WARRINGTON RETAIL AND LEISURE STUDY

*Final Report Prepared For*

Warrington BC

July 2006
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## APPENDICES

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1.0 Executive Summary

1.1 Retail and leisure are dynamic sectors of the economy. This report has been commissioned by Warrington BC to inform the LDF process to try and ensure policies support whilst directing this dynamic sector. Policies in the LDF need not replicate national policy and other than where local interpretation is needed should only refer to the specific policy guidance and tests.

1.2 The summary of recent trends in the retail and leisure industries indicates that these sectors have withstood recessions in the past when other sectors such as manufacturing and production have declined. The development plan (LDF) must respond quickly to ever changing consumer preferences within these sectors. The LDF should therefore attempt to realise locally the objectives of PPS6 in enhancing consumer choice, supporting efficient, competitive and innovative retail and leisure sectors and improving accessibility. With this regard new town and edge-of-centre sites are identified in this report. Recommendations are also made on a suitable boundary for the Primary Shopping Area (PSA) and the wider town centre boundary.

1.3 The report makes recommendations based on the PPS6 definitions on the current and future hierarchy of shopping centres in Warrington and also upper limits for acceptable size of retail development in any particular centre to ensure it is of an appropriate scale. Gaps in the retail hierarchy are identified taking into account social exclusion and accessibility considerations.

1.4 Specific issues that arise from the review of trends in the retail and leisure sectors include the growth of non-food retailing in supermarkets. Any applications for new superstores or extensions to existing stores are likely to retail a considerable amount of non-bulky comparison goods in direct competition with the town centre. Likewise existing retail warehouses with floorspace that are not restricted to bulky goods sales are likely to be occupied in the future by non-bulky operators, possibly foodstores, and those that are restricted are likely to come under pressure to relax restrictive conditions. There are also likely to be more proposals for small supermarkets in petrol filling stations as the large operators expand further into the convenience sector.

1.5 In the town centre there is likely to be a shift in the centre of gravity as the Golden Square extension is occupied by multiples relocating to these new primary pitches. There will also be pressure for non retail uses in the PSA that should ideally be
directed to the secondary frontages where there is likely to be less retail investment. This too is a good location for evening economy uses provided there is no conflict with any residential areas. There is also development pressure for a new cinema in the centre. Other commercial leisure uses might follow but many will prefer to locate out-of-centre and they are required to undertake a sequential assessment as are other town centre uses such as public and commercial offices.

1.6 The town centre currently displays strong PPS6 indicators of vitality and viability and compares favourably with competing centres and other sub-regional centres in the region. The main strength is the Golden Square mall, as reflected in rental levels and yields, and town centre environment. The main weakness is the lack of diversity but this is likely to be addressed by new developments and proposals. The main opportunity in the short term is the three potential development sites – Golden Square extension, Times Square and The Wireworks site – and the possibility of a public transport interchange. The main threat is the continued development of town centre uses including offices, leisure and retail in peripheral locations in the borough.

1.7 The town is well served by large supermarkets and there is no great quantitative need for additional convenience goods floorspace in Warrington and no requirement for the Council to identify sites for new supermarkets in the LDF. Minor amendments will be required to the designated local retail hierarchy to address ‘food deserts’ to the west of the town centre (Chapelford area), at Burtonwood and possibly the NE (Cinnamon Brow) but these are only small extensions to the local retail hierarchy.

1.8 There is a quantitative and qualitative need for additional comparison goods floorspace in Warrington but in the short term (2011) this is entirely accounted for by committed floorspace, in particular the Golden Square mall extension. In the longer term (2016) much of the quantitative and qualitative need could be taken up by pipeline schemes that should be designated in the LDF to prioritise them ahead of sequentially inferior sites that may also come forward during the plan period. There is therefore no requirement for Warrington BC to identify sites for new comparison goods in the LDF other than the Wireworks and Times Square sites.

1.9 There is a quantitative and qualitative need for new cinema screens and commercial leisure facilities such as restaurants and café bars in the town centres to help diversify the centre which currently is its main weakness. Such development will also help establish the evening economy in Warrington and will complement the expanding retail role. All town centre uses are subject to the sequential approach
which should be used to prioritise any competing claims to meet quantitative and qualitative need in the Borough.
2.0 Introduction

2.1 Warrington Borough Council (WBC) appointed MT Town Planning in October 2005 to undertake an update of the 2000 Warrington UDP Retail Study written by Chestertons. The Brief for the study update indicated that the main purpose of the study was to:

- replace the current outdated study;
- take account of new guidance in PPS6;
- inform the LDF; and,
- assist in the consideration of planning applications.

2.2 In addition, the Council required a sound economic/commercial appraisal that could be carried forward to inform the LDF and also assist in the consideration of future planning applications. The study should include a health check of the town centre and a quantitative assessment of comparison and convenience goods need and the level of new floorspace that could be planned for in the study area.

2.3 The study should also include a qualitative assessment of missing retailers, geographical areas of need and market support to address this. The Council also required an assessment of the need for further commercial leisure facilities. The study should conclude with recommendations for future retail provision and town centre development within the framework of the local retail hierarchy.

2.4 This report addresses the requirements of the brief and is structured accordingly. The next section presents a summary of recent trends in the retail and commercial leisure sectors and also considers current national retail planning and town centre policy that forms a background to the study.

2.5 Section 4 then presents a health check of the town centre using PPS6 indicators of vitality and viability and drawing upon the surveys commissioned to inform the study and consultations with key retail agents operating in the local market.

2.6 The quantitative need assessment for convenience and comparison goods is presented in Sections 5 and 6 drawing upon the results of the household survey and with reference to the tables in Appendix 3.

2.7 The need for new commercial leisure facilities in Warrington is examined in Section 7 and the physical capacity of Warrington town centre to accommodate this and new retail floorspace is considered in Section 8.
2.8 The local hierarchy of shopping centres is considered in Section 9 including the three district centres, neighbourhood and local centres and the overall conclusions and recommendations of the study are presented in Section 10.
3.0 Summary of Recent Trends in the Retail and Leisure Sectors and National Retail Planning Policy

*The Retail Property Market in the United Kingdom Since 1980*

3.1 The retailing and leisure industries have experienced considerable growth in the last two decades in the UK despite two recessions during this period. However, they are now faced with changes in demographics, increasingly restrictive planning policies and technological changes that will influence the future format of retail and leisure development. As an easier alternative many retailers are now looking to the continent and particularly the emerging markets in Eastern Europe to roll out formats such as Factory Outlet Centres and Hypermarkets that have proved so successful in the UK.

3.2 During the property boom of the mid to late 1980s, the retail market in the UK experienced high growth generated by strong consumer demand, restricted supply and relaxed planning policies. However, by 1990 this demand began to fall considerably with the onset of the recession and a number of new shopping centres had difficulties letting and some schemes were completely abandoned.

3.3 The increasing uncertainty in the market affected investment as the institutions became more selective and favoured low risk properties on prime sites that were fully let. However, supermarkets continued to perform well during the last two recessions with demand remaining strong particularly for out-of-centre locations.

3.4 Since the mid 1990s, retail property in the UK has witnessed the highest levels of rental growth amongst all property sectors. Average UK prime high street retail yields are now approximately 6.5% (Source VOA) which is between 1 and 2 percentage points lower than during the last recession and there has been an improvement in rental levels in all the major regions.

3.5 The recession of the early nineties led to a complete change in the way property development is funded. Investors are much more cautious of lending money to small developers and funding for speculative schemes is less common without anchor tenants (usually a department store) and significant pre-lets to national retailers. Combined with the difficulty of site assembly in central locations, this has increased the time taken to develop town centre schemes. Conversely, there has been much less investment in secondary and tertiary frontages although this has allowed the development of quality independent shopping and / or café and bar quarters taking advantage of the lower rentals in some larger city centres.
3.6 Since 1995 multiple retailers in particular have improved their performance and are becoming more dominant in the retail market, benefiting from economies of scale, they are prepared to pay the higher zone A rentals in the primary pitches where footfall (pedestrian movement) is highest. There has also been a concentration of development in the top 80 retail centres, with flag ship stores in the main regional centres, although certain multiples also target the lower order centres.

3.7 The cyclical pattern of retail development activity in many large cities causes periods of over supply followed by shortages and rental growth as market shares and shopping patterns stabilise.

Increasing Town Centre Shop Sizes

3.8 There is increasing pressure from the shareholders of national multiples to achieve better financial performances from their stores. Retailers have responded by seeking to occupy larger units of 500 - 2,000 sqm (or greater in the larger centres) to achieve greater economies of scale and attract shoppers from a wider area. The result is the polarisation of the higher order retailers into 80 or fewer of the main shopping centres and examples of 'flagship stores' operators include Next and Gap. These larger stores enable operators to reduce costs (£’s per sqm) through economies of scale whilst introducing a greater range of goods to customers. However, as multiples seek increasingly larger floorplates the centre of gravity in many cities has shifted from the traditional high street to the covered malls.

Consumer Preferences

3.9 Despite Government efforts to reduce the amount of carborne shopping that takes place, approximately one third of all retail sales are made in out-of-centre locations (Source: Verdict). Shoppers are becoming more discerning and no longer simply demand good quality products but a high quality, pleasant environment in which to purchase their goods and accessible free parking in the vicinity. This has helped to rejuvenate some cities which can provide a quality environment and unique visitor experience in comparison to the characterless out-of-centre malls surrounded by acres of tarmac. However, with increased working and commuting hours, the importance of car accessibility still favours the out-of-centre locations.

Sunday Trading and Extended Opening

3.10 A major change to the retail market in Britain has been the introduction of Sunday trading, which is particularly popular in large covered shopping centres such as the Trafford and Metro Centres. Sunday trading has made shopping into more of a
leisure and family activity, especially since many of these centres provide excellent leisure facilities that can be combined with a shopping trip. Large shops (over 280 sq m) are currently restricted to 6 hours trading on Sundays.

3.11 Sunday trading is largely restricted to the out-of-centre malls, retail parks and outlet centres. In the city centres the covered malls and shops in the primary frontages usually trade on Sundays but in the secondary frontages and smaller town centres it is often restricted to the Christmas seasonal shopping period. In terms of the impact of Sunday trading on sales, research indicates that many multiples both in and out-of-centre register the majority of takings at the weekend and the early week in particular has low takings. However, this is compounding the decline of secondary retail frontages as these are often occupied by independents that don’t open on a Sunday and even for those stores that do trade, there are insufficient neighbouring shops open to attract significant footfall to these frontages on a Sunday.

3.12 Recently Tesco has introduced 24 hour opening to their larger stores on the basis that there are shop and security staff present and ambient temperatures have to be maintained within the store regardless of whether it is open or not and therefore trading hours can be spread further. Asda has followed suit in some of its larger stores. Most banks and building societies now operate a Saturday service and restrictions on opening hours for pubs, clubs and bars have also been relaxed. The larger town centres and shopping areas are active beyond just ‘working hours’, and now maintain their activities, and hence vitality, into the evenings and weekends. However, most smaller centres have yet to see the benefits of all these extended opening hours.

**Emerging Convenience Retail Markets**

3.13 Partly in response to the rising number of city centre residents and in order to develop new markets such as the office worker top-up shopper, Tesco, Sainsbury, M&S and now Somerfield have placed a renewed emphasis on the town centre foodstore format. These formats are smaller, have no customer parking and have fewer budget ranges compared to the traditional out-of-centre superstores.

3.14 Research by Verdict indicates that Supermarkets now have a 75% market share of the bakery market; 50% of the grocery and butchers markets and 33% of the off-license trade. This is obviously having an impact on independents that traditionally formed the mainstay of the high street and particularly suburban parades.
3.15 However, the margins in convenience retailing are so tight and the competition so fierce, that the big four supermarket chains are all transferring floorspace to comparison goods sales. Whilst comparison goods retail for less than convenience goods per square metre of floorspace, the margins are greater, there is spin-off into the foodstore element of the stores and the supermarkets can utilise their enormous buying power! It is no coincidence that the two fastest growing supermarket chains in recent years are those with the greatest area of floorspace given over to comparison goods – Asda (43%) and Tesco (35%) (Source: Verdict 2005).

3.16 Where supermarkets have been unable to extend and/or open new stores due to planning restrictions, new strategies have been adopted. Until recently mezzanine floors did not require planning consent as long as the external building was not altered, but this loophole has now been closed except for small mezzanines under 200 sq m. Another strategy is to find old retail warehouses that have open A1 consents and occupy these although there is competition for this space from clothes retailers many of whom such as Next, Gap and the Arcadia Group (Burtons et al) have developed ‘fashion park formats’. Most LPAs ensure that new developments are suitably conditioned but there is no control over historic consents.

3.17 Despite all the major operators introducing comparison lines, not everyone is successful as witnessed by the Morrison takeover of Safeway. The takeover enabled the largely northern based Morrison Group to acquire a large portfolio of stores in southern England and Scotland where they were previously unrepresented.

3.18 The Co-operative Group has also all but given up competing with the large supermarkets in most locations and has sold on superstores to competitors, in particular Asda, whilst developing its local centre/parade formats including the acquisition of the Alldays group.

3.19 The continental discounters (Aldi, Lidl and Netto) are also reducing their once ambitious expansion plans as the lower end of the convenience market reaches saturation point and the larger supermarkets are now competing with them more effectively with their value ranges, in particular Asda.

3.20 The smaller supermarket operators such as Co-op, Somerfield/Kwik Save and Spar are concentrating their attention on district/local centres and suburban parades. However, this in turn will impact on the smaller independents that increasingly rely on this market.
Local Centres and Parades

3.21 The decline of the independent convenience sector is most evident in the smaller shopping centres and local parades where the number of bakers, butchers and grocers has dramatically decreased in recent years. The once dynamic Asian corner shop is also in decline as the educated children of the shopkeepers seek more lucrative / less work intensive careers. The Sunday Trading Laws limit unrestricted opening on Sundays to convenience stores below 280 sq m which helps protect the smaller operators that anchor many small centres and local parades.

3.22 Many local parades now consist of a convenience store / newsagent (that might include a Post Office and off-license), possibly a pharmacy and the remaining units which will usually be occupied by a mixture of service uses such as hair salons, hot food takeaways and betting shops or may be vacant in the less popular parades. The confectioner / tobacconist / newsagent (CTN) is a crucial anchor to nearly every small parade and local centre and this is a sector that is being targeted by the large Supermarkets.

3.23 The off-license is another local parade operator that is being squeezed by the buying power of the large supermarkets and only the national chains can compete with the supermarkets prices. They are also being squeezed by the ‘booze cruise’ market which results in a high level of cheap imported alcohol and cigarettes (also affecting CTN sector). The other local parade operator that is coming under increasing pressure from supermarkets is the pharmacy.

Petrol Filling Station Shops

3.24 A further threat to local centres / parades and independents is the expansion of Petrol Filling Station (PFS) shop market. These are now being promoted in and out-of-centre by Esso Tesco Express, BP Safeway and Elf Somerfield. The new formats have floorspaces of over 200 sqm and turnovers often in excess of £2million per annum (excluding petrol sales which are almost ancillary) and can impact greatly upon small centres and local shops. PFS shops are open for long hours (often 24 hours) and often have the added attraction of cash dispensing machines (ATMs).

Changing Comparison Goods Retail Markets

3.25 The main trend in comparison retailing is for polarisation of the national multiples into the major shopping centres and the decline of smaller shopping centres which are becoming more convenience goods orientated. Retail warehousing floorspace is continuing to grow despite policy constraints and non-bulky operators continue to
locate on retail parks where planning permissions allow a wider range of goods to be sold. Certain comparison goods are more susceptible to competition from 'etailing', however, the major threat to many sectors is the continuing expansion of the large supermarkets into new comparison goods markets. The Factory Outlet market reached saturation point some years ago in the UK and operators are now looking to Europe for their expansion.

**Home Shopping**

3.26 Home shopping is the largest component of the non-store retailing sector and is mainly accounted for by mail order, TV Shopping Channels and electronic shopping ('etailing'). Mail order is still the largest element of home shopping. As an increasing number of households get direct internet access mail order will continue declining. Despite the negative publicity (credit card security, delivery problems, etc.), eetailing continues to expand particularly in certain sectors (books, DVDs and music). Sainsbury and Tesco also report high growth in their internet delivery services although these are from conventional stores and not remote warehouses. All the high street retailers are developing their websites to complement / advertise their store offer and provide pre-purchase information whether the goods are bought online or in store. EBay, although not strictly a retailer, continue to record the highest number of hits and has impacted upon charity shops, car boot sales and specialist retailers as a new outlet for second hand goods.

**Market Stall Retailing**

3.27 Market stalls selling foodstuffs find it very difficult to compete with the supermarkets in terms of buying power and quality of produce. Whilst the produce stalls manage to compete in traditional market towns, in many urban shopping centres they are associated with low quality foodstuffs. The emergence of farmer's and seasonal continental markets has proved a popular shopping destination for many consumers. These less frequent markets sell at reasonable prices local, specialist and quality products that can’t be obtained in the large foodstores.

**Town Centre Services**

3.28 The recent trend in banking has been the closure of smaller branches in favour of telephone and, more recently, online banking services. There is a major concern at government level that the decline of high street and neighbourhood banking services is contributing to further social exclusion as the least profitable branches are the first to be closed. In the poorest centres, often the banks are not even replaced with
ATMs yet they proliferate in the major high streets, at large supermarkets, retail parks, motorway service stations and even petrol filling stations.

3.29 It is anticipated that major shopping centres will not suffer, except where mergers have resulted in duplication, and where vacancies are occurring they are being successfully converted to restaurants and fashion outlets. However, where banks move out of smaller centres, their former premises often remain vacant longer adding to the spiral of decline and detracting from the local shopping / services offer.

3.30 Another high street market that is facing on-line competition is the travel industry. Budget travellers have used teletext for several years to find cheap flights and last minute bargains and these are now being offered on the Internet. Conversely, there is also a trend for travel agents starting to occupy large spaces on retail parks such as the First Choice Holiday Hypermarket.

The Future of Town Centre Entertainment and Leisure

3.31 Like the retail sector, the leisure industry is also very dynamic, in particular the cinema and family entertainment sectors, and it has experienced significant changes in recent years. These are changes driven by demographics, cyclical participation rates, consumer expectations and general market trends. The UK population is ageing and the pattern and pace of age profile change will have a considerable impact upon all aspects of leisure demand and supply. The most significant change has involved relocating entertainment venues such as cinemas away from the high street to out-of-centre locations. National planning policy, in particular PPG/S6, has also been instrumental in refocusing the direction of leisure development back into the centres.

3.32 The cinema industry epitomises the revolution in the leisure sector. The UK cinema industry has undergone a revival after a period of decline since the introduction of multi-screen cinemas in the 1980s and cinema attendances have increased by over 100%. Unlike their predecessors, today's multi-screen cinemas are able to offer more films, provide a high quality purpose built environment and a higher standard of comfort, convenience and service and increasingly IMAX screens.

3.33 However, there is now an oversupply of screens in many urban areas even following the closure of many older town centre and suburban cinemas. Conversely, many smaller towns no longer have a Cinema. To address this gap in the market Warner Villages Cinemas developed its 'Citiplex' format which has eight or less screens.
Casinos

3.34 Currently Casinos are restricted to 53 permitted areas and are strictly regulated as to what services and facilities they provide. However, changes in the Gaming Laws will facilitate a limited number of super casinos and make it easier to open and operate smaller casinos. Eight potential locations for regional casino were announced by the Government in May 2006.

Eating Out

3.35 Research by Mintel indicates that eating out is one of the fastest growing leisure activities, and this sector has responded to this by producing a range of new formats. The choice is very wide with a vast array of establishments spurred on by the successes of Planet Hollywood, Hard Rock Cafe, All-Star Café and Sports Cafe amongst many others.

3.36 Rapid expansion by large fast food chains over the last decade has seen a rapid increase in turnover within the hot food takeaway market. Market leader McDonalds are now being challenged by other fast food outlets such as Burger King, KFC and Subway. At the local level there has been an increase in the number of independent hot food take-aways in secondary frontages and smaller parades despite strict planning controls. As many of these operators are closed (often shuttered) during the daytime they add little to the shopping offer and, along with any vacancies, can present a depressing, blighted image of a parade or centre.

3.37 There has also been strong growth in the number of coffee shops and sandwich bars, in particular certain brands such as Subway. The advantage for these companies is that these uses are classified as A1 retail and with seating in these outlets generally being small-scale and ancillary, they can trade from existing retail use consents. The main market for these outlets are office and shop workers in the larger centres and students / tourists in the older centres and university towns. The market has also been targeted by chain ‘bakers’ such as Greggs for whom this is their main business as they cannot compete with the cheap in-store bakeries at the large supermarkets.

3.38 The nineties witnessed the arrival of the coffee shop on British high streets with American imports such as Starbucks joined by indigenous chains such as Costa Coffee and Caffé Nero. The most recent trend is the incorporation of Coffee Shops within A1 shops such as Borders and Waterstones in order to achieve prime locations.
3.39 Another recent market trend is the arrival of the cafe bar that should benefit from the relaxed licensing laws. This concept mixes the concepts of a drinking bar and cafe such as Slug and Lettuce, Pitcher and Piano and All Bar One attracting drinking and eating custom throughout the day.

3.40 Generally there is a trend towards increased alcohol consumption at home and reduced patronage of public houses. Amongst young people there is a marked decline in the number of visits to public houses. One exception to this trend is themed public houses such as Walkabout and JD Wetherspoons, which are growing in popularity and have an ambitious expansion plan. These often locate on the high street in the larger centres in former A1 and A2 retail units, offices, industrial or entertainment uses, and/or refurbishing existing pubs and restaurants.

Health and Fitness Clubs

3.41 Although not traditionally high street occupants, these facilities are associated with the urban area and public sector provision. However, in recent years there has been an increased provision of private sector facilities many of which prefer to locate out-of-centre and are reliant on carborne customers. The first chain in this sector was David Lloyd Tennis Centres, now owned by Whitbread, although competitors such as Fitness First, LA Fitness and Total Fitness rapidly followed.

National Retail Planning and Town Centre Policy Guidance (PPS6)

3.42 The national retail planning and town centre policy guidance is contained in Planning Policy Statement 6 (PPS6) entitled Planning for Town Centres that was published in March 2005. It builds on previous guidance (PPG6) and Ministerial Statements and reiterates the Government’s commitment to developing and supporting successful town centres. Unlike the guidance it replaces (PPG6), PPS6 is very specific in stating that it relates to all town centre uses including retail, leisure, commercial and public offices, cultural and tourism (para 1.8).

3.43 PPS6 sets out the Government’s key objectives for key town centres to promote their vitality and viability by planning for the growth and development and focusing development in centres and encouraging a wide range of services in a good environment accessible to all. The main objectives (para 1.4) which need to be taken into account in development plans include:
• Enhancing consumer choice by making provision for a range of shopping and leisure services which allows for a genuine choice to meet the needs of the entire community and particularly socially excluded groups;
• Supporting efficient, competitive and innovative retail and leisure sectors with improving productivity; and,
• Improving accessibility, ensuring that existing or new development is accessible and well served by a choice of means of transport.

3.44 The Government’s wider objectives (para 1.5) include amongst other things:

• Promoting social inclusion and ensuring that communities have access to a main range of town centre uses, and that the deficiencies in provision in areas with poorer customer facilities are remedied;
• Encouraging investment to regenerate deprived areas, create additional employment opportunities and an improved physical environment;
• Promoting economic growth; and,
• Delivering more sustainable patterns of development ensuring locations are fully exploited through high density, mixed use development and promoting sustainable transport choices.

3.45 PPS6 advises LPAs through the Local Development Documents to identify a hierarchy and network of centres and to assess the need for further town centre development. Section 2 of PPS6 provides detailed guidelines on positively incorporating national planning policy into their development plan.

3.46 LPAs are advised to assess the need for new floorspace for town centre uses to meet identified qualitative gaps in existing provision (para 2.16) and to identify a primary shopping area (PSA) from which the distance to edge-of-centre sites can be measured. They are also advised to identify sites for future development and, if appropriate, town centre expansion using the sequential approach and considering the potential impact on the existing centre.

3.47 Section 3 of PPS6 contains guidance for LPAs in considering planning applications for town centre uses. Paragraph 3.4 details that in the context of development control, Local Planning Authorities (LPAs) should require applicants to demonstrate:

1. The need for the development;
2. The development is of an appropriate scale;
3. That there are no more central sites for the development (i.e. the sequential approach to site selection);
4. That there are no unacceptable impacts on existing centres; and,

5. Locations are accessible.

3.48 The first test can be further broken down into demonstrating quantitative and qualitative need so in effect there are six policy tests that applicants must satisfy.

**Quantitative Need**

3.49 PS6 advises that quantitative need has primacy over qualitative need. Quantitative assessments in support of planning applications should ideally be based on the development plan capacity assessment, updated if necessary. Development Plan capacity assessments have to take account of the catchment areas of centres outside the LPA boundary (2.32) as do planning applications (3.10).

**Qualitative Need**

3.50 Considerations that can be taken into account in support of the qualitative need case include providing for consumer choice through an appropriate distribution of locations and the extent to which shops are overtrading. Other material considerations such as regeneration and employment benefits are not indicators of qualitative need.

**Appropriateness of Scale**

3.51 PPS6 advises LPAs should aim to locate the appropriate type and scale of development in the right type of centre to ensure that it fits into that centre and complements its role and function e.g. large scale developments are inappropriate in local centres. Eventually LPA’s are to consider publishing upper limits for acceptable size of retail development in any particular centre.

**Sequential Approach**

3.52 PPS6 advises that the sequential approach is to apply to all town centre uses including retail i.e. that the preference is for town centre sites, then edge-of-centre and only then out-of-centre. PPS6 (Annex A) advises that for retail uses sites within the PSA are in-centre and sites up to 300m from the PSA (depending upon physical barriers) are edge-of-centre. For all other uses sites within the town centre boundary are in-centre and sites up to 300m from the boundary are edge-of-centre.

3.53 Where sequentially preferable sites are identified they must fail one of the three tests of the sequential approach (availability, suitability and viability) before less favourable sites can be considered. Availability is defined as being within a ‘reasonable period of time’. To be unsuitable a site would have to be undevelopable for a proposal even
when flexible formats are taken into account. Viability refers to a proposal not being commercially viable on the site.

3.54 When selecting sites as part of the development plan process edge-of-centre sites can be prioritised on their connectivity to the centre (2.44) i.e. they are not all equal status. Para 2.46 of PPS6 advises that development plans might phase the release of sites over the development plan period to ensure that sequentially preferable sites are developed ahead of less central sites.

Impact

3.55 Impact assessments undertaken on a goods based methodology are required in support of all town centre uses not in centre and / or in accordance with an up-to-date development plan. Ideally they should be based upon the development plan capacity assessment and the study period should not normally be more than 5 years. Need does not equate to no impact (para 3.21). Applicants must also consider the impact upon the spatial strategy and retail hierarchy (para 3.22). The scope of impact assessments should be proportionate to the scale of a proposal and have to be undertaken for development over 2,500 sq m (para 3.23).

Access

3.56 PPS6 para 3.25 advises that developments should be accessible by a choice of means of transport, including public transport, walking, cycling and the car (taking full account of customers likely travel patterns). In determining whether developments are or will become genuinely accessible, LPAs should assess the distance of the proposed developments to the public transport interchange. Frequency and capacity of services are also important considerations (para 3.25). Impact on overall distance travelled by car should also be assessed and the impact of a proposal on congestion (3.27).

Other Material Considerations

3.57 PPS6 (paras 2.51 and 3.28) advise that along with the six policy tests, other relevant matters such as specific local circumstances can be taken into account including:

- Physical Regeneration: the benefits of developing on previously developed sites which may require remediation;
- Employment: the net additional employment opportunities that would arise in a locality as a result of a proposed allocation, particularly in deprived areas;
• Economic Growth: the increased investment in an area, both direct and indirect, arising from economies of scale; and

• Social inclusion: this can be defined in broad terms and may, in addition to the above, include other considerations, such as increasing the accessibility of a range of services and facilities to all groups.

3.58 PPS6 also recommends LPAs produce town centre strategies to guide future development and it also provides guidance on managing the evening and night-time economy.

3.59 More guidance is to follow from ODPM on undertaking retail studies and the sequential approach.

Issues for the Warrington Development Plan in the light of Recent Trends in the Retail and Leisure Sectors and National Retail Planning Policy

3.60 The development plan (LDF) must recognise that both the retail industry and commercial leisure sector are very dynamic responding quickly to ever changing consumer preferences. The LDF should therefore attempt to realise locally the objectives of PPS6 in enhancing consumer choice, supporting efficient, competitive and innovative retail and leisure sectors and improving accessibility.

3.61 Guidance in PPS1 advises that LPAs need not replicate the policy guidance contained in PPGs and PPSs but must provide a local interpretation. As such Warrington BC should identify a hierarchy of shopping centres within the Borough and address any gaps in provision. This report will inform the LDF of the need for further town centre development and recommendations are made on a suitable boundary for the PSA and the wider town centre boundary.

3.62 With regard to the district, neighbourhood and local centres, this report makes recommendations based on the PPS6 definitions on the current and future hierarchy of these centres and also upper limits for acceptable size of retail development in any particular centre to ensure it is of an appropriate scale. Gaps in the retail hierarchy are identified taking into account social exclusion and accessibility considerations.

3.63 Quantitative assessments in support of future planning applications for town centre uses in the borough should ideally be based on the development plan capacity assessment that for retail and leisure uses this report forms. The study should not need updating until 2011 but elements may be updated in the interim such as expenditure and demographic information or market share.
3.64 Specific issues that arise from the review of trends in the retail and leisure sectors include the growth of non-food retailing in supermarkets. Any applications for new superstores or extensions to existing stores are likely to retail a considerable amount of non-bulky comparison goods in direct competition with the town centre. Likewise existing retail warehouses with floorspace that are not restricted to bulky goods sales are likely to be occupied in the future by non-bulky operators, possibly foodstores, and those that are restricted are likely to come under pressure to relax restrictive conditions. There are likely to be more proposals for small supermarkets in petrol filling stations as the large operators expand further into the convenience sector.

3.65 In the town centre there is likely to be a shift in the centre of gravity as the Golden Square extension is occupied by multiples relocating to primary pitches. There will also be pressure for non retail uses in the PSA that should ideally be directed to the secondary frontages where there is likely to be less retail investment. This too is a good location for evening economy uses provided there is no conflict with any residential areas. There is also development pressure for a new cinema in the centre. Other commercial leisure uses might follow but many will prefer to locate out-of-centre and they are required to undertake a sequential assessment as are other town centre uses such as public and commercial offices.

3.66 Warrington town centre already has a strategy and this report only makes complementary recommendations for the town centre where new issues and policies have emerged that are not already addressed. As a boroughwide study, the report also makes recommendations for the direction of retail and leisure development at this wider strategic level.
**4.0 The Vitality and Viability of Warrington Town Centre**

4.1 Section 4 of PPS6 is entitled Monitoring and Review and emphasizes the need to gain a proper understanding of the vitality and viability of shopping centres and in para 4.4 sets out the following indicators by which the health of a centre can be assessed:

- Diversity of uses;
- the amount of retail, leisure and office floorspace in edge and out-of-centre locations;
- the potential capacity for growth;
- Retailer representation and intentions to change representation;
- Shopping rents;
- Proportion of vacant street level property;
- Commercial yields on non-domestic property;
- Pedestrian flows;
- Accessibility;
- Customer and residents views and behavior;
- Perception of safety and crime; and
- State of the town centre environmental quality.

4.2 Although there is some overlap between the PPS6 indicators, they help provide a context for looking at shopping centres. All but two of the indicators are the same as the earlier PPG6 indicators allowing comparison over time. These indicators are considered in turn and then comparison is made to the earlier 2002 health check.

**Introduction**

4.3 Warrington Town Centre is a sub-regional centre serving the town itself (population 180,000) and surrounding areas. Its catchment in the wider region is limited by the catchments of the three regional centres - Chester, Liverpool and Manchester – and also the Trafford Centre and, to a lesser extent, the competing centres of Wigan, Northwich, Widnes and St. Helens.

4.4 The town benefits from its historical location (until the Widnes Road Bridge was built) as the last bridging point of the Mersey for cars and as a result forms a road hub in the strategic highway network.
4.5 Warrington’s designation as a New Town in the 1970’s led to significant growth in the town’s population and expansion in local employment. In some respects the town centre is constrained by the historic street layout, dense development and the later ring road and the centre has not kept up with the expansion of the town. There was also a strategy by the New Town Development Corporation (NTDC) to decentralise retailing to district centres in suburban locations and they, and later the Council, also permitted the development of out-of-centre retailing on employment land at Gemini and along Winwick Road that now competes directly with the town centre.

4.6 Partly as a result of these constraints there has not been extensive investment in the town centre itself since the Golden Square mall was built in the late 1970s. There has been fairly extensive development around the town centre at the Cockhedge and Riverside Retail Parks, School Brow, Pinners Brow and in solus units around the town but only the Cockhedge Centre could be defined as edge-of-centre and this too acts as a standalone retail destination to a certain extent.

**Diversity of Main Town Centre Uses**

4.7 The vitality and viability of a town centre is dependent not only on its shopping offer but also on the mix of uses which add to the visitor experience and make the centre more attractive to those who live and work there. Offices can generate lunchtime and top-up shopping trips whilst leisure and entertainment facilities, cafes, bars and restaurants add variety and can assist in promoting the evening economy. Educational establishments add to the number of young people in the centre during the week adding to the vibrancy.

4.8 As a sub-regional centre, Warrington Town Centre is a focus of town centre activity between Manchester and Liverpool and should be able to sustain a good diversity of uses to complement the retail function. In the service sector, these include banks and building societies, hairdressers, dry cleaners, travel agents and estate agents.

4.9 There are also a number of smaller professional offices, and the administrative office of the Borough Council, but Warrington Town Centre is not traditionally a major office location. The ODPM’s 2002 Area of Town Centre Activity Database records around 92,000 sq m of office floorspace in the town centre. The modern business parks developed by the NTDC tend to be more peripheral although there is also the later Centre Park just to the south of the town centre.

4.10 Civic and administrative functions are well represented, reflecting the town’s sub-regional role, with uses including police station and Crown Court, as well as various
Borough Council offices. According to the ODPM’s 2002 Area of Town Centre Activity Database (extracting from the 2001 Annual Business Inquiry) 1,550 people work in civic and public administration in the town centre and 2,470 people in commercial offices.

4.11 Warrington does not have a higher education establishment (Chester University has a small campus at Cinnamon Brow) and the town’s three further education establishments are located out of the centre.

4.12 Warrington has a limited range of leisure and tourist facilities, although some of these are located out-of-centre. Within the Town Centre are the Pyramid & Parr Hall Arts Centre (that hosts events including theatre, music and dance) and the Warrington Museum and Art Gallery (which houses both permanent collections and special exhibitions). There are a number of older buildings in the town linked by a self guided circular walk. Golden Square, formerly the Old Market Place, is used for exhibitions, promotions and other activities.

4.13 The evening economy within Warrington is limited. There are a number of bars and night clubs in the centre but the only Cinema is located at Westbrook. Experian Goad identify catering, including cafes, bars and restaurants, as a sector that is under-represented in Warrington when compared with national averages, both in terms of the number of units and the amount of floorspace.

4.14 In summary, excluding retail there is only a limited range of other uses in Warrington Town Centre that contribute to the vitality and viability of the town. For a sub regional centre, diversity is not good. This partly reflects the fact that Warrington is an expanded town and the centre hasn’t expanded with the surrounding suburbs and the former NTDC has exacerbated this to a certain extent with its decentralising planning strategy.

**The Amount of Retail, Leisure and Office Floorspace in Edge and Out-of-Centre Locations**

4.15 There has been fairly extensive retail development around the town centre at the Cockhedge and Riverside Retail Parks, School Brow, Pinners Brow and in solus units around the town such as the B&Q SuperCentre at Milner Street. Only the Cockhedge Centre could be defined as edge-of-centre under the PPS6 definition (within 300m of the PSA taken to be Golden Square mall) and due to the indirect pedestrian links, physical barriers and parking management at the centre this too
acts as a standalone retail destination to a certain extent as identified by the low footfall recorded between the Cockhedge and Golden Square.

4.16 Riverside Retail Park is not really edge-of-centre under the PPS6 definition. The closest unit to the town centre is the DFS (not actually part of the retail park) and Homebase which are within easy walking distance but beyond 300m from the PSA and across a busy road (A49). The rest of the retail park is predominantly non-bulky and many of the units now have mezzanine floors increasing the sales area that competes directly with the town centre.

4.17 Further out from the centre there is extensive retail warehousing north along Winwick Road (A49) in the Alban Retail Park, where there is some non-bulky floorspace (Mothercare and Hobbycraft), and also in surrounding quasi retail (trade) solus units such as Topps Tiles. Even further along Winwick Road and north of the M62 junction is the solus B&Q Warehouse. To the west along the M62 is the Gemini Retail Park which is home to Ikea, M&S, Next, Boots, Toys R Us amongst others. Certainly the out-of-centre developments, and in particular Gemini Retail Park, were perceived as competing retail destinations by many respondents in the 2003 and 2006 Town Centre Business Surveys (Appendix 1).

4.18 With regard to convenience goods, there are no major foodstore in the town centre itself although there is the M&S foodhall, Market Hall and the Kwik Save unit on Academy Street. The three district centres are all anchored by supermarkets although with reference to PPS6 criterion the Morrisons at Stockton Heath is probably out-of-centre and Westbrook doesn't even have a Post Office (that usually anchor local centres according to the PPS6 Annex A definition). Birchwood isn't particularly accessible to surrounding residential areas but is redeemed by the town's excellent bus service and a railway station. Of the three district centres, only Stockton Heath is an organic centre that has grown with the community it serves. Westbrook and Birchwood are very much (New Town) 'planned' centres that have the trading characteristics of out-of-centre locations.

4.19 There is an Asda store at the edge-of-centre Cockhedge Centre which operates as a standalone store to a certain extent. Across the A49 at School Brow is a Sainsburys store in an out-of-centre location. North of the town centre along the A49 is the new Tesco Extra also in an out-of-centre location. There is some anecdotal evidence of a limited number of combined trips being made from the Sainsburys and Tesco stores to other out / edge-of-centre stores and to the town centre. There are also two
discount foodstores on the very periphery of the town centre, Lidl on Fennel Street just beyond the Cockhedge Centre and Aldi on Liverpool Road.

4.20 The review of diversity in the town centre revealed the weakness of the leisure offer in Warrington town centre. The only cinema in the town is located at Westbrook that does not enjoy a particularly frequent bus service in the evening or on Sundays. Other commercial leisure facilities are also mainly out-of-centre such as LA Bowl at Winwick Quay. There are several gyms and health clubs in the town but most of these are also edge or out-of-centre such as JJB Health (edge-of-centre) David Lloyd (Great Sankey) and Total Fitness (Winwick Road).

4.21 The review of diversity in the town centre also revealed the weakness of the office market in Warrington town centre. Much of the newly built office developments in the town have been in out-of-centre locations which appears to be a legacy of the NTDC, continued by the Council to a certain extent, as much as market trends.

4.22 In summary there is fairly extensive edge and out-of-centre retailing in Warrington and other town centre uses such as leisure and offices are mainly to be found out-of-centre. The extent of this edge / out-of-centre offer that competes directly with the town centre in many instances is a major weakness.

**Potential Capacity for Growth**

4.23 The town centre is fairly compact and surrounded on three sides by busy roads that form a physical barrier to town centre expansion. Developers have identified two development sites within the UDP defined town centre core area and a third just beyond.

4.24 Golden Square shopping mall is currently being extended to create 34,374 sq m new retail floorspace. As part of the extension a new multi-storey car park and bus station are being provided.

4.25 Times Square and the adjacent market area is the second site within the town centre core area. This site is proposed for a mixed use leisure led development.

4.26 The Wireworks is just to the north of midland way is the third site. It is outside the town centre core area but is well related to the central railway station and relocated bus station. This too is proposed as a mixed use leisure led development.

4.27 In addition, the Council have identified the former swimming baths site on Legh Street for regeneration with a preference for retention of the historic buildings in
whatever town centre use is brought forward. Whilst the site has a direct pedestrian access to Golden Square mall it is beyond the main car park, which presents a dead frontage and obstacle to pedestrian movement, and will not be that attractive to the market for retail or leisure use.

**Retailer Representation and Intentions to Change Representation**

4.28 Experian Goad recorded 17 out of 27 key attractors are present in Warrington (Argos, Bhs, Boots, Burton, Clarks, Dorothy Perkins, M&S, New Look, Next, River Island, Superdrug, Topman, Topshop, WH Smith, Waterstones, Wilkinsons and Woolworths). Missing key attractors include Debenhams, H & M, House of Fraser, John Lewis, Sainsbury’s, Tesco, Waitrose, Virgin Megastore and Dixons (the last two have closed stores in the centre in recent years). The Golden Square mall extension is to be anchored by Debenhams and other key attractors may well locate here. In addition Tesco and Sainsbury are located just outside the town centre therefore the list of missing key attractors is / will be reduced somewhat. However, even after the Golden Square mall extension opens the number of department stores will be limited to one which does not compare favourably to some other sub regional centres such as Bolton and Stockport.

4.29 The key attractors are mainly located in and around Golden Square (inc. M&S), one is located on Sankey Street, four are on or just off the northern end of Bridge Street and two (inc. Argos) are in the Cockhedge Centre.

4.30 One indicator of the success of a town centre is the number of multiple retailers present. Clearly regional and sub-regional centres have the greatest concentration of multiples as they identify store locations on the basis of catchment populations and socio economic profiles. Warrington Town Centre currently has 193 multiple retailers (47.5%) out of a total of 406 that compares favourably with the Goad GB average of 42.4%.

4.31 According to Focus 80% of the top twenty retailers are represented in Warrington. The four missing retailers are Debenhams, John Lewis, Lloyds Pharmacy and Co-op Department Stores. Obviously Debenhams will anchor the Golden Square mall extension and Focus also advise that TopShop, TopMan and WH Smith have already taken space in the extension.

4.32 Warrington also has a reasonable range of independent traders adding to the shopping offer and countering the ‘clone town’ syndrome. The independents are
mainly located in older premises in peripheral frontages where rental / property overheads are cheaper.

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<tr>
<th>A1 Unit Breakdown for Warrington Town Centre - January 2006</th>
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<tr>
<td>Total Units</td>
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<td>Under Refurbishment</td>
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Source: Warrington BC Town Centre Survey January 2006

4.33 The Council’s most recent town centre survey indicates that within the town centre (including the Cockhedge) there is 810,300 sq ft (gross) A1 floorspace. Of this around 61% (excl. the Market) is comparison goods, which compares to the Goad GB Centre average of 53%; 13.5% is in convenience use compared to the Goad GB Centre average of 17%; and, 5% is in service use compared to the Goad GB Centre average of 21%. It can be seen from this analysis that there is a higher than average level of comparison floorspace, although this is to be expected for a higher order sub-regional centre, and lower than average level of convenience floorspace. There is a below average level of services in Warrington and in particular Goad identify a shortage of restaurants and cafes compared to national averages.

4.34 Comparison of the Council’s 2006 survey with their 2004 survey indicates no great change in the overall amount of A1 floorspace but the convenience level has increased since then and comparison decreased slightly. The level of vacant units has also increased although this is largely accounted for by two vacancies in the retail warehouse element of the Cockhedge Centre. No units were being refurbished at the time of the 2004 survey but in 2006 8 units were perhaps indicating growing investor confidence ‘spinning off’ from the Golden Square mall extension currently under construction.

4.35 In terms of unit size, Warrington has a good range of units, particularly the larger sized units (over 930 sq m) normally sought by national multiples, although it does have a slightly lower than average proportion of medium sized units (in the range 230 – 930 sq m) that would usually also be occupied by multiples. These deficiencies will be made up by the completion of the Golden Square mall extension. Unlike many traditional town centres, Warrington does not have a high proportion of very small
premises (under 93 sq m) which are often difficult to let because they do not meet the needs of modern retailing and service uses.

4.36 Specialist retail agents Churston Heard identify 60 retail / town centre user requirements in Warrington which is a good indicator of the perceived strength and attraction of the centre. It is interesting to note that many of the requirements are from quality coffee shops and food retailers obviously targeting the identified gap in provision in the town. Whilst some of the requirements are already represented in the town and are simply seeking relocations many are new to the town such as Costa Coffee, Dr & Herbs, Frankie & Benny’s, Haagen Daz Café, Hammicks, Julian Graves, Millies Cookies, Motor World, O’Brien’s Sandwich Bar, Partners Stationers, Powerhouse, Republic, Shoe Zone and The Works. This is thought to be a fairly comprehensive list of published requirements as consultations with other agents active in the town centre have only identified a few additional operators including H&M, Sports World, Boots and Topshop / Topman (the last two are relocations to the Golden Square mall extension).

4.37 In the town centre business survey (Appendix 1), despite poor overall trading performance only five businesses (4%) reported an intention to close and / or relocate outside of Warrington whilst 21 (19%) were planning on expanding / refitting in situ and 18 (16%) were planning on relocating to new premises within Warrington. This suggests that there is a degree of uncertainty in the centre with the current construction work causing disruption to parking, etc. but that many businesses were planning to invest / expand / relocate indicating the Golden Square extension is generally seen as an opportunity by current operators in the centre.

4.38 In summary, Warrington already has a quality retail offer with the exception of a department store that will be addressed with the completion of the Golden Square mall extension. The town centre also enjoys above average national multiple representation but also has strong independent representation adding to the variety and overall offer. There is above average comparison goods retail floorspace in the town as to be expected from a town of this size. The main weakness is the limited amount of floorspace given over to services but this will be addressed by many of the requirements for floorspace in the town centre. There is a good range of unit sizes in the town which will be further enhanced by the completion of the Golden Square mall extension. The town centre displays strong vitality and viability on this PPS6 indicator.
Shopping Rents

4.39 The Valuation Office Agency (VOA) record rental levels achieved in the larger shopping centres including Warrington. The VOA use an average of the zone A and zone B rental values in prime position shops in the principal shopping centre. Zone A is the first 20 feet of floorspace from the main entrance and zone B is the next 20 feet. The VOA recorded an average rental for Warrington (most probably from Golden Square mall) of £1,450 per square metre (per annum) which compares very favourably with rentals in competing centres in the region.

4.40 Colliers CRE who also publish national zone A rentals have recorded Warrington zone A’s as static from June 2002 onwards at £1,560 psm (£145 psf) which again compares very favourably with competing centres.

4.41 The rentals for the secondary frontages in Warrington compared less favourably with competing centres suggesting less demand and a lack of investment in recent years. The VOA also record rentals achieved in edge-of-centre locations (e.g. Cockhedge and Riverside) but again the rentals achieved compared less favourably with retail warehouses in competing centres again suggesting that the primary pitches are trading very well in Warrington but other retail floorspace is not doing as well.

4.42 Experian Goad calculate that rental levels in Warrington (2.5% growth in the last five years) have grown below the UK average (4.1% in the same period). Rental growth is affected by numerous factors including economic factors, turnover performance and floorspace supply. The fact that Experian Goad predict that rental levels in Warrington will grow above the UK level over the four years from 2004 to 2008 (2.5% compared to 1.3%) suggests an increased floorspace provision in Warrington will increase turnover and rentals as economic factors should remain constant.

Proportion of Vacant Street Level Property

4.43 The council’s January 2006 survey of A1 floorspace in the town centre (including the Cockhedge Centre) found that 51 (16.2%) of A1 units were vacant although as a percentage of total floorspace the 96,400 sq ft of empty floorspace (11.9% of the total) indicates that most vacancies were in smaller (peripheral) units. Although this was an increase on the January 2004 survey most of this was accounted for by two large vacancies in the Cockhedge Centre (further indicating the small average size of the remaining vacant units).

4.44 Experian Goad have a slightly wider definition of the town centre and also record vacancies in non A1 units. In their July 2005 survey Experian Goad recorded 57
vacancies out of 406 premises. A vacancy rate of 14% that compares with a national GB average of 10.1%. However, in terms of vacant floorspace this was only 8.6% of the total, again indicating the small average size of the vacant units which compares more favourably with the national GB average of 8.1%.

4.45 There are very few vacancies in the principal shopping frontages and no particular concentrations of vacancies other than in the secondary frontages in Horrocks Lane, Times Square and also the aforementioned vacant retail warehouse units in the Cockhedge Centre (which are understood to be under offer). Vital and viable town centres need a certain level of vacant units to allow turnover of occupants and new retailers to locate. The level of vacancies in Warrington town centre is therefore not a major concern.

**Commercial Yields on Non-domestic Property**

4.46 Yields are calculated by dividing the annual rent, as though it had been received as a single sum at the year end, by the capital value or sale price of the property. The ‘all risks yield’ recorded by the VOA is a simple benchmark which the property market uses to assess the comparative attractiveness of different shopping centres. It is the ratio of rental income to capital value and is expressed in terms of the open market rent of a property as percentage of the capital value.

4.47 The July 2005 VOA Property Market Report recorded a yield of 6.25% for Warrington town centre. Yields have fluctuated in Warrington since 1994 when they stood at 6.75% but the overall trend is downwards the most recent fall from 6.5% to 6.25% in 2004. This means that investors are confident of a return in Warrington and are prepared to wait longer to achieve it. Yields in Warrington compare favourably with competing centres and this is discussed later in this section.

**Pedestrian Flows**

4.48 PMRS surveys presented in the Experian Goad Town Centre Futures Report for Warrington indicate the highest footfall is recorded in Golden Square mall and in parts of the Cockhedge centre. Of the traditional shopping streets the eastern end of Sankey Street (that M&S opens onto) enjoys the highest footfall followed by Horsemarket Street, the northern part of Bridge Street and then Times Square and Horrocks Lane. Pedestrian activity around Newmarket Walk and the southern part of Bridge Street is much lower. Generally pedestrian activity in the Town Centre during the evening is low. The greatest concentration of evening economy activity is around the southern part of Bridge Street which has a concentration of pubs and restaurants.
4.49 In terms of pedestrian circulation the main circuit appears to be around the Golden Square mall. As there is high footfall at the Cockhedge Centre but not in between with Golden Square / Sankey Street it would appear that the Cockhedge Centre is acting as a stand alone retail destination to a certain extent.

Accessibility

Car Access and Parking

4.50 The street survey identified that most people travel to the centre by car as a driver and then passenger. Access to the Town Centre for cars is reasonably good, with the main road network facilitating access from all directions. However, traffic congestion is a problem, in particular at peak hours and on Saturdays. Car parks are relatively convenient and well distributed around the Town Centre although there has been disruption with the construction of the Golden Square extension. Prior to this there were over 3300 public parking places available in and on the edge of the town centre (Experian Goad). Over two thirds of these spaces were located in two multi-storey car parks operated by the Council, at Golden Square (Legh Street) and the Market. Car parking charges vary, with short stay shopper parking being fairly reasonable but charges for longer stays are higher to deter commuter parking.

4.51 Part of the Golden Square car park has been demolished as part of the extension and but there will be a net increase in parking spaces designed to a higher standard. The extended and enhanced provision will greatly improve car parking in the centre. The current (temporary) shortage of car parking spaces was seen as a major weakness of the centre by both visitors and businesses in the town centre surveys (Appendix 1).

4.52 Some of the other town centre car parks are owned and operated by retailers such as ASDA, Kwik Save and Comet and are intended for store customers’ use and some of these have a charging regime to deter other users / limit combined trips to other shops. There are also parking spaces beyond the UDP defined town centre core area such as at Sainsbury’s, the Riverside Retail Park and the new Tesco store and there is survey evidence of some people making linked trips on foot from these more peripheral car parks.

4.53 There is a ‘shopmobility’ scheme is in place to assist disabled people in the Town Centre, based at Golden Square car park and dedicated free parking spaces for disabled people using cars are provided around the centre.
Bus Access

4.54 Warrington’s bus station has been relocated to a new site between Golbourne Street and Midland Way. (Unfortunately due to limited space this is not a drive in drive out design like the demolished station that does not require reversing and are the safest layout for passengers straying onto the apron.) The new bus station is not as well related to Golden Square as the old station but it is closer to the central railway station and taxi rank creating a public transport hub although not quite an interchange.

4.55 Warrington has the benefit of its own (former municipal) bus company and the urban area is well served Monday to Saturday with routes radiating from the Town Centre and many routes operating at 10 minute frequency. Most services operate during the evenings, although less frequently and Sunday services are more limited, but better than in many towns of similar size. In addition to urban services there are bus services to neighbouring towns including Leigh, Wigan, Newton-le-Willows, St Helens, Widnes, Runcorn, Northwich, Lymm, Knutsford and Altrincham. Longer distance services also operate to Liverpool, Manchester and Chester.

4.56 Bus stops are located around the periphery of the Town Centre facilitating good access to the Town Centre. The Town Centre Survey found that some 29% of those questioned had travelled to the Town Centre by bus and most were well satisfied with the service.

Pedestrian / Cycle Access

4.57 The town is surrounded by residential areas within walking distance of the town centre (17% of respondents in the shopper survey walked to the Town Centre). However, busy roads around the town centre and large roundabout junctions on the approach from many directions discourage cycling trips to the centre despite the flat terrain and provision of cycle routes in the wider urban area.

Rail Access

4.58 Warrington has two central railway stations – Bank Quay on the West Coast Main Line and Central Station on the Liverpool to Manchester route, also connecting to Yorkshire, the North East and East Midlands. There is also a direct local service to Manchester Airport from Central Station. The town centre therefore has excellent rail links to the strategic network but local services are insufficiently frequent and the local station network (3 suburban stations) limited to generate many shopping trips by rail as identified in the town centre survey.
Customer and Residents Views and Behavior

4.59 The town centre surveys found that on most indicators the town centre scored positively and in particular for the choice of food and non-food shops reflecting the superior range and offer in the town centre and perhaps some shoppers including Asda Cockhedge or other more distant supermarkets in their personal town centre definition. The cost of car parking was not popular with businesses, shoppers and visitors and was below average on the availability of car parking. However, the centre scored very well on ease of getting round on foot and signposting.

4.60 Unfortunately visitors and shoppers to the town centre were not impressed with the provision of public toilets – 8% of respondents specifically mentioned the poor state of toilets in response to the question on town centre management – although there appears to have been some improvement on previous years. Other specific comments on the town centre management in Warrington included 26% of respondents who thought the centre was very tidy and conversely 14% who thought it was untidy and a similar percentage who felt it was a waste of money!

4.61 M&S was the most popular shop in the town centre mentioned by 18% of respondents followed by New Look (8%), Next (7%), the market (5%), HMV (5%), TJ Hughes (5%), WH Smiths (4%) and Top Shop (4%). In terms of missing shops 35% of respondents mentioned Debenhams although this might have been influenced by media reports of Debenhams anchoring the new Golden Square mall extension. Other missing shops mentioned included Primark (16%) and around 10% mentioned various department stores (John Lewis, Selfridges, etc.). Regarding the leisure offer, 54% of respondents suggested a cinema, again possibly skewed by recent media reports although an equally massive gap in the town centre offer, and 16% mentioned a pool. Very few respondents mentioned a theatre (2%).

4.62 39% of shoppers / visitors also visited the town centre on a Sunday. Of those who didn’t shop in the town centre on a Sunday only 15% weren’t aware that town centre shops were open on Sundays. Asked what would persuade them to shop in the town centre on a Sunday 73% of those who currently stay away that day responded “nothing” suggesting there is little prospect of significantly increasing footfall in the centre on a Sunday. Of those open to persuasion 59% said more shops trading on a Sunday would persuade them and 24% stated bus services would have to be improved on Sunday. The business survey indicated a small majority, including many who currently don’t open on Sunday, thought Sunday trading would become more
important suggesting some potential to expand the current range of shops open that day.

4.63 In terms of frequency of visits the 2006 survey recorded 71% of visitors / shoppers visiting at least once per week which itself is quite high. However, the 2004 survey recorded 90% and the 2003 survey 82% which is even higher for a predominantly comparison goods shopping centre. This could have been skewed by more interviews undertaken at the weekend in the 2006 survey.

4.64 With regard to the purpose of the visit to the town centre, these are not directly comparable, however, it can be seen that there were fewer leisure visits in 2006 than in earlier years.

Perception of Safety and Crime

4.65 The 2004/5 Home Office Report on Crime Statistics indicates that for four of the six main recorded types of crime per 1,000 population within the Warrington BC administrative area were below the national average (robbery, burglary, vehicle theft and theft from vehicles). Only for two types of crime (violence against the person and sexual offences) were crime rates slightly higher than the national average. Given that Warrington is a predominantly urban area where crime rates are usually higher, this indicates that crime levels are below what might be expected for a town of this size.

4.66 Town centres are usually high on the list of reported incidents in any Local Authority area. The last three street surveys found very high perceptions of personal safety amongst daytime visitors but lower for evening visitors although this appeared to have improved on earlier years perhaps reflecting improved policing, security and management measures. In terms of the frequency of evening visits levels have declined since 2003. The town centre business survey found more policing to be a high priority for businesses but increased CCTV / warden services were much less of a priority for investment.

State of the Town Centre Environmental Quality.

4.67 A number of streets in the Town Centre have been pedestrianised by the Borough Council providing a safe and pleasant environment for shoppers and visitors and enhancing the townscape quality of the centre. The centre contains a variety of modern and traditional buildings, with some quality frontages and a few attractive historic buildings particularly in Golden Square and the old fish market as well as
Bridge Street and Sankey Street. The area to the west of the centre is predominantly Conservation Area and provides very attractive business environments around Palmyra Square and the Bank Park. The quality of the pedestrianised environment was very high on the list of investment priorities for businesses that responded to the town centre business survey.

4.68 The Golden Square shopping mall provides an attractive covered shopping area that is currently being extended. Pedestrian routes to bus stops and car parks are convenient and direct. In general the standard of cleanliness of the Town Centre is high, with little evidence of litter, fly-posting or graffiti. The town centre street surveys identified public toilets and car parking availability as the key concerns of visitor and shoppers in the centre although for businesses only the latter was a concern.

Comparison with Competing Centres

4.69 Warrington compares very favourably with other centres on the PPS6 yield and rental indicators. (Yields are the market value of a property divided by the annual rental income expressed as a percentage and the lower the yield the greater the market confidence as investors are prepared to wait longer for a return.) Warrington’s yield of 6.25% as recorded by the VOA in the July 2005 Property Market Report is only marginally higher than those of the regional centres – Manchester (6%), Liverpool (5.25%) and Chester (5.75%). It also lower than the immediate competing centres of Wigan and St. Helens (both 7%) and Widnes (8.5%) and Northwich (7.5%). Warrington’s yield also compares very favourably with other sub-regional centres in the NW such as Altrincham (8.5%), Bolton (6.5%), Preston (6%) and Stockport (6%) indicating high levels of investor confidence in Warrington town centre within the region.

4.70 In terms of rentals, fewer comparisons can be made as the VOA do not record as many centres for this indicator. However, primary pitch rentals in Warrington (£1,400 per square meter (psm)) are much higher than in Wigan (£1,000 psm) although obviously lower than those of the regional centres – Manchester (£3,500 psm), Liverpool (£2,700 psm) and Chester (£2,100 psm). Primary pitch rentals in Warrington also compare reasonably favourably with other sub-regional centres in the NW such as Altrincham (£1,250 psm), Bolton (£1,600 psm), Preston (£1,400 psm) and Stockport (£2,150 psm) indicating operators are willing to pay these high levels to locate in the prime pitches in Warrington town centre.
4.71 Colliers CRE measure zone A rental levels in Warrington slightly higher than the VOA at £1,560 psm. According to Colliers CRE Warrington has the sixth highest zone A rentals behind the Trafford Centre, Manchester, Liverpool, Chester and Stockport but ahead of Bolton, Preston, Blackburn and Carlisle. In contrast to the retail hierarchy rental levels in Warrington are quite impressive as all these centres are designated regional or sub regional centres.

4.72 There are also a number of commercial indexes that draw upon various indicators and research to rank town centres. Experian Goad publish such an index based on the number of key attractors / multiples, overall retail floorspace and the count of comparison operators, vacancy levels, leisure and service uses and expenditure levels. Within the Experian Goad national index Warrington is 96th which compares well with competing centres – Wigan (125th) and St. Helens (134th). Warrington is ranked much lower than the regional centre of Manchester (5th) and some of the larger sub-regional centres – Preston (51st) and Bolton (58th).

4.73 Finally there are some specialist indexes that allow a degree of comparison. CACI publish a shopping mall index that ranks malls by floorspace size in which Golden Square is ranked 50th nationally and will obviously be a lot higher when the extension opens. Within the region Golden Square had the fifth highest ranking after Manchester Arndale (12th nationally), Blackburn Mall (27th), Stockport Merseyway (29th) and Bury Millgate (41st). These managed (and usually covered) town centre malls are important in drawing shoppers into a centre, particularly in winter, and allowing them to compete more effectively with out-of-centre facilities such as the Trafford Centre. Golden Square mall is therefore a key strength in the town centre’s shopping offer and the extension is expected to raise the centre in the various rankings.

4.74 FPD Savills also produce a ranking of retail parks by size and rental level. Gemini was 20th nationally in 2004 in terms of floorspace area (behind Middlebrook Bolton (2nd nationally) and New Mersey Liverpool (7th)), however, it did not feature in the top 50 rental levels achieved (perhaps reflecting the freehold ownership of some occupants such as Ikea?). Again this type of retail facility is influential in deciding the destination of some shoppers – particularly those who value easy access and free car parking – and from this perspective Gemini can be seen as a strength in the overall offer within the town.
4.75 In summary, Warrington performs very well nationally and regionally on most of the commercial indicators and indexes and can be expected to improve its performance once the Golden Square extension opens.

**Comparison with Previous Health Check Assessments**

4.76 The 2000 Chestertons study identified Warrington as having a lower than average representation of convenience goods floorspace in the town centre and this is still the case. The 2002 study also identified representation of service trades lower than national levels, and this is also still the case, and in particular for cafes and restaurants.

4.77 Vacancy levels have increased dramatically since 2000 when they were below national average levels and now they are above. However, the two large vacant units in the Cockhedge Centre are understood to be under offer and these certainly skew the current position. Other vacant units are mainly within ‘secondary’ locations in the centre.

4.78 The 2002 study recorded 188 multiple retailers in Warrington Town Centre and this has now increased to 193 (based on Goad research and definitions).

4.79 In 2000 the average prime pitch rental in Warrington was £1,020 psm and this has now risen to £1,400 psm. Chestertons quoted a 1998 yield for the town centre of 6.4% and this has now fallen to 6.25%.

4.80 Chestertons recorded 6 charity shops in 2000 and now there are 5 although none of them are in the Primary Shopping Area recommended in this report and / or detract from the street scene.

4.81 Accessibility has not really changed since 2000 other than the relocation of the bus station and demolition of the Golden Square multi-storey causing a temporary reduction in car parking spaces. Pedestrian flows reported in the 2000 study have not really changed with slightly lower footfall in Buttermarket Street only.

4.82 The town centre environment has changed since 2000 with the landscape improvements but the remaining built form remains largely unchanged although it is set to change considerably once the Golden Square mall extension opens in 2007. A comparison of visitor survey results shows that issues that were of concern in 2000 generally remain valid today.
The October 2000 Warrington BC UDP Retail Study concluded that Warrington Town Centre is a vital and viable centre, based on the indicators in PPG6. The same conclusion is also reached in 2006 based on the PPS6 indicators detailed above, however, the limited range of leisure activities in the centre identified by Chestertons is still a factor influencing the diversity of the town. Chestertons concluded that the town centre was diverse but this updated study cannot concur because other than the retail offer there is very little to attract people into the centre as confirmed by the visitor survey results. There is a very limited tourism and cultural offer, no large educational establishments, a small office market, an embryonic evening economy, only a few restaurants of note and the commercial leisure offer is almost non-existent in the centre itself.

Yields have fallen since 2000 and rentals have increased – both favourable in comparison to competing centres. Conversely vacancies have risen although much of this is accounted for by edge-of-centre retail warehousing rather than central vacancies. However, unlike competing centres, there has been little investment in the town centre before the commencement of the Golden Square mall extension. This is what will move the centre forward in terms of the retail offer although it will do little to increase the diversity of the centre that will remain limited as in 2000 until other developments address this weakness.

In summary, excluding retail there is only a limited range of other uses in Warrington Town Centre that contribute to the vitality and viability of the town. For a sub regional centre, diversity is not good. This partly reflects the fact that Warrington is an expanded town and the centre hasn’t expanded with the surrounding suburbs and the former NTDC has exacerbated this to a certain extent with its decentralising planning strategy.

The amount of retail, leisure and office floorspace in edge and out-of-centre locations has grown since 2000 such as the Ikea extension and more of the retail warehousing and supermarket floorspace is selling non-bulky comparison goods. This is a major weakness, although a national trend, that could discourage investment in the town centre.

The potential capacity for growth in the immediate future is good with two identified town centre sites, one under construction, and an edge-of-centre site.
Retailer representation and intentions to change representation is a strong indicator in Warrington. There is a good national multiple representation that will improve further when the Golden Square extension opens. There are also high level of retailer demand particularly from cafes and restaurants.

Experian Goad report shopping rent growth below national average but project that it will increase above it up to 2000. However, the prime pitch rents recorded by VOA have increased dramatically.

The proportion of vacant street level property has increased in recent years but not to the point where it is a major weakness in the centre. There will be further vacancies as part of relocations to the Golden Square extension and it will not become apparent until trading patterns settle down whether there is an oversupply of units in any particular size range or location.

Commercial yields on non-domestic property have decreased to a healthy 6.25% which compares very favourably with competing centres.

Pedestrian flows have changed slightly in recent years with lower footfall recorded on Buttermarket Street and Horsemarket Street. Golden Square mall continues to record the highest footfall followed by the Cockhedge Centre which does appear to trade as a separate retail destination to a certain extent.

Accessibility is fairly good by most modes although motorists face congestion at peak periods. It will improve slightly following the opening of the Golden Square extension and completion of the replacement bus station.

Customer and residents views and behavior indicate high levels of satisfaction with the town centre. The main concern for visitors and shoppers is the availability of toilet facilities whereas for businesses it is the availability and cost of car parking.

Perception of safety and crime are reasonably good and local crime levels are generally below the national average.

The town centre environmental quality is quite good and will improve further with the opening of the Golden Square extension.

In summary, Warrington town centre displays strong PPS6 indicators of vitality and viability and compares favourably with competing centres and other sub-regional centres in the region. The main strength is the Golden Square mall, as reflected in rental levels and yields, and town centre environment. The main weakness is the lack
of diversity but this is likely to be addressed by new developments (Golden Square mall extension) and proposals (Wireworks and Times Square). The main opportunity in the short term is the three development sites and the possibility of a public transport interchange arising from the recent relocation of the bus station close to the Central railway station. The main threat is the continued development of town centre uses including offices, leisure and retail in peripheral locations in the borough.
5.0 The Need for Additional Convenience Goods Floorspace in Warrington

5.1 PS6 advises that quantitative need has primacy over qualitative need. This section considers them in turn before drawing conclusions. In addition to the surveys and qualitative assessment, the qualitative assessment draws upon the health check and the review of local and neighbourhood centre provision.

Quantitative Assessment

5.2 The methodology for undertaking the quantitative need assessment is based on guidance in PPS6 and is set out in Appendix 2. This indicates that the main source of quantitative need is expenditure growth (2.34). Overtrading and leakage, although assessed quantitatively, are not a source of quantitative need in a strict interpretation of PPS6 (although a recent First Secretary of State decision in Birmingham indicates where there is recent survey evidence leakage might be considered as quantitative need). The quantitative need assessment is the same for both broad goods categories and follows a fairly standard methodology that is presented in a logical step by step sequence of linked spreadsheet tables that are set out in Appendix 3.

The Study Area

5.3 The study area that was adopted for this report is shown in the appended plans (Appendix 3) and for the sake of consistency is based on that used in the 2000 Chestertons UDP Retail Study. This study area is subdivided into nine postcode sector based subzones. It became apparent when reviewing the survey results for both goods categories that five of the outer zones (North Warrington (Newton / Golbourne area), Knutsford, Northwich, Runcorn and Widnes) should no longer be in the Primary Catchment Area (PCA) for Warrington (if they ever were) as very few shopping trips to Warrington originated in these subzones. (The findings of the survey are summarised in appendix 1.)

5.4 The four subzones that formed the PCA covered the entire Warrington BC administrative area and took in parts of the neighbouring boroughs of Salford (Irlam and Cadishead) and Halton (East Widnes). Even on the periphery of the PCA there were extensive shopping trips made to competing centres, in particular, in the NE Warrington subzone residents of Irlam and Cadishead shopped locally for convenience goods and travelled to the nearby Trafford Centre and Manchester for
comparison goods. Any future update of this study might therefore wish to subdivide some of the subzones in the PCA.

The Study Period

5.5 A ten year study period was adopted as the MapInfo demographic data is only projected to 2016. Secondly the expenditure growth for comparison goods beyond 2016 is so extensive that unwanted developer interest could be attracted and possibly justified by longer term projections. The study period therefore ends in 2016 and it is advised that this study should be updated well before then in order to adhere to guidance in PPS6 (3.10) i.e. that study periods of more than five years are not normally necessary.

Population and Expenditure Information

5.6 Population and demographic data for the subzones within the study area was purchased from MapInfo. The base population figures for 2003 were projected forward by MapInfo and were cross-checked against the ONS 2003 Sub Regional Mid Year Estimates and Projections for the Council areas that made up the entire study area and individual zones (i.e. St. Helens, Wigan, Salford, Macclesfield, Vale Royal, Halton and Warrington). The MapInfo projections were slightly lower than the ONS projections, which is consistent with the Council’s own longer term projections, and are robust.

5.7 The expenditure per head of population information was extracted by MapInfo from the 2001 ONS Blue Book (National Family Expenditure Survey). The expenditure per head figures were cross checked against the Experian Goad expenditure per head figures for their definition of the Warrington catchment area (this extends to Southport and includes much of eastern Merseyside so not unexpectedly the Experian Goad figures were slightly lower than the MapInfo figures for the much narrower Warrington PCA).

5.8 The MapInfo expenditure per head figures for the Warrington PCA are therefore considered robust. They include special forms of trading (SFT) - and these were retained as the household survey recorded people using SFT in the study area including non shop retailing such as mail order, the internet and markets.

5.9 Future expenditure per head levels were projected using Oxford Economic Foundation (OEF) projections set out in Table 2 of MapInfo Brief 05/02 which recommends 0.8% per annum (pa) for the study period.
5.10 The expenditure per head figures (Table 2) are then multiplied by the population figures (Table 1) to arrive at overall current and future expenditure levels in the study area (Table 3). Overall growth in convenience goods expenditure per head in the study period is shown in Table 4.

5.11 In theory there is c. £18m convenience goods expenditure growth to support new floorspace in Warrington by 2011 and £43.2m by 2016 as shown in Appendix 3 Tables 5 and 6. However, there are other claims on this expenditure growth such as the potential for leakage from the PCA at the same level (7%) as recorded in the survey.

5.12 PPS6 (2.34) also advises turnover efficiency improvements in existing floorspace over and above inflation (held constant at 2003 prices) has to be taken into account. Research by Experian Goad (Retail Planner Briefing Note 2.2 April 2005) indicates turnover efficiency improvements in convenience goods floorspace taking up most of the expenditure growth in recent years. For future projections they advise using a turnover efficiency increase of 0.75%pa for convenience goods but this study uses the more cautious figure of 0.4% pa which is approximately 50% of the rate of expenditure growth.

5.13 The other claim on expenditure growth is committed convenience goods floorspace schemes either with planning consent or already under construction, then these too would have a claim on expenditure growth. However, there are currently no specific convenience goods commitments to be deducted from the expenditure growth (although there are some pipeline schemes detailed below).

5.14 Total claims on expenditure growth amount to c. £8m in 2011 as shown in Table 5 leaving c. £10m to support new floorspace. This is an insufficient ‘notional surplus’ to support another modern supermarket in Warrington and there are pipeline schemes such as the new neighbourhood / local centre at the Chapelford Urban Village that meets an identified gap in provision. There are also other qualitative gaps in local provision detailed in section 9. In addition there may well be a convenience element to the Golden Square mall extension such as sandwich shops and bakers. If 10% of the extended floorspace was given over to convenience goods this would turnover at around £7m. Finally, the level of vacant floorspace in the town centre is increasing and some of this could be occupied by convenience goods shops.

5.15 By 2016 there is a notional surplus of c.£27m from the 2006 base year in expenditure growth. Once the aforementioned pipeline schemes are deducted from the
expenditure growth / overtrading in out-of-centre stores there still is insufficient to support another modern supermarket in Warrington. It is therefore recommended that the notional surplus that will exist in 2016 is used to support pipeline schemes (that ideally should be identified in the LDF) and qualitative improvements within the existing retail hierarchy.

**Qualitative Assessment**

5.16 PPS6 advises that qualitative need considerations that can be taken into account in support of new designations include providing for consumer choice through an appropriate distribution of locations and the extent to which shops are overtrading. Other material considerations such as regeneration and employment benefits are not indicators of qualitative need.

**Consumer Choice**

5.17 Plan 1 in Appendix 4 shows the hierarchy of supermarket provision in Warrington. There are six large superstores over 2,500 sq m (red boxes). All four of the major supermarket operators are represented in Warrington and Asda have three stores.

5.18 There are ten small supermarkets over 1,000 sq m (blue circles). These are mainly Somerfields (2), Kwik Saves or discounters (Netto are not represented in Warrington) although there is also the M&S Foodhall at Gemini and a larger than average co-operative store at Fearnhead Cross Neighbourhood Centre.

5.19 There are seven smaller co-operative stores between 280 and 1,000 sq m (yellow triangles). The distribution across the residential areas of the borough is quite even and reflects the majority of the population living north of the ship canal. Where there are gaps in provision they are mainly filled by local centres with convenience stores such as Spar (below 280 sq m) and this is considered in section 9.

5.20 The only qualitative gap in provision appears to be the Chapelford Urban Village area of the borough and there are proposals to address this as part of the master plan. A designated neighbourhood centre with a convenience store of 1,000 sq m (gross) would more than suffice in this location given the proximity of Westbrook Asda and the Penketh Somerfield.

**Overtrading in Existing Floorspace in the Study Area**

5.21 PPS6 (2.36) advises that overtrading in existing stores is also a form of qualitative need. To determine this the expected turnovers of stores can be compared to the turnovers derived from the market share analysis of the household survey.
5.22 Table 7 lists the floorspace for major convenience stores in the PCA and aggregated floorspace for smaller shops in the town and other centres. These have been derived from a variety of sources but mainly Council schedules cross-checked against the IGD Database and company information.

5.23 The expected turnovers of the individual stores were derived from 2005 Mintel Retail Rankings and Verdict 2005 (Grocers Report) which publish national company average sales densities. These are utilised for the larger stores and aggregated for shopping centres and retail parks. The expected turnover of the aggregated shopping centres and retail facilities can then be calculated by multiplying the floorspace by the sales density as shown in Table 5.

5.24 The resultant turnovers drawn from the study area can then be compared against the survey based turnovers to identify any potential over or under-trading. The survey found that overall convenience goods floorspace in the PCA is trading just below equilibrium or expected levels.

5.25 The survey results at the individual store level do have to be treated with caution as visits to smaller stores and top-up shopping tend to be under-stated by survey respondents. What the survey analysis does show is some stores calculated to be over-trading significantly whilst others were under-trading. In particular the Asda stores at the Cockhedge Centres and Westbrook District Centre were trading well as was the Morrisons at Stockton Heath.

5.26 The Asda at Birchwood District Centre was trading less well as were the Tesco stores at Winwick Road and the store in Irlam. The only out-of-centre store that appeared to be over-trading significantly was the Sainsbury store on Church Street. As such there is not a great deal of over-trading that can contribute to the future qualitative need for convenience floorspace in the Borough.

**Market Share**

5.27 Prior to PPS6 increased market share was often regarded as a potential source of quantitative need. Whilst the survey did record some inflow expenditure from the SCA this was limited as was leakage from the PCA (around 7%). Convenience goods inflow expenditure is estimated to be around £38m and leakage is c. £24.5m so the PCA is a net importer of expenditure.

5.28 The leakage is to be expected given that the PCA extends to Daresbury to the SW, almost to Widnes in the west and Eccles in the east and it is considered that there is
very little potential to reduce this leakage from peripheral areas of the PCA. Convenience goods shopping tends to be very localised and it is unlikely that additional inflow expenditure could be achieved to the PCA or market share increased within it therefore no quantitative need is claimed from this source.

Conclusions on Need for Convenience Goods Floorspace in the PCA

5.29 There is no great quantitative need for additional convenience goods floorspace in Warrington. In the short term most of the limited growth is accounted for by leakage that cannot realistically be clawed back, by growth in the turnover of existing floorspace and development pipeline proposals such as the convenience element of the Golden Square mall extension, a new neighbourhood centre at Chapelford Urban Village and qualitative improvements within the existing retail hierarchy. In the longer term up to 2016 there is slightly more growth but insufficient to support a major new foodstore proposal or expansion of existing supermarkets for convenience goods retailing.

5.30 In terms of 'food deserts' the main qualitative gap identified in section 9 is to the west of the town centre (Chapelford area) and possibly the NE (Cinnamon Brow) but these are only small extensions to the local retail hierarchy. In addition there is not a great deal of over-trading that can contribute to the future qualitative need for convenience floorspace in the Borough.

5.31 There is therefore no requirement for Warrington BC to identify sites for new supermarkets in the LDF. Minor amendments will be required to the designated local retail hierarchy.
6.0 The Need for Additional Comparison Goods Floorspace in Warrington

Quantitative Need Assessment

6.1 The methodology for undertaking the quantitative need assessment for comparison goods is the same as for convenience goods and is outlined in Appendix 2. The same study area and study period are used. Tables 8 to 11 in Appendix 3 show the expenditure growth. Again the expenditure per head figures include SFT as the household survey recorded people using SFT in the study area including non shop retailing such as mail order, the internet and markets.

6.2 Future expenditure per head levels were projected using Oxford Economic Foundation (OEF) projections set out in Table 2 of MapInfo Brief 05/02 which recommends 4.1% pa up to 2011 and 4.3%pa thereafter for comparison goods.

6.3 The expenditure per head figures (Table 9) are then multiplied by the population figures (Table 8) to arrive at overall current and future expenditure levels in the study area (Table 10). Overall growth in convenience goods expenditure per head in the study period is shown in Table 11.

6.4 Due to the higher growth rates than convenience goods greater expenditure growth is identified, however, there are also greater claims on this expenditure and in particular committed floorspace.

6.5 Table 11 identifies c. £164m comparison goods expenditure growth to support new floorspace in Warrington by 2011 and £387m by 2016 as shown in Appendix 3 Tables 12 and 13. However, there are significant claims on this expenditure growth such as the potential for leakage from the PCA at the same level (28%) as recorded in the survey.

6.6 Turnover efficiency improvements in existing floorspace are also much greater than for convenience goods. Experian Goad recommend that for future projections a turnover efficiency increase of between 2% and 2.5%pa for comparison goods (Retail Planner Briefing Note 2.2 April 2005) and this study uses a midpoint figure of 2.25% pa which is over 50% of the rate of expenditure growth.

6.7 There are also significantly more claims on comparison goods expenditure growth from committed schemes as shown in Tables 12 and 13. In particular the Golden Square mall extension takes up a significant percentage of the identified expenditure.
growth and the total claims are actually greater than growth in 2011 resulting in a notional deficit of c. £21m

6.8 By 2016 there is a notional surplus of c.£67m from the 2006 base year in expenditure growth. However, in addition to the commitments there are advanced pipeline schemes such as the Wireworks and Times Square proposals. The Wireworks proposal just to the north of the town centre is a mixed use leisure and retail scheme that includes retail floorspace totaling 5,490 sqm (gross). The Times Square proposals is within the south west quadrant of the town centre boundary and is also a mixed use leisure and retail scheme that includes retail floorspace totaling 5,703 sqm (gross including an allowance for mezzanines). These two schemes combined could have a total turnover of £40m or more, depending upon the eventual occupiers, therefore once an allowance is made for both these sites to be built out within the LDF period, there is very little of the notional surplus remaining to support new floorspace elsewhere in the town centre / borough other than qualitative improvements within the existing retail hierarchy.

Qualitative Assessment

6.9 Plan 2 in Appendix 4 shows the distribution of comparison goods provision in Warrington. The main provision is in the town centre and Stockton Heath although the provision in the other two district centres (red circles) is limited other than the Asda floorspace. The smaller neighbourhood centres are also mapped (small red circles) as they provide for useful day to day shopping needs such as pharmacies, book & card shops, hardware, etc. The yellow circles on the plan represent the retail parks and major solus retail warehouses such as the out-of-centre B&Q Warehouse

6.10 It can be seen from the plan that there is quite a good geographical distribution of retail centres and facilities again with the majority being in the more highly populated north of the Borough. There is no great qualitative need in the form of geographical provision in the Borough.

6.11 With regard to the town centre, this is currently lacking an anchor department store and a number of key attractor multiples, however, much of this will be addressed by the completion of the Golden Square mall extension.

6.12 Retail Warehousing is well provided for in the Borough and the quality of the offer is good with a PC World, B&Q Warehouse, Toys R US and Ikea amongst the key attractions. There are currently four vacant premises (Pinters Brow, Riverside and
Cockhedge Centre (2)) and there should be no need for new bulky goods retail warehousing in the Borough during the study period.

6.13 Comparison goods floorspace in supermarkets is also well provided for in Warrington varying between 25% (Sainsburys) and 45% (Tesco) of total sales area and much of this competes directly with town centre retailing such as clothes, CD’s, books and stationary shops. There is no qualitative need to extend the comparison goods element of any of the supermarkets.

Overtrading in Existing Floorspace in the Study Area

6.14 Table 14 lists the floorspace for major comparison stores in the PCA and aggregated the floorspace for shops in the town and other centres and their expected turnovers based on national company averages. The resultant turnovers drawn from the study area can then be compared against the survey based turnovers to identify any potential over or under-trading. The survey found that overall comparison goods floorspace in the PCA is trading around equilibrium or expected levels.

6.15 Again the survey results at the individual store level do have to be treated with caution as visits to smaller centres and stores tend to be under-stated by survey respondents. What the survey analysis does show is the town centre and Stockton Heath are calculated to be over-trading significantly whilst most of the retail parks were under-trading with the exception of the B&Q warehouse. The comparison goods floorspace in the supermarkets wasn’t trading particularly well with the exception of the Asda Westbrook store.

6.16 As most of the over-trading was therefore taking place in the town centre there is not a great deal of qualitative need from this source to support new floorspace in the Borough with the possible exception of new floorspace in the centre itself.

Market Share

6.17 The survey recorded much higher levels of leakage from the PCA (around 28%) for comparison goods than convenience goods (7%) which is to be expected given the extent of the PCA and also the proximity of the higher order regional centres of Manchester, Liverpool and Chester as well as competing centres such as Wigan, St. Helens and Widnes.

6.18 Inflow expenditure to the PCA from the SCA and beyond is estimated to be around £135m but leakage from the PCA is much higher at c. £187m making the PCA a net exporter of expenditure.
6.19 Whilst in theory a greater level of expenditure could be retained in the PCA and also a higher level attracted to it from the SCA and beyond with the opening of the Golden Square mall extension, Warrington town centre is not the only expanding centre in the region. The survey revealed that the Trafford Centre accounted for the largest percentage of leakage followed by Manchester and then Liverpool. Both the regional centres are in the process of major expansions (as is Chester) and there are unimplemented consents at the Trafford Centre.

6.20 In addition, the Grand Arcade scheme in Wigan will greatly expand that competing centre. Halton Lea shopping centre in Runcorn is to be greatly expanded with the construction of Tesco Extra Store, Trident Retail Park is also expanding and a new retail park has been permitted near the old town. Even the Warrington Ikea is going to lose its ‘monopoly’ position within the region with the opening of new Ikeas in Ashton and possibly North Liverpool. The amount of expenditure lost to internet shopping is also set to rise.

6.21 On this basis, the most cautious and robust approach therefore is to assume that once shopping patterns have settled after the opening of the Golden Square mall extension, Warrington town centre will retain its current market share level within the PCA, SCA and beyond and that this is not a source of quantitative or qualitative need for new comparison goods floorspace.

**Conclusions on Need for Comparison Goods Floorspace in the PCA**

6.22 There is a quantitative and qualitative need for additional comparison goods floorspace in Warrington but in the short term (2011) this is entirely accounted for by committed floorspace. In the longer term (2016) much of the quantitative and qualitative need could be taken up by pipeline schemes that should be designated in the LDF to prioritise them ahead of sequentially inferior sites that may also come forward during the plan period. Times Square would constitute redevelopment of a town centre location with better use of land, improved townscape and public realm as well as increased density. The Wireworks would reflect the long-term objective of the Council to regenerate this edge-of-centre area perhaps as a town centre extension as it is well related to the centre and transport network. There is therefore no requirement for Warrington BC to identify sites for new comparison goods in the LDF other than the Wireworks and Times Square sites.
7.0 The Need for New Commercial Leisure Facilities in Warrington

7.1 PPS6 is very specific in stating that it relates to all town centre uses including retail, leisure, commercial and public offices, cultural and tourism (para 1.8). This means that all these town centre uses are also subject to the same policy tests as retail development i.e. that proposals for such uses must demonstrate need, appropriateness of scale, sequential approach, impact and accessibility. PPS6 also provides some useful guidance on promoting the evening economy.

7.2 The main difference for other town centre uses is the extent of the sequential approach site search. For retail uses in-centre means within the PSA and edge-of-centre means within 300m walk from the PSA. For other town centre uses such as commercial leisure in-centre means within the town centre boundary and edge-of-centre means within 300m of the town centre boundary. Therefore other town centre uses are not as strictly controlled by the sequential approach but they must still comply with it.

7.3 This section considers the quantitative and qualitative need for new commercial leisure facilities. For some uses such as cinemas quantitative methodologies have been developed based on attendance / membership levels. However, for other uses such as private gyms and casinos the assessment is mainly qualitative.

The Need for New Cinema Screens in Warrington

7.4 Warrington currently has one ten screen cinema on the edge of the Westbrook District Centre as currently designated. Although this was one of the first multiplex cinemas in the country when it opened in 1988 the cinema is now outdated in comparison to the latest cinema developments.

7.5 The household survey found lower cinema attendance levels in the study area (c. 50%) than nationally – 71% of people attend the cinema at least once a year (National Film Council Research). Although the cinema is in a district centre it is not particularly accessible by modes other than private car. The excellent bus service available during the weekday and on Saturday becomes much less frequent on an evening (half hourly) and is only hourly on a Sunday.

7.6 Whilst any proposal for a new cinema in Warrington would have to take into account the Westbrook Odeon (nee UCI) in its quantitative need and impact assessment, if it
were within the town centre boundary then need would not have to be demonstrated. A case might also be made that an edge-of-district centre site (it is the recommendation of this report that the cinema is removed from the district centre designation) is not an appropriate location for a cinema of this scale therefore an edge-of-town centre site might be more appropriate.

**Quantitative Assessment**

7.7 The cinema quantitative need assessment is shown in Table 15 in Appendix 3. The study area is based upon the PCA the population of which should generate around 460 thousand cinema trips per year based on a national attendance level (71%) and an average of 3 trips per cinema-goer a year in 2006 (Dodona Research advise average cinema trip levels vary between 2 and 6 per year depending upon location and provision). Currently 30% of cinema trips go outside the PCA and cinema going population could support 6.3 screens within Warrington based on national attendance levels and an average of c. 51,000 trips per screen (Dodona).

7.8 An allowance is also made for inflow cinema trips from the SCA based on current levels recorded in the survey. At the same national attendance and frequency levels the inflow cinema goers from the SCA could support an additional 2.6 screens in Warrington making a total of 9 screens that could be supported – one less than currently exists at the Westbrook Odeon.

7.9 The quantitative assessment is projected forward to take account of a growing population and attendance levels (increasing from 3 pa per cinemagoer to 4pa) in the PCA and, assuming an improved offer (i.e. more screens in the town), retention of more cinema trips (90%). Market shares within the SCA are increased by 50% as the offer in competing destinations will also be improving. In 2011 it is estimated that the cinema-going population in the PCA and inflow from the SCA could support 14 screens (4 more than currently provided).

7.10 The quantitative assessment is then projected forward to 2016 and trip frequency increased to 4 per cinema going resident in the study area. On this basis 15 screens could be supported in 2016 – five more than currently available.

7.11 On this basis there is the quantitative need for one more (small) cinema in the Borough by 2016. However, it is possible that the outdated Westbrook Odeon may close or relocate before then in which case there would be a quantitative need for two cinemas totalling c. 15 screens in the Borough.
Conclusions on the Need for New Cinema Screens in Warrington

7.12 The health check of vitality and viability in section 4 identified the limited diversity of the town centre as a main weakness. A new cinema in the town centre will make a significant contribution to diversifying the centre and will be a major anchor for the evening economy around which other attractions can be developed.

7.13 Even if the Westbrook Odeon doesn’t close / relocate then it could be argued that an edge-of-centre district centre cinema should not prevent a town centre and / or edge-of-town centre sites coming forward as they are much more appropriate in scale and contribute so much more to the evening economy of the town centre. In effect, there is strong qualitative argument for at least one town cinema regardless of the status of the Westbrook Odeon.

7.14 Two sites have been identified by developers for possible cinema anchored mixed use development schemes in Warrington – The Wireworks and Times Square. The Wireworks is an edge-of-centre scheme outside the recommended town centre boundary that relates well to the public transport interchange and has a degree of synergy with retail and leisure (stadium) uses in this part of Warrington. It benefits from a UDP designation for mixed use (EMP8). Times Square is a town centre scheme less well related to the public transport interchange but well related to the existing, but limited, evening economy on south Bridge Street.

7.15 In theory Times Square is the most sequentially preferable site but The Wireworks has superior public transport access. It is therefore recommended that both schemes are supported as (maximum eight screen) cinema anchored mixed-use schemes in the LDF. It is understood that more than one operator is seeking a town centre location, including Odeon, Vue and Curzon therefore the market will determine whether there is a need for one or two cinemas in / around the town centre but the UDP / LDF will provide the flexibility to deliver this.

The Need for a New Theatre in Warrington

7.16 The household survey found that 41% of PCA residents visited the theatre, however, because of the lack of provision most of these trips were made to Manchester or, to a much lesser extent, Liverpool. Clearly there is a need based on leakage of theatre expenditure that could be used to support a new facility in Warrington in addition to the Pyramid and Parr Hall. Theatres are town centre uses and subject to the sequential approach.
The Need for New Restaurants and Cafes in Warrington

7.17 The health check of vitality and viability in section 4 identified the limited diversity of the town centre as a main weakness. In particular there is a need for new restaurants and cafes which are currently underrepresented in the town centre. Café bars which operate as café restaurants during the day and bars in the evening are particularly useful in developing the evening economy as they help bridge the daytime and evening role of the town centre. The list of retailer/operator requirements provided by Retail Agents Churston Heard includes a number of national café and restaurant operators and the Golden Square mall extension is very likely to contain some food and drink outlets such as coffee bars and diners. In addition, the Wireworks will contain diners for later night custom when Golden Square will have closed.

7.18 At the moment the principal shopping frontages where many medium to higher order café bar and restaurant operators would like to locate are restricted to predominantly retail uses by the UDP (policy TCD9). It is the recommendation of this report that the PSA is tightly defined around Golden Square and that the majority of the frontages outside the PSA (Plan 5) are mostly redesignated as secondary where café bar and restaurant operators would be encouraged. The PMRS footfall surveys indicate that outside of Golden Square/eastern Sankey Street pedestrian movement does not justify primary retail frontage designation.

7.19 The nightclub offer in Warrington is quite good and with the relaxation of the licensing laws bars and pubs will also be able to offer late night watering holes. There is probably no need to identify new sites for night clubs or encourage them in the LDF. However, night clubs, bars and pubs should be located away from residential areas and conflicts with daytime uses in the town centre, e.g. the debris and fallout from the late night economy managed as part of the town centre strategy/management regime/local licensing.

The Need for New Hotel Bedrooms in Warrington

7.20 At the moment the hotel offer is peripheral and located around the motorway network/junctions and ranges from budget to four star accommodation. The Village Hotel at Centre Park is the only really comparable central hotel to the peripheral hotels. More central provision in all categories would greatly boost the short stay visitor level and the evening economy. As tourist destinations/facilities, Hotels are also subject to the sequential approach.
The Need for a Casino in Warrington

7.21 Currently Casinos are restricted to 53 permitted areas and are strictly regulated as to what services and facilities they provide. However, changes in the Gaming Laws will facilitate a limited number of super casinos and make it easier to open and operate smaller casinos. They will also allow some Bingo clubs to become small casinos and Gala already operate a number of small casinos.

7.22 Warrington currently has no casino. As a commercial leisure operation they are subject to the sequential approach. Unlike other leisure activities such as Cinemas, Casinos are particularly flexible uses that can be fitted into a variety or refurbished existing or new units. The Council should encourage central locations so that they can fully contribute to the evening economy and discourage the conversion of peripheral Bingo Clubs to Casinos.

The Need for New Bingo Clubs in Warrington

7.23 The household survey found around 7% of residents played bingo regularly and that the Gala Bingo at Cockhedge was the most popular venue in the Borough. However, a significant number of people visited Bingo clubs outside the study area suggesting there may be a requirement to provide additional facilities in the Borough. In providing such facilities they should be located in the town centre or if more localised provision is required it should be of an appropriate scale to the centre it seeks to serve i.e. the catchment area of that particular district / neighbourhood / local centre and not the Borough as a whole.

The Need for New Private Gym Clubs in Warrington

7.24 Although not traditionally high street occupants, these facilities are associated with the urban area and in recent years there has been an increased provision of private sector facilities many of which prefer to locate out-of-centre. However, as commercial leisure facilities they are subject to the sequential approach although some operators such as Total Fitness have attempted to circumvent this by claiming to be quasi health / medical centres. PPS6 (1.8) makes it quite clear that it applies to ‘more intensive sport and recreation uses’.

7.25 The household survey found around 18% of residents were members of private gymnasiums. The most popular gym was Total Fitness on Winwick Road followed by David Lloyd and JJB. However, several other destinations were also recorded and there appears to be no qualitative shortage of such facilities in the Borough. JJB is the only large scale facility within the current town centre boundary.
7.26 Proposals for large new private gym facilities are subject to the sequential approach and should not be permitted if they are not in an edge-of-centre (or better) location as they can help diversify the centre, are well accessed by public transport and provide facilities for shoppers / visitors / workers thereby adding to the overall offer. There may be smaller scale proposals in the district / neighbourhood / local centres that should be of an appropriate scale to the centre and catchment area it seeks to serve.

The Need for New Office Floorspace in Warrington

7.27 Although not part of the remit of this study, the Council should be mindful of the guidance in PPS6 on the location of office development and the contribution it can make to diversifying the centre. Historically, as part of the NTDC legacy, there has been much peripheral office / B1 development on out-of-centre / town sites in Warrington. However, under PPS6 the Council must try and direct office development towards the town centre if physically possible and the provisions of the sequential approach must be satisfied before less central sites can be considered. In considering the sequential approach for all town centre uses including offices, the Council should also be mindful of the prioritising of out-of-centre sites by public transport accessibility amongst other criteria.

Conclusions on the Need for New Commercial Leisure Facilities

7.28 There is a quantitative and qualitative need for new cinema screens and commercial leisure facilities such as restaurants and café bars in the town centres to help diversify the centre which currently is its main weakness. Such development will also help establish the evening economy in Warrington and will complement the expanding retail role. All town centre uses are subject to the sequential approach which should be used to prioritise any competing claims to meet quantitative and qualitative need in the Borough.
8.0 Physical Capacity of Centres in Warrington

The Town Centre

8.1 The Town Centre Retail Core is quite tightly surrounded by roads / railway on three sides and by the Palmyra Square conservation area to the SW. The wider town centre area as shown in the UDP Inset Proposals Map is constrained by railways to the north, west and south and by the ring road. As such there are few possibilities for expansion.

8.2 Within the Town Centre Retail Core is the Golden Square mall extension site currently under construction and the Times Square redevelopment site. No sites have been identified within the wider town centre area which is heavily built up with the exception of Bank Park which is part of an extensive conservation area to the west of the town centre.

8.3 Immediately to the north of the Transpennine Railway Line is The Wireworks site. Whilst this is an edge-of-centre site it is very well related to the public transport interchange and offers a good opportunity to provide complementary leisure and retail facilities to the town centre. On the opposite side of Winwick Road to the Wireworks site is the Cheshire Lines site that is being brought for forward predominantly for housing.

8.4 Current commitments including the Golden Square mall extension can meet the identified quantitative need up to 2011. Longer term quantitative need can mostly be met by the retail elements of The Wireworks and Times Square. The physical constraint of the town centre is therefore not currently a problem but could be beyond 2016.

Westbrook District Centre

8.5 Westbrook District Centre is surrounded by car parking on two sides. Asda have in the past submitted and withdrawn plans to extend their store which anchors the district centre that involved extending onto the car park to the east. However, the car park to the south and west is more extensive and probably offers the best scope for physical extension of the centre if this is deemed necessary (the visitor survey found the main gap in provision is smaller shops, banking facilities and a Post Office). The Odeon Cinema at the SW corner of the site may offer a local redevelopment opportunity for leisure use if this ageing multiplex relocates to the town centre.
**Birchwood District Centre**

8.6 Birchwood District Centre like Westbrook is a purpose built district centre dating back to the NTDC days. Like the Westbrook Centre it has the trading characteristics of an out-of-centre supermarket although the Asda at Birchwood has more surrounding shops in the adjoining mall. There are extensive car parks on two/three sides of the district centre that offer the best opportunity of extending this centre.

**Stockton Heath District Centre**

8.7 Stockton Heath is the only ‘organic’ district centre in Warrington that has grown with the community it serves for over a century. The boundaries are very tightly constrained by surrounding residential areas. There is a committed development site in the form of a small extension to the Forge Shopping Centre but apart from this there are no possibilities for expansion. On the opposite side of the ship canal is the Morrisons supermarket that is further separated from the district centre by an extensive car park with poor pedestrian linkages. It is not recommended that this forms an extension site for this district centre.

**The Neighbourhood Centres**

8.8 The Warrington UDP identifies 8 neighbourhood centres. PPS6 does not provide a definition for this hybrid centre within the retail hierarchy which appears to be halfway between a district and local centre for which PPS6 Annex A does have definitions. Most of the neighbourhood centres appear to be anchored by slightly larger supermarkets than the convenience stores which are to be found in most of the local centres. A useful definition for the neighbourhood centre might therefore be “a range of shops and services including a small supermarket of no more than 1,000 sq m (gross)”. A survey of the neighbourhood centres revealed few opportunities for expansion.

**The Local Centres**

8.9 The Warrington UDP identifies 33 local centres. Local Centres are defined in PPS6 as including “a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other things, a small supermarket, a newsagent, a sub-post office and a pharmacy…” As the Neighbourhood Centres have removed most of the small centres containing a small supermarket it is probably worth the Council redefining this PPS6 definition to exclude the small supermarket reference and replace it with a convenience store of no more than 280 sq m (Sunday
Trading Laws definition / cut-off) to avoid any unwanted small supermarket proposals lower than neighbourhood centre level.
9.0 Hierarchy of Centres

9.1 Within the Regional Network of Town Centres Warrington is designated as sub-regional centre by White Young Green in the June 2005 NWRA Town Centre Assessment Study. This is the next tier down in the hierarchy from the two regional centres of Liverpool and Manchester. The nearby competing centres of St. Helens and Wigan are also designated as sub-regional centres but not Widnes or Runcorn which are both lower tier centres.

9.2 Plan 3 in Appendix 4 shows the retail hierarchy within Warrington. Below the town centre there are 3 District Centres, 8 neighbourhood centres and 33 local centres (although not all with convenience stores). The plan shows an even distribution of centres throughout the Borough relative to the built up / populated areas. There are few obvious gaps in geographical provision other than the local centres without foodstores which the Council can only encourage to locate in these designated centres. In terms of food deserts in areas of social exclusion, Plan 4 in Appendix 4 shows that the highest areas of unemployment (as recorded in the 2001 Census) are fairly central to the urban area and reasonably well served by supermarket and / or convenience stores.

9.3 The only gap in provision is at Chapelford Urban Village where a new neighbourhood centre is proposed. In terms of the local centres, there is an existing Spar at Cinnamon Brow that is signposted from the road as a local centre but is not designated as such in the UDP. Although the Spar is the only shop in the local centre. There is also a Spar on Old Hall Road in Westbrook and a Co-operative store on Folly Lane in Bewsey that is not designated in the UDP. It is recommended that these three stores are designated as a local centre as, in the case of Cinnamon Brow and Westbrook, they form a focal point for the local pedestrian network and all three serve residential areas without any other shopping centres / convenience stores.

The Town Centre

9.4 The health check revealed that the town centre was a particularly strong retail centre other than the lack of a department store and some key attractor multiples which will be addressed with the opening of the Golden Square mall extension in 2007. There are no large supermarkets in the centre itself but there is a foodhall in M&S as well smaller stores, the daily market hall and a peripheral Kwik Save. There is also the large Asda in the edge-of-centre Cockhedge Centre. Just out-of-centre there is the
Sainsburys and Lidl at School Brown and Tesco Extra on Winwick Road so shoppers travelling to the centre by car have a good choice of food destinations.

The District Centres
9.5 There are three district centres in Warrington – two ‘planned’ centres in the north of the town where the bulk of the population lives and Stockton Heath in the south of the town. Combined with the town centre and neighbourhood centres, most of which are anchored by small to medium sized supermarkets, residents of Warrington have a good choice of shopping centres within a reasonable distance.

9.6 In terms of appropriateness of scale and PPS6 guidance on upper limits of floorspace, to ensure that the centres continue to serve their district catchments and not a wider catchment, it is recommended that foodstores in district centres should not exceed 5,000 sq m in gross floorspace area. There is therefore no need for new supermarkets or expansion of existing ones in any of the three district centres. For comparison goods it is recommended that individual units do not normally exceed 500 sq m in gross floorspace area to ensure only a local catchment is served.

Westbrook District Centre
9.7 Apart from the Asda at Westbrook District Centre there are only six small stores at this district centre and there is no Post Office, a key component of a lower order local centre according to the PPS6 definition. The centre therefore has the trading characteristics of an out-of-centre supermarket rather than a district centre providing a wide range of services and shops to the local community. Experian Goad do not produce a centre map or report for Westbrook confirming its limited importance as a centre.

9.8 The survey of visitors to Westbrook District Centre found low levels of access by means other than car confirming the out-of-centre trading characteristics of the centre. Shoppers at Westbrook were less satisfied with the retail / leisure / service offer than in comparison to the other district centres. In particular the centre would benefit from a post office and a greater range of shops and services other than Asda.

9.9 The centre boundary is extensively drawn to include all the car park and the Odeon Cinema. The Council might consider creating a PSA within this area in the LDF to include the arcade and entrance to Asda to ensure greater control over this area in the future. Any expansion should ideally increase the number of shops and services
but not necessarily the supermarket which appears to be of an appropriate size for the centre and catchment it seeks to serve.

9.10 The centre is reasonably well served by public transport and the bus stops benefit from ‘real time’ information advising the length of wait until the next bus although they are not that well related by a direct route to the main entrance. Unfortunately evening services are reduced to half hourly and Sunday services hourly. The centre also has reasonable segregated links to surrounding housing estates in the NW of the borough. Any proposals to extend the centre might therefore be linked to improved public transport services and pedestrian linkages.

**Birchwood District Centre**

9.11 Birchwood District Centre is also anchored by an Asda but is adjoined by a covered mall with 52 shop / service units. There is also an Iceland and Aldi store at Birchwood for additional choice.

9.12 Birchwood also has some trading characteristics of an out-of-centre supermarket as it is very peripheral to the urban area most of which it is separated from by the M6 Motorway and Transpennine Railway line and it is surrounded by car parks on two / three sides. The centre is only in close proximity to one residential area surrounded on other sides by business and open farmland (on the opposite side of the railway).

9.13 The centre boundary is extensively drawn to include all the car park and an employment area to the east. The Council might consider creating a PSA within this covered mall to ensure greater control over this area in the future.

9.14 The centre is reasonably well served by public transport including rail services into Padgate and Warrington. Unfortunately evening and Sunday services are less frequent. Any proposals to extend the centre might therefore be linked to improved public transport services and pedestrian linkages.

**Stockton Heath District Centre**

9.15 Stockton Heath District Centre serves the southern suburbs of Warrington. The centre itself is anchored by a Somerfield store in the small Forge Centre mall. At the southern end of the centre there is a new Sainsbury’s Local convenience store. The rest of the centre is spread along the A49 south of the Ship Canal bridge and comprises a mixture of multiples, quality independents and services. On the opposite side of the canal is an out-of-centre Morrisons that has poor pedestrian links with the centre and should not be regarded as edge-of-centre.
9.16 Stockton Heath is the only really ‘organic’ shopping centre that has grown over time with the community it serves. Experian Goad produce a Centre Plan and Report for Stockton Heath and it is the only centre in Warrington other than the town centre to feature in the ODPM’s Area of Town Centre Activity database. As the centre is on a main radial it is well served by public transport and easily accessible by foot from surrounding residential areas.

9.17 The household survey found that Stockton Heath was a popular destination for both convenience and comparison goods and not just the (out-of-centre Morrisons) on the opposite bank of the ship canal. The survey of visitors to Stockton Heath found high levels of satisfaction with the centre and its diverse range of retail and leisure facilities.

9.18 The centre boundary is tightly drawn to reflect the surrounding residential areas. Car parking is limited in the centre itself to the small Forge Centre car park and free short stay on street car parking. Any further proposals to extend the centre might be linked to improved / increased car parking so that reliance upon Morrisons car park is reduced.

**Neighbourhood and Local Centres**

9.19 The neighbourhood centres are generally larger than the local centres in terms of overall floorspace for all goods categories and including services and they are usually anchored by small-medium stores above 280 sq m (gross) and below 900 sq m (gross) whereas the local centres tend only to have small convenience stores (280sq m).

9.20 However there are a number of discrepancies that ideally need rectifying in the LDF. For example, Latchford Village neighbourhood centre is anchored by a independent convenience store of only 136 sq m although there is over 2,000 sq m of other retail floorspace in the centre. Conversely Penketh West local centre is anchored by 1,494 sq m Somerfield but there is only 670 sq m of other floorspace in the centre. Twelve of the 33 local centres are anchored by convenience stores of over 280 sq m. Seven of the local centres have no convenience store at all and as this is the primary purpose of such centre perhaps they should be de-allocated unless they are in ‘food deserts’ or there are other reasons for their retention (such as a pharmacy).

9.21 In terms of appropriateness of scale and PPS6 guidance on upper limits of floorspace, to ensure that the neighbourhood centres continue to serve their local communities and not a wider catchment, it is recommended that foodstores in
neighbourhood centres should not exceed 1,000 sq m in gross floorspace area. For comparison goods it is recommended that units do not normally exceed 280 sq m in gross floorspace area to ensure only a local catchment is served.

9.22 In local centres it is recommended that no shop unit should exceed 280 sq m in gross floorspace area. (280 sq m is the maximum size for a convenience store in the Sunday Trading Laws – above this threshold stores have restricted trading hours on a Sunday.)

9.23 Obviously there will be historic reasons for shops above these threshold limits are already found in district centres and this is what gives the centres their individual character and appeal. The limits are aimed at future development and should not be exceeded without good reason, for example local businesses expanding to larger premises, to ensure the retail hierarchy and distribution of current shops is maintained and protected.

9.24 Following a review of the neighbourhood and local centres it is recommended that the Marsh House Lane local centre is redesignated a neighbourhood centre. It is also recommended that the proposed Chapelford Urban Village centre is designated as a neighbourhood centre. This would bring the number of designated neighbourhood centres to 10.

9.25 It is also recommended that the local centre at Cinnamon Brow is officially designated within the LDF as a local centre. There are also parades / shops at Lovely Lane and Old Hall Road (Plan 3) that should also designated as local centres. The local centres at Heatley, Outrightington Lane, Woolston (Parksway) and Grappenhall (Lindi Avenue) have no convenience stores or pharmacies and are not in ‘food deserts’ and / or areas of social exclusion are recommended for removal from the LDF local centre designation bringing the total number of local centres to 34.

**Petrol Filling Station Shops**

9.26 Convenience store developments in petrol filling stations (PFSs) can be a threat to both neighbourhood and local stores as they are often operated by the large supermarket operators, open for 24 hours and usually have the benefit of ATMs. PFSs are often promoted on the assumption that they provide for ancillary purchases for motorists but research indicates that petrol sales are almost incidental and they actually provide top-up shopping for residents in the immediate area thereby undermining the retail hierarchy and in particular the smaller centres that rely upon this trade. Unless PFSs are actually located within a designated shopping centre
boundary they should therefore be resisted as out-of-centre developments. Even if they are located within centre boundaries there are issues of appropriateness of scale as sometimes the PFS shops can be quite extensive.
10.0 Conclusions and Recommendations

Retail Context

10.1 Warrington Borough has a strong town centre in retailing terms but also extensive out-of-centre retailing not all of which is restricted to bulky goods and competes directly with the town centre. There is also a choice of six modern superstores – two anchoring district centres, a third close to Stockton Heath District Centre and three on the edge or just outside the town centre. Below the district centres there is a good network of neighbourhood and local centres with few geographical gaps in provision.

10.2 Warrington town centre has not extended its quantity of retail floorspace since the Cockhedge Centre was built although there have been some significant changes in retailers occupying it and the amount of convenience floorspace has decreased. There has been new retail floorspace developed out of the centre at the Gemini Retail Park and along the A49 corridor in particular.

Town Centre Health Check

10.3 The overall conclusion is that the town centre displays strong PPS6 indicators of vitality and viability and compares favourably with competing centres and other sub-regional centres in the region. The main strength is the Golden Square mall, as reflected in rental levels and yields, and town centre environment. The main weakness is the lack of diversity although this is likely to be addressed by new developments and proposals. The main opportunity in the short term is the three development sites (Golden Square mall extension, Times Square and The Wireworks site) and the possibility of a full public transport interchange. The main threat is the continued development of town centre uses including offices, leisure and retail in peripheral locations in the borough.

The Need for Additional Convenience Goods Floorspace in Warrington

10.4 There is no great quantitative need for additional convenience goods floorspace in Warrington. In the short term most of the limited growth is accounted for by leakage that cannot realistically be clawed back, by growth in the turnover of existing floorspace and developments such as the convenience element of the Golden Square mall extension, a new neighbourhood centre at Chapelford Urban Village and qualitative improvements within the existing retail hierarchy. In the longer term up to 2016 there is slightly more growth but insufficient to support a major new foodstore proposal or expansion of existing supermarkets for convenience goods retailing.
10.5 In terms of ‘food deserts’ the main qualitative gap identified in section 9 is to the west of the town centre (Chapelford area) and but this is only a small extension to the local retail hierarchy. (There are no convenience stores in the rural villages of Burtonwood and Croft.) In addition there is not a great deal of over-trading that can contribute to the future qualitative need for convenience floorspace in the Borough.

10.6 There is therefore no requirement for Warrington BC to identify sites for new supermarkets in the LDF. Minor amendments will be required to the designated local retail hierarchy.

The Need for Additional Comparison Goods Floorspace in Warrington

10.7 There is a quantitative and qualitative need for additional comparison goods floorspace in Warrington but in the short term (2011) this is entirely accounted for by committed floorspace. In the longer term (2016) much of the quantitative and qualitative need could be taken up by mixed use pipeline schemes that should be designated in the LDF to prioritise them ahead of sequentially inferior sites that may also come forward during the plan period. There is therefore no requirement for Warrington BC to identify sites for new comparison goods in the LDF other than the Wireworks and Times Square sites that with regard to retail use are both edge-of-centre i.e. outside the PSA boundary proposed in this report (Appendix 4 Plan 5) but within 300m of it.

The Need for New Commercial Leisure Facilities in Warrington

10.8 There is a quantitative and qualitative need for new cinema screens and commercial leisure facilities such as restaurants and café bars in the town centres to help diversify the centre which currently is its main weakness. Such development will also help establish the evening economy in Warrington and will complement the expanding retail role. All town centre uses are subject to the sequential approach which should be used to prioritise any competing claims to meet quantitative and qualitative need in the Borough.

Retail Hierarchy

10.9 The only gap in provision is at Chapelford Urban Village, where a new neighbourhood centre is proposed, and at Burtonwood and Croft villages where the local centre designation should be retained to encourage local businesses to locate here. With regard to other local centres, there are existing convenience stores at Cinnamon Brow, Bewsey (Lovely Lane) and Westbrook (Old Hall Road) that are not designated as such in the UDP.
With regard to PFS shops, unless they are actually located within a designated shopping centre boundary they should therefore be resisted as out-of-centre developments. Even if they are located within centre boundaries there are issues of appropriateness of scale as sometimes the PFS shops can be quite extensive. Occasionally there could be issues of PFS shops providing convenience facilities in areas that would otherwise be food deserts such as on Rushgreen Road to the East of Lymm.

**Recommendations**

Retail and leisure are dynamic sectors of the economy. This report has been commissioned by Warrington BC to inform the LDF process to try and ensure policies support whilst directing this dynamic sector. Policies in the LDF need not replicate national policy and other than where local interpretation is needed should only refer to the specific policy guidance and tests.

Quantitative assessments in support of planning applications should ideally be based on the LDF capacity assessment, updated if necessary. This report adopted by the Council effectively forms the development plan capacity assessment and will not need updating by the Council for five years, however, applications for large retail schemes not in accordance with the LDF may have to update elements of it in the interim.

**Warrington Town Centre**

Warrington town centre is a major asset to the Borough that performs well but needs to be protected, promoted and enhanced through LDF policies, the determination of planning applications and implementation of the Town Centre Strategy.

It is recommended that the PSA is drawn very tightly around Golden Square as shown in plan 5 and this is the boundary from which the 300m defined distance for edge-of-centre retail uses is measured.

There will also be pressure for non retail uses in the PSA (plan 5) that should ideally be directed to the secondary frontages where there is likely to be less retail investment. This too is a good location for evening economy uses provided there is no conflict with any residential areas / daytime uses.

The current Core Retail Area in the UDP should be redesignated as the town centre boundary (Plan 5 shows necessary realignment to include the Golden Square extension and new bus station) in the LDF from which the 300m defined distance for
other town centre uses is measured. (UDP policy TCD6 needs to be revised in the LDF with regard to measuring sequential sites from the new town centre boundary rather than the public transport interchange.) Within this boundary a recommended primary shopping area (PSA) is shown that comprises Golden Square mall, Eastern Sankey Street and northern Bridge Street. The rest of the revised town centre (current Core Retail Area) should be regarded as secondary retail frontage.

10.17 In terms of priorities, the town centre's comparison goods offer needs to be improved through the attraction of national multiples which are currently unrepresented. The priority is to increase the number of standard shop units (300 sqm) in existing and new primary frontages and provide some larger units (up to 3,000 sqm) to accommodate, in particular, fashion and lifestyle outlets. The centre also still needs to increase the number of anchor stores, that is, department and / or variety stores.

10.18 The Golden Square mall extension currently under construction should help achieve both objectives. One of the key roles for the Council and the Town Centre Management team will be working with the Golden Square developers to attract new operators to the town rather than simply relocating current retailers.

10.19 The Council in partnership with the Town Centre Management team and perhaps developers Lend Lease need to consider a 'vacancy filling strategy' as the Golden Square mall extension will relocate some current operators within the town centre. The designation of the PSA resulting in some current primary frontages being redesignated as secondary frontages will assist this process by allowing a greater range of uses in more frontages in the centre. (It is understood that Lend Lease have taken over the lease of the Boots shop on Bridge street that will be vacated when Boots relocated to the Golden Square mall extension.)

10.20 In terms of town centre development in the longer term up to 2016, the development of Times Square and The Wireworks, both key in- and edge-of-centre sites, for mixed use schemes including comparison goods retailing should take precedence over other retail proposals in the town outside the PSA and reflected in LDF policies and designations. Times Square is within the current retail core which is proposed as the new town centre boundary and The Wireworks forms a potential town centre extension area.

10.21 Diversifying the town centre is the next priority. In terms of commercial leisure and the evening economy, this is most likely to be achieved through the delivery of Cinema led development schemes at Times Square and / or The Wireworks.
To achieve further diversity within the centre itself principal shopping frontages on Bridge Street, Buttermarket Street and Horsemarket Street should be redesignated as secondary frontages where A2, A3 and A4 uses will also be permitted in up to 35% (one third) of frontages with no more than two non-retail uses together.

The Council need to ensure night time uses do not become dead frontages during the day through suitable locations and conditioning of frontages, shuttering, etc. The café bar that operates both in the day and evening is the best option for promoting the evening economy in the town with minimal impact on the daytime business.

There are specific management issues in relation to ensuring the evening economy does not impact on the daytime economy such as early morning street cleaning strategy that need to be incorporated into any update of the Town Centre Strategy.

With regard to diversifying the centre through office development, further work is needed to establish the capacity of the Town Centre to accommodate office development and inform the LDF with regard to applying the sequential approach to office and B1c proposals.

**Convenience Goods Shopping**

It is recommended that no allocations are made in the LDF for new convenience floorspace in the Borough other than the designation of a new neighbourhood centre at Chapelford Urban Village. Any other claims on the limited notional surplus in expenditure to support new foodstores should be directed towards the town centre or, other areas of demonstrable qualitative need in the town. The position should be reviewed in 2011.

All development within the Borough should be of an appropriate scale in relation to the centre and catchment it seeks to serve. Guidelines for gross maximum floorspace thresholds for inclusion in the LDF are 5,000 sq m for district centres, 1,000 sq m for neighbourhood centres and 280 sq m for local centres. Any development in the smaller centres will of course have to respect residential amenity.

Neighbourhood and local centres in particular need to be protected from edge / out-of-centre convenience goods proposals including shops in petrol filling stations.

As part of the LDF, the Council should consider extending the defined shopping hierarchy to include a new neighbourhood centre at Chapelford Urban Village and local centres at Cinnamon Brow, Bewsey and Westbrook. Local centres which do not
contain convenience stores or pharmacies and are not in ‘food deserts’ and / or areas of social exclusion are recommended for removal from the schedule.

**Comparison Goods Shopping**

10.30 It is recommended that a cautious approach to Local Plan site allocation for comparison goods floorspace is adopted up to 2011. The Golden Square mall extension will meet all the identified quantitative need for the next five years and beyond.

10.31 The town centre should be the focus of new comparison floorspace after 2011 where most need could be met in the two development proposals at Times Square and The Wireworks. Guidelines for gross maximum floorspace thresholds for inclusion in the LDF are 500 sq m for district centres and 100 sq m for neighbourhood and local centres.

10.32 There is no qualitative need for new retail warehousing as the local offer is already very good and there are several vacant units that could be used to accommodate any further demand.

10.33 Existing retail warehouses with floorspace that are not restricted to bulky goods sales are likely to be occupied in the future by non-bulky operators, possibly foodstores, and those that are restricted are likely to come under pressure to relax restrictive conditions. The Council should attempt to retain as many retail warehouses in bulky goods use (DIY, furniture and large electrical goods) and resist attempts to relax such restrictive conditions.

10.34 Specific issues that arise from the review of trends in the retail and leisure sectors include the growth of non-food retailing in supermarkets. Any applications for new superstores or extensions to existing stores are likely to retail a considerable amount of non-bulky comparison goods in direct competition with the town centre.

10.35 The need for additional comparison retail floorspace should be reviewed in 2011 as part of a review of this report.