Greater Nottingham

Broxtowe Borough Council
Erewash Borough Council
Gedling Borough Council
Nottingham City Council
Rushcliffe Borough Council

Retail Background Paper
June 2012

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1 Introduction

1.1 The evidence base for the retail policies in the Aligned Core Strategies (ACS) is based upon retail studies undertaken between 2006 and 2010. These were principally the Greater Nottingham Retail Study (2008), the Erewash Borough Council Retail Needs Study 2007 (and update in 2010), and the Ashfield Retail Study (2006). A Nottingham City Local Centres Study was also undertaken in 2009.

1.2 The Greater Nottingham Retail Study was undertaken by DTZ on behalf of Nottingham City Council, Nottinghamshire County Council, Broxtowe Borough Council, Gedling Borough Council and Rushcliffe Borough Council; it reported in 2008, and underpinned much of the policy within the publication draft of the Aligned Core Strategies. Given the delay in the Aligned Core Strategy process largely caused by national policy changes, the opportunity was taken to consider whether there was a need to update the Greater Nottingham Retail Study (GNRS).

1.3 The authorities have considered two fundamental factors and issues:

- Whether the GNRS remains relevant and current given that it was published in 2008;
- Whether the GNRS meets the requirements of changes to national planning policy guidance. National Policy now comprises the NPPF, albeit that the practice guide on Need, Impact and the Sequential Approach supporting PPS4 remains extant. This background paper was prepared with a view as to consistency with PPS4 and when not contradicted by more recent policy in the NPPF, these references are retained as they remain good practice (as reflected in the practice guide) albeit not requirements.

1.4 An initial assessment of the GNRS in the light of these matters suggested that a limited update – as opposed to a full repeat of the Study commissioned from consultants - was the most appropriate, proportionate, and cost-effective response.

1.5 As a result, representatives of the Greater Nottingham Aligned Core Strategy group worked to produce this paper as part of the evidence base, to supplement and update the GNRS. The group considers this to be sufficient and appropriate ahead of the future examination of the evidence base to demonstrate that the policies, where they relate to retail development in the Core Strategy, are ‘sound’.

1.6 In common with all retail studies of this nature, a key assumption behind future retail needs is increasing expenditure on comparison and convenience goods among the population of the catchment area. The current economic circumstances mean that expenditure growth will not have grown to the extent envisaged in the study. However, as the economy recovers, expenditure growth is predicted to rise. The findings of the study therefore remain valid, albeit it may take longer for expenditure to reach the levels predicted by the study. Of particular relevance to the Core Strategies, the studies findings with regard to the retail hierarchy of the area remain valid.

1.7 Therefore this paper includes in Section 2 an assessment of the GNRS against the requirements and guidance in updated national policy to ensure the local evidence remains appropriate to inform the Core Strategy.

1.8 As a result of that assessment subsequent sections deal with the matters that were identified to need attention, i.e.:

Section 3 An update of district centre ‘health checks’ to provide up-to-date evidence.

Section 4 An update of part of the GNRS in terms of the current state of the retail market, and the relationship with more recent studies in Erewash and Ashfield.

Section 5 A consideration of appropriate floorspace thresholds and how they should be produced for subsequent development plan documents.

2 Compatibility of Evidence to National Government Policy

2.1 Following the publication of the GNRS, updated and revised national planning guidance related to retail issues was published in 2009. Planning Policy Statement (PPS) 4 on 'Planning for Economic Development' replaced PPS6 which focused on retail and town centre issues, as well as replacing older guidance on employment and industrial issues in PPG4. It also encompassed and updates parts of earlier guidance on rural planning, diversification, and development issues. The Erewash Study update in 2010 was produced, in part, to ensure PPS4 compatibility.

2.2 The Government has in March 2012 published the National Planning Policy Framework, which consolidates existing PPS, PPGs and some circulars into one document. All PPSs and PPGs were subsequently revoked, however to date a large quantity of the supporting guidance has not been revoked. In particular the Practice Guidance on Need, Impact and the Sequential approach entitled Planning for Town Centres published December 2009 is still relevant. Therefore the NPPF, in particular paragraph 23, plus this technical guidance represent the key national guidance to inform retail studies which make up the evidence base to influence the content of Core Strategies. For town centre retail matters the NPPF broadly continues the approach set out in PPS4, and therefore this assessment of the guidance in PPS4 in relation to the evidence and analysis required to support policy-making and decision- making is still considered appropriate. The assessment demonstrates a strong degree of alignment and consistency with the evidence and analysis provided by the GNRS. Appendix 1 contains a table which provides a more detailed assessment of the comparison between PPS4 and the GNRS. Although there are differences between PPS6 and PPS4, these tend not to be focused on the evidence base required or suggested. Appendix 2 contains a further table which assesses the consistency in approach outlined in the National Planning Policy Framework with the GNRS.

2.3 At the local level, previously, under the guidelines set out in PPS4 Local Planning Authorities were obliged to assess the detailed need for land and floorspace over the plan period. This included:

- Taking account of the quantitative and qualitative need for additional floorspace for different types of retail uses
- Giving additional weight to meeting qualitative deficiencies in deprived areas
- Looking at existing and forecast population levels
- Forecasting expenditure levels and improvements in retail sales density
- Assessing if shopping provision allows genuine choice in light of town centre viability and the sequential approach, and

- Taking into account overtrading and the need to increase competition and retail mix.

2.4 Given that all of these matters remain relevant in line with the practice guidance on Need, Impact and the Sequential Approach it remains appropriate to consider them.

2.5 Notwithstanding the overall consistency between the GNRS and national policy, the comparison did identify some issues which required detailed consideration. These, and the judgements about what actions (if any) were required in response, are as follows:

2.6 <u>Do the market assumptions and growth projections made in 2008 remain valid in light of recession and downturn?</u>
The evidence base published in January 2008 of forecasts of likely expenditure growth and capacity in Greater Nottingham did not foresee the recession and economic downturn. However, the view reached, and supported through dialogue with some local agents, is that while the anticipated growth in expenditure and demand has been delayed by the recession, the overall picture of future growth and capacity remains valid for the purposes of informing the Core Strategy. Therefore, while a new Study with new forecasts may be required in due course, the commissioning of additional or updated expenditure growth and capacity forecasts was not considered necessary at this stage.

2.4 <u>Do the potential retail sites identified need to be revisited and the list updated?</u>
While the list should be updated to remove any sites which have been subsequently developed, all of the remaining sites are still considered appropriate for potential retail use.

2.5 <u>Is more analysis required of the role/capabilities of each centre in the retail hierarchy, including in terms of the acceptable size of stores?</u>
Not via any refresh or update to the GNRS itself, but this further analysis should be provided via local ‘health check’ surveys and monitoring of centres. This approach would provide much of the local context and market intelligence required to judge the role and function of specific centres in the hierarchy and is shown in Appendix 3.

2.6 <u>Whether qualitative deficiencies in deprived areas require additional analysis or work within any refresh of the GNRS?</u>
This can be addressed in detail at the local level, and is arguably more appropriate at that level to inform other Development Plan Documents (DPDs) rather than as part of the Core Strategy process. Therefore, the GNRS need not be updated to incorporate this information.

2.7 Overtrading is explicitly referred in PPS4 and in the practice guide on Need Impact and the Sequential Approach, but can be hard to establish with data. Is this something it is necessary to focus on in any revised and updated GNRS?
In the absence of consistent data it is hard to see how a new study might address this in the short-term, and is considered to be more of a local issue making use of any available local market information. The NPPF does not deal explicitly with overtrading.

2.8 Should the 2500sq.m. threshold for requiring an impact assessment everywhere be adopted, and/or should allowance be made for lower or other thresholds in specific places?
As PPS4 allows for this to be looked at and this threshold is carried forward in guidance in the NPPF, this will be done where considered appropriate, but outside of the Core Strategy and the GNRS refresh. Further work looking at how lower, locally determined thresholds might be determined will be undertaken to inform individual DPDs in due course. Section 3 refers to this.

2.9 Should the specific impacts to be assessed be defined?
As this is by definition often in the context of quite local issues and concerns, the conclusion is that this is best taken forward outside of the GNRS refresh and Core Strategy.

2.10 Therefore, while PPS4 had raised some new issues and data requirements, overall the GNRS still represents a sound and appropriate evidence base for the Aligned Core Strategy, and aligns well with the requirements of PPS4 and the NPPF. The nature of some of the new issues means they are best dealt with at the individual local authority or retail centre level rather than through a full refresh or update to the GNRS.

3 Updating evidence - Retail centres (Health Checks)

3.1 The GNRS assessed the vitality and viability of the Nottingham City Centre and, in more limited detail, of 14 smaller retail centres in order to assess the relative health of their retail functions. These heath checks applied indicators taken from PPS6 to assess vitality and viability insofar as data was available.

3.2 PPS 4 which replaced PPS 6 had its own set of retail centre health check indicators. While there are close similarities between the two sets of indicators, the changes made were sufficient to warrant a refresh of GNRS health checks using the new set of indicators. Moreover, given the time that has elapsed since the health checks were originally conducted, there is merit in looking to identify any changes in physical or retail market conditions that have occurred since the GNRS was published changes that have since occurred. The healthchecks were undertaken before the NPPF was published but the indicators used are considered to be broadly in accordance with the retail matters contained within the NPPF.

3.3 14 smaller centres in Nottinghamshire (and 4 in Erewash) have had health check information updated. These are:

Broxtowe
Beeston
Eastwood
Kimberley
Stapleford

Nottingham
Bulwell
Clifton
Hyson Green
Sherwood

Erewash
Borrowash
Ilkeston
Long Eaton
Sandiacre

Rushcliffe
Bingham
West Bridgford

Gedling
Arnold
Carlton Square
Mapperley Plains
Netherfield

3.4 The GNRS health checks have therefore been updated using the headings below. These are categories either used by the GNRS or taking account of PPS4. The checks have taken best account of the health check methodologies already employed by Nottingham City, Gedling and Rushcliffe in recently assessing their own retail centres using the following headings:

- Diversity of uses
- Retailer representation and intentions
- Retail rankings
- Proportion of vacancy at street level
- Retail rents
- Commercial Yields
- Land values
- Pedestrian Flows
- Accessibility
- Perceptions of safety and crime
- Environmental quality
- Potential capacity for growth
- Consumers' views (existing)
- Consumers' views (future wishes)

3.5 While not part of the GNRS study area, it should be noted that Erewash Borough Council and Ashfield District Council have undertaken work to update their own health check information for their retail centres.

3.6 Summary of Health Check Conclusions

Broxtowe

From the health checks of the four district centres in Broxtowe it was considered that the two centres performing well were Beeston and Kimberley, this was based on statistics such as the proportion of retail units in the centre, the number of vacant units and the general vitality of the centres as detailed in the study. (Although it was recognised that Beeston had a unusually high level of vacant units this can be attributed to the demolitions associated with the NET development). Using the same logic Eastwood and Stapleford were considered to be underperforming and in need of some consolidation. For this reason these two centres are specifically mentioned in Policy 6 of the Core Strategy as centres which are in need of enhancement and investment to be addressed in later DPDs or guidance documents on a local level.

Erewash

Healthchecks were carried out across Erewash at the two town centres of Ilkeston and Long Eaton and the two local centres of Sandiacre and Borrowash in 2011. Evidence suggests that Ilkeston is performing less well out of the four centres in terms of retail health in comparison to national trends and in relation to its size and expected trading capacity. At the time of the assessment, the town centre had a considerably higher than average vacancy rate compared with the national average figure recorded by the British Retail Consortium in 2011. Having said this, there is still a healthy representation from national retailers at the heart of the centre. The main challenge for Ilkeston in the coming years will be the expanding role of Derby and Nottingham City centres and the future of the town centre will need to be managed carefully with positive planning and appropriate intervention. On the contrary, Long Eaton is trading reasonably healthily with a vacancy rate in line with the national average (at the time of the assessment). Notably, the supermarkets on the edge of centre have ensured that the convenience shopping needs of Long Eaton's retail catchment have been comprehensively met where there was previously a deficiency, and the town centre has managed any negative effects from these developments successfully.

The two local centres, Sandiacre and Borrowash, are trading reasonably healthily in relation to their size and expected trading capacity. Both centres, at the date of the assessment, had vacancy rates well below the national average figure and both continue to successfully serve the needs of their local community and surrounding settlements, providing a crucial service and retail function.

Gedling

The health checks carried out as part of the refresh of the Greater Nottingham Retail Study show that Arnold and Mapperley Plains are strong town centres and perform complimentary functions. Arnold is the main centre in the Borough while Mapperley Plains offers a 'top-up' and leisure function. Carlton Square has the highest vacancy rate and is dominated by Tesco. Netherfield has a good range of uses but may be affected by the Victoria Retail Park and Morrison's to the south.

Nottingham City

The health check assessment of Bulwell indicated strong performance across a range of criteria including vacancy levels, pedestrian flows, retailer representation, accessibility and on-going enhancement of the centre's retail, leisure and community facilities. The elevation of Bulwell to the status of Town Centre within Policy 6 of the Core Strategy is consistent with these findings and reflects the centre's unique nature and function within the retail hierarchy, and its potential for on-going enhancement. The assessments conducted for the three District Centres of Sherwood, Hyson Green and Clifton highlighted the very different characters of each of these centres, which were all recognised as having particular strengths and performing important roles, but were also all considered to have the scope and potential to improve.

Rushcliffe

Health Checks were undertaken for the two district centres of West Bridgford and Bingham within Rushcliffe. It is considered that West Bridgford is performing well, based on statistics such as the proportion of retail units in the centre, the number of vacant units and the general vitality of the centre as detailed in the survey. Within West Bridgford, there are fewer vacant units than when it was last surveyed in 2007 which suggests strong and increasing demand for retail premises.

With regard to Bingham, since the previous survey, Tesco have obtained conditional planning permission for a store which would add significantly to the convenience sector and this, along with other factors such as the town centre size and catchment area and the number and type of existing retail units within the centre, has led to the reclassification of Bingham as a District Centre in order to better reflect its offering. Whilst it is acknowledged that there is currently a higher level of vacant units in the town centre than when last surveyed this can in part be attributed to the current economic climate.

Vacancies in Bingham are not, however, so high as to clause particular concern at this stage. Nonetheless, the health of both centres will be the subject of on-going monitoring and review and policy interventions, such as informal planning guidance, will be implemented where necessary to improve economic performance and maintain and enhance the vitality and viability of the centres.

4 Updating evidence – Retail economy & adjoining retail studies

4.1 Part of the rationale behind the judgement that a full repeat and update of the GNRS is not necessary at this stage was the view that while the recession and economic downturn have delayed retail capacity growth, the longer-term assumptions about retail growth and demand in Greater Nottingham remain valid.

4.2 The GNRS report also gave capacity-based recommendations as "*an indication of the likely order of magnitude of future shop floorspace capacity … rather than as growth targets…*". One recommendation included in the study was that the forecasts be updated again after the Broadmarsh redevelopment had opened. That permission has subsequently expired, with different proposals now planned in the City Centre both at Broadmarsh and Victoria Centre (see below).

4.3 It is worthwhile repeating here the pertinent conclusions on comparison goods from the Study.

> *"We also conclude that there will probably eventually be a need to identify and allocate a site or sites in Nottingham City Centre for further major comparison goods retail development, to be developed towards the end of the forecasting period (ie around 2021, unless further validation demonstrates a need earlier in the study period). However, this should be checked and validated after completion of the Broadmarsh Centre extension. We therefore see no need to develop such a site or sites in the immediate future, unless there is no realistic prospect of the Broadmarsh redevelopment occurring, as this could compromise and put at risk that much needed new scheme."*

4.4 As part of the assessment of the robustness of forecasts and assumptions included in the GNRS about the future levels of retail growth in Greater Nottingham, the local authorities have considered analysis and market updates produced by local agents. Although these reports are often a combination of market analysis with wider narrative and opinion, they represent a useful source of information about some of the general trends of retail market and development activity.

4.5 Reports produced by local agents such as Fisher Hargreaves Proctor (FHP) suggest that, while the retail sector was affected by the wider difficult economic conditions, the signs in early 2012 were that optimism was returning, and market interest and investment beginning to increase. For example, FHPs 'Nottingham Retail Study Autumn/Winter 2011/12[1] describes that even though we've been through one of the toughest periods in history for the consumer economy, Nottingham's retail heart is still beating strongly with vacancy

[1] www.investinnottingham.co.uk/websitefiles/Nottm_Retail_Study_2010.pdf

rates stable and a particularly strong discount and leisure market.. They point to major committed transport infrastructure projects including the transformation of the railway station, two new NET lines and the A453 widening which FHB consider will deliver ‘big numbers’ for retailers. They also refer to Nottingham strong position in the CACI rankings with Nottingham being the fifth biggest retail destination in the UK outside London in terms of spend, its appeal as home to two universities of national standing (international in the case of the University of Nottingham), the HQ of two global corporates in Alliance Boots and Experian and surrounded by affluent catchments. Their outlook for Nottingham remains very positive for these reasons.

4.6 DTZ[2] have looked at the national property outlook including for retail and conclude that despite the challenging economic environment, the majority of UK markets are still rated as either HOT or WARM owing to solid income returns in a low interest rate environment. These include the Leeds and London West End office markets, the Manchester and London West End retail markets and the Manchester and Birmingham industrial markets. They suggest that whilst capital growth is expected to be subdued in coming years, most retail and office markets are trading at yields of around 5-6%, which offers a substantial premium over five-year bond yields at 1.4% at the end of Q3. The majority of the UK’s markets are priced around fair value, with investment opportunities available across the office, retail and industrial sectors.

4.7 The same level of analysis and information does not exist for the smaller town centres in the wider conurbation, although recent market activity across Greater Nottingham, as described below, also supports the view that development activity and investment is already increasing.

4.8 Further signals of market confidence and that the retail development sector sees Nottingham as a location with capacity for further retail growth have come in the form of two major retail led planning applications in the city centre. Proposals for the redevelopment and expansion of the Broadmarsh Shopping Centre by Westfield were agreed in outline in May 2011, and a full application for the extension of the Victoria Centre was submitted by Capital Shopping Centres in early June 2011. These proposals account for 47,000 sq m and 29,000 sq m net of new comparison floorspace at the two centres. However, Capital Shopping Centres, the owners of the Victoria Centre, have recently acquired Westfield’s interests in the Broadmarsh Centre. As a result, discussions are ongoing between the City Council and Capital Shopping Centres with the aim of ensuring that the nature of the development at the two centres is as complementary as possible. This will ensure the benefits to the retail offer of the City Centre as a whole are maximised.

[2] DTZ Fair Value Index Q3, 2011

4.9 The Greater Nottingham Retail Study treated the Broadmarsh redevelopment as a commitment, but the study pre-dated the later proposals mentioned above. It identified capacity for further 30,200 sq m of net comparison floorspace up to 2021 (i.e. over and above the then Broadmarsh centre commitment of 64,000 sq m).

4.10 The floorspace which would be provided by these two current schemes, if both receive planning permission and are delivered in their entirety, is slightly less than the available comparison retail capacity to 2021 identified in the GNRS. The GNRS identified further potential market capacity after 2021, to 2026.

4.11 In addition to the strategic retail development proposals referred above, there have been a number of other schemes approved or developed across the conurbation since the GNRS was published, principally for convenience floorspace. Tables 1 & 2 set out those over 1,000 sq m (gross) and provides an indication that the retail market has remained active over the recent period since the GNRS was published.

Table 1: Retail Proposals over 1,000 sq m (gross) opened since February 2007

Site	**Size/Floorspace**	**Operator and/or Use**	**Date of completion / opening**
Bulwell, Nottingham City.	10,000sqm *Not in GNRS*	Tesco Foodstore	Open
Beeston, Broxtowe District.	9,200sqm *GNRS: 3,850*	Tesco Superstore and PFS	Opened Winter 2010/11
Giltbrook Retail Park	14,000 sqm *All in GNRS*	Various (comp.)	Opened Oct 2008
IKEA, Giltbrook, Broxtowe District.	2,500 sqm *All in GNRS*	IKEA	Opened early 2008
Former Focus Do-It-All, Perry Road	4,007 (gross) (change of type only)	Sainsburys	Opened 2009
Hyson Green Town Centre.	2,385sqm extension *Not in GNRS*	Asda	Opened 2009
Site B, Victoria Park Way Netherfield	1,593 sq m retail *GNRS 480*	Unknown (part of mixed scheme)	Built 2008
Great Northern Way, Netherfield	1403 sq m *GNRS: 850*	Lidl	Completed February 2007
Sainsburys, Sir John Robinson Way	1,433 Extension *GNRS: 1,000*	Sainsburys	Completed 2009
Total additional floorspace: 46,521 sq m **GNRS assumed that proposals would be implemented as shown above: floorspace implemented additional to GNRS: 19,834 sq m**			

Notes: There are a few instances of stores over 1,000 sqm closing, not listed here.

Table 2: Retail Proposals over 1,000 sq m (gross) permitted since Feb 2007

Site	Size/Floorspace	Operator and/or Use	Date of permission
Society Linen, Daleside Road, Nottingham City	3,500sqm	Foodstore	Permitted October 2010
Sainsbury's, Castle Bridge Road, Nottingham City.	3,500sqm	Existing foodstore extension	Permitted December 2010
Greater Island Site, Nottingham	11,000sqm	Mixed retail	Permitted April 2008
Tesco Store, Carlton Hill	6,000 sq m Appr. Increase	Tesco	Permitted October 2009
White Hart, Mansfield Road, Arnold	1,100 sqm	Mixed retail	Permitted June 2011
Total additional floorspace: 18,000 sq m **All floorspace additional to GNRS assumptions**			

Notes: Tesco store, Bingham. Size 2280 m2. RBC Planning Committee resolved to approve proposal subject to an agreement being reached to implement a scheme to provide a footbridge over the rail line at Bingham.

4.12 Therefore, while it is clear that the recession and market downturn has affected the trajectory and speed of retail capacity growth in Greater Nottingham, the overall picture emerging both from analysis of planning activity and information provided by local agents, and by retailers, is that the growth forecasts and overall picture provided by the GNRS remain valid. While there are clearly differences of opinion in terms of the speed of the wider economic recovery, there seems to be a good level of consensus that the recovery in terms of retail is already beginning, and that there is capacity for further growth of the scale envisaged in the GNRS, both to 2021 and 2026.

4.13 Greater Nottingham, Erewash and Ashfield Retail Studies
While the Greater Nottingham Retail Study (2008), the Erewash Borough Council Retail Needs Study (2007 and update in 2010) and the Ashfield Retail Study (2006) were each prepared separately, later studies have attempted to ensure consistency with earlier work. Erewash have updated their health checks as reported in this paper.

4.14 The GNRS took into account the findings of the earlier Erewash and Ashfield studies in order to help review the network of centres across Greater Nottingham and to identify an appropriate hierarchy of centres. More recently, the 2010 update of the Erewash study has aimed to maintain consistency of approach with the GNRS. Specifically, the Erewash update tested the GNRS's recommended retail hierarchy in relation to the Borough and reached the conclusion that it is valid, reflecting the role and function of existing Erewash centres.

4.15 A review of Ashfield's district-wide retail study was undertaken by WYG and was published in December 2011. The review provided a detailed and comprehensive review of retail requirements within Ashfield District to 2030. It reflected the changes to planning legislation up to the end of 2011 and retail trends. The review also identified the most appropriate retail boundaries and assessed the 'health' of each area. This approach was broadly consistent with the Greater Nottingham retail study.

4.16 This consistency of approach enables these various studies to be used jointly to inform and support a common strategic approach to retail policy for Greater Nottingham through the Aligned Core Strategies.

5 Additional floorspace thresholds

5.1 PPS4 (Policy EC14.4) identifies that development proposals above 2,500 sq metres gross floorspace are required to submit an impact assessment. PPS4 (Policy EC3.1d) also requires local authorities to

> *"…consider setting floorspace thresholds for the scale of edge of centre and out of centre development which should be subject to an impact assessment….and specify the geographic areas these thresholds will apply".*

5.2 If local thresholds are not established the national figure of 2,500 sq metres will apply once the development plan has been updated to reflect PPS4. This default level of floorspace remains in the NPPF.

5.3 It is not proposed to set any impact assessment threshold figures in the Aligned Core Strategies. Such matters are best dealt with through other, non-strategic documents. However, given the nature of the retail market in Greater Nottingham it will be important that any figure used by the authorities is consistent, yet reflects the circumstances of those authorities across the conurbation.

5.4 For example the threshold currently adopted in Nottingham City for such a Retail Assessment is 2,500 sq m (gross) floorspace, but with the proviso that an assessment may be necessary for proposals below this threshold if they are large compared with a nearby centre, or likely to have a significant effect on a vulnerable centre, or put at risk more sustainable retail development. A trigger for pre-application discussions is set at 1,000 sq m (gross) retail floorspace.

5.5 Consequently any floorspace figure that would trigger the requirement for an impact assessment needs to be well-founded and flexible in its application.

5.6 A suggested approach is to first estimate a percentage of the available expenditure that would threaten vitality and viability if it was drawn away from any particular town centre. This expenditure figure would be then converted into a floorspace figure using average sales densities. A suitable floorspace figure (where it was below 2,500 sq m) would act as a trigger threshold within a certain specified distance of the town centres, specified on a map. A different percentage could be applied to different types of centres and comparison or convenience goods.

5.7 The ACS authorities will work together to establish thresholds that are consistently based and reflect the circumstances in their local areas as well as those in adjoining authority areas.

APPENDIX 1 - Greater Nottingham Retail Study (Jan 2008) compared with National Planning Policy Statement (PPS4)

For town centre retail matters the NPPF broadly continues the approach set out in PPS4, and therefore this assessment of the guidance in PPS4 in relation to the evidence and analysis required to support policy-making and decision-making is still considered appropriate.

PPS4 Requirements:	Does the GNRS meet this requirement, or inform policies which do? (page and para refs). If no, what other sources of evidence/data?
Policy EC1 – 'Using evidence to plan positively' – this is the main section re: explicit guidance/policy on evidence of most relevance to the GNRS. (However, other sections also of some relevance re: other evidence or issues to be addressed by policy (DPDs, etc) – these are described below.) Local evidence base should (EC1.3):	
b) assess detailed need for land or floorspace for economic development, including all main town centre uses over the plan period;	Retail 'need' is addressed by the GNRS for the Greater Nottingham area. (Chapter 5).
c) identify any deficiencies in the provision of local convenience shopping and other 'day to day' needs;	Chapters 7 and 8 re: vitality and viability of City Centre and District Centres – this arguably adequately covers this for those centres. However, not for the very local level centres – but assume this is likely to be picked up by Health Checks.
d) Assess existing and future supply of land available for economic development, ensuring existing site allocations are reassessed against PPS4, particularly if for single or restricted uses.	Chapter 10 covers potential sites.
e) Assess capacity of existing centres to accommodate new town centre development taking account of role of centres/hierarchy (and change management).	Chapters 7 and 8 re: vitality and viability of City Centre and District Centres cover this.

PPS4 Requirements:	**Does the GNRS meet this requirement, or inform policies which do? (page and para refs). If no, what other sources of evidence/data?**
<u>Specifically for retail planning at the local level (EC1.4):</u>	
a) Take account of both quantitative and qualitative need for additional floorspace for different types of retail/leisure;	Chapter 5 covers Quantitative Need in general, Chapter 7 Vitality and Viability in City Centre which covers qualitative issues in City, and Chapter 8 qualitative issues for District Centres.
b) Additional weight to addressing qualitative deficiencies in deprived areas.	Qualitative deficiencies are identified in the GNRS (e.g. Chapters 7 and 8), but no explicit weight or priority to deprived areas.
c) In assessing quantitative need, have regard to relevant market information and economic data, including “realistic assessment” of existing and forecast population levels, forecast expenditure for specific classes of goods within comparison and convenience (and main leisure sectors), and forecast improvements in retail sales density.	Chapter 5 provides this. No perceived need to re-do this analysis, as progress against earlier projections likely to have stalled, but the overall projections remain valid. (also see EC1.3b above).
d) For qualitative assessments of need, consider whether provision and distribution allows genuine choice to meet needs of whole community, in light of “promote the vitality and viability of town centres and the application of the sequential approach”. Also assess degree of “overtrading” and need to increase competition/mix.	Chapter 7 covers this for the City, but against PPS6 list of indicators (page 55 of the GNRS report). However, very strong degree of overlap between PPS6 and PPS4 indicators (11 of 13 the same, and the remaining 2 are picked up elsewhere re: population and economic change). Chapter 8 covers this for District and other centres.
<u>**Policy EC3** Planning for Centres.</u> <u>At the local level:</u>	
EC3.1 b) define a network and hierarchy of centres – should be	Network/hierarchy is identified in the GNRS.

PPS4 Requirements:	**Does the GNRS meet this requirement, or inform policies which do? (page and para refs). If no, what other sources of evidence/data?**
resilient to anticipated future economic changes. i) make choices about which centres will accommodate any identified need for growth in town centre uses; expansion where necessary; address identified deficiencies in the network by promotion of centres to higher levels in the hierarchy, or designating new centres;	Table 5.4 (pg 38) and 5.5 (page 41) of Study do provide basis for choices re: further growth – those Tables and associated text provide assessment and analysis of capacity forecasts for all centres. Also, Chapter 8 re: vitality and viability of District Centres directly relates.

OTHER PPS4 Policies of relevance to evidence base, but of lesser importance for the GNRS? (i.e. of relevance to LDF via Core Strategy or DPDs, etc, but there **may be other sources of the information**/evidence required).

Policy EC3 Planning for Centres. At the local level:	
EC3.1 c) define the extent of the centre and the primary shopping area (in Adopted Proposals Map), having considered distinguishing between realistic primary and secondary frontages; policies which make clear which uses will be permitted in such locations.	Not for the GNRS to do, to be defined elsewhere on a more local basis (DPDs, etc).
EC3.1 d) consider setting floorspace thresholds for the scale of edge-of, or out-of centre development which should be subject to an impact assessment…	This can be addressed outside of the GNRS, and at the local level using health-check data and centre surveys to inform any judgements about lower thresholds for impact assessments.
EC3.1 e) define any locally important impacts on centres which should be tested.	Not explicitly, but is implicit in sections of the report in context of the hierarchy.

Policy EC 4 Planning for Consumer Choice/Promoting competitive centres. Local Auths should be proactive by:	
b. Planning for a strong retail mix so the range/quality of comparison and convenience retail offer "meets the requirements of the local catchment area".	Table 5.4 (pg 38) and 5.5 (page 41) of Study do provide basis for choices re: further growth – those Tables and associated text provide assessment and analysis of capacity forecasts for all centres.
d. Identifying sites in the centre, or failing that, on the edge of the centre, capable of accommodating larger format developments, where such a need is identified.	Not for the GNRS to do in full, but site identification in Chapter 10 is a helpful and relevant input.
Policy EC5 – Site selection issues to all main town centre uses, (so including retail). Local Auths should:	
5.1 - Identify an appropriate range of sites to accommodate identified need. Apparent lack of sites is not a good reason not to plan to meet need.	GNRS does identify potential sites (Chapter 10). Detailed site allocations will be done at the local level via DPDs, etc.
5.1 a) base approach on identified need;	'Need' is a GNRS issue, and is identified in the Study for the Greater Nottingham area. Assessments of need and capacity inform Study conclusions re: growth, which feeds into sites issues, and will inform local land/sites policies.
5.1 b) identify appropriate scale of development, ensuring scale of sites identified and travel they will generate, are in keeping with the role and function of the centre re: hierarchy;	Only limited consideration of the scale of retail development at each site identified in Chapter 10. However, this is arguably not for the GNRS to do and more a matter for local DPDs or further evidence gathering.
5.1 c) apply sequential approach to site selection (Pol EC5.2);	Not for the GNRS to do, but site identification in Chapter 10 is a helpful input, with passing references to the location/sequential test issues of the sites identified.
5.1 d) assess impact of sites on existing centres (Pol EC5.4);	Chapter 5 re: Qualitative need (e.g. Page 43) scenarios do consider likely impact of growth on other centres, but not at a site level (is at level of whether growth of centres in general

	would have impact on others). Also, Chapter 8 re: District Centres reflects on impacts had already by development elsewhere.
5.1 e) consider degree to which other considerations (e.g. physical regeneration benefits, employment, inclusion) may be material to the choice of appropriate locations for development.	Not for the GNRS, but more an issue for local, specific consideration re: land allocations (DPDs).
EC 5.2 Sequential Approach: Identify suitable, available and viable sites in the following order: a) In existing centres, sites or buildings for conversion; b) Edge of centre, with preference to well connected to centre locations; c) Out of centre, with preference to sites which are or will be well served by choice of transport, are closest to centre, and have higher likelihood of links with the centre.	Not for the GNRS to do in full, but site identification in Chapter 10 is a helpful input, with passing references to the location/sequential test issues of the sites identified.
EC5.5 Site Selection and land assembly. Having identified sites, allocate sufficient sites in DPDs to meet at least the first 5 years identified need. LDFs may set out policies re: phasing and release of allocated sites to ensure sequence of development re: location.	Not for the GNRS to do in detail, but site identification a helpful input.

Appendix 2 – Greater Nottingham Retail Study compared with the NPPF

NPPF requirement	Does the GNRS meet this requirement, or inform policies which do.
Para 14 outlines that local plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change.	The GNRS was undertaken in order to assess the quantitative and qualitative retail need in accordance with PPS 6 and the technical guidance which is consistent with PPS 4. 'Need' is not specifically defined in the NPPF but the methods used are still appropriate in line with the practice guide on Need.
Para 17 states the core planning principles.	The approach taken is generally in accordance with the principles.
Para 18-22 covers building a strong, competitive economy.	The aim of sustainable economic growth is key to the approach.
Para 23: • Defining network and hierarchy and viability and vitality of town centres. • Extent of town centres • Encouraging competitive town centres and markets. • Retaining and enhancing town centres. • Allocation of suitable sites in town centres and edge of centre.	• As outlined in the previous table the viability and vitality of the City and District centres is covered in the GNRS and the Network and hierarchy is defined. • Although there is a stronger emphasis on defining the extent of primary shopping areas in the NPPF than PPS 4, the Core Strategy will not contain policies for this as this will be defined on a more local basis – e.g. DPDs. • Separate retail health checks for each district cover the use classes and deals with competition and potential enhancement issues within the individual district centres. • The 'need' to expand town centres and to allocate appropriate edge of centre sites is specifically assessed and informs the GNRS which will subsequently inform land/sites policies. • A stronger emphasis is given in the NPPF on office development. District health checks will assess the need for

NPPF requirement	**Does the GNRS meet this requirement, or inform policies which do.**
	offices.
Para 25 advocates the use of the sequential approach	The sequential test is contained within technical guidance used to inform the GNRS. The sequential test would be applied at district level.
Para 26 details the requirements for an impact assessment.	The impact assessment is directly dealt with in the technical guidance and would be applied at site level.
Para 156 covers the provision of retail.	The provision of retail is dealt with when assessing need.
Para 158 highlights that the evidence base should be relevant and up to date and they should work closely with county and neighbouring authorities.	The GNRS was undertaken as a joint study and subsequent retail health checks have been undertaken to address gaps and provide updated information at a more local level The preparation of the evidence base is broadly consistent with these aims.

APPENDIX 3 - District Centre Health Checks

The following Centres were assessed in late 20011 or early 2012:

Broxtowe:
Beeston
Eastwood
Kimberley
Stapleford

Erewash:
Borrowash
Ilkeston
Long Eaton
Sandiacre

Gedling:
Arnold
Carlton Square
Mapperley Plains
Netherfield

Nottingham City:
Bulwell
Clifton
Hyson Green
Sherwood

Rushcliffe:
Bingham
West Bridgford

Each Centre is assessed under the following headings

- Introduction
- Diversity of Uses including
  - Numbers & proportions of uses & types
  - Primary and Secondary centres where appropriate
  - Proportion of vacant street level property
  - Retailer representation (including potential retailer representation)
- Rents and yields (City only)
- Crime rates (where available)
- Accessibility
- Pedestrian Flows
- Environment of the Centre
- Conclusion

At the end of the Appendix is a short list of terms used in the tables

BROXTOWE

Beeston

Introduction

Beeston is located West of Nottingham City Centre. The High Road runs through the centre with major retail establishments centred around the Square and the two major Supermarket chains (Tesco's to the SE and Sainsbury's to the North). The centre is in close proximity with the A52 allowing for convenient access to Derby City Centre, Nottingham City Centre and the M1. Broadgate Park is located just outside the secondary retail area and forms the Eastern Gateway of the town (from Nottingham City Centre). The landmark development of Anglo-Scotian Mills which has been converted in recent years into modern apartments defines the Northern Gateway (from the A52). The centre contains a mixture of employment, retail and entertainment opportunities including Broxtowe Borough Council's offices.

Diversity of Uses

Primary Area (Use Class):

Type	Number	Percentage
A1	95	71.96%
A2	22	16.66%
A3	7	5.30%
A4	5	3.78%
A5	0	0
D1	1	0.75%
SG	2	1.52%
Total	132	100%

Secondary Area (Use Class):

Type	Number	Percentage
A1	45	26.16%
A2	36	20.93%
A3	6	3.49%
A4	7	4.07%
A5	2	1.16%
B1	4	2.33%
B8	1	0.58%
C3	51	29.65%
D1	16	9.30%
D2	0	0
SG	4	2.33%
Total	172	100%

Combined Primary and Secondary Areas (Use Class):

Type	Number	Percentage
A1	140	46.05%
A2	58	19.08%
A3	13	4.28%
A4	12	3.95%
A5	2	0.66%
B1	4	1.34%
B8	1	0.33%
C3	51	16.78%
D1	17	5.59%
D2	0	0
SG	6	1.97%
Total	304	100%

Primary Area (Type of goods/services) :

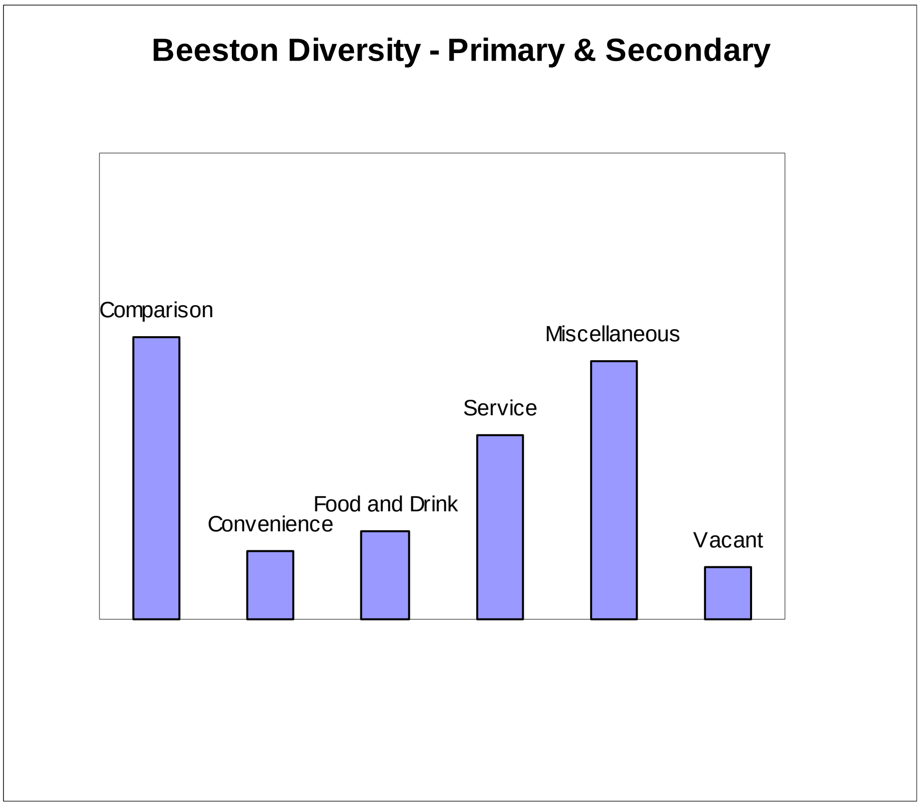
Type	Number	Percentage
Comparison	64	48.49%
Convenience	14	10.60%
Food and Drink	12	9.09%
Service	23	17.42%
Miscellaneous	7	5.30%
Vacant	12	9.09%
Total	132	100%

Secondary Area (Type of goods/services):

Type	Number	Percentage
Comparison	28	16.27%
Convenience	8	4.65%
Food and Drink	17	9.88%
Service	37	21.51%
Miscellaneous	77	44.77%
Vacant	5	2.91%
Total	172	100%

Combined Primary and Secondary Area (Type of goods/services):

Type	Number	Percentage
Comparison	92	30.2%
Convenience	22	7.23%
Food and Drink	29	9.54%
Service	60	19.74%
Miscellaneous	84	27.63%
Vacant	17	5.59%
Total	304	100%



The Primary retail area extends for almost the entire stretch of High Road and encompasses the units around the Square and Stoney Street. This area is occupied by over two thirds retail in line with Local and National . The primary area is also represented by a high proportion of eating establishments and services.

The secondary retail area covers a large area in which there is significantly more of a variety of commercial uses inter-dispersed with dwellings. Although the statistics show that convenience only forms a small part of the centre, these types of retail establishments include key draws to the centre with Sainsbury's and Tescos covering a large proportion of the retail floor space in the centre. 2010 saw the arrival of Tescos to the centre and although it is located in the secondary retail area this supermarket has had a considerable impact on the vitality of this area and the centre as a whole. Generally speaking the two major supermarkets act as key attractions to the centre with the shops and services in between benefitting from the extra visitors.

Services include a number of banks and estate agents some of which are located within the primary centre but are generally in the less prominent positions in the secondary area and there are a number of properties used for office accommodation particularly surrounding the Council offices on Foster Avenue. The secondary area generally consists of lower density units mixed with dwellings however there is a secondary range of retail offer both along Wollaton Road and on the High Street past Broadgate Park which is generally specialist and independent shops.

Beeston has a good range of restaurants, public houses, sandwich bars/cafes and takeaways mainly within the secondary area and particularly surrounding the Northern Gateway to the town, plus a number of smaller eating and drinking establishments are located along the high road, Stoney street and the Square which predominantly attract day time shoppers. The eating and drinking establishments consist of a healthy mix of independent and chain establishments.

<u>Retailer representation</u>

Beeston has a good mix of national chains and local independent stores. Key national chains which are major draws to the centre are TESCO, Sainsbury's, Argos, B&M bargains, Wilkinsons, WHSmiths, Peacocks and Clinton Cards, as well as a large Wethespoons. These major stores are generally located around the High street hub and are in easy walking distance from one another. Notably there is a high number of charity shops (both National chains and independent chains) within the primary shopping area. The centre also contains a typical range of high street banks and estate agents with most of the National chains being represented but there are also a number of independent professional and financial services particularly local estate agents.

The independent shops and charity shops on the high street tend to occupy the smaller units and generally consist of specialist stores such as jewellers and food stores. It was observed that a large proportion of the vacant units in the area were formally occupied by independent retailers perhaps reflecting the market dominance of the larger chain stores leading to higher rents and affecting viability for smaller business. The statistics show a higher proportion of vacant units within the primary area than may be expected. As many of these are in the area surrounding the bus station and the shopping parade this is however undoubtedly attributable to the development of the tram as a large proportion of the units in this area will be demolished in the near future due to works associated with the construction of the tram which commenced in early 2012.

Accessibility

Station road runs through the centre of the primary area and this is well connected by a pedestrian crossing. There is also adequate facilities for cyclists with cycle paths entering the centre from all directions, which are well used in the centre, however there is a large number of cycle stands situated outside of Tesco's which appear underutilised.

The centre has 6 public car parks in the secondary retail area however these do not appear to be used to their full capacity. This may be attributable to the introduction of car park charges in 2011 with drivers intending to stay more than one hour preferring to park on the side streets or utilising three hours of free parking associated with the large supermarkets.

The bus station is in the secondary retail area and there is a number of bus stops also within the area allowing for good transport links into and out of Beeston and these services are generally well-used. The development of the tram which is expected to be completed in late 2014 will increase the use of public transport and hopefully decrease the use of the private car.

Pedestrian Flows

Footfall counts were taken on two separate days, on a busy market day and a less busy non-market day. Three separate footfall counts over ten minutes were taken between the hours of 10:00am – 11:00am, 11:00am and 12:00am and 12:00pm – 1:00pm then the average calculated.

	Beeston	**East Midlands Small Towns**
Busy	340	113
Quiet	260	75

When compared to other East Midlands small towns (figures from AMT Town Benchmarking report) this pedestrian flow suggests that Beeston is performing extremely well in terms of footfall.

Environment of the Centre

The primary area is completely pedestrianised and the centre contains many benches particularly within in the square and along High Road which generally are well used by shoppers. Electronic information points were introduced in 2011 to improve the usability of the centre. Broadgate Park, just outside the defined area provides recreational space within close proximity and does help to increase the footfall in this area ,define the Eastern Gateway and give a pleasant first impression to those arriving from this direction.

A number of shops and cafes along the High Road have outdoor stalls and sitting areas which contributes to the vitality of the area. A large problem however is that the square and the high street have the feel of being dissected by Station road a major transport route which runs through the centre. The public realm in the area surrounding the square, including the band stand and street trees is a focal point for the centre with many events and street markets congregating here, however the shopping shelter which runs from the square to the bus station looks dated and is not generally an appealing initial perspective of Beeston for those arriving by bus. As this area is largely going to be demolished with the arrival of the tram into Beeston, this provides an opportunity to greatly improve the public realm in this area as well as having the potential to attract new business to the centre. The town may benefit from some level of consolidation associated with this redevelopment, to reduce the linear sprawl of the shopping facilities and provide a definite 'heart' to the centre. Investment in this area may potentially spread to the other areas of the centre and therefore improve the public realm for the overall centre and also contribute to creating a more holistic feel to the centre.

Litter doesn't seem to be a significant problem in the centre therefore it is considered that the number of street bins is adequate and the street cleaning facilities are suitable.

Conclusions

Overall the centre performs relatively well with its positive attributes being the good retail representation and pedestrian friendly atmosphere with fairly low percentage of vacant units. There are fairly good transport links as existing which are set to improve with the introduction of the tram. On the negative side the public realm is poor in some places. The bus station and parade are outdated and there is a lack of greenspace. Also the dissection of the shopping areas due to Station Road is a problem and top end retailers are under represented.

There are however a number of opportunities associated with the redevelopment/revitalisation /reconfiguration of Beeston square following the tram development. The underuse of the car parks calls into question the need which could be better utilised for other uses and opens up the potential to attract larger businesses and the opportunity to create a more attractive public realm. The multi-storey car park next to the bus station is particularly underutilised and there are current discussions to redevelopment this land.

The attraction for key draws to Nottingham City and the potential for shoppers to favour travelling into Nottingham benefiting from easy access once the tram is completed is a major threat for businesses. There is also the disruption for existing retailers and shoppers whilst the tram is being constructed which could force some retailers to relocate and shoppers to change their habits in the interim.

Eastwood

Introduction

Eastwood is the largest settlement to the North of the Borough and is in close proximity to the boundary with the borough of Amber Valley. The town centre is linear in nature and is predominantly laid out along both sides of Nottingham Road, which is a major through road. The centre benefits from close proximity to the A610 which provides good links to Nottingham City Centre and the M1. A number of smaller settlements surround the town therefore Eastwood has a fairly large catchment area which extends past the Borough boundary. Eastwood has a mix of uses predominantly retail, offices and a number cultural attractions associated with its DH Lawrence heritage. Over half of the primary and secondary shopping areas are within the designated conservation area.

Diversity of Uses

Primary Area (Use Class):

Use Class	Number	Percentage
A1	53	58.89%
A2	15	16.67%
A3	2	2.22%
A4	2	2.22%
A5	13	14.44%
B1	1	1.11%
SG	4	4.44%
Total	90	100%

Secondary Area (Use Class):

Use Class	Number	Percentage
A1	32	38.55%
A2	10	12.04%
A2/B1	1	1.20%
A3	2	2.41
A4	3	3.61
A5	1	1.20
B1	3	3.61
C3	8	9.64
D1	15	18.07
D2	3	3.61
SG	5	6.02
Total	83	100

Combined Primary and Secondary Area (Use Class):

Use Class	Number	Percentage
A1	85	49.13%
A2	25	14.45%
A2/B1	1	0.58%
A3	4	2.31%
A4	5	2.89%
A5	14	8.09%
B1	4	2.31%
C3	8	4.62%
D1	15	8.67%
D2	3	1.73%
SG	9	5.20%
Total	173	100%

Primary Area (Type of goods/services):

Type	Number	Percentage
Comparison	36	40%
Convenience	6	6.67%
Food and Drink	15	16.67%
Service	19	21.11%
Miscellaneous	10	11.11%
Vacant	4	4.44%
Total	90	100%

Secondary Area (Type of goods/services):

Type	Number	Percentage
Comparison	20	24.10%
Convenience	6	7.22%
Food and Drink	8	9.64%
Service	14	16.87%
Miscellaneous	27	32.53%
Vacant	8	9.64%
Total	83	100%

Combined Primary and Secondary Areas (Type of goods/services):

Type	Number	Percentage
Comparison	56	32.40%
Convenience	12	6.94%
Food and Drink	23	13.29%
Service	33	19.08%
Miscellaneous	37	21.38%
Vacant	12	6.94%
Total	173	100%

The primary retail area in Eastwood runs along both sides of Nottingham road including the Hollies which is set back from the main road. The secondary retail area includes a number of side streets emanating from Nottingham road, and also includes the area surrounding the large Kelham Way roundabout. Statistically convenience stores only represent a small proportion of the number of units for the whole of the centre however, three major supermarket chains have units which take up a significant proportion of the centre in terms of floorspace.

Services occupy a high proportion of the retail area, being fairly evenly distributed throughout the primary and secondary areas. Overall there are a fairly high number of food establishments but these generally serve shoppers during daytime hours. The proportion of vacant premises is encouragingly low. Two of the public houses within the primary area are currently vacant and being on comparatively sizeable plots do not promote a positive image for the area and also indicates that there is a lack of vitality in the centre during night time hours. Bringing such vacant premises back into use should be a key target to re-vitalise the town.

Retailer Representation

Morrison's with its associated car park and garage is the largest of the three major supermarkets represented in Eastwood, occupying a prime location in the secondary retail area served by the Kelham Way roundabout, whilst Iceland and The Co-operative occupy smaller units on Nottingham road itself. These are considered key draws for the centre. There is a small range of banks and estate agents largely in the primary area, but not all of the major chains are represented indicating that Eastwood is not entirely self-sufficient.

There is a fairly high number of small independent stores within Eastwood with mixed with a relative small number of chain store such as Peacocks and the Co-operative. The majority of the premises on Nottingham Road are small in, in terms of floorspace, and growth is constrained by the conservation area designation and the two listed buildings on Victoria Street and Scargill Walk. This limits the attraction of the large chain stores who tend to prefer units with large floor space. The close proximity of the Giltbrook Business Park may also play a part in this, with larger chains preferring to locate in this area. Eastwood however perhaps benefits from a planning condition on the retail park which prevents any of the retail units being used for food goods.

The frontage of Mansfield road is largely occupied by independent stores and services. The craft centre and the number of shops associated with the DH Lawrence heritage act as a visitor attraction and a potential draw to other shops and businesses within the centre however the number of vacant premises in this area suggests that independent businesses are struggling due to the economic situation. The recent part takeover of Durban House by the University has the potential to boost the funding in the heritage assets of the area so these related businesses may be revitalised.

Accessibility

The busy road which runs through the centre separates the two sides of Nottingham road and does make shopping difficult for pedestrians however, there are a number of pedestrian crosses along the road and traffic calming measures which aids in minimising this inconvenience for shoppers. The car parks in Eastwood are fairly underutilised and, like other towns in Broxtowe car parking charges apply in the public car parks in Eastwood for stays over 1 hour which may have led to visitors preferring to park on the side streets or in the Morisson's car park.

There is a fairly good bus service offering access to Giltbrook retail park, Nottingham City Centre and to other towns in the proximity. Cycling facilities in the centre are however poor and Nottingham road and the surrounding areas are not considered a particularly safe or encouraging environment for cyclists.

Pedestrian Flows

Footfall counts were taken on two separate days, on a busy market day and a less busy non-market day. Three separate footfall counts over ten minutes were taken between the hours of 10:00am – 11:00am, 11:00am and 12:00am and 12:00pm – 1:00pm then the average calculated.

	Eastwood	**East Midlands Small Towns**
Busy	62	113
Quiet	48	75

When compared to other East Midlands small towns (figures from AMT Town Benchmarking report) this pedestrian flow which raises some concern for the number of pedestrians to Eastwood.

Environment of the Centre

The car park of the Hollies forms the market, keeping the market tradition of Eastwood alive and adding to the vitality of the area on market days. The units in this parade are however fairly dated and could benefit from consolidation. There are a few benches for pedestrians surrounding the library and the Hollies. Benches are fairly sparse towards the West of the centre overall the street so there are improvements which could be made to make the public realm more attractive. Provision of trees and hanging baskets could improve the visual impression of the centre. Many of the businesses are in a relatively poor overall condition and improvements to their appearance would create a better perception. However, improvements to the public realm are severely constrained by the high amount of through traffic and the lack of pavement space for pedestrians.

Conclusion

Eastwood does have a good overall mix of businesses and the cultural links add as a draw however, the lack of a pedestrian friendly environment with the busy road and the underrepresentation of services explain the relatively high rate of vacant units plus low pedestrian foot counts.

There are opportunities to bring back a number of the vacant pubs for retail use and funding from the University gives the change to enhance the heritage aspects. There is the potential to redevelop the area surrounding the library and the Hollies which would aid in making the centre more attractive. New housing development could potentially increase investment into the centre.

The main threats to Eastwood would be the draw of other shopping areas such as the Giltbrook retail park and the fact that housebuilders prefer to locate to the South of the borough.

Kimberley

Introduction

Kimberley is the smallest centre in Broxtowe, hence the retail offer is fairly limited. Kimberley is situated between Eastwood town centre and Giltbrook retail park. Nuthall is in close proximity. The retail units are largely centred around the large Sainsbury's supermarket which acts as a focal point for the centre and along Main Street which is a major route through the centre. To the North East of the centre is the Kimberley Brewery site which features in a SPD by the Council and is earmarked as an area for future development. The centre is well positioned with good road links to the A610 and the M1.

Diversity of Uses

Primary Area (Use Class):

Use Class	Number	Percentage
A1	14	100%
Total	14	100%

Secondary Area (Use Class):

Use Class	Number	Percentage
A1	31	37.80%
A2	5	6.10%
A3	5	6.10%
A4	5	6.10%
A5	5	6.10%
B1	3	3.66%
C3	21	25.61%
D1	2	2.44%
SG	5	6.10%
Total	82	100%

Combined Primary and Secondary Area (Use Class):

Use Class	Number	Percentage
A1	45	46.88%
A2	5	5.21%
A3	5	5.21%
A4	5	5.21%
A5	5	5.21%
B1	3	3.13%
C3	21	21.88%
D1	2	2.08%
SG	5	5.21%
Total	96	100%

Primary Area (Type of goods/services):

Type	Number	Percentage
Convenience	4	28.57%
Comparison	8	57.14%
Food and Drink	1	7.14%
Service	1	7.14%
Total	14	100%

Secondary Area (Type of goods/services):

Type	Number	Percentage
Convenience	2	2.44%
Comparison	22	26.83%
Food and Drink	14	17.07%
Miscellaneous	24	29.17%
Service	13	15.85%
Vacant	5	6.10%
Total	82	100%

Combined Primary and Secondary Area (Type of goods/services):

Type	Number	Percentage
Convenience	6	6.25%
Comparison	30	31.25%
Food and Drink	15	15.63%
Miscellaneous	24	25%
Service	14	14.59%
Vacant	5	5.21%
Total	96	100%

Quite significantly all the units within the defined primary area are classified as A1 which is over and above what is specified in the Local Plan, however this does reflect the relatively small number of units in the primary area. The presence of Sainsbury's in Kimberley undoubtedly acts as a significant draw to the centre allowing the surrounding retail units in close proximity to offer complementary goods to customers to the supermarket. The secondary area also has a fairly high proportion of A1 units despite the fact it is inter-dispersed by dwellings.

Convenience goods represent a high proportion of the of the units in the centre as a whole which suggests that Kimberley is primarily used by shoppers purchasing essential goods and that they would perhaps need to travel into Eastwood or Giltbrook retail park for a wider selection and comparison goods and to access services as these are not highly represented within Kimberley itself. As Giltbrook retail park has a planning restriction preventing stores selling food goods locating there, the capability of Sainsbury's in Kimberley in retaining customer numbers is unlikely to be under significant threat from the growth of the retail park.

Convenience goods are less prominent in the secondary area than in the primary area with a heavy reliance on shops selling comparison goods which signifies that Kimberley does offer a fairly diverse range. A high proportion of the stores are independent specialist shops. Vacant units are relatively low in Kimberley however there is a stretch of mainly vacant units when entering Kimberley from the Western end of Main street reflecting how independent businesses are struggling in the current economic situation and possibly creates a negative image for people entering the centre from this direction.

Retailer Representation

The primary shopping area covers Sainsbury's and the shops surrounding the adjacent car park and is notably all the units fall within the A1 use class and comprises a mix of national chains such as Wilkinsons and Card Factory as well as a large proportion of independent businesses. There is noticeably a lack of banks and financial institutions in the centre making it necessary to travel out of Kimberley to access such services.

There is a fairly large proportion of food and drink establishments in Kimberley mainly consisting of takeaways with some public houses and restaurants which indicates that there is some vitality in the centre in the night time. A potential worry may be that the high number of takeways which may constitute an over intensification of use.

Accessibility

The bus service is fairly frequent linking Eastwood and the surrounding areas to the North West (Amber Valley) and to the South West (Giltbrook Retail Park, and Nottingham City Centre) and the park and ride at Phoenix Park is also fairly accessible. However, as parking is free of charge for the supermarket and the surrounding units so there is little incentive to use alternative means of transport and there is little in the way of provision for cyclists in the centre.

Pedestrian Flows

Footfall counts were taken on two separate days, on a busy market day and a less busy non-market day. Three separate footfall counts over ten minutes were taken between the hours of 10:00am – 11:00am, 11:00am and 12:00am and 12:00pm – 1:00pm then the average calculated.

	Kimberley	**East Midlands Small Towns**
Busy	33	113
Quiet	26	75

When compared to other East Midlands small towns (figures from AMT Town Benchmarking report) this pedestrian flow raises concerns for the number of pedestrians to Kimberley however taking into account the size of the centre a small number would be expected.

Environment of the Centre

The environment of the centre is predominantly designed for the car and centred around Sainsbury's. There is some pedestrian facilities to the public realm in the primary area such as benches and trees but these are again centred around Sainsbury's and do not continue into the secondary area. The pedestrian facilities along the Main Road are fairly limited with only one or two pedestrian crossings making it a challenge for shoppers to access shops on the other side of the road.

Conclusions

Kimberley has a fairly strong retail mix offering most items necessary for weekly shopping as well as a diverse range of independent stores and a fairly large range of food establishments. On a negative note however, Kimberley has a lack of provision for greener transport choices and a lack of facilities. Furthermore there is a lack of services indicating that Kimberley is not self sufficient. The footfall statistics suggest that the number of shoppers is lower than would be hoped however, as the centre is relatively small this does not raise significant concerns.

There is the potential to revitalise the existing premises, also the potential development of Kimberley Brewery may bring investment to the area. There is however the threat of having an over-reliance on one retailer and the competition from other centres such as Eastwood and Giltbrook retail park.

Stapleford

Introduction

Stapleford lies on the South Western border of Broxtowe borough close to the border with Erewash Borough. The centre is in close proximity with the A52 allowing for convenient access to Derby City Centre, Nottingham City Centre and the M1. Stapleford is comparatively smaller to Beeston which is within 4 miles to the East and consequently offers a less diverse range of uses. The Church Street Gateway to the North East is a designated conservation area which contains the listed St Helen's Church and monuments. The area is also home to a branch of the South Nottinghamshire College. The town centre is primarily centred around one side of Derby Road mixed with residential properties on the other side.

Diversity of Uses

Primary Area (Use Class):

Type	**Number**	**Percentage**
A1	20	62.5%
A2	10	31.25%
A3	1	3.125%
A4	0	0
A5	1	3.125%
B1	0	0
D1	0	0
D2	0	0
SG	0	0
Total	32	100%

Secondary Area (Use Class):

Type	**Number**	**Percentage**
A1	29	29%
A2	6	6%
A3	6	6%
A4	6	6%
A5	6	6%
B1	1	1%
C3	35	35%
D1	4	4%
D2	6	6%
SG	1	1%
Total	100	100%

Combined Primary and Secondary Area (Use Class):

Type	Number	Percentage
A1	49	37.12%
A2	16	12.12%
A3	7	5.30%
A4	6	4.55%
A5	7	5.30%
B1	1	0.76%
C3	35	26.52%
D1	4	3.03%
D2	6	4.55%
SG	1	0.76%
Total	132	100%

Primary Area (Type of goods/services):

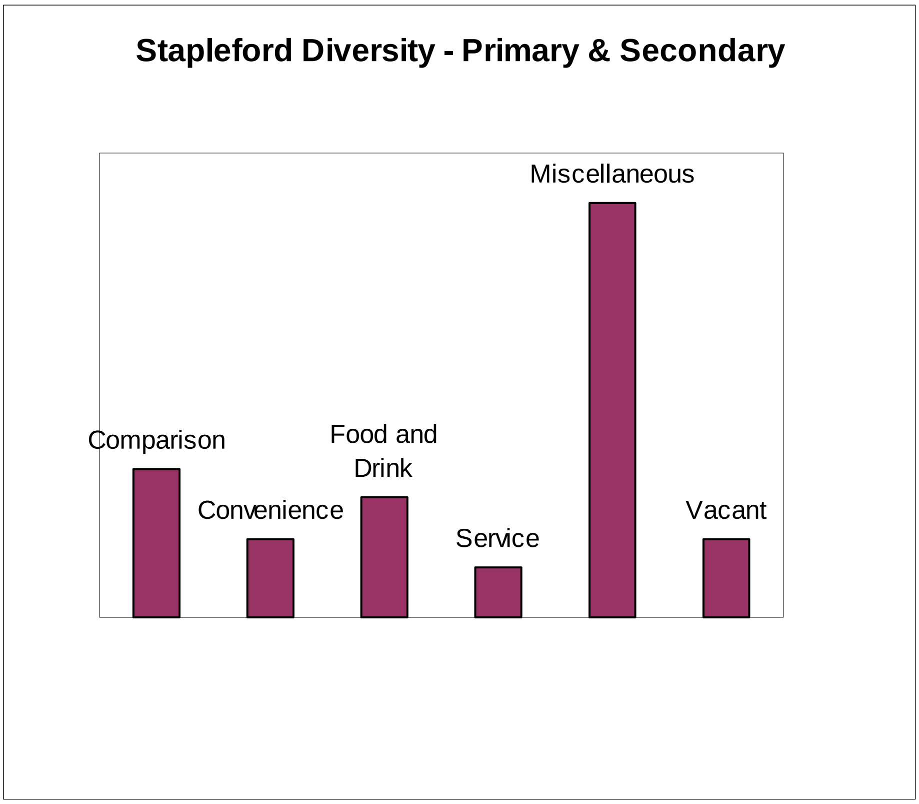
Type	Number	Percentage
Comparison	8	25%
Convenience	8	25%
Food and Drink	1	3.125%
Service	2	6.25%
Miscellaneous	9	28.12%
Vacant	4	12.5%
Total	32	100%

Secondary Area (Type of goods/services):

Type	Number	Percentage
Comparison	19	19%
Convenience	3	3%
Food and Drink	16	16%
Service	5	5%
Miscellaneous	50	50%
Vacant	7	7%
Total	100	100

Combined Primary and Secondary Area (Type of goods/services):

Type	Number	Percentage
Comparison	27	15.9%
Convenience	11	8.3%
Food and Drink	17	12.88%
Service	7	5.30%
Miscellaneous	59	44.7%
Vacant	11	8.33%
Total	132	100%



The primary retail area in Stapleford only covers a small area which encompasses the even numbers from 2 to 68 on Derby road. The opposite side of the street is occupied primarily by residential properties and forms part of the secondary area. The area is covered just less than two thirds by A1 uses which is slightly less than stipulated within Local policy which causes some concern. A2 uses represents approximately a third of this primary area suggesting that the area performs fairly well as a service centre. The secondary area in Stapleford covers a larger area and the type of uses are more spread out however A1 uses are still the most predominant. Despite the large amount of the shopping area devoted to residential, A1 uses still dominate the primary and secondary area as a whole.

The primary area encompasses equal proportions of convenience and comparison goods strongly suggesting that the central area caters well for everyday shopping needs. This however may disguise the situation as the unit sizes for the primary shopping in Stapleford are relatively small therefore they predominantly contain specialist shops and services as opposed to multi-purpose convenience stores which generally offer a wider choice. There are two large national supermarket chains which have local stores in the secondary area which occupy relatively large units for the centre as a whole. These units are however relatively small compared to the large modern style supermarkets which dominate the market.

Notably food and drink establishments represent a fairly significant proportion of the secondary retail offer. This is a mixture of food outlets, including takeaways, and public houses. Stapleford's night time economy is fairly lively for a centre of this size. The Weatherspoons which opened in February 2012, which replaces a former health centre occupying a prominent position on Derby Road is likely to boost the vitality of the town in day time and night time hours by bringing a vacant unit back into use and potentially improving investment in the area.

Of some significance is the high representation of community facilities such as the new medical centre, the library and a number of religious institutions and social clubs which is likely to encourage residents into the centre and help build a strong sense of community.

<u>Retailer representation</u>

The representation from National chains in Stapleford is less than would be expected from a centre with this amount of overall units possibly because the size and location of the units is not generally attractive, with large firms tending to prefer to locate to other larger areas such as Beeston. The centre does have a fairly well stocked Co-operative store and a Sainsbury's local however with larger modern style supermarkets in Beeston and Toton which cater more for people with cars and large families act as a pull out of Stapleford centre.

There is a fairly high proportion of smaller independent stores, some of which appear to be doing well and offer a relativity good range of services to people, however a worryingly high proportion of vacant units in the primary area with also pockets spread around the secondary area, particularly around the Church Lane area suggest that many of these independent firms are struggling in the current economic climate.

<u>Accessibility</u>

A relatively good bus service runs from Derby through Stapleford and onto Nottingham making Stapleford fairly accessible by public transport. The development of the tram with the park and ride site near to Bardills island will improve transport links to other centres in the borough, such as Beeston. The result may be that Stapleford could become isolated discouraging investment in both retail and housing and may find it difficult to compete.

There are limited car parks in the area and these are generally underutilised. The car park at Derby Road and Victoria Rd does provide any opportunity for further retail development. Provision for cyclists is poor within the centre. Also there is a limited number of crossings over Derby Road which is a fairly busy main road which makes it awkward for pedestrians. There are a few benches and trees scattered around the centre however the environment for pedestrians is fairly poor. Overall the disjointed linear nature of the centre results in a less attractive location for investment.

<u>Pedestrian Flows</u>

Footfall counts were taken on two separate days, on a busy market day and a less busy non-market day. Three separate footfall counts over ten minutes were taken between the hours of 10:00am – 11:00am, 11:00am and 12:00am and 12:00pm – 1:00pm then the average calculated.

	Stapleford	**East Midlands Small Towns**
Busy	88	113
Quiet	62	75

When compared to other East Midlands small towns (figures from AMT Town Benchmarking report) this pedestrian flow this raises some concerns for the number of pedestrians to Stapleford.

<u>Environment of the Centre</u>

The overall quality of the centre suffers as a result of its disjointed linear layout of the centre. The central shopping parade is broken up by residential properties and the quality of the public realm does not seem to be consistent throughout the primary and secondary shopping areas. A strong disadvantage is that Stapleford does not appear to have a definite ‘heart’ to its centre. The Walter Parker VC Memorial Square provides a small amount of greenspace and relaxation area for visitors incorporating benches and trees however, overall the level of greenspace and public realm quality is lacking. A high level of public amenity space is perhaps quite difficult to achieve when the centre has such a high proportion of residential properties and is divided by a busy road. Also the conflicting needs within the centre (for shoppers and residents) creates difficulty. .

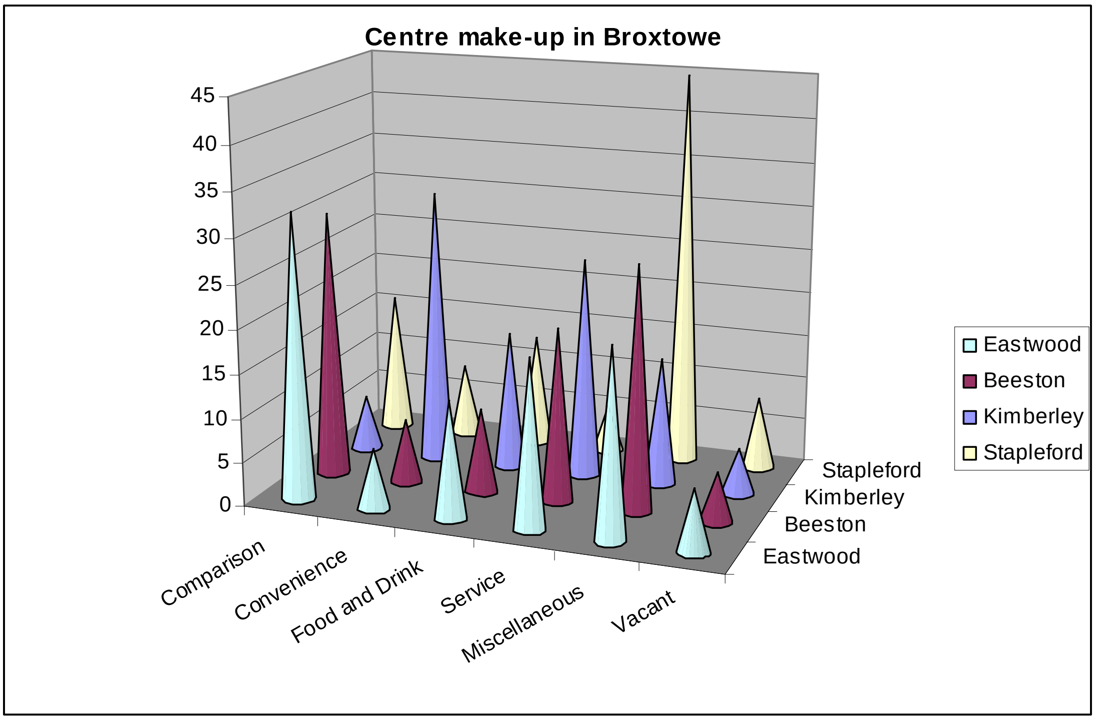
There is a large vacant unit on the Nottingham road approach and which does not portray a positive initial reaction to the town for anyone entering from this direction. Despite the relatively newly provided medical centre in this area which is a well designed modern building and the South Nottinghamshire College bringing students to this area, the attractiveness of this area for businesses is limited due to its physical and perceived severance from the primary locations in the centre. Furthermore growth in this area is constrained by the designated conservation area. and the listed monuments associated with St Helen’s Church.

Conclusion

Stapleford has some strengths as a centre with a good range of independent shops, a number of community facilities within the centre and a growing night time economy. The centre is however suffering due to the lack of larger units in the primary area which has caused a small representation of major retailers. The proportion of A1 units is slightly lower than would be and this possibly is reflected in the low number customer flows.

Opportunities for the centre include the potential for commercial expansion on the empty public house sites and the Derby Rd car park. Also there is the potentiality of new housing developments within the area which could attract more investment to the centre. The major threats for Stapleford include the loss of customers and retailers to the larger centres which may be made more accessible due to the development of NET phase two.

Overall Conclusions for Broxtowe



EREWASH

Borrowash

Introduction

Borrowash Local Centre is located around 12 miles west of Nottingham City Centre and 5 miles west of Long Eaton Town Centre. Due to its geographic location it has a much stronger relationship to the urban area of Derby, of which its urban conurbation begins a mile to the west. For the purposes of this assessment, the boundary of Borrowash Local Centre is defined as that used in the Saved Policies Document - Policy (S1). The emerging Aligned Core Strategy promotes the Borrowash as being a Local Centre within the draft hierarchy and network of centres across Greater Nottingham. The heart of the shopping centre is located at the junctions of Derby Road, Nottingham Road and Victoria Avenue. These busy roads are not pedestrianised with through traffic able to pass in close proximity to all local facilities. It is noticeable that Borrowash's shopping centre is largely and closely surrounded by residential development.

Diversity of Uses

Type	Number	Percentage
A1	22 (inc. 3 V)	61%
A2	4	11%
A3	3	8.5%
A4	1	3%
A5	2	5.5%
Other	4	11%
Total	36	

Type	Number	Percentage
Convenience	2	5.5%
Comparison	9	25%
Service	10	28%
Food & Drink	6	16.5%
Miscellaneous	6	16.5%
Vacant	3	8.5%
Total	36	

Borrowash Local Centre contains a variety of uses; although there is a particularly high percentage of A1 Retail uses currently present. The statistics set out in the tables above show that comparison and service uses predominate (service uses include 5 hairdressers classed as A1 in line with the methodology of this assessment). The Co-operative store caters for some of Borrowash's retail needs, however it must be recognised that the influence of nearby Derby which is in close proximity to this centre means that Borrowash is only expected to provide for localised needs.

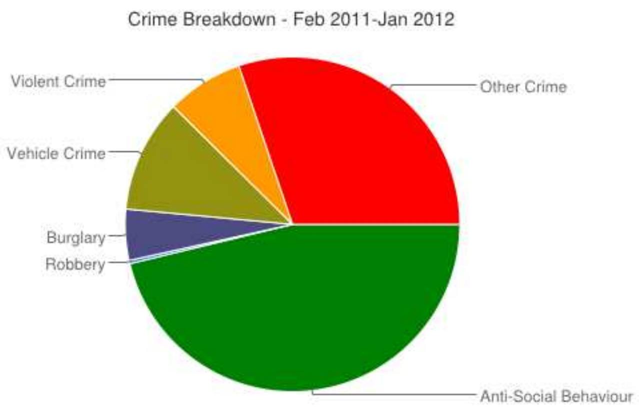
There are a limited number of cafes, restaurants, public houses, traditional financial and professional services present in the centre. This restricts the scope for residents and visitors needing to visit Borrowash throughout various stages of the day and into the evening. The Co-operative store is considered to be the main anchor store within the centre and this is regarded as the primary reason why people would use and visit the local centre for their retail requirements.

Retailer Representation

The Co-Operative is the only store of note and influence acting as a draw for people to visit the shopping centre of Borrowash. However, the Post Office and Building Society also attract a healthy number of users and it is thought that the other smaller/independent services currently present only meet specialised localised needs and are not thought to be of sufficient size to act as a draw in clawing back trade from those who do not carry out their main shopping activities in Borrowash.

Rents and Yields
No information available.

Crime Rates



[3]

With regards to crime, Borrowash and Ockbrook is a generally safe centre for shopping and visiting although the statistics do show a particular high amount of anti social behaviour being evident throughout the centre. However, Neighbourhood Wardens do patrol the centre as means to aid local policing in the area.

Environment of the Centre (including Accessibility)

Borrowash's centre is dominated by the 1970's shopping precinct which is of basic and unimaginative design. This contains a Co-operative store, its largest unit, along with other uses and associated car parking. The precinct is separated from the rest of the centre (which typically consists of small functional units) by Victoria Avenue and Nottingham/Derby Road. Traffic is

[3] http://www.ukcrimestats.com/Neighbourhood/Derbyshire_Constabulary/Borrowash_and_Ockbrook

therefore a problem for the centre as it is dissected by these roads. This is likely to be a factor in detracting from the retailing experience which is evident in Borrowash.

In terms of public transport, the centre is well served by a frequent Trent Barton bus service that links through to Derby (and to Long Eaton and Nottingham - although the latter involves a 50 minute journey). The close proximity of Derby and a number of surrounding centres offering retail facilities in the Derby City administrative area (Spondon, Chaddesden etc) means this centre is thought to only cater for localised needs, with spending evidence from the most recent Retail Need Study reaffirming this and will not attract a significant number of visitors into the centre from elsewhere. In terms of car parking, the centre is served well by a large car park that surrounds the shopping precinct which is principally accessed off Chapel Row.

Conclusion

In conclusion, the evidence suggests that Borrowash Local Centre is trading reasonably healthily. To reaffirm this, the Centre currently has an 8.5% vacancy rate of retail units which is considerably lower than the 11.2% national average figure recorded by British Retail Consortium in 2011.

The evidence suggests that Borrowash Local Centre is at current, reasonably healthy and successful in meeting the local needs of the settlement’s residents. However, the close proximity of Derby will mean this centre will only ever realistically cater for local needs only given the extent of its current retail offer, limited scope for enhancement in terms of new floorspace and the ease in which public transport can be accessed to reach larger nearby centres. These factors are significantly influential in Borrowash not being able to attract a substantial number of shoppers and visitors into its centre.

However, as a local centre, Borrowash fulfils an important service function to its population. Given the size of the settlement (population circa. 5,500) and the accessible nature of its centre, trading is expected to remain stable due to its limited, but important role of being able to cater for the retail needs of it residents and those from nearby settlements where little, if any, retail facilities of any reasonable scale exist (i.e. Ockbrook).

Ilkeston

Introduction

Ilkeston is located ten mile north-east of Derby City Centre and eight miles west of Nottingham City Centre. It is also in close proximity to the M1. Although Ilkeston lies within Derbyshire, it is closer to Nottingham than it is to Derby. For the purposes of this assessment, the boundary of Ilkeston Town Centre is defined by the Saved Local Plan Shopping Centre Policy (S1). The Aligned Core Strategy continues to promote Ilkeston as a Town Centre within the draft network and hierarchy of centres across Greater Nottingham. The heart of the shopping area is located along the pedestrianised section of Bath Street (which includes the Albion Shopping Centre). The Co-operative Department Store on South Street/Market Place is also a very important part of the Town Centre's past and present retail offer. Notable buildings within the centre and its immediate surroundings include a large 24-hour Tesco supermarket, Museum, Cinema, Library and Town Hall, amongst other uses.

Diversity of Uses

Primary Shopping Area (Use Class)[4]:

Type	Number	Percentage
A1	90 (inc.16 V)	68%
A2	19	14%
A3	4	3%
A4	7	5%
A5	4 (inc. 1 V)	3%
Other	9	7%
Total	133 (inc. 17 V)	n/a

Secondary Shopping Area (Use Class)[5]:

Type	Number	Percentage
A1	81 (inc. 20 V)	57%
A2	12	8%
A3	6	4%
A4	9 (inc. 2 V)	6%
A5	7	5%
Other	28 (inc. 2 V)	20%
Total	143 (inc. 24 V)	

[4] The Primary Shopping Area is defined by the Local Plan Primary Shopping Frontage Policy (S4)
[5] The Secondary Shopping Area represents the remainder of the Shopping Centre (Policy S1)

Combined Primary and Secondary Shopping Areas (Use Class):

Type	Number	Percentage
A1	171 (inc. 36 V)	62%
A2	31	11%
A3	10	3.5%
A4	16 (inc. 2 V)	6%
A5	11 (inc. 1 V)	4%
Other	37 (inc. 2 V)	13.5%
Total	276 (inc. 41 V)	

Primary Area (Type of goods/services):

Type	Number	Percentage
Convenience	14	10.5%
Comparison	46	34.5%
Service	28	21%
Food & Drink	17	13%
Miscellaneous	12	9%
Vacant	16	12%
Total	133	

Secondary Area (Type of goods/services):

Type	Number	Percentage
Convenience	4	3%
Comparison	37	26%
Service	29	20%
Food & Drink	19	13.5%
Miscellaneous	29	20%
Vacant	25	17.5%
Total	143	

Combined Primary and Secondary Areas (Type of goods/services):

Type	Number	Percentage
Convenience	18	6.5%
Comparison	83	30%
Service	57	20.5%
Food & Drink	36	13%
Miscellaneous	41	15%
Vacant	41	15%
Total	276	

Ilkeston contains a wide and diverse range of uses within its primary shopping area (PSA). This is principally located along the entire length of Bath Street and South Street; in particular it contains a very high percentage of A1 Retail uses. While the statistics show that convenience-based uses form only a small part of the PSA, it is important to acknowledge that a large Tesco supermarket is located adjacent to the boundary of Ilkeston's shopping boundary. With a significant amount of trade, this helps to cater for a lot of identified convenience need for the town.

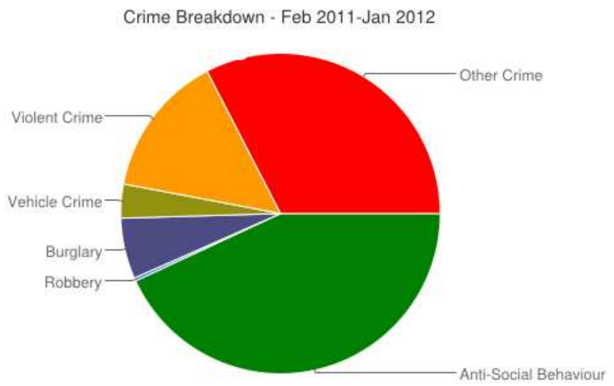
The evidence highlights that Ilkeston currently has a healthy level of A1 retail offer (although the high number of vacant units within this particular use class is a cause of concern). This assessment has considered that shops such as hairdressers and beauty salons should be regarded as services alongside the more traditional financial and professional services. Currently, there is also a good range of restaurants, public houses, sandwich bars/cafes and fast food takeaways available across the shopping centre that greatly contributes to enhancing the attractiveness of Ilkeston to visitors and shows the town as having a lively night time economy which adds to its vitality throughout the various stages of the day and evening.

Retailer Representation

There is a good mix of national chains and local independent stores currently present in Ilkeston. Key national chains which act as a draw for town centre trading include Boots, WH Smiths, Curry's, Dorothy Perkins, the Co-operative Department Store and Wilkinsons. These national chains are focused within the Primary Shopping Area around the southern end of Bath Street near to the entrance of the Albion Shopping Centre. South Street contains a number of independent stores which complement the larger retailers elsewhere within the town adding diversity to the overall range of shopping offer in Ilkeston.

Rents and Yields
No information available.

Crime Rates



[6]

Ilkeston suffers from a reasonable but acceptable level of crime with a particular high amount of anti social behaviour being evident throughout the town. However, these issues are more prone to the night time whilst Ilkeston in the daytime is a reasonably safe location to shop and visit. Neighbourhood

[6] www.ukcrimestats.com/Neighbourhood/Derbyshire_Constabulary/Ilkeston_Town

Wardens patrol the centre as a means to aid local policing in the area, which is also assisted by the police station present in the town.

Environment of the Centre (including Accessibility)

The shopping area of Ilkeston is largely pedestrianised and encourages and makes for a safe environment for visitors. However, the town's topography, and in particular in its centre poses a challenge in ensuring that certain parts remain accessible to shoppers. A long rising hill rises up from the northern end of Bath Street towards the Market Place which could discourage visitors parking and walking from this part of the town to access the heart of Ilkeston's shopping area. Traffic is not thought to be a significant problem for any part of the Town Centre with Chalons Way ensuring that north-south traffic can bypass the Town Centre without needing to pass through it.

The shopping centre itself is easily accessible through a number of bus services which terminate near the Market Place outside the Town Hall and the Co-operative store. In terms of car parking, street parking around the centre is restricted, but a sizeable provision of spaces is available at a number of Council-owned car parks located off South Street, Bath Street (namely the Albion Centre Car Park) and Pimlico.

The style and quality of the buildings range substantially with historic buildings being situated amongst other more modern buildings (inc. those in a typical 1960 and 70's design). Much of the town centre is included within the extent of a conservation area which helps to restrict inappropriate development. Many first-floor flats and businesses are in a relatively poor overall condition visually, with scope existing for their improvement. The secondary shopping area is a key gateway into the town centre at the northern end of Bath Street and again, there are opportunities to improve its general appearance (there are a number of vacant buildings/shops and numerous other buildings are in a poor state of repair) in order to enhance the attractiveness of this area and of the centre as a whole.

Conclusion

In conclusion, the evidence suggests that Ilkeston Town Centre is performing worse in terms of health than the national average with an overall vacancy rate of 15%. This does not compare favourably to the national average of 11.2% as recorded by British Retail Consortium in 2011. However, the primary shopping area of the town centre at 12% is much closer to this national average which offers encouragement.

There is still good representation from national retailers in the heart of Ilkeston's shopping centre. A sizeable number of A1 convenience/comparison and other uses are present overall which adds to the town's retail appeal. Considering the pressures created from a growing reliance on internet shopping, a large edge-of-centre supermarket and the proximity of Waterside and Giltbrook Retail Park's to the east and north-east of Ilkeston; it is considered that Ilkeston has actually maintained a credible retail performance over recent years. The high level of overall vacancies evident at the time of assessment is a cause for concern however and should be actively monitored by the Borough Council.

Another challenge for the town centre in the coming years will be the expanding role of Derby and Nottingham city centres. In light of this, Ilkeston will need to maintain its vitality and viability through positive planning and co-ordinated action to ensure its successful regeneration in line with the key objectives outlined within the Town Centre Masterplan.

Long Eaton

Introduction

Long Eaton is located broadly between the cities of Derby and Nottingham. For the purposes of this assessment, the boundary of Long Eaton Town Centre is defined by the Saved Local Plan Shopping Centre Policy (S1). The Aligned Core Strategy continues to promote Long Eaton as a Town Centre within the draft network and hierarchy of centres across Greater Nottingham. The heart of the Shopping Centre is located along Tamworth Road and from the Market Place southwards along the pedestrianised High Street. Notable buildings within the centre and its immediate surroundings include two large edge-of-centre supermarkets, West Park Leisure Centre, several historic Mills, Long Eaton Health Centre, Cinema and the Town Hall. This range of services reflects the centre's status as a Town Centre given that it provides for the needs of a sizeable population currently living in Long Eaton.

Diversity of Uses

Primary Shopping Area (Use Class)[7]:

Type	Number	Percentage
A1	67 (inc.5 V)	78%
A2	6	7%
A3	4	5%
A4	3	3%
A5	1	1%
Other	5 (inc.1 V)	6%
Total	86 (inc.6 V)	n/a

Secondary Shopping Area (Use Class)[8]:

Type	Number	Percentage
A1	83 (inc.16 V)	49%
A2	31	18%
A3	9	5%
A4	8 (inc. 2 V)	5%
A5	8 (inc. 2 V)	5%
Other	30 (inc. 2 V)	18%
Total	169 (inc. 22 V)	

[7] The Primary Shopping Area is defined by the Local Plan Primary Shopping Frontage Policy (S4)
[8] The Secondary Shopping Area represents the remainder of the Shopping Centre (Policy S1)

Combined Primary and Secondary Shopping Areas:

Type	Number	Percentage
A1	150 (inc. 21 V)	59%
A2	37	15%
A3	13	5%
A4	11 (inc. 2 V)	4%
A5	9 (inc. 2 V)	3%
Other	35 (inc. 3 V)	14%
Total	255 (inc. 28 V)	

Primary Area (Type of goods/services):

Type	Number	Percentage
Convenience	1	1%
Comparison	51	59%
Service	9	11%
Food & Drink	11	13%
Miscellaneous	8	9%
Vacant	6	7%
Total	86	

Secondary Area (Type of goods/services):

Type	Number	Percentage
Convenience	8	5%
Comparison	46	27%
Service	46	28%
Food & Drink	22	13%
Miscellaneous	25	15%
Vacant	22	12%
Total	169	

Combined Primary and Secondary Areas (Type of goods/services):

Type	Number	Percentage
Convenience	9	4%
Comparison	97	38%
Service	55	22%
Food & Drink	33	13%
Miscellaneous	33	13%
Vacant	28	11%
Total	255	

Long Eaton contains a wide range of uses with its defined primary shopping area. This area is principally located along the pedestrianised High Street, accommodating a particularly high percentage of A1 retail uses. While the collected data shows that convenience floorspace and units only form a small part of the centre, it is important to acknowledge the close proximity of both

Tesco and Asda Supermarkets that are located within walking distance of the defined shopping centre. In addition to serving a wide range of general shopping needs, the two large scale supermarkets make sizeable provision in catering for localised convenience needs.

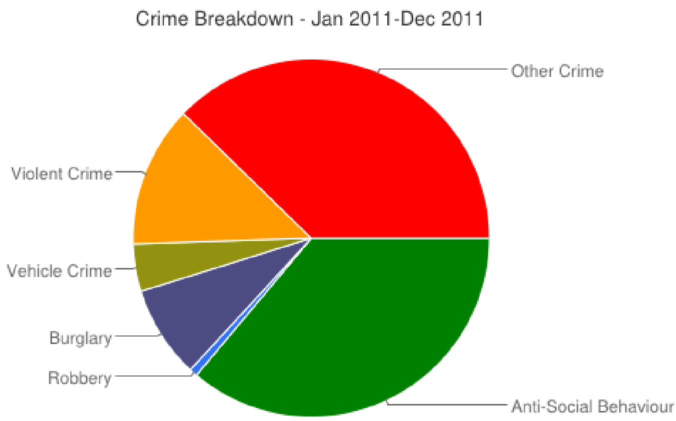
The evidence highlights that Long Eaton currently has a healthy A1 retail offer. This assessment has considered that shops such as hairdressers and beauty salons should be regarded as services alongside the traditional financial and professional services. There is also a good range of restaurants, public houses, sandwich bars/cafes and fast food takeaways available across the centre. These are valuable in contributing to the diversity of uses within the centre and as a consequence help to add to the offer of Long Eaton. The presence of cafes in particular helps to contribute to a better shopping experience within the Town Centre. A number of pubs being present also help to contribute to a positive and reasonably healthy night-time economy.

Retailer Representation

There is a good mix of national chains and local independent stores present within Long Eaton. Key national chains which act as a major retail draw for the centre include Boots, Burtons, WH Smiths and Argos. These national chains are all focused within the Primary Shopping Area although Aldi, Wilkinsons, Home Bargain are located within the Secondary Areas but still make an important contribution to the vitality of the centre.

Rents and Yields
No information available.

Crime Rates



[9]

Long Eaton suffers from a reasonable but acceptable level of crime with a particular high amount of anti social behaviour being evident throughout the town. However, these issues are more prone to the night time whilst Long

[9] http://www.ukcrimestats.com/Neighbourhood/Derbyshire_Constabulary/Long_Eaton_Town

Eaton in the daytime is a reasonably safe location to shop and visit. Neighbourhood Wardens do patrol the centre as means to aid local policing in the area, which is also assisted by the police station present in the town.

Environment of the Centre (including Accessibility)

The primary shopping area of Long Eaton is largely pedestrianised, resulting in a good flow of shoppers and a comfortable retailing environment. This in part explains why A1 retail/comparison shopping is focused within the Primary Shopping Area as the environment allows for a more relaxed and enjoyable shopping experience. However, traffic congestion is an environmental issue for other parts of the Centre particularly at peak times during the day. This poses a real concern for some commercial operations present in the Secondary Shopping Area as they are positioned immediately adjacent to busy roads (i.e. Derby and Tamworth Road's) with particularly narrow pavements ensuring that shoppers are in close distance of traffic. The roundabout between Nottingham and Derby Road, Midland and High Street is a particularly frequent source of congestion.

In terms of public transport, there is adequate provision for cyclists throughout the town centre, but it is acknowledged that this could be developed further, particularly with regards to additional signage and cycle stand facilities. With regards to other forms of public transport, Long Eaton's Railway Station is a sizeable distance away from the shopping centre and is a significant walking distance (approx twenty minutes). However, a wide range of bus services pass through the town centre making it easily accessible, with Derby Road acting a transport hub for these services. Frequent services link the town centre to Derby, Nottingham, Ilkeston and Loughborough (via East Midlands Airport). In terms of car parking, street parking around the centre is restricted but ample provision is available at Beaconsfield Street and Lawrence Street car parks. These are reasonably well used throughout the day. Furthermore, the large car parks at Tesco and Asda, offer parking (albeit for a limited period) which can also be used to allow for shopping visits into the Centre.

Of particular importance to restoring elements of the historic built environment is the Long Eaton Townscape Heritage Initiative (THI). This ongoing project funded by lottery monies has significantly improved the public realm of the Town Centre and as a consequence, the shopping experience. As a result from the initiative, eligible buildings have been renovated (notably, York Chambers/Rendevouz Cafe) whilst the Market Place has been resurfaced and fitted with contemporary street furniture positively enhancing the streetscape. However, greater emphasis could be placed on the area surrounding the Market Place, and there is potential for the new paving to be continued along the High Street through further phases of this work pending the availability of funding.

The style and quality of the buildings within the Town Centre range substantially with historic buildings being situated in and amongst other more modern buildings constructed throughout the 1960 and 1970's of basic, but functional design. Many first floor flats and businesses are in a relatively poor overall condition, and could be improved with targeted investment. The secondary shopping area is a key gateway into the town centre from all directions and its appearance could be improved to improve the attractiveness and desirability of the centre as a whole. A sizeable element of the town centre is covered by a Conservation Area which helps to manage development and provides scope to protect and enhance its general character and setting.

<u>Conclusion</u>

The assessment has collected evidence which suggests that Long Eaton is currently trading reasonably healthily as a shopping centre. Indeed, the shopping centre has an 11% vacancy rate which is broadly in line with the 11.2% national average figure recorded by the British Retail Consortium in 2011. There are also a limited number of vacancies within the Primary Shopping Area and this is supplemented by a sizeable number of A1 units providing for an acceptable comparison-led shopping experience. This shows that the shopping centre has been reasonably successful in managing the effects from the two large format supermarkets (located on the edge of the centre) and avoiding vacancies and a restricted retail offer.

Simultaneously, the supermarkets have enabled the convenience shopping needs of Long Eaton’s retail catchment to be comprehensively met. The Secondary Shopping Area has developed a mainly service-led role, particularly as it currently hosts a sizeable number of financial and professional services. In summary, considering the pressures created from rising patterns of internet shopping, the town’s proximity to larger retail centres in Derby and Nottingham, Long Eaton must be considered in this context as trading to a relatively high performance.

Ongoing enhancements to the town centre will be carefully co-ordinated and promoted against the objectives set out within the Long Eaton Town Centre Masterplan. This provides a blueprint which sets out a series of actions to be enacted upon to help the ongoing regeneration of the town centre.

Sandiacre

Introduction

Sandiacre Local Centre is located around nine miles east of Derby city centre and seven miles west of Nottingham city centre. It is also in close proximity to Stapleford District Centre and Long Eaton Town Centre. For the purposes of this assessment, the boundary of Sandiacre Local Centre is defined by the Local Plan Shopping Centre Policy (S1). The Aligned Core Strategy promotes Sandiacre as being a Local Centre within the draft hierarchy and network of centres across Greater Nottingham. The heart of the Shopping Centre is located at the junction of Station Road and Derby Road, both of which are not pedestrianised and are subject to congestion at peak times. The Centre's surroundings include a site which has the benefit of a planning permission for a new Tesco superstore, a historic listed mill building (Springfield Mill) and also the Erewash Canal with runs north south through the centre.

Diversity of Uses

Type	Number	Percentage
A1	36 (inc. 7 V)	49%
A2	3	4%
A3	3	4%
A4	2	3%
A5	6	8%
Other	24 (inc.13 C3)	32%
Total	74 (inc. 7 V)	

Type	Number	Percentage
Convenience	6	8%
Comparison	12	16%
Service	11	15%
Food & Drink	13	18%
Miscellaneous	25	34%
Vacant	7	9%
Total	74	

Sandiacre Local Centre contains a variety of uses and accommodates a particular high percentage of A1 Retail and 'Other' uses. Due to the current role of Sandiacre as a 'Shopping Centre', the numerous A1 uses are expected, but the high proportion of 'Other'/Miscellaneous' uses is largely owing to the presence of a large number of C3 Dwellings (13 in total) which are located across the centre. The statistics show that convenience and comparison only forms a small part of the centre, with A1 hairdressers and sandwich bars offering a service role (in line with the methodology of this assessment). The presence of Lidl and Co-Operative stores, obviously cater for some existing retail needs, but it is expected that the new Tesco superstore will comprehensively meet these needs and also help to claw back trade from nearby retail centres when it opens.

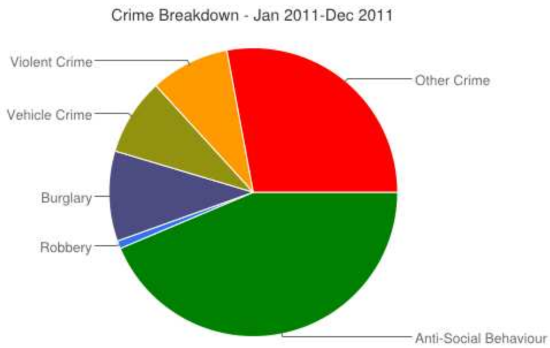
However, only a small number of cafes, restaurants, public houses and traditional financial and professional services are evident within the centre. This limits Sandiacre's diversity and restricts the reasons for residents and visitors to currently come to Sandiacre at various stages throughout the day and into the evening. Considering the presence of an attractive environment, mainly due to the presence of the Erewash Canal, this absence of non-A1 uses typically found in centres is noteworthy.

Retailer Representation

Although there are many local independent stores which operate within Sandiacre's Shopping Centre, there is only a limited range of stores when considering the lack of national chains present. Indeed, Lidl and The Co-Operative stores are the only real significant national chains which serve to act as draw to the centre, whereas the other smaller/independent stores largely exist to meet local and specialised needs.

Rents and Yields
No information available.

Crime Rates



[10]

With regards to crime, Sandiacre is generally a safe centre for shopping and visiting although the statistics do show a particular high amount of anti social behaviour being evident throughout the centre. However, Neighbourhood Wardens do patrol the centre as means to aid local policing in the area.

Environment of the Centre (including Accessibility)

Sandiacre has a pleasant built environment which is influenced by the presence of the Erewash Canal and adjacent Springfield Mill. The style and quality of the buildings seen across the centre ranges but most are deemed on visual assessment to be generally fit for purpose and suitable for modern trading. However, a significant and notable worry concerns local traffic which is a serious environmental problem for the Centre. This is exacerbated by the lack of a pedestriansed area for a comfortable shopping experience. Indeed,

10 http://www.ukcrimestats.com/Neighbourhood/Derbyshire_Constabulary/Sandiacre_~_Risley

the crossroads at the heart of Sandiacre centre, is a constant source of congestion with traffic consistently backing up on all four approaches owing to the traffic lights and limited road capacity with particularly narrow highways.

In terms of public transport, there is reasonable provision for cyclists in the shopping centre and the centre greatly benefits from the Canal towpath, but it is acknowledged that this provision could be developed upon given that the Erewash Canal is a key piece of Green Infrastructure in the Borough. With regards to other forms of public transport, the shopping centre is easily accessible through a number of bus services which links Sandiacre to Nottingham and the Borough's 2 towns. In terms of car parking, the small provision which is available is supplemented by nearby off street parking. Furthermore, the large car park at Lidl can utilised to allow for shopping visits into the Centre.

The centre has benefitted through a phased approach to enhancing public realm in recent years. The Borough Council has invested resources in successfully overseeing environment improvements to the street scene with new paving, seating, bins and street lighting all helping to enhance the offer of Sandiacre as a retail destination.

<u>Conclusion</u>

In conclusion, the evidence suggests that Sandiacre Local Centre is trading reasonably healthily at the time of assessment. However, a major threat to existing retailers comes from the impending impact of the Tesco Superstore which was granted planning permission in 2011. This will require active monitoring to understand the ongoing impacts to other retail activity within the defined Sandiacre shopping area. The centre only has a 9% vacancy rate which is significantly below the 11.2% national average figure recorded by British Retail Consortium in 2011. Even if you omit the 13 dwellings recorded within the survey, the vacancy rate only rises to 11.4% which is broadly in line with national vacancy trends.

However, the resilience of the centre will be under scrutiny in the near future when the impact of new Tesco Superstore becomes realised. However, even if the viability of some of the A1 units already present become threatened, there is certainly an opportunity that some of these enterprises could transfer into Cafes, Restaurants etc. to create more of a leisure/cultural role for the centre which could maximise Sandiacre's canalside location.

In conclusion, the evidence suggests that Sandiacre Local Centre is currently reasonably healthy and successful in meeting the retail needs of its residents. However, with the forthcoming implementation of a Tesco store, Sandiacre's retail role may see restructuring and a slight enhancement to its role. This will also help diversify the centre and result in more trade through the clawing back of spending done in nearby centres (Ilkeston and Long Eaton). Information received as part of the Tesco planning application pointed towards retail spending 'leaking' from Sandiacre, and with new floorspace, albeit located just outside the defined centre, this trend will be reversed.

GEDLING

Arnold

<u>Introduction</u>

Arnold is located north east of Nottingham city centre. The centre is linear in nature and is sited along the roads of Front Street and High Street. It lies to the east of the A60 (Mansfield Road) which forms a primary route into the city centre. The surrounding area are a number of parks and open spaces including Arnot Hill Park which includes Gedling Borough Council's Civic Centre.

<u>Diversity of uses</u>

Primary Area (Use Class):

Type	Number	Percentage
A1	76	72.38%
A2	17	16.19%
A3	3	2.86%
A4	2	1.9%
A5	3	2.86%
Other	4	3.81%
Total	105	100%

Secondary Area (Use Class):

Type	Number	Percentage
A1	41	38.32%
A2	7	6.54%
A3	6	5.61%
A4	5	4.67%
A5	8	7.48%
Other	40	37.38%
Total	107	100%

Combined Primary and Secondary Areas (Use Class):

Type	Number	Percentage
A1	117	55.19%
A2	24	11.32%
A3	9	4.25%
A4	7	3.3%
A5	11	5.19%
Other	44	20.75%
Total	212	100%

Primary Area (Type of goods/services):

Type	Number	Percentage
Convenience	9	8.6%
Comparison	47	44.8%
Service	19	18.1%
Food & Drink	12	11.4%
Miscellaneous	9	8.6%
Vacant	9	8.6%
Total	105	100%

Secondary Area (Type of goods/services):

Type	Number	Percentage
Convenience	1	0.9%
Comparison	24	22.4%
Service	17	15.9%
Food & Drink	23	21.5%
Miscellaneous	36	33.6%
Vacant	6	5.6%
Total	107	100%

Combined Primary and Secondary Areas (Type of goods/services):

Type	Number	Percentage
Convenience	10	4.7%
Comparison	71	33.5%
Service	36	17%
Food & Drink	35	16.5%
Miscellaneous	45	21.2%
Vacant	15	7.1%
Total	212	100%

Arnold is more than twice the size of the next largest centre in the Borough and contains a wide range of uses. The centre is split into two areas with Front Street being the primary shopping area and part of the north end of Front Street and High Street being secondary. While the statistics show that convenience only forms a small part of the centre, these uses include key draws such as ASDA and Iceland. Services include a number of banks and also estate agents which are generally found along Front Street. There is also a good range of restaurants, public houses, sandwich bars/cafes and fast food takeaways, mainly within the secondary area along High Street and the southern end of the centre along Nottingham Road. The Secondary area has a lower density of uses, with interspersed with dwellings. There are a higher percentage of non A1 uses in the secondary area, with a greater number of general business rather than 'main town centre uses'.

There is a good mix of national chains and local independent stores in Arnold. Key national chains which act as major draws for the centre include ASDA, Wilkinsons, WH Smiths and Argos. These national chains are focused along Front Street with Wilkinson's at the southern end of the primary are and ASDA at the north. Sainsbury's is located outside the centre to the South.

There is also a typical range of high street banks and well known estate agents. Local and independent traders are found in all sectors (convenience, comparison etc) and are mixed among the high street stores along Front Street. High Street is more focused on independent stores and other business uses such as garages and plumbers merchants which are especially prevalent towards the North end of High Street. The focus of the centre is on mid-range and budget stores.

<u>Rents and Yields</u>

No information available

<u>Accessibility</u>

In the primary area of Arnold the pedestrianised southern section encourages a good flow of visitors. There is adequate provision for cyclists, although it does not appear well used. Public transport, available from several bus stops along the North end of Front Street, is very well used which supports the frequent services. There is very limited on street parking is available, mostly for the disabled outside Wilkinsons, with some small taxi ranks. The car parks appear well used, including the large example accessible via Ravenswood Road, although parking on side streets is also popular. Traffic is moderate, with a one way system on Front Street although the Nottingham Road/Arnot Hill Road junction by Wilkinson's is something of a bottle neck during peak periods.

<u>Pedestrian Flows</u>

The majority of the pedestrian traffic in Arnold appears to be focused on the southern pedestrianised end of the centre, where the major retailers are located. Whilst the northern end of the centre does not appear to be as heavily used by pedestrians, the entire town is still relatively busy and clearly does not suffer from any particularly quiet spots.

<u>Town Centre Environment</u>

Street furniture appears well used, as generally there is little litter, although benches are scarce, notably around the southern section. Many first floor flats and businesses are in a relatively poor overall condition, and could be improved. Greater emphasis could be placed on the area surrounding the Market Place, which at present is underutilised and clearly requires revitalisation. Provision of trees and hanging baskets could also improve the visual impression of the centre.

In the secondary shopping area of Arnold bus services continue to be well used, although they are lesser in number than the primary area. The roads are busier with traffic, notably on High Street, with a wide highway, together with a distinct lack of pedestrian crossings prohibiting easy access on foot. Despite wide highways there is little provision for cyclists, with instead greater emphasis on private transport. This is evident through the high number of available car parks in the secondary area, of which many provide easy access to the primary shopping area. For example the car park to the rear of ASDA provides in excess of 120 spaces and is consistently well used, with little on street parking available.

A greater degree of green space is present in the secondary area; however grassy areas are largely poorly maintained and add little to the environment. Trees are again more noticeable in number than the primary area, but could be increased further. Benches are high in number, but the lack of bins is reflected by the moderate levels of litter. Furthermore, the pavements are poor and show evidence of numerous road works, which contribute to an untidy appearance. The secondary area is a key gateway into the town centre from both the North and South and its appearance could be improved to improve the attractiveness of the centre as a whole.

Conclusions

Arnold Town centre appears to be performing well. Vacancy rates are relatively low and there is a good mix of national chains, which act as anchors (ASDA, Argos and Wilkinsons), and independent stores. Arnold is very accessible with good bus connections. The market is a key feature although it is perhaps in need of improvement to ensure that the most is made of it. Space to grow the centre is limited although considerations will be given to environmental improvements and initiatives to increase footfall.

Carlton Square

Introduction

Carlton Square is centred on the B686, to the east of Nottingham city centre and the Carlton Hill area. The area also includes units on the north side of Burton Road. The junction of Burton Road, Carlton Hill and Cavendish Road forms the main junction between the eastern and western sections of Carlton Square.

Diversity of uses

Type	Number	Percentage
A1	17	52%
A2	2	6%
A3	1	3%
A4	2	6%
A5	3	9%
Other	8	24%
Total	33	100

Type	Number	Percentage
Convenience	4	12%
Comparison	6	18%
Service	4	12%
Food & Drink	5	15%
Miscellaneous	6	18%
Vacant	8	24%
Total	33	100%

Carlton Square contains the lowest number of businesses of the four main centres in the Borough with only thirty three units compared to eighty-three in the next smallest centre. The western area of the site is clearly dominated by the Tesco store and associated parking facilities. The eastern section contains a moderate number of retail outlets, including chain stores like Wilkinsons and Farmfoods, but also smaller independent units. The centre has a vacancy rate of 24%, the highest of the four main centres in the Borough. There is a lack of A3 units with the only one currently vacant.

As previously noted the supermarket Tesco dominates the area, and is clearly the main draw for visitors to Carlton Square. The main highway junction in the centre of the area clearly demarcates the separation of Tesco, with little pedestrian flow between the two sections and also acts as a barrier to links between the two areas. Independent retailers form a considerable percentage of the overall units. The units on Burton Road are perhaps too far from the main access to Tesco's or the parking at Carlton Square itself to add significant attraction to the centre.

Rents and Yields

No information available

Pedestrian Flows

The centre itself is extremely small with pedestrian flow mainly between the car park and the front of the Farmfoods / Wilkinsons units. Further down the precinct, on the date of our inspection there appeared to be less pedestrian movement and there as very limited movement between the centre itself and the retail units on Burton Road and Tesco. Indeed many of the units along Burton Road are in fact vacant with only the Joy House unit and the Blacks Head public house being open.

Accessibility

Public transport appears very well used, notably the bus stops on Carlton Hill, which is clearly used by shoppers visiting Tesco. There is a limited amount of trees and shrubbery, with the majority situated on the boundary between Tesco and Carlton Hill, and also some near Burton Road. The units present on Burton Road are in drastic need of redevelopment, with a collection of vacant shops, combined with the vacant offices which project onto the main highway junction and the Windsor Castle pub adding to the run down appearance of the centre.

The pedestrianised eastern section provides a street through the centre of the retail units; however it is of poor design and build quality, and lacks sunlight due to the adjoining offices. However, it does reduce the noise from traffic which is persistent throughout the surrounding roads. Tesco has permission to expand and make improvements to the links between its store and the main shopping precinct although this has not yet been implemented.

Town Centre Environment

Large amounts of car parking are available both on the Tesco site (200+ spaces) and around the eastern area (120 spaces) which are well used. However, the latter area in particular has a vast amount of underutilised parking facilities, which could be used to expand the existing shopping area, or redeveloped, into an area of green space which is currently lacking. There is a moderate amount of litter, a dearth of benching, particular in the pedestrianised area.

Conclusion

Carlton Square is dominated by Tesco. The shopping precinct is underperforming and has a high vacancy rate. The centre is in need of significant investment and upgrading especially the Burton Road facades which present a poor image and is outdated in terms of design and layout.. There is little connectivity between Tesco and the shopping precinct, perhaps due to the busy junction.

Mapperley Plains

Introduction

Mapperley Plains is located north east of Nottingham city centre. The area is sited along the B684, a major radial route into the centre of Nottingham for both public and private transport.

Street level uses

Type	Number	Percentage
A1	59	65%
A2	13	14%
A3	6	7%
A4	2	2%
A5	8	9%
Other	3	3%
Total	91	100%

Type	Number	Percentage
Convenience	31	34%
Comparison	10	11%
Service	25	27%
Food & Drink	16	18%
Miscellaneous	7	7%
Vacant	3	3%
Total	91	100%

Mapperley Plains contains a large number of businesses, including retail outlets, banks and restaurants and has a relatively low vacancy rate. Mapperley Plains has the highest percentage of Food and Drink uses of the four main centres in Gedling and provides a good range of popular restaurants, cafés and public houses. Comparison stores only make up 11% of the centre compared to 33% in Arnold and 28% in Netherfield. This along with the size of the stores, the high percentage of convenience and food and drink uses suggest that Mapperley may provide move of a 'top-up' and leisure destination than as a weekly shopping destination which is likely to be done in the larger stores available in Carlton Square and Arnold.

Boots and the Cooperative are located beside one another in the centre of Mapperley Plains. Farmfoods is located further towards Woodborough Road, while Ladbrokes and William Hill also have units in the central area. The majority of the other units are independent businesses including home ware, clothing, and several beauty salons. There are a moderately high number of banks in the area such as Barclays and Halifax, despite some recent closures, and a good number of estate agents. Some charity shops are located on Mapperley Plains, notably Oxfam, which has recently expanded, although they remain scattered throughout the area.

<u>Rents and Yields</u>
No information available

<u>Accessibility</u>

Mapperley Plains is well served by public transport, especially the NCT route 45, which runs very frequently into Nottingham City Centre. Other routes such as the 21 offer transport to other shopping areas like Arnold. These services are very well used.

<u>Pedestrian Flows</u>

The majority of pedestrian activity in Mapperley is focused around the Farmfoods and the Co-op. There was also pedestrian activity around the precinct and the other set back shops to the north east side of the main shopping street.

<u>Town Centre Environment</u>

Parking provision is high in the area, with several car parks located to the rear of the retail outlets with access via residential streets. The car park to the rear of Boots in particular offers c. 100 spaces. There is also some on street parking, which is consistently well utilised. Furthermore many local people walk to Mapperley Plains; however there is little provision for cyclists, which could be improved. At peak times the area becomes very congested and therefore noisy with both public and private transport slowed by the numerous pedestrian crossings and related traffic signals. However, such crossings encourage pedestrian flow and largely prevent the concentration of units on one side of the highway.

Street furniture is both numerous and well maintained, with negligible litter present. There is a mixture of mature and recently planted trees, with hanging baskets on many lampposts alongside some raised street level flower beds. Pavements are also well maintained, with lowered kerbs a notable feature which encourages disabled access. Many pavement areas are very wide, except where outside catering or food stalls inhibit easy access. Moreover shop exteriors at both ground and first floor level, combined with the street appearance provide a pleasant and accessible shopping area. The 'square' to the north side of Plains Road offers an opportunity for markets, craft fairs or similar uses.

<u>Conclusion</u>

Mapperley Plains provides a service and leisure function as shown by the high number of food and drink uses present. The centre is very accessible and benefits from being on a main route into Nottingham. There is little scope for expansion and redevelopment of existing sites would be required if improvements were required. Further events to increase footfall could be undertaken.

Netherfield

Introduction

Netherfield shopping centre is located to the east of Nottingham city centre around Victoria Road, and is accessible from Colwick Loop Road. A railway line forms the north westerly border to the shopping centre, while the south easterly edge adjoins residential properties. Victoria Road to the south links to Victoria Retail Park and there are a number of retail uses located along this road.

Diversity of uses

Type	Number	Percentage
A1	37	45%
A2	7	8%
A3	5	6%
A4	1	1%
A5	8	10%
Other	25	30%
Total	83	100%

Type	Number	Percentage
Convenience	4	5%
Comparison	23	28%
Service	10	12%
Food & Drink	13	16%
Miscellaneous	22	27%
Vacant	11	13%
Total	83	100%

Netherfield shopping centre contains a moderate number of businesses, with numerous residential properties included in the defined area. Partly due to this the ‘miscellaneous’ category is the highest of the four main centres in the Borough. While convenience forms only a small part of the centre the Cooperative store is an important anchor. Other uses in the area remain varied, with a good selection of banks, and also beauty salons and chemists among numerous others.

The banks located in the Netherfield shopping area are predominantly located to the north of the Co-op while to the south there are smaller independent units and some residential properties. There are a number of takeaways in the centre.

Rents and Yields

No information available.

Accessibility

The two bus stops in the shopping area are very well used, with long queues frequent for regular buses which connect the area to Nottingham city centre. However, there is little provision for cyclists in terms of cycle lanes and areas to secure bicycles. Pedestrian flow is aided by wide pavements and numerous zebra crossings which slow traffic through the centre. During peak periods and when the level crossing is in operation traffic can be backed up through the centre along Meadow Road. Parking is provided on a small number of side streets, and some limited on street parking, but the car park to the rear of the Cooperative forms the main area used by private vehicles by providing c. 50 spaces.

Pedestrian Flows

The primary area of footfall appeared to be located around the Co-operative foodstore, and along Victoria Road between the Co-op and the HSBC bank.

Town Centre Environment

Street furniture is generally well used, with some benches, but few litter bins. There is also a lack of green space, with a limited number of young trees, but no flowers or hanging baskets present. The street furniture was generally new and in good condition, and alongside the paving has recently been redeveloped. The small area outside the Co-op is used as a civic space and groups have used this to hold events on occasions.

There were also a high number of youths loitering around some businesses and bus stops, and although not aggressive, clearly made elderly shoppers nervous. Some of the vacant buildings, notably on side streets, such as Kenrick Street and Meadow Road are in need of redevelopment, as in some cases units appear to have been empty for a number of years. Areas such as these are the most suitable if the shopping centre is to expand, however it is debatable if such an expansion is required. The former school on Meadow Road has been demolished. Planning Permission has been granted to use this site as a Care Home.

Conclusion

Nethfield provides very much a local function at the lower end of the market. The presence of the nearby Victoria Retail Park and Morrison's and the size and nature of the stores limits the opportunities to improve the centre by changes to the range and quality of goods. The centre is compact and accessible by a variety of sustainable transport measures. Further developments at Victoria Retail Park and potentially at the Colwick Tank Farm may further impact on the vitality and viability.

NOTTINGHAM CITY

Bulwell

Introduction

Bulwell is a small market town located approximately 4 miles north-west of Nottingham City Centre. It is the largest of 4 District Centres within Nottingham City as classified within the 'saved' Nottingham Local Plan 2005. Within the City's emerging Core Strategy it is elevated to the status of Town Centre, reflecting its unique nature and function and marking its role and importance within the City's retail hierarchy.

As well as comprising a significant neighbourhood within the City of Nottingham, Bulwell retains its own distinctive character and identity based on its origins as an historic market town serving a number of small surrounding settlements, including those that grew up around the mining industry. The town continues to serve residents from beyond its immediate locality, including, for example, a number of the housing estates in the west of the City that have well established and popular bus services linking them to Bulwell.

Although Bulwell's precise pattern of trade draw may have shifted over time, with a growing emphasis on some of the City's suburban estates relative to outlying settlements, its essential market town character and function has remained robust. The majority of its retail and associated services are still focussed on the town's strong north/south Main Street and central Market Place where a regular market is held four times a week. A small number of secondary east/west streets and alleyways leading from this core area also accommodate a range of shops and services, and provide linkages to nearby residential areas.

Diversity of Uses

Type	Number	Percentage
A1	91	66%
A2	18	14%
A3	3	2%
A4	5	4%
A5	5	4%
Other	13	10%
Total	135	100%

Type	Number	Percentage
Convenience	25	19%
Comparison	40	30%
Split	1	1%
Service	41	30%
Food & Drink	13	10%
Miscellaneous	9	6%
Vacant	6	4%
Total	135	100%

Bulwell has 135 premises spanning a range of retail, commercial and community uses. The Centre consists of mainly small ground floor units within narrow individual buildings set out on each side of Main Street and immediately adjoining east/west streets. There are some medium-sized premises such as that occupied by Iceland. These are typically formed from the merger of adjoining older buildings although there are some examples of more recent purpose built premises including, for example, the premises occupied by Argos.

The town's Market Place is in regular use four days a week and incorporates a wide range of traditional market stalls across the convenience and comparison sectors, including fruit and vegetables, clothing and household goods.

A notable recent addition to the Centre is the newly constructed Tesco Extra superstore that opened in 2011. The 5000 net square metre store is located at the northern fringe of the defined Centre on land that was formerly occupied by Kwik Save and a surface car park. Pedestrian access to the store can be gained from the eastern side of Main Street, whilst car borne shoppers can access it from Jennison Street (that lies on the northern boundary of the shopping centre) and utilise on-site parking provision. The Tesco Extra represents the sole large format store within the Centre, the only other unit of significant size being a former Co-operative supermarket that is now largely occupied by Wilkinson's alongside a small number of ancillary tenants including the town's main Post Office.

To the south of the Centre, just outside the existing boundary, a new multi-purpose community facility has been opened to deliver library, health and education services.
Both of the above schemes add to the quantity and nature of the retail offer and community facilities provided within Bulwell respectively, reinforcing its role and status as a Town Centre serving the needs of users from both the immediate locality and wider catchment.

Bulwell has a high percentage of A1 retail units, a significant proportion of service outlets, but only a very small fraction of food and drink premises. The introduction of Wetherpoons to the northern part of Main Street has increased the number of drinking establishments within the defined Centre boundary to five, and also supplemented the very limited options for eating out in Bulwell, which focus mainly on day-time café type provisions. Leisure uses are also very limited, with the main provision being represented by the presence of two snooker halls.

Retailer Representation

The majority of Bulwell's A1 retail operators are independents that generally occupy the high number of small units within the Centre. However, there is a significant presence of national and regional multiples with a strong emphasis on the budget end of the market. Multiples represented in Bulwell include Boots, Argos, Superdrug, Wilkinson's, Brighthouse, Farmfoods, Littlewoods Clearance Store, Ethel Austin, Iceland, Heron Foods, Greggs, Birds, Jonathan James, Bon Marche, along with the new Tesco Extra superstore. Charity shops have only a minor presence within the Centre, and include Cancer Research U.K., the Salvation Army and Extra Care.

There is a strong service sector that includes a number of independent hair and beauty outlets, branches of several high street banks and building societies, national bookmakers, estate/letting agencies, solicitors, travel agents, opticians and funeral directors. Other specialist services available include tailoring and cake making.

Accessibility

Bulwell has excellent public transport links. It has very good bus services that span a wide catchment area and are supported by a dedicated bus station conveniently situated within the Centre boundary. The services are well used and draw visitors from a range of locations within and beyond Nottingham City. Just to the south east of the defined centre, Bulwell has a train station and a NET tram stop that also provide access to the services offered within Bulwell Centre to a wide catchment.

Free parking is readily available and mainly provided across several off-street car parks, the largest of which lies to the east of the Centre (bordering the NET tram line) within which there is generally spare capacity. The Tesco Extra superstore also has substantial on-site parking provision. On street parking within Bulwell is quite limited, partly as a consequence of the pedestrianisation of Main Street and also due to the levels of off-street provision available.

Pedestrian Flows

There is a strong pedestrian flow that is channelled predominantly along Main Street that forms the key north/south shopping street within the Centre. Pedestrian flow counts taken on the day of the survey (when the Friday Market was present) showed very high levels of activity focussed around the central section of Main Street and the Market Place.

A flow count at the northern end of Main Street close to the Tesco Extra superstore showed significantly lower levels than those within the Market Place, although there was still a good level of pedestrian activity. This finding supported the overall perception gained during the survey that pedestrian activity was highest around the central part of Main Street and the Market Place, and reduced further away from the core of the Centre. Flows on adjoining east/west streets were typically much lower than on Main Street, whilst the route from the Market Place to the bus station had noticeably high levels of footfall.

Environment of the Centre

One of the key factors contributing to the quality of environment within Bulwell is the absence of vehicular traffic within Main Street. As well as enabling free pedestrian flow within the main shopping street, this also helps to reinforce the natural role of the central Market Place as a focal point within the Centre. Bulwell has a core of good quality historic buildings clustered around the main Market Place. Some elements of the public realm, including some of the works carried out using former coalfields' regeneration funding, are now somewhat dated and there could be scope to enhance the environmental quality of the Centre with further public realm investment.

Soft landscaping within the Centre is minimal, but open space is readily available at a public park which adjoins the Centre to the east. General levels of maintenance within the Bulwell are good, litter levels are low and the small number of vacant units does not significantly detract from the overall appearance of the Centre.

Conclusion

Bulwell Centre appears to be performing successfully, with low levels of vacancy and strong pedestrian flows within core areas. The Centre continues to be supported by numerous long term independent and national retailers, and turnover of units is generally low. Recent new developments have added to the retail, leisure and community facilities available and excellent public transport links, as well as readily available car parking, attract patronage from both local and wider catchments. The current environmental quality of the Centre and the core of good quality historic buildings focussed around the Market Place provide a strong basis for future growth and improvements.

Clifton

Introduction

Clifton is the smallest of 4 District Centres within Nottingham City as classified within the 'saved' Nottingham Local Plan 2005, and is also included as a District Centre in the emerging Core Strategy.

Located approximately 4 miles south of Nottingham, the Centre is contemporaneous with the 1950s housing estate that it was designed to serve and continues to fulfil an important role in providing Clifton residents with access to basic goods and services without the need to travel outside the local area.

The majority of the Centre's retail and associated services are focussed within a continuous parade of retail and commercial units that lie along the north western side of Southchurch Drive, along with a Morrison's supermarket that is located to the rear of these units and accessed via Green Lane. A regular market comprising approximately 40 stalls is held at Southchurch Drive every Friday and Saturday.

Diversity of Uses

Type	**Number**	**Percentage**
A1	19	58%
A2	5	15%
A3	1	3%
A4	0	0%
A5	2	6%
Other	6	18%
Total	33	100%

Type	**Number**	**Percentage**
Convenience	13	40%
Comparison	4	12%
Split	0	0%
Service	7	21%
Food & Drink	3	9%
Miscellaneous	4	12%
Vacant	2	6%
Total	33	100%

Within its currently defined boundary, Clifton has 33 premises spanning a range of retail and commercial uses. Leisure and community facilities are predominately clustered just outside the defined Centre on the south eastern side of Southchurch Drive. These include a library and a recently constructed joint service centre that are immediately opposite the main shopping street and further to the north a recently upgraded leisure centre incorporating gymnasium and swimming pool.

The largest outlet within the Centre is the Morrison's superstore that was constructed in the 1990s originally as a Co-operative superstore. W.M. Morrison has occupied the building since 2008 and in 2011 successfully applied for planning permission to extend the amount of retail floorspace by approximately 50% from 3124 to 4763 square metres (gross). This scheme, which has yet to be implemented, would utilise the site of the currently vacant Sun Valley Amusements premises.

The Centre has a small number of medium-sized outlets including a Wilkinson's and an Iceland, but the majority of units are small scale. Although most retail units are accommodated at ground floor level, a small number utilise space on upper floors.

More than half of Clifton's premises are A1 retail units, 75% of which provide convenience goods and the remainder comparison goods. At 20%, service outlets comprise a significant proportion of units within the Centre. There is only a small presence of food and drink units within the defined Centre, although just outside the Centre boundary at the junction of Southchurch Drive and Green Lane, there is the Peacock Public House.

The market that takes place on Fridays and Saturdays comprises a wide range of fresh produce, clothing, household goods and crafts.

Retailer Representation

The majority (about 60%) of premises in Clifton are occupied by independents whilst the other 40% of units within the Centre are operated by chain stores/franchises. Multiples represented in Clifton include Morrison's, Boots, Wilkinson's, Farmfoods, Iceland, Heron Foods, Greggs, Birds, Jonathan James, Bairstowe Eves, Your Move, Co-operative Pharmacy, Lloyds TSB and Bet Fred. Charity shops have no presence within the Centre.

Clifton has a strong convenience goods sector that although dominated by large multiples as cited above, also comprises a number of independents including numerous traders that attend the twice weekly market. The service sector is similarly split between national operators and independents.

Accessibility

Clifton Centre has very good and well used bus services with several routes that serve the residential estates within Clifton and also provide linkages to other areas including the City Centre, The Meadows and West Bridgford. A free Link Bus service offers connections between different bus routes, creating an extensive potential catchment area for Clifton Centre but at the same time providing scope for possible trade leakage to other areas including West Bridgford Centre and Morrison's at Gamston.

Given the nature of goods and services within Clifton Centre, in spite of its good accessibility by public transport and proximity to the A453 trunk road, the predominant trade draw is likely to be from the residential estates within the Clifton area. The future introduction of a NET tram line that is scheduled to run along Southchurch Drive will enhance inward and outward accessibility.

Free short stay parking for Centre visitors is available within on-street bays on Southchurch Drive and also at Morrison's where there are 154 spaces that may be used free of charge for up to 3 hours. Parking is generally adequate, although the on-street bays on Southchurch Drive are usually in high demand and at busy times can become fully occupied. Whilst the main shopping parade is only a short distance on foot from the Morrison's car park, the available routes between Morrison's and Southchurch Drive are unappealing, especially after dark, being fronted by blank walls, poorly lit and also, in part, used by vehicular traffic including service vehicles.

Pedestrian Flows

The main shopping street on Southchurch Drive has high pedestrian flow levels and a bustling atmosphere characterised by frequent comings and goings on foot, via bus and by car. The various pedestrian routes leading to Morrison's from Green Lane and Southchurch Drive are also fairly well used, but lack of surveillance, deficient lighting and poor environmental quality appear to deter some users, including those that may otherwise link trips to Morrison's with visits to shops on the main parade. Although Morrison's is a significant trade draw for the Centre, its position set back from any main road frontage and the poor quality of its linkages with the remainder of the Centre do not encourage high levels of pedestrian flow between them.

Environment of the Centre

Clifton Centre is dominated by the main 1950s parade of shops on Southchurch Drive that have been supplemented by later developments including the 1990s supermarket to the rear and leisure and community facilities on the eastern side of Southchurch Drive. The original shopping parade is now somewhat dated, and the buildings and associated public realm have a rather tired appearance and would benefit from some maintenance and enhancement. However, although there is some underutilised upper floor space this is not overly prominent, ground level vacancies levels are low and the parade continues to be popular and well used. The shopping area is generally tidy and litter levels are low.

There is a wide pavement area in front of the main shopping parade that provides ample space for pedestrians using the shops and bus stops. Although there are some street trees and benches, there is very limited soft landscaping in the Centre. The pedestrian routes leading from Southchurch Drive and Green Lane towards the rear of the shops on the main shopping parade and Morrison's are flanked largely by blank walls or surface car parking and some are also used for servicing purposes. Overall, these linkages are unappealing and would benefit from reconfiguration/ enhancement.

Conclusion

Clifton is a busy centre that continues to provide a good level of convenience goods and services to residents within the surrounding residential areas. The Centre has been improved and reinforced by the addition of a joint service provision (Clifton Cornerstone) and extended facilities at the existing leisure centre, and further retail investment is proposed in the form of an extension to the Morrison's superstore. There is scope for further enhancement of the Centre, and opportunities to secure improvements to the public realm and the appearance of the Centre generally, should be fully exploited in connection with future investment/development activity.

Hyson Green

Introduction

Hyson Green is one of the 4 District Centres within Nottingham City as classified within the 'saved' Nottingham Local Plan 2005, and is also included as a District Centre in the emerging Core Strategy.

Located approximately 1 mile to the north west of Nottingham City Centre, Hyson Green Centre follows a strong linear format with the majority of units fronting onto either side of Radford Road, a busy transport route that runs in a broadly north/south direction linking the periphery of the City Centre and Basford. Radford Road is dissected by the east/west running Gregory Boulevard forming a prominent crossroads within the Centre that is fronted by a mix of commercial and community buildings.

Other than an Asda Superstore that is located just to the north east of the crossroads on land that had formerly been occupied by an unsuccessful complex of 1960s flats, most of the retail units on Radford Road comprise late Victorian properties laid out in long terraces, a minority of which have been amalgamated with adjoining premises to form larger outlets.

The wider tree-lined Gregory Boulevard incorporates a more varied range of properties in terms of age, scale and function, notable recent additions being the New Art Centre to the east of the crossroads and the Mary Potter joint service centre to the west.

Hyson Green has evolved over several decades into a Centre that provides general convenience goods to local residents together with a growing number of specialist products and services catering for an increasingly diverse range of ethnic groups both from neighbouring residential areas and other parts of the City.

A regular market comprising approximately 40 stalls is held every Wednesday and Saturday in a prominent position between Asda and the main crossroads. The market incorporates an assortment of stalls spanning from fresh fruit and vegetables, clothing, second hand goods to specialist fabrics.

Diversity of Uses

Type	**Number**	**Percentage**
A1	74	59%
A2	10	8%
A3	10	8%
A4	1	1%
A5	13	10%
Other	18	14%
Total	126	100%

Type	Number	Percentage
Convenience	27	21%
Comparison	25	20%
Split	1	1%
Service	31	25%
Food & Drink	23	18%
Miscellaneous	9	7%
Vacant	10	8%
Total	126	100%

Hyson Green has 126 premises within its currently defined shopping area boundary, and a number of further uses including public library, arts centre, medical practices, joint service centre and community facilities that closely adjoin the shopping area.

The largest outlet within the Centre is the Asda superstore which was constructed in the 1990s. The Asda store acts as a significant trade draw to Hyson Green, and its on-site car park provides the majority of available car parking for users of the Centre as a whole.

Most of the outlets in the Centre comprise of small ground floor units within Victorian properties that are occupied by independent traders. In the area around the junction of Radford Road and Gregory Boulevard there are also some larger units accommodated in late twentieth century buildings including a furniture shop and a medium-sized specialist foodstore.

Almost 60% of the units within the centre are in A1 retail use and there is also a significant food and drink sector that consists of about a fifth of the outlets. Hyson Green also has a strong service sector with approximately a quarter of the units falling within this category.

Goods and services within the Centre are supplied almost entirely by independent traders. This, in combination with the significant proportions of food and drink, and other service outlets, and the different specialist goods available, contributes to the unique character of the Centre and supports strong levels of both evening and daytime activity.

Hyson Green has several health, leisure and community facilities that are predominantly clustered along or close to Gregory Boulevard. These include a library, community centres, arts centre, joint service centre (incorporating a range of health and community provisions), doctors’ surgery, dentist and opticians.

There are some residential properties within the defined centre, particularly on the outer fringes of Radford Road where marginal retail viability and previous contraction in demand have in the past led to some conversions from retail to residential use. However, recent planning applications seeking reversion to retail use in relation to some properties, coupled with low vacancy rates (less than 10% in the Centre overall) suggest a potential reversal of this trend and a growing retail/commercial interest in Hyson Green.

Retailer Representation

The Centre is dominated by independent retailers and there is only minor presence from multiples. The Asda superstore is the most substantial and visible of the chain retailers in Hyson Green, with the limited number of other chain/multiple operators occupying only small scale units. Those present within the Centre include Nat West and Lloyds TSB banks, Ladbrokes and Bet Fred bookmakers, and a Gregg's sandwich shop. There is also a small Boots chemist's within the Mary Potter Joint Service Centre. Additionally, the RSPCA and Haven Housing Trust each occupy a small unit on Radford Road.

Accessibility

Hyson Green has very good public transport provision. It is served by several bus routes and the NET tram line passes along the northern section of Radford Road before looping around to the east and passing the site of the twice weekly market. Trams are very frequent, with one every five or six minutes at peak times.

Radford Road carries high levels of vehicular traffic and at times can become quite congested, its capacity also being shared by frequent trams and buses. There is only limited on-street parking available and few of the retail outlets or community facilities have any significant dedicated parking. The Asda superstore car park provides much of the available free parking for users of the Centre, but there can often be delays experienced around the access/egress point. The Forest Park and Ride car park is also used by those visiting Hyson Green Centre. Overall, although there is car parking available, traffic congestion and perceived parking difficulties appear to lessen the attraction of the Hyson Green Centre in terms of car borne visitors.

High traffic levels can also restrict freedom of pedestrian movement between the two sides of Radford Road, and many Centre users seem to heavily rely on fixed pedestrian crossings to reach their destinations. Although there are pavements on each side of Radford Road, the Victorian pavement widths are not overly generous and in some places available space is compromised and encroached upon by the outdoor display of goods for sale. Some sections of constrained footpath widths can impede access particularly for those using mobility aids and pushchairs.

Pedestrian Flows

The main shopping street, Radford Road, has high levels of pedestrian activity, but in some cases the free flow of pedestrians can be impeded, particularly at busy junctions such as the access to the Asda supermarket car park and the crossroads at the junction of Radford Road and Gregory Boulevard. Although the level of vehicular traffic movement through the Centre does detract from its environmental quality, the large resident population within walking distance of the shopping area still gives rise to a steady flow of users accessing it on foot to obtain goods and services.

Environment of the Centre

The late Victorian origin of the main shopping area on Radford Road is still much in evidence, in spite of some of the properties being the subject of insensitive alterations, and many being spoilt by the display of poor quality and garish signage.

The eclectic mix of independent occupiers and the virtual absence of corporate branding help to create a Centre with individual character and atmosphere. However, a lack of regular maintenance does detract from the appearance of some units, which combined with the accumulated effects of dust and other pollution generated by passing traffic, can give a somewhat negative impression of the Centre in terms of up keep and investment.

The much wider tree lined Gregory Boulevard has a contrasting character to Radford Road, and a greater variety of buildings from different periods. This part of the Centre has seen recent substantial investment in the form of the New Art Exchange and the Mary Potter Centre, both of which represent significant additions to the overall range of facilities available in Hyson Green.

There is currently a prominent vacant site to the west of the library on Gregory Boulevard in respect of which there has been recent developer interest. Along with a number of poor quality late twentieth century buildings close to the Radford Road and Gregory Boulevard junction, this currently detracts from the overall appearance of the area. Just to the south west of this junction there is a small area of open space with some limited seating available. This open space appears to be underutilised, possibly due to its proximity to the busy crossroads, but with some attention it could make a more positive contribution to the environment of the Centre. On the north side of Gregory Boulevard, the Grade II listed United Reformed Church adds a further element to the mixed character of this part of Hyson Green.

The zone in the vicinity of Terrace Street is somewhat detached from the main shopping area and lacks active frontage, being largely dominated by the service area enclosure of the Asda superstore and other tall boundary walls to the south, along with large areas of car parking/hard surfacing and the currently vacant Cricket Players Pub. Although part of this area is occupied by the market that is held twice weekly, in the main it is a bland and inactive space that detracts from the environmental quality of the Centre.

Vacancy levels within Hyson Green are low and empty units do not therefore impact greatly on the Centre’s appearance. However, a small number of long term vacant premises do create a negative impression of the vitality and viability of the Centre.

Conclusion

Hyson Green is a vibrant Centre with a unique character and blend of uses. Although the Centre has experienced some contraction in the past, it now has high levels of activity both during the day time and evening, and a diverse range of independent outlets serving a number of niche markets and providing goods and services to local residents and wider catchments. These characteristics, combined with low vacancy levels and recent developer interest for further retail floorspace, indicate the potential for further improvements in the Centre’s performance. Measures to improve the environmental quality and accessibility of the Centre without harming its character would be likely to support its on-going success.

Sherwood

Introduction

Sherwood is currently one of the 4 District Centres within Nottingham City as classified within the 'saved' Nottingham Local Plan 2005, and is also included as a District Centre in the emerging Core Strategy. It lies approximately 2 miles north of Nottingham City Centre, and broadly comprises two main rows of shops that line Mansfield Road, one of the busiest routes linking the centre of Nottingham with its northern suburbs and settlements in the north of the county. A small number of units are also located on adjoining east/west streets, such as Haydn Road and Winchester Street close to their junctions with Mansfield Road.

The suburb of Sherwood became established in the latter half of the nineteenth century. A large proportion of the properties that accommodate the Centre's retail and commercial unit date from the late Victorian and Edwardian periods although a number of twentieth century developments are now interspersed between them. The former Sherwood Tram depot (now partly converted to a public house/nightclub) still holds a commanding presence within the southern section of the shopping street.

The Centre does not include any superstore scale developments, but does have a medium-sized supermarket that was originally constructed as a Somerfield approximately 10 years ago and subsequently acquired as a Co-operative food store.

Diversity of Uses

Type	Number	Percentage
A1	83	57%
A2	18	12%
A3	11	7.5%
A4	5	3.5%
A5	12	8%
Other	18	12%
Total	147	100%

Type	Number	Percentage
Convenience	20	13.5%
Comparison	31	21%
Split	1	1%
Service	53	36%
Food & Drink	27	18%
Miscellaneous	5	3.5%
Vacant	10	7%
Total	147	100%

Sherwood has 147 retail and commercial units within its presently defined boundary.

It has a good proportion of convenience goods provision, and its most substantial convenience outlet is the Co-operative food-store that extends to approximately 1200 square metres of gross retail floorspace. The Centre also has a number of smaller general grocery stores, including another smaller Co-op and a NISA Local (that is open 24 hours a day).

The majority of the Centre's outlets are small scale and accommodated at ground floor level within short terraces of mainly late Victorian and Edwardian properties. There are some twentieth century developments including a larger unit occupied by Wilkinson's and a block of small commercial premises with flats at upper floor level on part of the western section of Mansfield Road. There are a limited number of commercial units at first floor level, with the remainder of upper floors used as flats or ancillary storage, or vacant.

Sherwood has a very strong service sector, which combined with its food and drink provision comprises more than half of the units within the Centre. Whilst some of the food and drink premises open during the day, a large proportion only operate during evenings which can create some sections of inactive frontage during the daytime. However, the diversity of restaurants, takeaways and public houses within the Centre form an important component of its continuing success and individual character.

Sherwood has a small number of specialist outlets such as a Reptile Centre and technology store presence of a higher order than is typical of a shopping centre of its scale. Although the customer base for convenience goods within the Centre is likely to be mainly locally derived, a significant element of the Centre's custom is also likely to be generated from passing trade, and specialist outlets in particular will draw from a wider area.

Sherwood Centre incorporates a minor proportion of community and health facilities that include a library and medical practices. Other community and leisure facilities are dispersed beyond the defined boundary of the Centre, including a number of properties on Haydn Road to the west.

There is some residential presence within Sherwood Centre, consisting of flats above shops/ground floor commercial units. A series of residential streets run in a broadly east/west direction immediately to the east and west of Mansfield Road, and contribute towards creating a local character and atmosphere to the Centre in spite of the dominance of the busy arterial road running through it.

Retailer Representation

The Centre comprises mainly independent businesses, but there is some chain store /franchise presence including Wilkinson's, The Co-operative, Holland and Barratt, Boots and Birds. Sherwood also has a Lloyd's pharmacy, Nottingham Building Society, Lloyd's TSB, Pizza Hut, NISA Local, and Coral, William Hill and Ladbrokes bookmakers. There are several charity shops within Sherwood, representing both local and national charities.

The high proportion of independent operators that offer bespoke services to respond to local demand are an important element of the retail offer in the Centre and a key factor in its on-going success.

<u>Accessibility</u>

Sherwood has exceptionally good public bus service provision, with numerous bus stops and a range of routes that create an extremely high frequency of service reaching local and wider catchments.

Mansfield Road carries very high levels of vehicular traffic from within the inner areas of the city, its northern suburbs, and settlements in the north of the county and beyond. It is dualled in both directions along the full extent of the main shopping area, reducing to a single multi-user lane plus a bus lane immediately to the north and south of the defined Centre.

The scale of Mansfield Road, combined with the amount of vehicular traffic that is carries, has a very dominant impact on the character of Sherwood Centre. Whilst it clearly adds to the prominence and visibility of shops within it and aids access to them in a broad sense, at a localised level the road dissects the Centre, restricts the free flow of movement within it and has a negative impact upon its environmental quality. Visitors to the Centre are heavily dependent upon fixed pedestrian crossings (that exist at regular intervals) to pass from one side of the shopping street to the other. The environment of the Centre, because of traffic noise and vehicle movements, can come across as somewhat hostile and unappealing especially when traffic flows are at their highest.

There is some limited on-street parking available within recessed bays on Mansfield Road, which is subject to short stay restrictions and appears to be particularly popular with customers passing through en route to other destinations. Other than the Co-operative food store that provides free parking facilities to its customers and visitors to the Centre generally, few retailers have dedicated on-site parking provision. There are other free ‘shoppers’ car parks’ available on both sides of Mansfield Road (accessed from adjoining east/west streets). However, there is a suggestion that these facilities are sometimes used by people travelling to the City Centre from outside the area, who take advantage of the availability of free parking and extremely frequent bus services, thereby limiting the availability of parking for Centre users.

Although Mansfield Road effectively divides the Centre into two halves, generous pavement widths on each side of Mansfield Road allow generally good north/south pedestrian access, with some limited restrictions arising from the outdoor display of goods for sale. There are also some busy junctions of Mansfield Road with east/west streets that impair the free flow of pedestrians along each side of the shopping street.

Pedestrian Flows

Mansfield Road has reasonably high levels of pedestrian activity, but movement is inhibited by the presence of the road. Although some users of Sherwood will travel between a number of different outlets within the Centre, given the specialist nature of some of the retail units and the extent of custom generated from passing trade, a significant proportion of visitors will have a tendency to use only a single outlet, and this tendency will possibly be reinforced by the busy road and the extent of vehicular traffic passing through the Centre.

Environment of the Centre

Sherwood is generally a well maintained centre with some good quality historic buildings interspersed with some later developments that typically lack quality and character. In spite of being dominated by the busy road that passes through it, the presence of the immediately adjoining residential areas that it serves is very evident within the atmosphere of the Centre.

Because of the prominent position of the shopping street and the amount of passing traffic, any vacant or poorly maintained units do have a very visible presence that detracts from the image of the Centre and its overall appeal. Whilst vacancy levels are fairly low, individual examples of empty buildings or poor maintenance therefore have a disproportionate impact on the vitality and appearance of the shopping area relative to some other centres of comparable size.

Recent public realm investment has had some effect in terms of enhancing the physical appearance of the shopping area. However, the dominance of the main road reinforces the sense that Sherwood Centre is a shopping area to pass through or call in at, but appears to undermine efforts to reinforce Sherwood Centre’s identity or function as a focal point for the surrounding community in spite of the size of the local residential catchment for whom it provides a valuable resource and meeting place.

There is limited soft landscaping or open space within the Centre, and the overall impression is one of a busy and bustling urban environment rather than a natural place to pause and relax. Opportunities have, however, been taken to introduce street art in some locations, the most striking example being a high level mural located at a busy road junction in the centre of the high street. The Centre also does have a high proportion of food and drink outlets that ensure activity during both the daytime and evenings, albeit mainly focussed within buildings rather than spilling outdoors.

Conclusion

Sherwood is a busy centre whose success and weaknesses both emanate from the busy Mansfield Road that passes through it. Further public realm investment, measures to address the appearance of any vacant units, and improved parking management would assist in supporting its on-going vitality and viability, and its local and wider function within the city’s retail hierarchy.

RUSHCLIFFE

Bingham

The Market town of Bingham lies 9 miles east of Nottingham City Centre and 12 miles south west of Newark-On-Trent at the intersection of the A46 and A52 roads. Bingham is currently identified as a local centre in local planning policy, but as a district centre in the emerging Core Strategy. The Borough Council has considered it sensible to revisit Bingham's status within the town centre hierarchy on a number of grounds, including its catchment area and the number and range of retail units found in the centre. The retail centre is centred around a traditional market square and contains a range of shops and services including schools, health facilities, a leisure centre and a library.

<u>Diversity of uses</u>

Use Class	Number of Units	% of Total Units
A1	37	50.0%
A2	14	18.9%
A3	6	8.1%
A4	1	1.4%
A5	7	9.5%
Other	4	5.4%
Vacant	5	6.8%
Total	74	100.0%

Category	Number of Units	% of Total Units
Convenience	10	13.5%
Comparison	18	24.3%
Service	41	55.4%
Vacant	5	6.8%
Total	74	100.0%

- Convenience outlets are those that provide tangible goods that are bought on a daily basis and represent essential items.
- Comparison outlets are those that provide tangible goods that are not bought on a daily
  basis and are non – essential
- Service outlets are those that provide goods that are non-tangible – whether used on a daily basis (such as banks) or not (such as estate agents)

Bingham's retail centre has 74 units with street level frontage or access, seven of which are adjacent to the existing defined retail centre boundary. Available information on individual unit floor space is, however, inconsistent or inaccurate and is not therefore reported on here.

The town offers a good range of facilities across the convenience, comparison and service sectors. Although proportionately the convenience sector of Bingham's retail centre is small, it is appears quite adequate for the size of the town, considering the nature of retail outlets that represent this sector including the large Co-Op and Sainsbury's. In addition, Tesco have conditional planning permission for a store which would add significantly to the convenience sector. The service sector is made up primarily of hot food takeaways, hair and beauty salons and barbers and some banks and estate agents.

The town has a weekly market which sells a range of goods including fruit and vegetables, plants and household goods. There is also a monthly farmers market and, between April and September a monthly plant fair. These markets are a unique and important aspect of Bingham's retail health adding diversity to the consumer offer.

Since the last GNRS survey, the proportion of vacant property with street level frontage has increased significantly (from 3% in 2007 to 7% in 2012) but Bingham has also seen an increase in units with street level frontage, suggesting that the town has experienced some growth, but then subsequent decline since the last GNRS survey. The balance between comparison, convenience and service retail units has remained proportionately very similar.

There are several "traditional" style public houses located around the town centre including the Wheatsheaf on Nottingham Road and the Chesterfield Arms and The Crown Inn on the market square. There are a few small cafes and snack bars and takeaway outlets. The Yeung Sing Hotel on the corner of Market Street and Long Acre includes a Chinese restaurant and the Chesterfield Arms also has a restaurant.

<u>Proportion of vacant street level property</u>

There were 5 vacant units in the town centre (7% of all units). This is a considerable increase on the 2007 position where only 2 units were found to be vacant (3% of total units recorded). Out of the vacant units identified, some had dual street level frontage and, therefore, account for a noteworthy proportion of total commercial street level floor space across the centre. However, contact with local agents has alluded to there being a relatively healthy commercial rental market in the long term, where units have been acquired quickly after becoming available; notwithstanding that a deterioration in this trend has occurred in the last 12 to 18 months. Vacant units appear across the extent of the retail centre, including some prime units on the market square.

<u>Retailer representation and intentions to change representation</u>

The majority of retailers in Bingham's retail centre are independent, but there are some significant exceptions including Boots, Co-Op, Sainsbury's, Birds

Confectioners and a number of high street banks and estate agencies. As already mentioned, Tesco have conditional planning permission for a store at Bingham. The interest from Tesco acts as evidence of there being some level of requirement from at least one national retailer.

Rents and yields

An average sized commercial property with single street frontage in Bingham's retail centre will fetch in the region of £1250pcm, or £15,000pa (2011) according to local agents. Information in relation to yields was not obtained.

Accessibility

Bingham is well connected to wider infrastructure, and improvements to the A46 will enhance this further. The retail centre has no cycle lanes or defined taxi ranks. The centre is not pedestrianized although Eaton Place acts as an effective walkway from the car parks to the main centre. Pavements across the extent of the retail centre are wide and accessible to users. The centre is compact and relatively easy for pedestrians to navigate although Market Street is often very busy with vehicular traffic and somewhat splits the centre. The market square provides a large area for pedestrians only; however to reach the square means crossing at least one road, which are not equipped with formal crossing points. There are no restrictions on traffic movement in the retail centre, except for the one way entrance at the junction between Needham Street and Long Acre. This has obvious implications for pedestrians, particularly when goods vehicles, public transport and private vehicles are competing for space. Topographically, Bingham is relatively flat and is largely hard-landscaped to be this way.

Bingham train station is located 220 yards from the Market Place with easy access from Station Street. Bingham is on the Nottingham Grantham line and services include those to Nottingham, Grantham, Sleaford and Peterborough. There is a concentration of bus stops on Market Place on the south side of the market square and a single stop located on Market Street in the north west corner of the market square. There are further stops on the periphery of the retail centre. There are a range of bus services between Bingham and Nottingham, Grantham and Newark and villages and towns in between. Buses leave Bingham for Nottingham at least every 10 minutes.

There is a considerable range of parking facilities within or on the periphery of the retail centre. All car parks are within very close walking distance of the centre and shop frontages and offer short stay, free to use spaces. Generally, the car parks feel safe and are surrounded by lots of activity during the day, although they are generally open to access and there are few, if any, security systems in place. There is some provision for on-street parking along Market Street and around the market square and Market Place, although many of these spaces are designated for disabled use only. Generally, the designated car parks are heavily used and are very often near or at capacity. Particularly on market days, all three of the main pubic car parks (Newgate, Union and Needham) operate on a one in one out basis over the course of a full day (9am - 4pm).

Pedestrian flows

Footfall counts were carried out twice – on market day and one other day at Union Street and Market Street. All surveys were carried out between 10am and 12pm, each survey representing a fifteen minute snapshot. The centre was observed to be significantly busier on general market days than standard weekdays. Union Street was significantly quieter than Market Place, with pedestrian traffic being funnelled through Eaton Place from Newgate Street car park. The bus routes exacerbate this further with pedestrians disembarking in the market square. In addition, the majority of pedestrians recorded as travelling along Union Street seemed to be doing so for need rather than choice, usually to return to or leave their cars. In addition, Union Street is unable to attract the same kind of vehicular traffic flows as Market Street due to the one-way entrance to the road from Long Acre, limiting it as a thoroughfare. The road’s primary purpose is as an access point to related car parking facilities from which pedestrians tend to access the market square via Eaton Place rather than Union Street.

Town Centre Environmental Quality

Overall Bingham is considered a ‘good’ quality environment, which strikes a balance between environmental quality and function. The historical character and compact traditional market square charm of Bingham’s retail centre ensures that the general setting is overall an attractive one. Litter build up in Bingham’s retail centre is relatively low and there is very little obvious graffiti. The Market square provides a great open area for public activity (including the markets), however, there is a lack of seating and as such the market square could be considered under-utilised as a public space outside of market hours. Bingham has no provision of ‘green’ public space within the retail centre. There are a number of alternatives located on the periphery and beyond, however. Trees around the market square are highly attractive, and do well to highlight the area as a place for the convergence of public activity, but this could be expanded further. Due to the compact size and shape of the retail centre, significant noise is a persistent characteristic at times of increased traffic flow.

Some units to the north-east of the market square have remained vacant for some time, and, although they do not have street frontage, this detracts from environmental quality. Similarly there are a few vacant units with street frontage, and this does have some impact on the perceived quality of the environment. Generally though, the retail centre has an attractive mix of frontages, particularly those belonging to the town’s independent outlets. Eaton Place shopping centre needs some investment to update its frontages and match the quality of the market square.

Potential capacity for growth

It is evident that A1 uses have become established adjacent to the currently defined shopping area in recent years, which might indicate a lack of adequate property and room for growth historically. Whilst expansion outside of the defined retail centre is less preferable sequentially, it is worth noting that there is scope for this kind of expansion particularly along Church Street. Facilitating expansion along Church Street would not necessarily negate the intentions of policy to retain a compact town centre, when considering its proximity and connection to the existing defined retail centre.

Within the centre itself, there are a few sizeable vacant properties which may be appropriate for development. In particular, a building in the north east corner of the market square, off Market Place, is possibly large enough to accommodate several small retail units with appropriate alterations. Also, adjacent to Boots at Eaton Place, is a sizeable vacant commercial property. Brand new development might be considered viable at Eaton Place to replace the existing run down and unattractive shopping centre.

Consumer views and behaviour

Overall, of those people questioned respondents were positive about the retail centre, and many visited on at least a weekly basis often travelling from outside of Bingham itself. Respondents noted Bingham's market activity, significant range of services on offer and the quality of service at independent retailers. Concerns raised were largely related to restricted parking provision and traffic issues at busy times. It was also considered that certain types of shops (particularly hairdressers) were over represented. A re-design of Market Place was suggested – either to restrict access to buses and market traffic only or to implement a complete pedestrianisation (and relocate the bus stops along Market Street) and to increase parking provision. Generally, the provision of shops was considered adequate. The majority liked the current size and status of the town and expressed some concern that new development (including the location of a Tesco store) that might act to increase the size or influence of Bingham's retail centre.

Sustaining vitality

Generally Bingham's service and retail offerings are broad and varied enough that it continues to attract significant custom from the local town population and beyond. It is, however, important that service based retail units do not become overly dominant by rising above current levels. Instead, the preference would be for the representation of non-service retail outlets, particularly independent, to expand if possible. It is also important that the markets are maintained or even enhanced as these act as a unique selling point for Bingham. There are a number of potential physical and infrastructural improvements to the town centre that may help to maintain its vitality. In particular, provision for better pedestrian access between Eaton Place and the market square and further controls on traffic movement particularly at busy times. Pedestrianisation of some parts of the retail centre might also be considered viable (for instance across the extent of Market Place). In addition, physical upgrades to or the complete redevelopment of Eaton Place could also act to maintain vitality, as would efforts to restore the currently vacant property on the north east corner of Market Place.

Conclusions

Bingham is an attractive market town with a successful active market square. It has an overall pleasing environment which is pleasant for consumers. In addition, interest from Tesco illustrates the potential that retailers of this size consider Bingham to have.

Bingham is well connected, particularly when taking into account the A46 improvements and the provision of bus and train services. Accessibility within the centre is generally good, although small improvements such as the provision of formal crossing points across the retail centre could improve this. The number of vacant street level properties in Bingham's retail centre has increase since the 2007 survey, and this is something which needs to be taken into account when encouraging or facilitating new development or use proposals. Eaton Place is generally unattractive and outmoded and is often a hub of commercial vacancies, so the redevelopment of this important link between the car parks, library and the market square might be well justified too.

West Bridgford

West Bridgford is located approximately 3 miles south east of Nottingham City centre, off of the A60 and close to the A6011, both of which lead directly into Nottingham. The town centre is linear in composition and currently identified as a district centre in local planning policy and in emerging Core Strategy policy also.

Diversity of Uses

Use Class	Number of Units	% of Total Units
A1	66	53.2%
A2	28	22.6%
A3	11	8.9%
A4	4	3.2%
A5	6	4.8%
Other	8	6.5%
Vacant	1	0.8%
Total	124	100%

Category	Number of Units	% of Total Units
Convenience	13	10.5%
Comparison	34	27.4%
Service	76	61.3%
Vacant	1	0.8%
Total	124	100%

The retail centre of West Bridgford contains a wide range of uses. Overall there is a good range of service shops. Levels of comparison and convenience shops are both low, particularly so in the case of convenience retail. For comparison shops, this is arguably to be expected in a centre in such close proximity to Nottingham city centre.

Within the service sector West Bridgford Retail centre has a significant number of cafes, hair and beauty salons and restaurants as well as estate agents, opticians and firms offering legal services. It is by far West Bridgford's largest retail sector. Since the last GNRS there has been a real unit increase in service outlets and, consequently, a noticeable increase in the proportion of outlets this sector accounts for.

West Bridgford hosts a farmers market twice a month, located along Central Avenue on the croquet lawn. The market is held between 8.30am and 1.30pm and is comprised of approximately 25 stalls. It is a great asset for West Bridgford's retail centre, and attracts considerable numbers of additional visitors to the centre.

Proportion of vacant street level property

Only 3 units with street level frontage or access were found to be vacant. This represents only 2.6% of the total units with street level frontage and represents a decrease from 2007 when 3% were found to be vacant. The difference is even more marked when account is made of the fact that there were fewer total units with street frontage at the time. This suggests consistently strong and increasing demand for retail units within the retail centre.

Retailer representation and intention to change representation

West Bridgford has a small range of national and regional multiple retailers across the service, comparison and convenience sectors, and a small range of independent outlets. The comparison sector is represented by a range of charity shops, as well as a jewellery shop, art gallery shop and a selection of florists, gift shops and the Panasonic store. In addition, Boots exists as part of the comparison sector in the town centre, but has service and convenience sector elements. Besides Boots, the service sector is represented by a range of restaurants including Felicinis, Pizza Express and, along Bridgford Road, a number of bar restaurants including The Monkey Tree. There is also a large Café Nero and a number of much smaller, independent cafe-bars. In addition there are a range of solicitors, estate and travel agents (including Thomson and Co-Op Travel) and a number of opticians (including Vision Express) and a selection of hair and beauty salons and Banks. The convenience sector is represented by a Co-Op supermarket, Iceland and Marks and Spencer's Food and newsagents.

Rents and Yields

A small to medium sized commercial property with single street level frontage in West Bridgford retail centre will fetch in the region of £1600pcm, or £18,000 – £20,000pa. This information was provided by agents who did not have access to more specific information at the time, including specific dates or floor space, but reported that these rates related to the end of 2011 and represented intelligent estimates. Information in relation to land values and yields was not obtained.

Accessibility

Pavements are generally wide and in good repair. In addition, zebra crossings are very well provided for across the centre allowing for continuous movement around the town centre by the full range of users. Cycling is made easier because of the traffic improvements to Central Avenue, although there is no dedicated cycle path. At times, private vehicular traffic which is pushed around Central Avenue because of the enforced traffic flow constraints can build up. There are a range of competing bus services which run to a significant number of places including Edwalton, Compton Acres, Radcliffe, Bingham, Cotgrave, Keyworth, and Nottingham City.

All car parks are designated, off-street car parks and are within very close walking distance of the full extent of West Bridgford retail centre and offer disabled car parking spaces. There are also on-street parking options available, most of these spaces are short stay, no return facilities and are monitored as are the designated off-street sites. There are also roadside meter pay and display facilities available though most of these spaces can be found outside of the retail centre.

Pedestrian flows

Footfall counts were carried out at 4 key points across the centre. All surveys were carried out between 10am and 12pm, to avoid lunchtime, early morning and evening pedestrian traffic fluctuations so as to best represent the norm. Each survey represented a fifteen minute snapshot. Central Avenue is by far the busiest of the areas making up the retail centre and Gordon Road the quietest. This difference reflects the provision of fewer outlets along Gordon Road and the residential nature of the area and the dense and functional nature of Central Avenue as a shopping destination. The traffic control measures implemented at Central Avenue and its location as a thoroughfare for pedestrians travelling between different parts of the town make it the most accessible part of the retail centre for pedestrians, and a highly attractive shopping environment.

Pedestrian activity on Bridgford Road was mainly attributed to the Co-Op foodstore and the Borough Council car parking facilities. It is expected that activity continues to some extent in the evening as a result of the range of bars and pubs located here too. Although Saturdays were observed as being busier than weekdays, they were not significantly so. West Bridgford Retail centre seems able to attract a range of demographics across the whole week, at different times of day at consistently high levels.

Town centre environmental quality

The general setting is an attractive one, particularly since major upgrades in 2000 to traffic control methods through Central Avenue, and the varied nature of design and age of buildings across the retail centre. Gordon Road has a range of attractive older buildings including the Test Match pub. There is an abundance of very high quality public green space adjoining the retail centre in the way of formal parks and informal open spaces all of which are highly maintained. Open space is most prominent alongside Central Avenue, the busiest of the shopping areas making up the retail centre.

Aside from the range of signs directing traffic and a considerable number of bus stops, the retail centre is considered to be clutter-free. There is a good range of seating provided which is attractively integrated with public green spaces. There is scope for further seating in areas. In addition to seating, the town has a range of hanging baskets, bollards and planters which all act to enhance the general environment.

Potential capacity for growth

A review of local agent expectations and new lettings opportunities shows that there is probably demand for the expansion of the retail centre. The main focus of shopping activity is at Central Avenue, and this is unlikely to change with the current traffic arrangement. Traffic along Bridgford Road means that it would be unsuitable for the kind of transformation seen at Central Avenue and therefore its capacity for future diversification and growth is probably limited without commitment to infrastructure and environment alterations. The lack of vacant property on Central Avenue in particular shows that there is probably a willingness from potential investors to locate in the centre, though the physical nature of the environment does not necessarily allow for this. Much of the expanding commercial space outside of the centre is allocated as office use, with very little in the way of street frontage commercial properties.

Consumer views and behaviour

A significant proportion of those asked were visiting the centre for pleasure, rather than convenience and made use of the cafes, bars and charity shops especially. The quality of the environment was consistently highlighted as a very positive feature of the centre. Traffic controls through Central Avenue and the width of pavements and seating available were also highlighted positively. Respondents highlighted problems at Tudor Square with regard to traffic and pedestrian interaction and generally it was found that the crossings and street control measures (such as railings) in this area were sometimes detrimental to the quality of experience. In addition, some areas were considered prime for upgrade, for instance some of the buildings surrounding Tudor Square and some parts of Gordon Road. Car Parks were considered problematic and referred to as ‘often at capacity’. Those that were regular users of the centre cited a lack of convenience outlets as an issue, although this was not raised widely.

Sustaining vitality

The range of offerings within the centre is broad enough (especially in terms of services including restaurants and bars) that West Bridgford manages to attract custom from well outside of its locality. The mixture of daytime and night-time uses in similar proportions is a very positive asset for the town centre too in terms of promoting vitality and it should be considered important to maintain this kind of varied town centre activity.

So far West Bridgford has done well to establish itself as a place to visit during the day and at night as an alternative to Nottingham city centre, despite the city centre’s relative proximity. West Bridgford needs to ensure that it maintains this position by continuing to be successful town centre in its own right and, as destination, offering a different experience to the city centre. In addition, the farmers market and other similar events are critical components of West Bridgford’s success.

The improvement works completed in 2000 it seems were successful in consolidating the Retail centre into a well-functioning and attractive retail centre at least at Central Avenue, the focal point of the centre. There is room for improvements to Tudor Square which fails to reflect the environmental quality seen through Central Avenue in particular. Functionally too, Tudor Square has a host of crossing points, but their arrangement coupled with some restricting street furniture (for instance railings) makes for a sometimes unpleasant pedestrian experience, especially when the roads off of Tudor Square are congested.

Currently, access to the town centre for all modes of road transport seems to be successful and well balanced with pedestrian, environmental and safety priorities. This will need to be maintained, along with healthy parking provision, should West Bridgford continue to attract consumers as it currently does and provide some competition to the city centre.

Conclusions

West Bridgford retail centre offers an attractive, well-functioning environment for consumers. Based on the indicators, the retail centre has a good level of vitality and is a viable centre of consumer activity. However, levels of convenience retail are limited, and this was something noted by users of the centre as a potential limitation to its appeal as a centre to visit. There is a good range of comparison outlets, and an extensive range of service outlets including bars, restaurants, cafes and specialist services such as estate agencies, solicitors and hair and beauty salons. The presence of evening/night-time activity as well as standard day-time also helps to support the sense of vitality and feeling of general safety.

Categories and terms used in the Tables

Comparison Goods:	Are items not obtained on a frequent basis and include clothing, footwear, household and recreational goods.
Convenience Goods:	Are everyday essential items, including food, drinks, newspapers/magazines and confectionery.
Service	Providers of services rather than goods; e.g. hairdressers, estate agents, travel agents, dry cleaners.
Food & Drink	Outlets for food & drink, to take away, or eat on the premises; e.g. restaurants, cafes, Fish & chip bars.

Use Classes	
A1	Shops, retail, hairdressers, undertakers, travel and ticket agencies, post offices, dry cleaners. Pet shops, sandwich bars, coffee shops, internet cafes. Showrooms, domestic hire shops, funeral directors.
A2	Banks, building societies, estate and employment agencies. Professional and financial services, betting offices.
A3	Restaurants and Cafes Where the primary purpose is the sale and consumption of food and light refreshments on the premises.
A4	Pubs, bars Places where the primary purpose is the sale and consumption of alcoholic drink on the premises.
A5	Premises where the primary purpose is the sale of hot food to take away.
B1	Offices not within, A2 Research and development, studios, laboratories, high tech. Light industry.
B8	Wholesale warehouse, distribution centres, repositories.
C3	Dwellings, communal housing of elderly and handicapped.
D1	Places of worship, church halls Clinics health centres, crèches, day nurseries, consulting rooms Museums, public halls, libraries, art galleries, exhibition halls Non-residential education and training centres
D2	Cinemas music and concert halls Dance, spots halls, swimming baths, skating rinks, gymnasiums Other indoor and outdoor sports and leisure uses, bingo halls, casinos
SG	No specific use class – see Use Classes Order