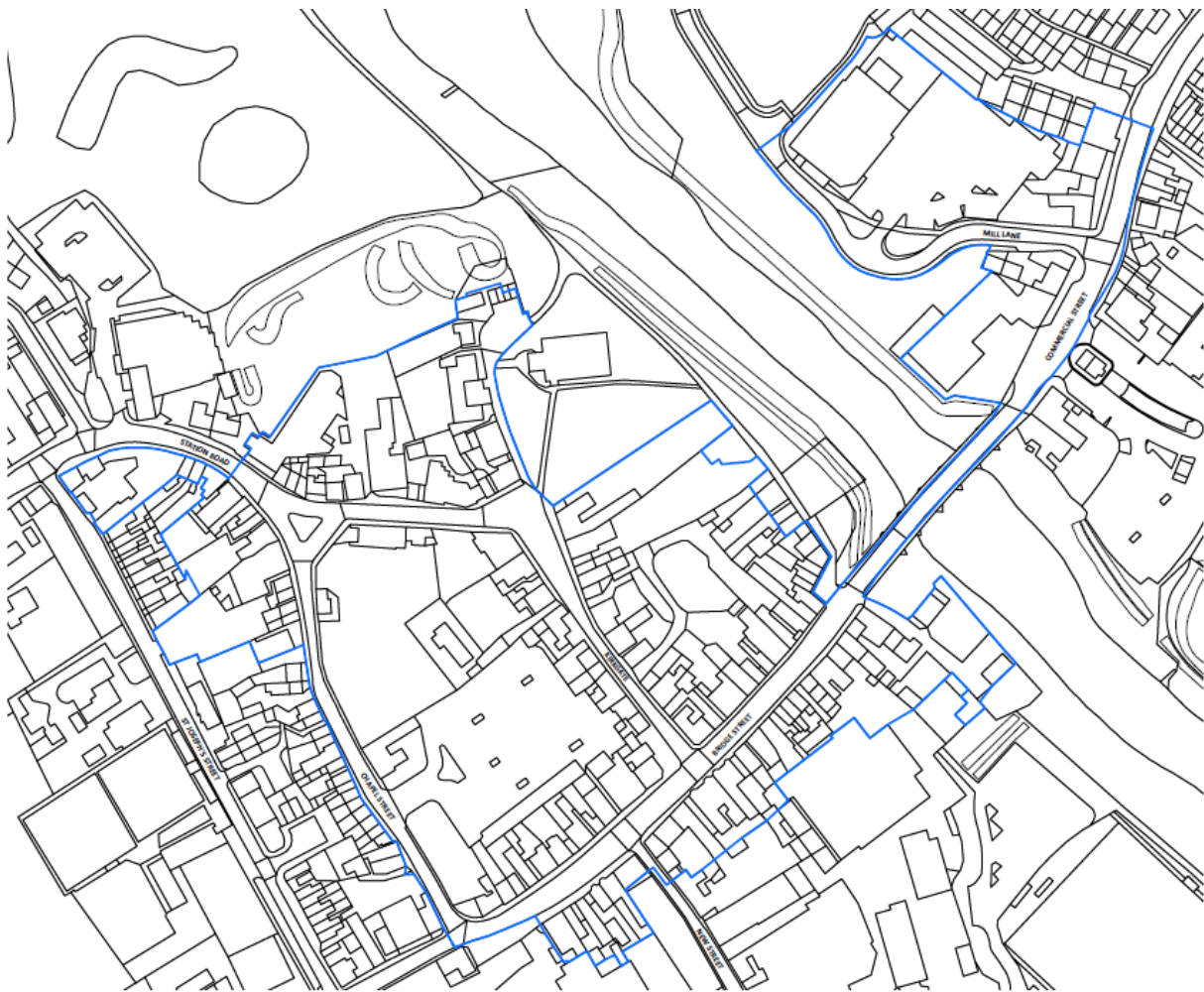
The survey results also indicated a slightly higher level of satisfaction with car parking provision than dissatisfaction (8% compared with 7%). Very few respondents mentioned bus services as a positive or negative factor (both less than 1%).

Tadcaster Town Centre

Tadcaster is located in the north east of the District. Tadcaster is identified as a 'Major Centre' in The Selby District Core Strategy and is 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.

Tadcaster Town Centre has a linear shape which is focused on the A659 Leeds Road/York Road and Kirkgate and extends to include parts of Chapel Street and Westgate. Tadcaster town centre primarily fulfils a local convenience shopping and services role. The main supermarket within the centre is Sainsbury's and there are some convenience stores for the purposes of top-up shopping, namely Costcutter. 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.

Tadcaster Town Centre Boundary



Tadcaster serves as a convenience shopping and services centre for a smaller, more local catchment. Tadcaster is bounded by residential areas to the west and south and is bound by the River Wharfe to the north east. Tadcaster's key roles include:

- Convenience shopping – a Sainsbury's store supported by a Costcutter, butcher and bakers;
- Comparison shopping – a small selection of independent shops;
- Services – restaurants and cafés, takeaways and hairdressers and a limited number of banks/building societies;
- Entertainment and evening economy – including several pubs/bars and a working men's social club;
- Community facilities – including one place of worship, several dentists and doctor's surgeries as well as a dance hall.

Mix of uses and occupier representation

Tadcaster has a total of 96 retail, service and leisure uses. The diversity of uses within Tadcaster is set out in Table B1, compared with the Goad Plan national average.

Table B1 - Mix of uses in Tadcaster

Type	Number units	% units	UK average
Convenience retail	7	7.3	9.2
Comparison retail	26	27.1	32.0
Non-retail services	11	11.5	14.2
Financial services*	6	6.3	11.4
Restaurants/cafés	7	7.3	9.9
Pubs/bars	5	5.2	4.8
Hot food takeaways	4	4.2	6.1
Vacant	30	31.3	12.4
Total	96	100.0	100.0

Source: Tadcaster Town Centre Survey 2018 and Experian Goad Plan national averages. * A2 includes betting shops now SG.

Tadcaster has a broadly similar mix of retail uses compared with the national average. There were 30 vacant units at the time of the Council's 2018 survey, a vacancy rate of 31.9%, which is significantly above the national average vacancy rate.

Tadcaster Town Centre has a small selection of comparison shops (26 units). Table B2 provides a breakdown of comparison shop uses by goods categories.

Table B2 - Mix of comparison goods uses – Tadcaster

Type	Number units	% units	UK Average
Clothing and footwear	3	11.5	22.9
Furniture, carpets and textiles	2	7.7	7.5
Books, arts, cards and stationers	2	7.7	7.6
Electrical, music and photography	1	3.8	9.4
DIY, hardware and homeware	2	7.7	6.4
Cars, motorcycles and accessories	1	3.8	1.2
Chemists, drug stores and opticians	3	11.5	11.3
Variety, department and catalogue	0	0.0	1.9
Florists, nurserymen and seedsmen	2	7.7	2.2
Toys, hobby, cycle and sports	1	3.8	5.2
Jewellers	1	3.8	5.0
Charity and second-hand shops	3	11.5	9.7
Other comparison goods retailers	5	19.2	9.7
Total	26	100.0	100.0

Source: Tadcaster Town Centre Survey 2018 and Experian Goad Plan national averages.

Most of the categories are represented within the centre but the choice of shops within each is limited. Excluding charity shops, Tadcaster has no national multiple comparison goods retailers.

Tadcaster has a reasonable range of services with most categories represented, as shown in Table B4. The mix of uses is broadly consistent with the national average.

Table B4 - Mix of service uses – Tadcaster

Type	Number units	% units	UK Average
Restaurants/café	7	25.9	24.1
Hot food/takeaways	4	14.8	14.7
Pubs/bars	5	18.5	11.5
Banks/other financial services	1	3.7	9.5
Betting shops/casinos/amusement	1	3.7	3.4
Estate agents/valuers	1	3.7	8.7
Travel agents	0	0.0	2.0
Hairdressers/beauty parlours	7	25.9	24.3
Launderettes/dry cleaners	1	3.7	1.8
Sub-total	27	100.0	100.0
Other	6		
Total	33		

Source: Tadcaster Town Centre Survey 2018 and Experian Goad Plan national averages.

Customer views

As part of the household survey, respondents were asked if they had used shops and services in Tadcaster in the last year. Tadcaster was the least visited centre in the District i.e. visited by only 17% of respondents across the study area. However, 88% of local households within Zone 3 visited the centre.

Of those who had used shops/services in Tadcaster, respondents were asked what they like and dislike about Tadcaster town centre. Similar to the other two town centres, 21% like Tadcaster because of its proximity to where they live. In total 29% suggested there was nothing they 'liked' about Tadcaster town centre compared with 44% who indicated there was nothing they 'disliked' about the town centre, which implies higher levels of satisfaction rather than dissatisfaction. Nevertheless, levels of satisfaction were the lowest of the three centres in the District. The main factors mentioned (5% of respondents or more) were:

- factors **liked**:
 - i good range of independent shops (12%);
 - ii attractive environment/nice place (8%);
 - iii good cafés/restaurants (7%); and
 - iv traditional/quaint character (6%).
- factors **disliked**:
 - i too many empty shops (15%)
 - ii need more/better non-food shops (14%);
 - iii need more 'high street' retailers (11%);
 - iv need more independent shops (8%);
 - v dirty streets/ poorly maintained (7%);
 - vi need more quality shops (6%); and
 - vii not enough car parking spaces (5%).

The results suggest there are mixed views regarding the choice of shops and the quality of the environment.

Accessibility

The household survey results suggest Tadcaster attracts the vast number of its customers by car. Mode of travel for food shopping with the local area (Zone 3) is similar to the study area average with the highest proportions doing their main food shopping by car (97%). For non-food shopping, Tadcaster attracts a higher proportion of customers via bus (7% compared with less than 1% for main food shopping). Tadcaster has the lowest proportion of customers walking to shop, which is due in part to the higher outflow of shopping trips from the local area.

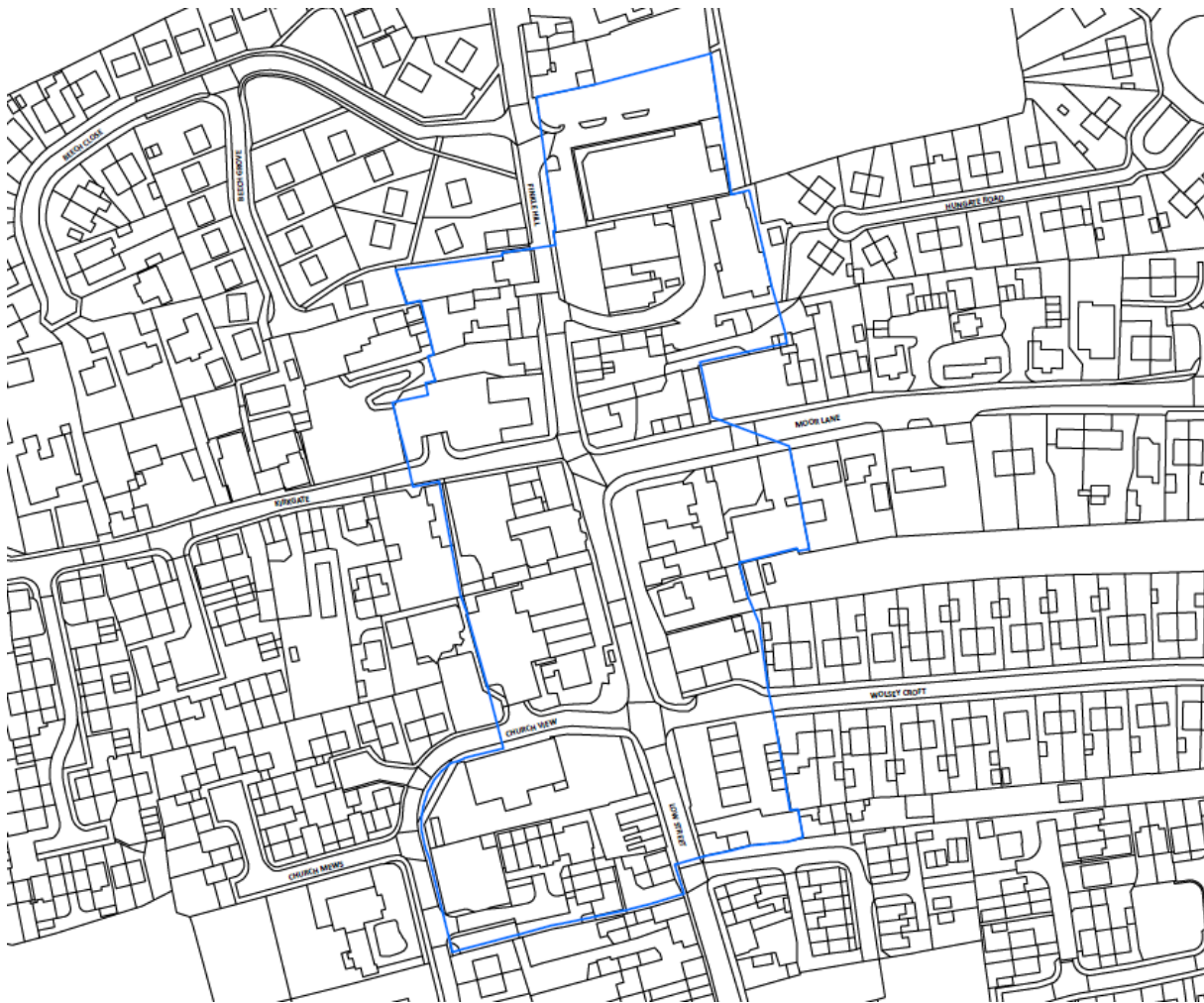
The survey results also indicated a slightly higher level of satisfaction with car parking provision than dissatisfaction (5.2% compared with 4.7%). Very few respondents mentioned bus services as a positive or negative factor (both less than 1%).

Sherburn in Elmet Town Centre

Sherburn in Elmet is located in the west of the District and is identified as a local service centre within the Selby District Core Strategy and is the third largest retail centre in the district. The centre is focused around the junction between Finkle Hill/Low Street and Kirkgate/Moor Lane.

Sherburn in Elmet centre primarily fulfils a local predominantly top-up orientated convenience shopping and services role for local residents. The centre is bounded by residential uses.

Sherburn in Elmet Town Centre Boundary



The key roles of Sherburn in Elmet include:

- Convenience shopping: Co-op and Tesco Express stores, supported by butchers' shops and a frozen food outlet, Jack Fulton Frozen Food;
- Comparison shopping: Boots Pharmacy and a limited mix of independent retailers.
- Services: cafés, restaurants, takeaways, hairdressers, a bank and dry cleaners;
- Entertainment and evening economy: including a pub and private members social club and
- Community facilities: a library, several health centres and dental surgeries.

Mix of uses and occupier representation

Sherburn in Elmet only has 40 retail, service and leisure uses and is the smallest of the three main centres in the District. The diversity of uses within Sherburn in Elmet is set out in Table C1, compared with the Goad Plan national average.

Table C1 - Mix of uses in Sherburn in Elmet

Type	Number Units	% units	UK average
Convenience retail	7	17.1	9.2
Comparison retail	11	26.8	32.0
Non-retail services	6	14.6	14.2
Financial services*	5	12.2	11.4
Restaurants/cafés	2	4.9	9.9
Pubs/bars	1	2.4	4.8
Hot food takeaways	8	19.5	6.1
Vacant	1	2.4	12.4
Total	41	100.0	100.0

Source: Sherburn in Elmet Town Centre Survey 2018 and Experian Goad Plan national averages. * A2 includes betting shops now SG.

Sherburn in Elmet has a high proportion of convenience retail outlets and hot food takeaways. There was only 1 vacant unit within Sherburn in Elmet at the time of the Council's 2018 survey, equating to a vacancy rate of 2.5%, which is significantly below the national average.

Sherburn in Elmet has a limited selection of comparison shops (11 units). Table C2 provides a breakdown of comparison shop units by category. Over half of the categories are not represented and the choice of shops within the represented categories is limited (1 to 3 shops). Boots Pharmacy is the only comparison goods national multiple.

Table C2 - Mix of comparison goods uses – Sherburn in Elmet

Type	Number units	% Units	UK Average
Clothing and footwear	0	0.0	22.9
Furniture, carpets and textiles	1	9.1	7.5
Books, arts, cards and stationers	3	27.3	7.6
Electrical, music and photography	0	0.0	9.4
DIY, hardware and homeware	2	18.2	6.4
Cars, motorcycles and accessories	0	0.0	1.2
Chemists, drug stores and opticians	2	18.2	11.3
Variety, department and catalogue	0	0.0	1.9
Florists, nurserymen and seedsmen	0	0.0	2.2
Toys, hobby, cycle and sports	0	0.0	5.2
Jewellers	0	0.0	5.0
Charity and second-hand shops	2	18.2	9.7
Other comparison good retailers	1	9.1	9.7
Total	11	100.0	100.0

Source: Sherburn in Elmet Town Centre Survey 2018 and Experian Goad Plan national averages.

Sherburn in Elmet has a range of service uses (22 units) with most of the categories represented as shown in Table P4, but the choice in each is small limited. There is a high proportion of fast food/ takeaways, but a low proportion of restaurants/cafés and pubs/bars.

Table C4 - Mix of service uses – Sherburn in Elmet

Type	Number units	% Units	UK Average
Restaurants/cafés	2	9.1	24.1
Hot food/takeaways	8	36.4	14.7
Pubs/bars	1	4.5	11.5
Banks/other financial services	2	9.1	9.5
Betting shops/casinos/amusement	1	4.5	3.4
Estate agents/valuers	2	9.1	8.7
Travel agents	0	0.0	2.0
Hairdressers/beauty parlours	5	22.7	24.3
Launderettes/dry cleaners	1	4.5	1.8
Sub-total	22	100.0	100.0
Other	0		
Total	22		

Source: Sherburn in Elmet Town Centre Survey 2018 and Experian Goad Plan national averages.

Customer views

As part of the household survey, respondents were asked if they had used shops and services in Sherburn in Elmet in the last year. Sherburn in Elmet was the second most visited centre in the District i.e. visited by 27% of respondents across the study area and 83% of local households within Zone 2.

Of those who had used shops/services in Sherburn in Elmet, respondents were asked what they like and dislike about the town centre. Similar to the other two town centres, 32% like Sherburn in Elmet because of its proximity to where they live. Only 17% suggested there was nothing they 'liked' about Sherburn in Elmet town centre compared with 60% who indicated there was nothing they 'disliked' about the town centre, which implies much higher levels of satisfaction rather than dissatisfaction. The main factors mentioned (5% of respondents or more) were:

- factors **liked**:
 - i good range of independent shops (10%);
 - ii good range of non-food shops (9%);
 - iii attractive environment/nice place (7%);
 - iv good supermarkets (7%);
 - v good bakers, butchers, greengrocers (6%);
 - vi good layout/shops close together (5%); and
 - vii free/cheap car parking (5%).
- factors **disliked**:
 - i not enough car parking spaces (13%); and
 - ii need more/better non-food shops (5%);

Accessibility

The household survey results suggest Sherburn in Elmet attracts the vast number of its customers by car. Mode of travel for food shopping with the local area (Zone 2) is similar to the study area average with the highest proportions doing their main food shopping by car (87%). For non-food shopping, Sherburn in Elmet attracts a higher proportion of customers via bus (3% compared with only 1% for main food shopping).

The survey results also indicated a higher level of dissatisfaction with car parking provision than satisfaction (13% compared with 2%). Very few respondents mentioned bus services as a positive or negative factor (both around 1% or less).

Appendix 4 Convenience goods capacity

Table 1: Selby study area population

	2019	2025	2030	2035	2040
Zone 1 - Selby	54,100	56,245	57,538	58,465	58,933
Zone 2 - Sherburn in Elmet	17,447	18,044	18,419	18,722	18,864
Zone 3 - Tadcaster	13,604	14,008	14,233	14,401	14,505
Zone 4 - Eggborough/South Selby	19,150	19,702	20,001	20,164	20,221
Zone 5 - North-Eastern Fringe	7,413	7,543	7,618	7,695	7,727
Zone 6 - South-Eastern Fringe	34,460	35,038	35,440	35,761	35,991
Zone 7 - Western Fringe	13,604	13,888	14,158	14,347	14,373
Total	159,778	164,468	167,407	169,555	170,614

Sources: Experian population projections

Table 2: Convenience goods expenditure per person (£)

	2019	2025	2030	2035	2040
Zone 1 - Selby	2,074	2,069	2,062	2,066	2,070
Zone 2 - Sherburn in Elmet	2,158	2,153	2,145	2,149	2,153
Zone 3 - Tadcaster	2,166	2,161	2,154	2,158	2,161
Zone 4 - Eggborough/South Selby	2,082	2,077	2,070	2,073	£2,077
Zone 5 - North-Eastern Fringe	2,198	2,192	2,185	2,189	2,193
Zone 6 - South-Eastern Fringe	1,957	1,952	1,945	1,949	1,952
Zone 7 - Western Fringe	2,155	2,150	2,142	2,146	2,150

Sources: Experian 2018 base year local expenditure (2018 prices) and Retail Planner Briefing Note 18
Excludes Special Forms of Trading

Table 3: Total convenience goods expenditure (£M)

	2019	2025	2030	2035	2040
Zone 1 - Selby	112.22	116.39	118.66	120.78	121.97
Zone 2 - Sherburn in Elmet	37.65	38.84	39.51	40.24	40.61
Zone 3 - Tadcaster	29.47	30.27	30.66	31.07	31.35
Zone 4 - Eggborough/South Selby	39.87	40.92	41.40	41.81	42.00
Zone 5 - North-Eastern Fringe	16.29	16.54	16.64	16.84	16.94
Zone 6 - South-Eastern Fringe	67.43	68.39	68.94	69.69	70.26
Zone 7 - Western Fringe	29.32	29.86	30.33	30.79	30.90
Total	332.25	341.21	346.14	351.22	354.04

Source: Tables 1 and 2

Table 4: Base year convenience goods market shares (%)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Morrisons, Market Cross, Selby	22.9%	2.6%	2.0%	3.3%	0.5%	1.1%	0.0%
Sainsbury's, Abbey Walk, Selby	10.9%	1.4%	0.0%	1.2%	0.0%	0.0%	0.0%
Tesco, Portholme Road, Selby	17.5%	1.1%	0.0%	2.9%	0.0%	0.0%	0.0%
Aldi, Three Lakes Retail Park, Selby	14.1%	1.3%	0.3%	4.3%	0.5%	2.4%	0.0%
Co-op, Flaxley Road, Selby	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Doncaster Road, Brayton	4.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%
Other Selby	3.3%	0.0%	0.2%	1.7%	0.0%	0.0%	0.0%
Other Zone 1	6.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 1 - Selby sub-total	80.4%	6.4%	2.5%	14.2%	1.0%	3.5%	0.0%
Co-op, Finkle Hill, Sherburn-in-Elmet	0.2%	14.7%	5.4%	0.0%	0.0%	0.0%	0.4%
Tesco Express, Low Street, Sherburn-in-Elmet	0.0%	4.2%	0.4%	0.0%	0.0%	0.0%	0.0%
Aldi, Low Road, Sherburn-in-Elmet	2.7%	32.0%	14.8%	0.3%	0.0%	0.0%	2.6%
Other Shops, Sherburn-in-Elmet	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Zone 2	0.0%	2.8%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 - Sherburn in Elmet sub-total	2.9%	55.4%	20.6%	0.3%	0.0%	0.0%	3.0%
Sainsbury's, Mill Lane, Tadcaster	0.0%	1.0%	24.0%	0.0%	0.0%	0.0%	3.2%
Other Tadcaster	0.0%	0.0%	4.8%	0.0%	0.0%	0.0%	0.4%
Other Zone 3	0.0%	0.0%	6.7%	0.0%	0.0%	0.0%	0.0%
Zone 3 - Tadcaster sub-total	0.0%	1.0%	35.5%	0.0%	0.0%	0.0%	3.6%
Local shops, Carlton	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%
Local shops, Eggborough / Whitley	0.0%	0.0%	0.0%	4.8%	0.0%	0.0%	0.0%
Zone 4 - Eggborough/S. Selby sub-total	0.0%	0.0%	0.0%	6.0%	0.0%	0.0%	0.0%
Selby District Total	83.3%	62.8%	58.6%	20.5%	1.0%	3.5%	6.6%
Outside District Total	16.7%	37.2%	41.4%	79.5%	99.0%	96.5%	93.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Selby Household Survey October 2020

Table 4B: Adjusted 2020 convenience goods market shares (%) - with completions

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Morrisons, Market Cross, Selby Town Centre	22.4%	3.2%	0.8%	8.4%	1.5%	1.1%	1.3%
Sainsbury's, Abbey Walk, Selby Town Centre	6.9%	3.5%	0.6%	4.0%	0.0%	0.0%	1.6%
Farmfoods, Micklegate, Selby Town Centre	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other Local Shops, Selby Town Centre	3.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Portholme Road, Selby	26.1%	2.1%	0.0%	4.1%	0.0%	1.7%	0.5%
Aldi, Three Lakes Retail Park, Bawtry Road, Selby	13.1%	2.0%	3.0%	11.9%	0.0%	2.3%	2.3%
Co-op Flaxley Road, Selby	0.7%	0.0%	0.5%	0.0%	0.0%	0.0%	0.0%
Other Zone 1	8.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 1 - Selby sub-total	83.2%	10.7%	4.8%	28.4%	1.5%	5.1%	5.7%
Co-op, Finkle Hill, Sherburn-in-Elmet	0.0%	7.8%	3.4%	0.0%	0.0%	0.0%	0.0%
Tesco Express, Low Street, Sherburn-in-Elmet	0.0%	3.5%	0.5%	0.0%	0.0%	0.0%	0.0%
Aldi, Low Road, Sherburn-in-Elmet	0.5%	20.0%	3.2%	0.0%	0.0%	0.0%	0.0%
Other Shops, Sherburn-in-Elmet Town Centre	0.0%	3.5%	0.2%	0.0%	0.0%	0.0%	0.0%
Other Zone 2	0.2%	2.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Zone 2 - Sherburn in Elmet sub-total	0.7%	36.8%	7.3%	0.0%	0.0%	0.0%	0.0%
Sainsbury's, Mill Lane, Tadcaster	0.0%	0.5%	50.1%	0.0%	0.5%	0.0%	0.0%
Other Local Shops, Tadcaster	0.0%	0.0%	1.9%	0.0%	0.0%	0.0%	0.0%
Zone 3 - Tadcaster sub-total	0.0%	0.5%	52.0%	0.0%	0.5%	0.0%	0.0%
Local Shops, Carlton	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%
Local Shops, Eggborough / Whitley	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%
Zone 4 - Eggborough/S. Selby sub-total	0.0%	0.0%	0.0%	2.8%	0.0%	0.0%	0.0%
Selby District Total	83.9%	48.0%	64.0%	31.2%	2.0%	5.1%	5.7%
Other Outside District Total	16.1%	52.0%	36.0%	68.8%	98.0%	95.0%	94.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Selby Retail and Leisure Study 2015 Household Survey

Table 5: Base year convenience goods shopping patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
Available expenditure 2019	112.22	37.65	29.47	39.87	16.29	67.43	29.32	332.25
Morrisons, Market Cross, Selby	25.70	0.98	0.59	1.32	0.08	0.74	0.00	29.41
Sainsbury's, Abbey Walk, Selby	12.23	0.53	0.00	0.48	0.00	0.00	0.00	13.24
Tesco, Portholme Road, Selby	19.64	0.41	0.00	1.16	0.00	0.00	0.00	21.21
Aldi, Three Lakes Retail Park, Selby	15.82	0.49	0.09	1.71	0.08	1.62	0.00	19.82
Co-op, Flaxley Road, Selby	1.01	0.00	0.00	0.00	0.00	0.00	0.00	1.01
Tesco Express, Doncaster Road, Brayton	4.49	0.00	0.00	0.32	0.00	0.00	0.00	4.81
Other Selby	3.70	0.00	0.06	0.68	0.00	0.00	0.00	4.44
Other Zone 1	7.63	0.00	0.00	0.00	0.00	0.00	0.00	7.63
Zone 1 - Selby sub-total	90.23	2.41	0.74	5.66	0.16	2.36	0.00	101.56
Co-op, Finkle Hill, Sherburn-in-Elmet	0.22	5.53	1.59	0.00	0.00	0.00	0.12	7.47
Tesco Express, Low Street, Sherburn-in-Elmet	0.00	1.58	0.12	0.00	0.00	0.00	0.00	1.70
Aldi, Low Road, Sherburn-in-Elmet	3.03	12.05	4.36	0.12	0.00	0.00	0.76	20.32
Other Shops, Sherburn-in-Elmet	0.00	0.64	0.00	0.00	0.00	0.00	0.00	0.64
Other Zone 2	0.00	1.05	0.00	0.00	0.00	0.00	0.00	1.05
Zone 2 - Sherburn in Elmet sub-total	3.25	20.86	6.07	0.12	0.00	0.00	0.88	31.18
Sainsbury's, Mill Lane, Tadcaster	0.00	0.38	7.07	0.00	0.00	0.00	0.94	8.39
Other Tadcaster	0.00	0.00	1.41	0.00	0.00	0.00	0.12	1.53
Other Zone 3	0.00	0.00	1.97	0.00	0.00	0.00	0.00	1.97
Zone 3 - Tadcaster sub-total	0.00	0.38	10.46	0.00	0.00	0.00	1.06	11.89
Local shops, Carlton	0.00	0.00	0.00	0.48	0.00	0.00	0.00	0.48
Local shops, Eggborough / Whitley	0.00	0.00	0.00	1.91	0.00	0.00	0.00	1.91
Zone 4 - Eggborough/S. Selby sub-total	0.00	0.00	0.00	2.39	0.00	0.00	0.00	2.39
Selby District Total	93.48	23.64	17.27	8.17	0.16	2.36	1.93	147.03
Outside District Total	18.74	14.01	12.20	31.70	16.13	65.07	27.38	185.22
Total	112.22	37.65	29.47	39.87	16.29	67.43	29.32	332.25

Source: Table 3 and Table 4

Table 6: Future 2025 convenience goods shopping patterns (£M) - without commitments

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
Available expenditure 2025	116.39	38.84	30.27	40.92	16.54	68.39	29.86	341.21
Morrisons, Market Cross, Selby	26.65	1.01	0.61	1.35	0.08	0.75	0.00	30.45
Sainsbury's, Abbey Walk, Selby	12.69	0.54	0.00	0.49	0.00	0.00	0.00	13.72
Tesco, Portholme Road, Selby	20.37	0.43	0.00	1.19	0.00	0.00	0.00	21.98
Aldi, Three Lakes Retail Park, Selby	16.41	0.50	0.09	1.76	0.08	1.64	0.00	20.49
Co-op, Flaxley Road, Selby	1.05	0.00	0.00	0.00	0.00	0.00	0.00	1.05
Tesco Express, Doncaster Road, Brayton	4.66	0.00	0.00	0.33	0.00	0.00	0.00	4.98
Other Selby	3.84	0.00	0.06	0.70	0.00	0.00	0.00	4.60
Other Zone 1	7.91	0.00	0.00	0.00	0.00	0.00	0.00	7.91
Zone 1 - Selby sub-total	93.58	2.49	0.76	5.81	0.17	2.39	0.00	105.19
Co-op, Finkle Hill, Sherburn-in-Elmet	0.23	5.71	1.63	0.00	0.00	0.00	0.12	7.70
Tesco Express, Low Street, Sherburn-in-Elmet	0.00	1.63	0.12	0.00	0.00	0.00	0.00	1.75
Aldi, Low Road, Sherburn-in-Elmet	3.14	12.43	4.48	0.12	0.00	0.00	0.78	20.95
Other Shops, Sherburn-in-Elmet	0.00	0.66	0.00	0.00	0.00	0.00	0.00	0.66
Other Zone 2	0.00	1.09	0.00	0.00	0.00	0.00	0.00	1.09
Zone 2 - Sherburn in Elmet sub-total	3.38	21.52	6.24	0.12	0.00	0.00	0.90	32.15
Sainsbury's, Mill Lane, Tadcaster	0.00	0.39	7.27	0.00	0.00	0.00	0.96	8.61
Other Tadcaster	0.00	0.00	1.45	0.00	0.00	0.00	0.12	1.57
Other Zone 3	0.00	0.00	2.03	0.00	0.00	0.00	0.00	2.03
Zone 3 - Tadcaster sub-total	0.00	0.39	10.75	0.00	0.00	0.00	1.07	12.21
Local shops, Carlton	0.00	0.00	0.00	0.49	0.00	0.00	0.00	0.49
Local shops, Eggborough / Whitley	0.00	0.00	0.00	1.96	0.00	0.00	0.00	1.96
Zone 4 - Eggborough/S. Selby sub-total	0.00	0.00	0.00	2.46	0.00	0.00	0.00	2.46
Selby District Total	96.95	24.39	17.74	8.39	0.17	2.39	1.97	152.00
Outside District Total	19.44	14.45	12.53	32.53	16.37	66.00	27.89	189.21
Total	116.39	38.84	30.27	40.92	16.54	68.39	29.86	341.21

Source: Table 3 and Table 4

Table 7A: Retail commitments - convenience goods floorspace and turnover

Zone		Sales Floorspace (sq.m net)	Convenience floorspace (%)	Convenience floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Zone 1 - Selby	Lidl, Bawtry Road (2015/1217/FUL) - Class A1 food store	1,325	80%	1,060	£10,542	£11.17

Source: Selby District Council online planning records

Table 7B: Retail commitments - convenience goods trade draw

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
Lidl, Bawtry Road (Zone 1)								
% trade draw	90%	3%	2%	3%	0%	2%	0%	100%
Trade draw (£M)	£10.06	£0.34	£0.22	£0.34	£0.00	£0.22	£0.00	£11.17

Source: Table 5 - Selby base year trade draw and Lichfield's assumptions

Table 8: Future 2025 convenience goods shopping patterns (£M) - With Commitments

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
Available expenditure 2025	116.39	38.84	30.27	40.92	16.54	68.39	29.86	341.21
Lidl, Bawtry Road, Selby (commitment)	10.06	0.34	0.22	0.34	0.00	0.22	0.00	11.17
Morrisons, Market Cross, Selby	23.75	0.99	0.59	1.31	0.08	0.74	0.00	27.45
Sainsbury's, Abbey Walk, Selby	11.30	0.53	0.00	0.47	0.00	0.00	0.00	12.31
Tesco, Portholme Road, Selby	18.15	0.42	0.00	1.15	0.00	0.00	0.00	19.72
Aldi, Three Lakes Retail Park, Selby	13.73	0.49	0.09	1.67	0.08	1.59	0.00	17.66
Co-op, Flaxley Road, Selby	1.02	0.00	0.00	0.00	0.00	0.00	0.00	1.02
Tesco Express, Doncaster Road, Brayton	4.53	0.00	0.00	0.32	0.00	0.00	0.00	4.85
Other Selby	3.74	0.00	0.06	0.69	0.00	0.00	0.00	4.49
Other Zone 1	7.91	0.00	0.00	0.00	0.00	0.00	0.00	7.91
Zone 1 - Selby sub-total	94.19	2.77	0.96	5.95	0.17	2.55	0.00	106.59
Co-op, Finkle Hill, Sherburn-in-Elmet	0.23	5.68	1.62	0.00	0.00	0.00	0.12	7.65
Tesco Express, Low Street, Sherburn-in-Elmet	0.00	1.63	0.12	0.00	0.00	0.00	0.00	1.75
Aldi, Low Road, Sherburn-in-Elmet	2.80	12.20	4.34	0.12	0.00	0.00	0.78	20.24
Other Shops, Sherburn-in-Elmet	0.00	0.66	0.00	0.00	0.00	0.00	0.00	0.66
Other Zone 2	0.00	1.09	0.00	0.00	0.00	0.00	0.00	1.09
Zone 2 - Sherburn in Elmet sub-total	3.03	21.27	6.08	0.12	0.00	0.00	0.90	31.39
Sainsbury's, Mill Lane, Tadcaster	0.00	0.39	7.27	0.00	0.00	0.00	0.96	8.61
Other Tadcaster	0.00	0.00	1.45	0.00	0.00	0.00	0.12	1.57
Other Zone 3	0.00	0.00	2.03	0.00	0.00	0.00	0.00	2.03
Zone 3 - Tadcaster sub-total	0.00	0.39	10.75	0.00	0.00	0.00	1.07	12.21
Local shops, Carlton	0.00	0.00	0.00	0.49	0.00	0.00	0.00	0.49
Local shops, Eggborough / Whitley	0.00	0.00	0.00	1.96	0.00	0.00	0.00	1.96
Zone 4 - Eggborough/S. Selby sub-total	0.00	0.00	0.00	2.46	0.00	0.00	0.00	2.46
Selby District total	97.22	24.43	17.79	8.52	0.17	2.55	1.97	152.65
Other Outside District Total	19.17	14.42	12.48	32.40	16.37	65.84	27.89	188.56
Total	116.39	38.84	30.27	40.92	16.54	68.39	29.86	341.21

Source: Table 6 and Table 7B

Table 9: Future 2030 convenience goods shopping patterns (£M) - with commitments

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
Available expenditure 2030	118.66	39.51	30.66	41.40	16.64	68.94	30.33	346.14
Lidl, Bawtry Road, Selby (commitment)	10.25	0.34	0.23	0.34	0.00	0.23	0.00	11.38
Morrisons, Market Cross, Selby	24.21	1.01	0.59	1.32	0.08	0.74	0.00	27.96
Sainsbury's, Abbey Walk, Selby	11.53	0.54	0.00	0.48	0.00	0.00	0.00	12.55
Tesco, Portholme Road, Selby	18.50	0.43	0.00	1.16	0.00	0.00	0.00	20.09
Aldi, Three Lakes Retail Park, Selby	14.00	0.50	0.09	1.69	0.08	1.61	0.00	17.97
Co-op, Flaxley Road, Selby	1.04	0.00	0.00	0.00	0.00	0.00	0.00	1.04
Tesco Express, Doncaster Road, Brayton	4.62	0.00	0.00	0.33	0.00	0.00	0.00	4.95
Other Selby	3.81	0.00	0.06	0.70	0.00	0.00	0.00	4.57
Other Zone 1	8.07	0.00	0.00	0.00	0.00	0.00	0.00	8.07
Zone 1 - Selby sub-total	96.03	2.82	0.97	6.02	0.17	2.57	0.00	108.58
Co-op, Finkle Hill, Sherburn-in-Elmet	0.23	5.78	1.64	0.00	0.00	0.00	0.12	7.78
Tesco Express, Low Street, Sherburn-in-Elmet	0.00	1.66	0.12	0.00	0.00	0.00	0.00	1.78
Aldi, Low Road, Sherburn-in-Elmet	2.85	12.41	4.40	0.12	0.00	0.00	0.79	20.57
Other Shops, Sherburn-in-Elmet	0.00	0.67	0.00	0.00	0.00	0.00	0.00	0.67
Other Zone 2	0.00	1.11	0.00	0.00	0.00	0.00	0.00	1.11
Zone 2 - Sherburn in Elmet sub-total	3.09	21.63	6.16	0.12	0.00	0.00	0.91	31.91
Sainsbury's, Mill Lane, Tadcaster	0.00	0.40	7.36	0.00	0.00	0.00	0.97	8.72
Other Tadcaster	0.00	0.00	1.47	0.00	0.00	0.00	0.12	1.59
Other Zone 3	0.00	0.00	2.05	0.00	0.00	0.00	0.00	2.05
Zone 3 - Tadcaster sub-total	0.00	0.40	10.88	0.00	0.00	0.00	1.09	12.37
Local shops, Carlton	0.00	0.00	0.00	0.50	0.00	0.00	0.00	0.50
Local shops, Eggborough / Whitley	0.00	0.00	0.00	1.99	0.00	0.00	0.00	1.99
Zone 4 - Eggborough/S. Selby sub-total	0.00	0.00	0.00	2.48	0.00	0.00	0.00	2.48
Selby District total	99.11	24.85	18.01	8.62	0.17	2.57	2.00	155.34
Other Outside District Total	19.55	14.67	12.64	32.78	16.48	66.36	28.33	190.80
Total	118.66	39.51	30.66	41.40	16.64	68.94	30.33	346.14

Table 10: Future 2035 convenience goods shopping patterns (£M) - with commitments

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
Available expenditure 2035	120.78	40.24	31.07	41.81	16.84	69.69	30.79	351.22
Lidl, Bawtry Road, Selby (commitment)	10.44	0.35	0.23	0.34	0.00	0.23	0.00	11.58
Morrisons, Market Cross, Selby	24.65	1.03	0.60	1.33	0.08	0.75	0.00	28.45
Sainsbury's, Abbey Walk, Selby	11.73	0.55	0.00	0.49	0.00	0.00	0.00	12.77
Tesco, Portholme Road, Selby	18.84	0.43	0.00	1.17	0.00	0.00	0.00	20.44
Aldi, Three Lakes Retail Park, Selby	14.25	0.51	0.09	1.71	0.08	1.62	0.00	18.26
Co-op, Flaxley Road, Selby	1.06	0.00	0.00	0.00	0.00	0.00	0.00	1.06
Tesco Express, Doncaster Road, Brayton	4.70	0.00	0.00	0.33	0.00	0.00	0.00	5.03
Other Selby	3.88	0.00	0.06	0.70	0.00	0.00	0.00	4.64
Other Zone 1	8.21	0.00	0.00	0.00	0.00	0.00	0.00	8.21
Zone 1 - Selby sub-total	97.75	2.87	0.98	6.08	0.17	2.60	0.00	110.45
Co-op, Finkle Hill, Sherburn-in-Elmet	0.23	5.89	1.66	0.00	0.00	0.00	0.12	7.91
Tesco Express, Low Street, Sherburn-in-Elmet	0.00	1.69	0.12	0.00	0.00	0.00	0.00	1.81
Aldi, Low Road, Sherburn-in-Elmet	2.91	12.64	4.46	0.12	0.00	0.00	0.80	20.92
Other Shops, Sherburn-in-Elmet	0.00	0.68	0.00	0.00	0.00	0.00	0.00	0.68
Other Zone 2	0.00	1.13	0.00	0.00	0.00	0.00	0.00	1.13
Zone 2 - Sherburn in Elmet sub-total	3.14	22.03	6.25	0.12	0.00	0.00	0.92	32.46
Sainsbury's, Mill Lane, Tadcaster	0.00	0.40	7.46	0.00	0.00	0.00	0.99	8.85
Other Tadcaster	0.00	0.00	1.49	0.00	0.00	0.00	0.12	1.61
Other Zone 3	0.00	0.00	2.08	0.00	0.00	0.00	0.00	2.08
Zone 3 - Tadcaster sub-total	0.00	0.40	11.03	0.00	0.00	0.00	1.11	12.54
Local shops, Carlton	0.00	0.00	0.00	0.50	0.00	0.00	0.00	0.50
Local shops, Eggborough / Whitley	0.00	0.00	0.00	2.01	0.00	0.00	0.00	2.01
Zone 4 - Eggborough/S. Selby sub-total	0.00	0.00	0.00	2.51	0.00	0.00	0.00	2.51
Selby District total	100.89	25.30	18.26	8.71	0.17	2.60	2.03	157.96
Other Outside District Total	19.90	14.93	12.81	33.10	16.67	67.08	28.76	193.26
Total	120.78	40.24	31.07	41.81	16.84	69.69	30.79	351.22

Table 11: Future 2040 convenience goods shopping patterns (£M) - with commitments

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
Available expenditure 2040	121.97	40.61	31.35	42.00	16.94	70.26	30.90	354.04
Lidl, Bawtry Road, Selby (commitment)	10.54	0.35	0.23	0.34	0.00	0.23	0.00	11.69
Morrisons, Market Cross, Selby	24.89	1.04	0.61	1.34	0.08	0.76	0.00	28.72
Sainsbury's, Abbey Walk, Selby	11.85	0.56	0.00	0.49	0.00	0.00	0.00	12.89
Tesco, Portholme Road, Selby	19.02	0.44	0.00	1.18	0.00	0.00	0.00	20.64
Aldi, Three Lakes Retail Park, Selby	14.39	0.51	0.09	1.72	0.08	1.64	0.00	18.43
Co-op, Flaxley Road, Selby	1.07	0.00	0.00	0.00	0.00	0.00	0.00	1.07
Tesco Express, Doncaster Road, Brayton	4.75	0.00	0.00	0.33	0.00	0.00	0.00	5.08
Other Selby	3.92	0.00	0.06	0.71	0.00	0.00	0.00	4.69
Other Zone 1	8.29	0.00	0.00	0.00	0.00	0.00	0.00	8.29
Zone 1 - Selby sub-total	98.70	2.90	0.99	6.11	0.17	2.62	0.00	111.49
Co-op, Finkle Hill, Sherburn-in-Elmet	0.24	5.94	1.68	0.00	0.00	0.00	0.12	7.98
Tesco Express, Low Street, Sherburn-in-Elmet	0.00	1.71	0.13	0.00	0.00	0.00	0.00	1.83
Aldi, Low Road, Sherburn-in-Elmet	2.93	12.76	4.50	0.12	0.00	0.00	0.80	21.12
Other Shops, Sherburn-in-Elmet	0.00	0.69	0.00	0.00	0.00	0.00	0.00	0.69
Other Zone 2	0.00	1.14	0.00	0.00	0.00	0.00	0.00	1.14
Zone 2 - Sherburn in Elmet sub-total	3.17	22.24	6.30	0.12	0.00	0.00	0.93	32.76
Sainsbury's, Mill Lane, Tadcaster	0.00	0.41	7.52	0.00	0.00	0.00	0.99	8.92
Other Tadcaster	0.00	0.00	1.50	0.00	0.00	0.00	0.12	1.63
Other Zone 3	0.00	0.00	2.10	0.00	0.00	0.00	0.00	2.10
Zone 3 - Tadcaster sub-total	0.00	0.41	11.13	0.00	0.00	0.00	1.11	12.65
Local shops, Carlton	0.00	0.00	0.00	0.50	0.00	0.00	0.00	0.50
Local shops, Eggborough / Whitley	0.00	0.00	0.00	2.02	0.00	0.00	0.00	2.02
Zone 4 - Eggborough/S. Selby sub-total	0.00	0.00	0.00	2.52	0.00	0.00	0.00	2.52
Selby District total	101.87	25.54	18.42	8.75	0.17	2.62	2.04	159.42
Other Outside District Total	20.09	15.07	12.93	33.25	16.77	67.63	28.86	194.62
Total	121.97	40.61	31.35	42.00	16.94	70.26	30.90	354.04

Table 12: Selby District main food store's convenience goods floorspace and benchmark turnover 2019

Zone/destination	Sales Floorspace (sq.m net)	Convenience floorspace (%)	Convenience floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Morrisons, Market Cross, Selby Town Centre	2,475	90%	2,228	£12,342	£27.49
Sainsbury's, Abbey Walk, Selby Town Centre	1,625	90%	1,463	£11,526	£16.86
Tesco, Portholme Road, Selby Town Centre	1,739	90%	1,565	£13,236	£20.72
Aldi, Three Lakes Retail Park, Bawtry Road, Selby	940	85%	799	£10,542	£8.42
Co-op, Flaxley Road, Selby	130	95%	124	£11,171	£1.38
Tesco Express, Doncaster Road, Brayton	257	95%	244	£13,236	£3.23
Zone 1 - Selby Sub-Total	7,166		6,422		£78.10
Co-op, Finkle Hill, Sherburn in Elmet	681	95%	647	£11,171	£7.23
Tesco Express, Low Street, Sherburn in Elmet	147	95%	140	£13,236	£1.85
Aldi, Low Road, Sherburn in Elmet	955	85%	812	£10,542	£8.56
Zone 2 - Sherburn-in-Elmet Sub-Total	1,783		1,598	34,949	£17.63
Sainsbury's, Mill Lane, Tadcaster	906	90%	815	£11,526	£9.40
Zone 3 - Tadcaster Sub-Total	906		815		£9.40
	9,855		8,836		£105.13

Floorspace figures from ORC's StorePoint. Sales densities from GlobalData / Lichfields' assumptions

Table 13: Summary of convenience goods expenditure 2020 to 2040

	2019	2025	2030	2035	2040
Available expenditure in Selby District (£m)					
Zone 1 - Selby main stores	89.49	94.19	95.94	97.59	98.51
Zone 1 - Other	12.07	12.40	12.64	12.86	12.98
Zone 2 - Sherburn in Elmet main stores	29.49	29.64	30.13	30.65	30.93
Zone 2 - Other	1.69	1.75	1.78	1.81	1.83
Zone 3 - Tadcaster	8.39	8.61	8.72	8.85	8.92
Zone 3 - Other	3.51	3.60	3.65	3.70	3.73
Zone 4 - Eggborough/South Selby	2.39	2.46	2.48	2.51	2.52
Total	147.03	152.65	155.34	157.96	159.42
Turnover existing facilities/commitments (£m)					
Zone 1 - Selby main stores	78.10	89.27	89.27	89.27	89.27
Zone 1 - Other	12.07	12.07	12.07	12.07	12.07
Zone 2 - Sherburn in Elmet main stores	17.63	17.63	17.63	17.63	17.63
Zone 2 - Other	1.69	1.69	1.69	1.69	1.69
Zone 3 - Tadcaster	9.40	9.40	9.40	9.40	9.40
Zone 3 - Other	3.51	3.51	3.51	3.51	3.51
Zone 4 - Eggborough/South Selby	2.39	2.39	2.39	2.39	2.39
Total	124.79	135.97	135.97	135.97	135.97
Surplus/deficit expenditure (£m)					
Zone 1 - Selby	11.39	5.24	7.23	9.11	10.15
Zone 2 - Sherburn in Elmet	11.86	12.07	12.58	13.13	13.43
Zone 3 - Tadcaster	-1.01	-0.69	-0.54	-0.36	-0.26
Zone 4 - Eggborough/South Selby	0.00	0.06	0.09	0.12	0.13
Total	22.23	16.68	19.37	21.99	23.45

Source: Tables 5 to 12

Table 14: Convenience goods floorspace capacity

	2019	2025	2030	2035	2040
Turnover density new floorspace (£ per sq.m)	£12,000	£12,000	£12,000	£12,000	£12,000
Sales floorspace capacity (sq.m net)					
Zone 1 - Selby	949	437	603	759	846
Zone 2 - Sherburn in Elmet	988	1,005	1,049	1,094	1,119
Zone 3 - Tadcaster	-84	-58	-45	-30	-21
Zone 4 - Eggborough/South Selby	0	5	8	10	11
Total	1,853	1,390	1,614	1,833	1,954
Gross floorspace capacity (sq.m gross)					
Zone 1 - Selby	1,265	583	803	1,012	1,128
Zone 2 - Sherburn in Elmet	1,317	1,341	1,398	1,459	1,492
Zone 3 - Tadcaster	-112	-77	-59	-40	-28
Zone 4 - Eggborough/South Selby	0	7	10	13	14
Total	2,471	1,853	2,152	2,444	2,605

Source: Table 13

Appendix 5 Comparison goods capacity

Table 1: Selby study area population

	2019	2025	2030	2035	2040
Zone 1 - Selby	54,100	56,245	57,538	58,465	58,933
Zone 2 - Sherburn in Elmet	17,447	18,044	18,419	18,722	18,864
Zone 3 - Tadcaster	13,604	14,008	14,233	14,401	14,505
Zone 4 - Eggborough/South Selby	19,150	19,702	20,001	20,164	20,221
Zone 5 - North-Eastern Fringe	7,413	7,543	7,618	7,695	7,727
Zone 6 - South-Eastern Fringe	34,460	35,038	35,440	35,761	35,991
Zone 7 - Western Fringe	13,604	13,888	14,158	14,347	14,373
Total	159,778	164,468	167,407	169,555	170,614

Sources: Experian population projections

Table 2: Comparison goods expenditure per person (£)

	2019	2025	2030	2035	2040
Zone 1 - Selby	3,438	3,473	3,892	4,417	5,053
Zone 2 - Sherburn in Elmet	3,722	3,759	4,213	4,781	5,469
Zone 3 - Tadcaster	3,749	3,787	4,244	4,816	5,510
Zone 4 - Eggborough/South Selby	3,330	3,364	3,770	4,278	4,894
Zone 5 - North-Eastern Fringe	3,621	3,658	4,099	4,651	5,321
Zone 6 - South-Eastern Fringe	2,908	2,937	3,291	3,735	4,273
Zone 7 - Western Fringe	3,899	3,938	4,414	5,008	5,730

Sources: Experian 2018 base year local expenditure (2018 prices) and Retail Planner Briefing Note 18
Excludes Special Forms of Trading

Table 3: Total comparison goods expenditure (£M)

	2020	2025	2030	2035	2040
Zone 1 - Selby	186.02	195.36	223.97	258.23	297.79
Zone 2 - Sherburn in Elmet	64.93	67.84	77.60	89.50	103.17
Zone 3 - Tadcaster	51.00	53.05	60.41	69.35	79.92
Zone 4 - Eggborough/South Selby	63.77	66.28	75.40	86.25	98.96
Zone 5 - North-Eastern Fringe	26.84	27.59	31.23	35.79	41.12
Zone 6 - South-Eastern Fringe	100.19	102.91	116.65	133.56	153.78
Zone 7 - Western Fringe	53.04	54.70	62.49	71.85	82.35
Total	545.80	567.73	647.73	744.55	857.08

Source: Tables 1 and 2

Table 4: Base year comparison goods market shares (%)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Selby in centre	32.1%	8.6%	2.9%	11.6%	1.6%	3.0%	0.5%
Selby out of centre	12.5%	2.8%	2.0%	7.0%	1.1%	1.4%	0.2%
Other Zone 1	1.5%	0.3%	0.0%	0.2%	0.0%	0.4%	0.1%
Zone 1 - Sub-total	46.1%	11.7%	4.9%	18.8%	2.7%	4.8%	0.8%
Sherburn in Elmet	0.2%	8.5%	2.9%	0.0%	0.0%	0.0%	0.2%
Other Zone 2	0.2%	2.1%	0.4%	0.0%	0.0%	0.0%	0.7%
Zone 2 - Sub-total	0.4%	10.6%	3.3%	0.0%	0.0%	0.0%	0.9%
Tadcaster	0.0%	0.1%	10.9%	0.0%	0.9%	0.0%	1.3%
Other Zone 3	0.0%	0.1%	0.1%	0.0%	0.0%	0.0%	0.0%
Zone 3 - Sub-total	0.0%	0.2%	11.0%	0.0%	0.9%	0.0%	1.3%
Eggborough / Whitley	0.1%	0.0%	0.0%	0.4%	0.1%	0.0%	0.1%
Zone 4 - Sub-total	0.1%	0.0%	0.0%	0.4%	0.1%	0.0%	0.1%
Selby District Total	46.6%	22.5%	19.2%	19.2%	3.7%	4.8%	3.1%
Outside District Total	53.4%	77.5%	80.8%	80.8%	96.3%	95.2%	96.9%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Selby Household Survey October 2020

Table 5: Base year comparison goods shopping patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
Available expenditure 2019	186.02	64.93	51.00	63.77	26.84	100.19	53.04	545.80
Selby in centre	59.71	5.58	1.48	7.40	0.43	3.01	0.27	77.87
Selby out of centre	23.25	1.82	1.02	4.46	0.30	1.40	0.11	32.36
Other Zone 1	2.79	0.19	0.00	0.13	0.00	0.40	0.05	3.57
Zone 1 - Sub-total	85.76	7.60	2.50	11.99	0.72	4.81	0.42	113.80
Sherburn in Elmet	0.37	5.52	1.48	0.00	0.00	0.00	0.11	7.48
Other Zone 2	0.37	1.36	0.20	0.00	0.00	0.00	0.37	2.31
Zone 2 - Sub-total	0.74	6.88	1.68	0.00	0.00	0.00	0.48	9.79
Tadcaster	0.00	0.06	5.56	0.00	0.24	0.00	0.69	6.56
Other Zone 3	0.00	0.06	0.05	0.00	0.00	0.00	0.00	0.12
Zone 3 - Sub-total	0.00	0.13	5.61	0.00	0.24	0.00	0.69	6.67
Eggborough / Whitley	0.19	0.00	0.00	0.26	0.03	0.00	0.05	0.52
Zone 4 - Sub-total	0.19	0.00	0.00	0.26	0.03	0.00	0.05	0.52
Selby District Total	86.69	14.61	9.79	12.24	0.99	4.81	1.64	130.78
Outside District Total	99.33	50.32	41.21	51.53	25.85	95.38	51.40	415.02
Total	186.02	64.93	51.00	63.77	26.84	100.19	53.04	545.80

Source: Table 3 and Table 4

Table 6: Future 2025 comparison goods shopping patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
Available expenditure 2025	195.36	67.84	53.05	66.28	27.59	102.91	54.70	567.73
Selby in centre	62.71	5.83	1.54	7.69	0.44	3.09	0.27	81.57
Selby out of centre	24.42	1.90	1.06	4.64	0.30	1.44	0.11	33.87
Other Zone 1	2.93	0.20	0.00	0.13	0.00	0.41	0.05	3.73
Zone 1 - Sub-total	90.06	7.94	2.60	12.46	0.74	4.94	0.44	119.18
Sherburn in Elmet	0.39	5.77	1.54	0.00	0.00	0.00	0.11	7.80
Other Zone 2	0.39	1.42	0.21	0.00	0.00	0.00	0.38	2.41
Zone 2 - Sub-total	0.78	7.19	1.75	0.00	0.00	0.00	0.49	10.21
Tadcaster	0.00	0.07	5.78	0.00	0.25	0.00	0.71	6.81
Other Zone 3	0.00	0.07	0.05	0.00	0.00	0.00	0.00	0.12
Zone 3 - Sub-total	0.00	0.14	5.84	0.00	0.25	0.00	0.71	6.93
Eggborough / Whitley	0.20	0.00	0.00	0.27	0.03	0.00	0.05	0.54
Zone 4 - Sub-total	0.20	0.00	0.00	0.27	0.03	0.00	0.05	0.54
Selby District Total	91.04	15.26	10.19	12.73	1.02	4.94	1.70	136.87
Outside District Total	104.32	52.57	42.87	53.55	26.57	97.97	53.00	430.86
Total	195.36	67.84	53.05	66.28	27.59	102.91	54.70	567.73

Source: Table 3 and Table 4

Table 7: Future 2030 comparison goods shopping patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
Available expenditure 2030	223.97	77.60	60.41	75.40	31.23	116.65	62.49	647.73
Selby in centre	71.89	6.67	1.75	8.75	0.50	3.50	0.31	93.38
Selby out of centre	28.00	2.17	1.21	5.28	0.34	1.63	0.12	38.76
Other Zone 1	3.36	0.23	0.00	0.15	0.00	0.47	0.06	4.27
Zone 1 - Sub-total	103.25	9.08	2.96	14.17	0.84	5.60	0.50	136.40
Sherburn in Elmet	0.45	6.60	1.75	0.00	0.00	0.00	0.12	8.92
Other Zone 2	0.45	1.63	0.24	0.00	0.00	0.00	0.44	2.76
Zone 2 - Sub-total	0.90	8.23	1.99	0.00	0.00	0.00	0.56	11.68
Tadcaster	0.00	0.08	6.58	0.00	0.28	0.00	0.81	7.76
Other Zone 3	0.00	0.08	0.06	0.00	0.00	0.00	0.00	0.14
Zone 3 - Sub-total	0.00	0.16	6.64	0.00	0.28	0.00	0.81	7.89
Eggborough / Whitley	0.22	0.00	0.00	0.30	0.03	0.00	0.06	0.62
Zone 4 - Sub-total	0.22	0.00	0.00	0.30	0.03	0.00	0.06	0.62
Selby District Total	104.37	17.46	11.60	14.48	1.16	5.60	1.94	156.59
Outside District Total	119.60	60.14	48.81	60.92	30.07	111.05	60.55	491.14
Total	223.97	77.60	60.41	75.40	31.23	116.65	62.49	647.73

Source: Table 3 and Table 4

Table 8: Future 2035 comparison goods shopping patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
Available expenditure 2035	258.23	89.50	69.35	86.25	35.79	133.56	71.85	744.55
Selby in centre	82.89	7.70	2.01	10.01	0.57	4.01	0.36	107.55
Selby out of centre	32.28	2.51	1.39	6.04	0.39	1.87	0.14	44.62
Other Zone 1	3.87	0.27	0.00	0.17	0.00	0.53	0.07	4.92
Zone 1 - Sub-total	119.05	10.47	3.40	16.22	0.97	6.41	0.57	157.08
Sherburn in Elmet	0.52	7.61	2.01	0.00	0.00	0.00	0.14	10.28
Other Zone 2	0.52	1.88	0.28	0.00	0.00	0.00	0.50	3.18
Zone 2 - Sub-total	1.03	9.49	2.29	0.00	0.00	0.00	0.65	13.46
Tadcaster	0.00	0.09	7.56	0.00	0.32	0.00	0.93	8.91
Other Zone 3	0.00	0.09	0.07	0.00	0.00	0.00	0.00	0.16
Zone 3 - Sub-total	0.00	0.18	7.63	0.00	0.32	0.00	0.93	9.06
Eggborough / Whitley	0.26	0.00	0.00	0.35	0.04	0.00	0.07	0.71
Zone 4 - Sub-total	0.26	0.00	0.00	0.35	0.04	0.00	0.07	0.71
Selby District Total	120.34	20.14	13.32	16.56	1.32	6.41	2.23	180.31
Outside District Total	137.90	69.36	56.04	69.69	34.47	127.15	69.63	564.24
Total	258.23	89.50	69.35	86.25	35.79	133.56	71.85	744.55

Source: Table 3 and Table 4

Table 9: Future 2040 comparison goods shopping patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
Available expenditure 2040	297.79	103.17	79.92	98.96	41.12	153.78	82.35	857.08
Selby in centre	95.59	8.87	2.32	11.48	0.66	4.61	0.41	123.94
Selby out of centre	37.22	2.89	1.60	6.93	0.45	2.15	0.16	51.41
Other Zone 1	4.47	0.31	0.00	0.20	0.00	0.62	0.08	5.67
Zone 1 - Sub-total	137.28	12.07	3.92	18.60	1.11	7.38	0.66	181.02
Sherburn in Elmet	0.60	8.77	2.32	0.00	0.00	0.00	0.16	11.85
Other Zone 2	0.60	2.17	0.32	0.00	0.00	0.00	0.58	3.66
Zone 2 - Sub-total	1.19	10.94	2.64	0.00	0.00	0.00	0.74	15.51
Tadcaster	0.00	0.10	8.71	0.00	0.37	0.00	1.07	10.25
Other Zone 3	0.00	0.10	0.08	0.00	0.00	0.00	0.00	0.18
Zone 3 - Sub-total	0.00	0.21	8.79	0.00	0.37	0.00	1.07	10.44
Eggborough / Whitley	0.30	0.00	0.00	0.40	0.04	0.00	0.08	0.82
Zone 4 - Sub-total	0.30	0.00	0.00	0.40	0.04	0.00	0.08	0.82
Selby District Total	138.77	23.21	15.34	19.00	1.52	7.38	2.55	207.78
Outside District Total	159.02	79.96	64.57	79.96	39.60	146.40	79.80	649.30
Total	297.79	103.17	79.92	98.96	41.12	153.78	82.35	857.08

Source: Table 3 and Table 4

Table 10: Summary of comparison goods expenditure up to 2040

	2019	2025	2030	2035	2040
Available expenditure in Selby District (£m)					
Zone 1 - Selby	113.80	119.18	136.40	157.08	181.02
Zone 2 - Sherburn in Elmet	9.79	10.21	11.68	13.46	15.51
Zone 3 - Tadcaster	6.67	6.93	7.89	9.06	10.44
Zone 4 - Eggborough/South Selby	0.52	0.54	0.62	0.71	0.82
Total	130.78	136.87	156.59	180.31	207.78
Turnover existing facilities (£m)					
Zone 1 - Selby	113.80	£122.90	£140.82	£160.10	£182.03
Zone 2 - Sherburn in Elmet	9.79	£10.57	£12.11	£13.77	£15.65
Zone 3 - Tadcaster	6.67	£7.20	£8.26	£9.39	£10.67
Zone 4 - Eggborough/South Selby	0.52	£0.56	£0.64	£0.73	£0.83
Total	130.78	141.24	161.83	183.99	209.19
Surplus/deficit expenditure (£m)					
Zone 1 - Selby	0.00	-3.72	-4.41	-3.02	-1.00
Zone 2 - Sherburn in Elmet	0.00	-0.35	-0.43	-0.31	-0.15
Zone 3 - Tadcaster	0.00	-0.27	-0.36	-0.32	-0.23
Zone 4 - Eggborough/South Selby	0.00	-0.02	-0.03	-0.02	-0.02
Total	0.00	-4.37	-5.24	-3.68	-1.40

Source: Tables 5 to 9

Table 11: Comparison goods floorspace capacity

	2019	2025	2030	2035	2040
Turnover density new floorspace (£ per sq.m)	£5,000	£5,400	£6,211	£7,062	£8,029
Sales floorspace capacity (sq.m net)					
Zone 1 - Selby	0	-688	-711	-428	-125
Zone 2 - Sherburn in Elmet	0	-66	-70	-44	-19
Zone 3 - Tadcaster	0	-51	-58	-46	-29
Zone 4 - Eggborough/South Selby	0	-4	-4	-3	-2
Total	0	-808	-843	-521	-175
Gross floorspace capacity (sq.m gross)					
Zone 1 - Selby	0	-918	-948	-570	-167
Zone 2 - Sherburn in Elmet	0	-88	-93	-59	-25
Zone 3 - Tadcaster	0	-68	-78	-61	-39
Zone 4 - Eggborough/South Selby	0	-5	-5	-4	-3
Total	0	-1,078	-1,124	-694	-233

Source: Table 10

Appendix 6 Food/beverage capacity

Table 1: Selby study area population

	2019	2025	2030	2035	2040
Zone 1 - Selby	54,100	56,245	57,538	58,465	58,933
Zone 2 - Sherburn in Elmet	17,447	18,044	18,419	18,722	18,864
Zone 3 - Tadcaster	13,604	14,008	14,233	14,401	14,505
Zone 4 - Eggborough/South Selby	19,150	19,702	20,001	20,164	20,221
Zone 5 - North-Eastern Fringe	7,413	7,543	7,618	7,695	7,727
Zone 6 - South-Eastern Fringe	34,460	35,038	35,440	35,761	35,991
Zone 7 - Western Fringe	13,604	13,888	14,158	14,347	14,373
Total	159,778	164,468	167,407	169,555	170,614

Sources: Experian population projections

Table 2: Food/beverage expenditure per person (£)

	2019	2025	2030	2035	2040
Zone 1 - Selby	1,376	1,310	1,425	1,490	1,558
Zone 2 - Sherburn in Elmet	1,487	1,415	1,539	1,609	1,683
Zone 3 - Tadcaster	1,496	1,424	1,549	1,620	1,694
Zone 4 - Eggborough/South Selby	1,294	1,231	1,339	1,400	1,465
Zone 5 - North-Eastern Fringe	1,403	1,335	1,452	1,519	1,588
Zone 6 - South-Eastern Fringe	1,141	1,086	1,181	1,236	1,292
Zone 7 - Western Fringe	1,581	1,505	1,637	1,712	1,790

Sources: Experian 2018 base year local expenditure (2018 prices) and Retail Planner Briefing Note 18

Table 3: Total food/beverage expenditure (£M)

	2019	2025	2030	2035	2040
Zone 1 - Selby	74.45	73.66	81.96	87.10	91.82
Zone 2 - Sherburn in Elmet	25.94	25.53	28.34	30.13	31.75
Zone 3 - Tadcaster	20.36	19.95	22.05	23.33	24.58
Zone 4 - Eggborough/South Selby	24.77	24.25	26.78	28.24	29.61
Zone 5 - North-Eastern Fringe	10.40	10.07	11.06	11.69	12.27
Zone 6 - South-Eastern Fringe	39.33	38.06	41.87	44.19	46.51
Zone 7 - Western Fringe	21.51	20.90	23.17	24.56	25.73
Total	216.75	212.43	235.25	249.23	262.27

Source: Tables 1 and 2

Table 4: Base year food/beverage market shares (%)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7
Selby	30.7%	4.1%	4.7%	18.1%	0.0%	8.4%	0.8%
Other Zone 1	18.0%	4.5%	0.0%	4.2%	1.3%	2.0%	0.0%
Zone 1 - sub-total	48.7%	8.6%	4.7%	22.3%	1.3%	10.4%	0.8%
Sherburn in Elmet	0.9%	11.2%	2.2%	0.7%	0.0%	0.4%	0.8%
Other Zone 2	1.4%	18.1%	1.8%	0.0%	0.0%	0.0%	0.0%
Zone 2 - sub-total	2.3%	29.3%	4.0%	0.7%	0.0%	0.4%	0.8%
Tadcaster	0.0%	4.2%	18.6%	0.0%	0.0%	0.0%	1.6%
Other Zone 3	0.3%	6.0%	18.2%	0.0%	2.9%	0.0%	0.0%
Zone 3 - sub-total	0.3%	10.2%	36.8%	0.0%	2.9%	0.0%	1.6%
Eggborough/Whitley	0.1%	1.2%	0.0%	2.0%	0.0%	0.0%	1.6%
Other Zone 4	1.5%	0.0%	0.0%	12.3%	0.0%	0.6%	0.0%
Zone 4 - sub-total	1.6%	1.2%	0.0%	14.3%	0.0%	0.6%	1.6%
Selby District total	52.9%	49.3%	45.5%	37.3%	4.2%	11.4%	4.8%
Outside Selby District	47.1%	50.7%	54.5%	62.7%	95.8%	88.6%	95.2%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Selby Household Survey October 2020

Table 5: Base year food/beverage spending patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
Available expenditure 2019	74.45	25.94	20.36	24.77	10.40	39.33	21.51	216.75
Selby	22.85	1.06	0.96	4.48	0.00	3.30	0.17	32.83
Other Zone 1	13.40	1.17	0.00	1.04	0.14	0.79	0.00	16.53
Zone 1 - sub-total	36.26	2.23	0.96	5.52	0.14	4.09	0.17	49.36
Sherburn in Elmet	0.67	2.90	0.45	0.17	0.00	0.16	0.17	4.53
Other Zone 2	1.04	4.69	0.37	0.00	0.00	0.00	0.00	6.10
Zone 2 - sub-total	1.71	7.60	0.81	0.17	0.00	0.16	0.17	10.63
Tadcaster	0.00	1.09	3.79	0.00	0.00	0.00	0.34	5.22
Other Zone 3	0.22	1.56	3.71	0.00	0.30	0.00	0.00	5.79
Zone 3 - sub-total	0.22	2.65	7.49	0.00	0.30	0.00	0.34	11.01
Eggborough/Whitley	0.07	0.31	0.00	0.50	0.00	0.00	0.34	1.23
Other Zone 4	1.12	0.00	0.00	3.05	0.00	0.24	0.00	4.40
Zone 4 - sub-total	1.19	0.31	0.00	3.54	0.00	0.24	0.34	5.62
Selby District total	39.38	12.79	9.26	9.24	0.44	4.48	1.03	76.62
Outside Selby District	35.06	13.15	11.10	15.53	9.96	34.84	20.48	140.12
Total	74.45	25.94	20.36	24.77	10.40	39.33	21.51	216.75

Source: Table 3 and Table 4

Table 6: Future 2025 food/beverage spending patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
Available expenditure 2025	73.66	25.53	19.95	24.25	10.07	38.06	20.90	212.43
Selby	22.61	1.05	0.94	4.39	0.00	3.20	0.17	32.35
Other Zone 1	13.26	1.15	0.00	1.02	0.13	0.76	0.00	16.32
Zone 1 - sub-total	35.87	2.20	0.94	5.41	0.13	3.96	0.17	48.67
Sherburn in Elmet	0.66	2.86	0.44	0.17	0.00	0.15	0.17	4.45
Other Zone 2	1.03	4.62	0.36	0.00	0.00	0.00	0.00	6.01
Zone 2 - sub-total	1.69	7.48	0.80	0.17	0.00	0.15	0.17	10.46
Tadcaster	0.00	1.07	3.71	0.00	0.00	0.00	0.33	5.12
Other Zone 3	0.22	1.53	3.63	0.00	0.29	0.00	0.00	5.68
Zone 3 - sub-total	0.22	2.60	7.34	0.00	0.29	0.00	0.33	10.79
Eggborough/Whitley	0.07	0.31	0.00	0.49	0.00	0.00	0.33	1.20
Other Zone 4	1.10	0.00	0.00	2.98	0.00	0.23	0.00	4.32
Zone 4 - sub-total	1.18	0.31	0.00	3.47	0.00	0.23	0.33	5.52
Selby District total	38.97	12.59	9.08	9.05	0.42	4.34	1.00	75.44
Outside Selby District	34.70	12.94	10.87	15.21	9.65	33.72	19.90	136.98
Total	73.66	25.53	19.95	24.25	10.07	38.06	20.90	212.43

Source: Table 3 and Table 4

Table 7: Future 2030 food/beverage spending patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
Available expenditure 2030	81.96	28.34	22.05	26.78	11.06	41.87	23.17	235.25
Selby	25.16	1.16	1.04	4.85	0.00	3.52	0.19	35.91
Other Zone 1	14.75	1.28	0.00	1.12	0.14	0.84	0.00	18.14
Zone 1 - sub-total	39.92	2.44	1.04	5.97	0.14	4.35	0.19	54.05
Sherburn in Elmet	0.74	3.17	0.49	0.19	0.00	0.17	0.19	4.94
Other Zone 2	1.15	5.13	0.40	0.00	0.00	0.00	0.00	6.67
Zone 2 - sub-total	1.89	8.30	0.88	0.19	0.00	0.17	0.19	11.61
Tadcaster	0.00	1.19	4.10	0.00	0.00	0.00	0.37	5.66
Other Zone 3	0.25	1.70	4.01	0.00	0.32	0.00	0.00	6.28
Zone 3 - sub-total	0.25	2.89	8.11	0.00	0.32	0.00	0.37	11.94
Eggborough/Whitley	0.08	0.34	0.00	0.54	0.00	0.00	0.37	1.33
Other Zone 4	1.23	0.00	0.00	3.29	0.00	0.25	0.00	4.77
Zone 4 - sub-total	1.31	0.34	0.00	3.83	0.00	0.25	0.37	6.10
Selby District total	43.36	13.97	10.03	9.99	0.46	4.77	1.11	83.71
Outside Selby District	38.61	14.37	12.02	16.79	10.60	37.10	22.06	151.54
Total	81.96	28.34	22.05	26.78	11.06	41.87	23.17	235.25

Source: Table 3 and Table 4

Table 8: Future 2035 food/beverage spending patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
Available expenditure 2035	87.10	30.13	23.33	28.24	11.69	44.19	24.56	249.23
Selby	26.74	1.24	1.10	5.11	0.00	3.71	0.20	38.09
Other Zone 1	15.68	1.36	0.00	1.19	0.15	0.88	0.00	19.26
Zone 1 - sub-total	42.42	2.59	1.10	6.30	0.15	4.60	0.20	57.35
Sherburn in Elmet	0.78	3.37	0.51	0.20	0.00	0.18	0.20	5.24
Other Zone 2	1.22	5.45	0.42	0.00	0.00	0.00	0.00	7.09
Zone 2 - sub-total	2.00	8.83	0.93	0.20	0.00	0.18	0.20	12.34
Tadcaster	0.00	1.27	4.34	0.00	0.00	0.00	0.39	6.00
Other Zone 3	0.26	1.81	4.25	0.00	0.34	0.00	0.00	6.65
Zone 3 - sub-total	0.26	3.07	8.59	0.00	0.34	0.00	0.39	12.65
Eggborough/Whitley	0.09	0.36	0.00	0.56	0.00	0.00	0.39	1.41
Other Zone 4	1.31	0.00	0.00	3.47	0.00	0.27	0.00	5.04
Zone 4 - sub-total	1.39	0.36	0.00	4.04	0.00	0.27	0.39	6.45
Selby District total	46.08	14.85	10.62	10.53	0.49	5.04	1.18	88.79
Outside Selby District	41.02	15.28	12.72	17.70	11.20	39.15	23.38	160.45
Total	87.10	30.13	23.33	28.24	11.69	44.19	24.56	249.23

Source: Table 3 and Table 4

Table 9: Future 2040 food/beverage spending patterns (£M)

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Total
Available expenditure 2040	91.82	31.75	24.58	29.61	12.27	46.51	25.73	262.27
Selby	28.19	1.30	1.16	5.36	0.00	3.91	0.21	40.12
Other Zone 1	16.53	1.43	0.00	1.24	0.16	0.93	0.00	20.29
Zone 1 - sub-total	44.72	2.73	1.16	6.60	0.16	4.84	0.21	60.41
Sherburn in Elmet	0.83	3.56	0.54	0.21	0.00	0.19	0.21	5.52
Other Zone 2	1.29	5.75	0.44	0.00	0.00	0.00	0.00	7.47
Zone 2 - sub-total	2.11	9.30	0.98	0.21	0.00	0.19	0.21	13.00
Tadcaster	0.00	1.33	4.57	0.00	0.00	0.00	0.41	6.32
Other Zone 3	0.28	1.91	4.47	0.00	0.36	0.00	0.00	7.01
Zone 3 - sub-total	0.28	3.24	9.04	0.00	0.36	0.00	0.41	13.33
Eggborough/Whitley	0.09	0.38	0.00	0.59	0.00	0.00	0.41	1.48
Other Zone 4	1.38	0.00	0.00	3.64	0.00	0.28	0.00	5.30
Zone 4 - sub-total	1.47	0.38	0.00	4.23	0.00	0.28	0.41	6.78
Selby District total	48.57	15.65	11.18	11.05	0.52	5.30	1.24	93.51
Outside Selby District	43.25	16.10	13.39	18.57	11.76	41.21	24.49	168.77
Total	91.82	31.75	24.58	29.61	12.27	46.51	25.73	262.27

Source: Table 3 and Table 4

Table 10: Summary of food/beverage expenditure 2019 to 2040

	2019	2025	2030	2035	2040
Available expenditure in Selby District (£m)					
Zone 1 - Selby	49.36	48.67	54.05	57.35	60.41
Zone 2 - Sherburn in Elmet	10.63	10.46	11.61	12.34	13.00
Zone 3 - Tadcaster	11.01	10.79	11.94	12.65	13.33
Zone 4 - Eggborough/South Selby	5.62	5.52	6.10	6.45	6.78
Total	76.62	75.44	83.71	88.79	93.51
Turnover existing facilities (£m)					
Zone 1 - Selby	49.36	£49.36	£51.88	£54.53	£57.31
Zone 2 - Sherburn in Elmet	10.63	£10.63	£11.17	£11.74	£12.34
Zone 3 - Tadcaster	11.01	£11.01	£11.57	£12.16	£12.78
Zone 4 - Eggborough/South Selby	5.62	£5.62	£5.91	£6.21	£6.53
Total	76.62	76.62	80.53	84.64	88.96
Surplus/deficit expenditure (£m)					
Zone 1 - Selby	0.00	-0.69	2.17	2.82	3.10
Zone 2 - Sherburn in Elmet	0.00	-0.17	0.44	0.60	0.66
Zone 3 - Tadcaster	0.00	-0.21	0.38	0.49	0.55
Zone 4 - Eggborough/South Selby	0.00	-0.11	0.19	0.24	0.25
Total	0.00	-1.18	3.17	4.15	4.55

Source: Tables 5 to 9

Table 11: Food/beverage floorspace capacity

	2019	2025	2030	2035	2040
Turnover density new floorspace (£ per sq.m)	£5,000	£5,308	£5,578	£5,863	£6,162
Sales floorspace capacity (sq.m gross)					
Zone 1 - Selby	0	-130	388	481	503
Zone 2 - Sherburn in Elmet	0	-31	79	102	107
Zone 3 - Tadcaster	0	-40	67	84	89
Zone 4 - Eggborough/South Selby	0	-20	34	41	40
Total	0	-222	569	707	738

Source: Table 10

Birmingham

0121 713 1530

birmingham@lichfields.uk

Edinburgh

0131 285 0670

edinburgh@lichfields.uk

Manchester

0161 837 6130

manchester@lichfields.uk

Bristol

0117 403 1980

bristol@lichfields.uk

Leeds

0113 397 1397

leeds@lichfields.uk

Newcastle

0191 261 5685

newcastle@lichfields.uk

Cardiff

029 2043 5880

cardiff@lichfields.uk

London

020 7837 4477

london@lichfields.uk

Thames Valley

0118 334 1920

thamesvalley@lichfields.uk

