Selby Retail, Commercial and Leisure Study 2009

October 2009

Version	Date	Amended by	Principal Changes
Version 1	18 September 2009		First draft issued to SDC for Comment
Version 2	30 September 2009		Second Draft issued to SDC for Comment
Version 3	9 October 2009		Final Draft issued to SDC for Approval
Version 4	14 October 2009		Final Study and Appendices issued to SDC and signed on behalf of Drivers Jonas LLP by:

SELBY DISTRICT COUNCIL
Moving forward with purpose

DRIVERS JONAS

Selby Retail, Commercial and Leisure Study 2009

Appendices

1. Survey and Primary Catchment Area Plan
2. Household Survey Results (July 2009)
3. On Street Survey Results (August 2009)
4. Convenience Goods Analysis Tables
5. Comparison Goods Analysis Tables
6. Leisure Analysis Tables
7. Housing Planned Growth Analysis Tables
8. Selby - Proposed Town Centre Boundary, Primary Shopping Area and Primary Shopping Frontages
9. Tadcaster - Proposed Town Centre Boundary
10. Sherburn in Elmet - Proposed Town Centre Boundary

Executive Summary

Introduction

1. In May 2009, Drivers Jonas LLP was commissioned by Selby District Council to prepare a detailed Study of the retail (both food and non food), commercial and leisure sectors within the District.

2. The Study provides an assessment of the need for further development for retail, commercial and leisure uses up to 2026 (to correspond with the proposed Local Development Framework period). It also assesses deficiencies in current provision and the capacity of existing centres to accommodate new development.

3. It will assist the Council in developing a sound framework through which policies and proposals can be formulated and provide a robust background against which decisions on major retail, commercial and leisure applications can be made.

Review of Retail, Commercial and Leisure Planning Policy

4. To set the context for the Study and to inform its recommendations, a review of the current and emerging planning policy at a national, regional and local level has been undertaken.

5. The aim of planning policy at all levels is to promote the vitality and viability of centres through focusing the development of town centre uses within existing centres, and encouraging a wide range of services within a good environment which is accessible to all.

Trends in the Retail, Commercial and Leisure Sectors

Retail Sector

UK Retail Property Market

6. The past 18 months has been a particularly turbulent time for the retail property market. The "US sub prime crisis" of 2007, which quickly evolved into the "Credit Crunch" of 2008, has transformed itself into a widespread, global recession.

7. Across the UK in particular, rising employment, falling house prices, sluggish wage growth and fears over the overall health of the economy

have resulted in more difficult personal circumstances and low levels of consumer confidence. This in turn has lead to a prolonged fall in consumer spending across the board and stifled levels of business investment.

8. Given the high level of debt (in terms of both household and corporate) in the UK economy, a period of deflation is a real risk. This would mean a period of increased real debt burden, which would necessitate further retrenchment in both household and corporate spending and further dampen any prospect of short-term economic recovery, including that of the retail sector.

9. Looking forward, conditions for retailers are expected to remain extremely difficult. The UK retail property market has entered into a period of significant uncertainty, as the economy as a whole is predicted to decline into the first quarter of 2010 and unemployment rises are expected well into 2010. Whilst there are predictions of a recovery (albeit slow and cautious, particularly in the medium term) it is vital that landlords, investors and Local Authorities are alive to the pressures facing the retail sector, particularly if they want to be in a strong position at a time of recovery.

Town Centre Retailing

10. Town centre retailing is the most important sales channel in UK retailing, although it has been significantly hit by the global economic recession. High street retailer failures have become commonplace in the last 12 months and there remains concern that more will follow.

11. In terms of new development coming forward, the shopping centre pipeline for the UK in 2009 and 2010 has shrunk quite dramatically from 1.5 million sq m as at June 2008 to 530,000 sq m in December 2008. With development activity plummeting, non-food retail sector expansion requirements in town centres – for a lengthy period – may have to be largely met by the occupation of disposed of units.

12. On a more positive note, there are some new entrants to the UK market and other retailers such as H&M and Halfords are investing in their existing store formats.

Out-of-Town Retailing

13. The out-of-centre retailing market has been particularly susceptible to the economic downturn, especially bulky goods retailers, and a number of out

of town fascias have been placed into administration over the past twelve months.

14. There are some positive trends taking place in this sector however. Operators are taking advantage of empty properties, for example, B&M and Home Bargains, and discounter retailers are also being acquisitive on retail parks, in particular Lidl and Aldi. An emerging market for temporary occupiers is also predicted as occupiers can negotiate cheaper and flexible terms and can cover the landlords' rates burden.

Grocery and Food Retailing

15. The supermarket sector continues to grow, with 2008 witnessing food and grocery specialists defying the wider retail market gloom and increasing their combined sales by 5.0% to £124.1bn[1]. Grocers (such as Tesco and ASDA) performed especially well with sales ahead by 5.6% - their strongest growth since 2001[2].

16. Indeed, despite the deteriorating economic conditions within the UK, grocers' sales have continued to grow over the past year. In part, this is a result of steep food price inflation in 2008, however, improved performances from the likes of Morrisons and Asda have also been highly influential, as has the continued roll out of new floorspace and product innovation within the sector. Generally, grocers have shown themselves to be more adept in reacting to the changing market conditions than retailers within other sectors.

17. The non food market within the supermarket sector has been hit particularly hard by the economic climate. Whereas food represents an essential purchase, non food purchases are becoming increasingly more discretionary.

18. 'Hard discounters' such as Aldi, Lidl and Netto have substantially increased their advertising expenditure over the last couple of years and have been opening new stores in a bid to increase their market share. While these types of stores have previously struggled to make significant inroads into the UK market, they are now attracting new customers, including a proportion of more affluent shoppers.

[1] Verdict – UK Grocery Food and Retailers (2009)
[2] Verdict – UK Grocery Food and Retailers (2009)

19. For Grocers to survive the recession, they need to have an ability to react and adapt to short term market issues and remain committed to long term strategies. In short, those that can adapt quickly will benefit the most.

E-Retail

20. Shopping patterns have shifted significantly in the past decade due to internet retailing, and it now accounts for a large proportion of retail sales within the UK. Electricals and food and grocery continue to dominate online retailing, and even in the recession, the sector has continued to perform well.

21. The effect of the internet on some retail categories including electricals, books, music and travel has been highly significant, as price-led shoppers look to find items on the internet which can be found cheaper. These categories must adapt quickly in order to maintain a retail presence on the High Street due to the fact that consumers are becoming increasingly comfortable in buying these products without handling them.

22. In the future, the internet is set to become more complex and competitive and this will present more long term growth opportunities. Many retailers are using social networking sites to interact with customers. Retailers need to target key, affiliate sites and utilise an online marketing strategy which will stand out. Website design is also important, as those websites which are easier to use and more convenient have a higher satisfaction rating among customers.

Commercial Sector

Investment

23. 2008 was a tough year for investors. Activity slowed in all markets as the effects of the "credit crunch" and the associated economic downturn continued. 2008 saw the total value of investment transactions fall by 65% across the UK[3] – the second consecutive year the UK recorded a fall of this level and yields continued to move out across all locations.

[3] Drivers Jonas LLP: Office Trends – UK Key Cities (2009)

24. DJ Research anticipates that there could be further upward yield movement[4] across the UK in 2009, and does not envisage confidence in the wider investment market returning until the severity of the impact of the economic slowdown rental market is more fully understood.

Offices

25. UK wide occupier demand will inevitably be weaker in 2009, and the majority of transactions will be driven by occupiers who have key lease events, although landlords will inevitably work hard to stop occupiers leaving their existing buildings. The market has moved firmly in the favour of the occupier, and those who do move will be offered strong incentive packages and have a greater choice of commercial buildings.

26. In a market town, such as Selby, a relatively high proportion of office based businesses own the premises they occupy. This trend is common in market towns where the office investment market is more limited and occupiers can purchase premises at relatively affordable freehold values. The combination of the economic slowdown and its impact on confidence, together with the difficulty that many small and medium enterprises report in accessing capital at reasonable cost, however means there is likely to be a lower number of businesses willing to purchase premises for their own occupation.

27. One particular sector that is likely to find the office market more difficult in the near future is any new business, or small business, that is looking to make the step change from a home based business to one with office space. Landlords may be very cautious about the financial strength of such businesses, and might insist on significant rental deposits and/or guarantee arrangements. These could become onerous and prevent businesses from taking on new premises. It is important that consideration is given to how these new or very small businesses can access office accommodation to provide a platform for their continued growth.

Leisure Sector

28. Consumer spending on leisure services is generally more vulnerable than other sectors, therefore in a time of slowing consumer growth there is likely

[4] The commercial yield represents the return to the investor for risk taking. An upward shift in yields signifies a reduced confidence amongst property investors.

to be some impact on the leisure sector. It is estimated that spending will contract during 2009, before growth resumes in 2011.

Cinemas

29. Since 2007, there has been an increase in the number of screens within the UK from 3,514 to 3,610. However, this growth in screens coupled with a relatively small increase in overall admissions from 162.4 million in 2007 to 164.2 million in 2008[5] has resulted in a decrease in the number of admissions per screen.

30. Dodona estimates that within the UK, there is an average population per cinema screen of 12,503 people. In terms of the future of cinema going, Dodona predicts that cinema-going will continue to be a popular pursuit amongst a range of age groups, and the introduction of many films now in "3D" will rival the download and DVD rental markets.

Health and Fitness

31. The Fitness Industry Association state that there are more than 5,700 public and private gyms in the UK, resulting in more than 90% of UK population living no more than 20 minutes from their nearest gym[6]. However, despite the market value of the health and fitness sector being estimated at £2.3 billion a year[7], only 9.4% of the adult population pays to go to a private club (12% if public leisure centre memberships are included).

32. Gym membership is expected to fall further as the current climate prevails and people become more frugal on the services that they require. It has been noted by Target Group Index (TGI) that only 27% of people regularly use their gym membership, thus leaving over 70% of accounts dormant.

Restaurants, Bars and Pubs

33. The ban on smoking in pubs and restaurants, which came into force in July 2007, has had an impact on this sector. Some pubs have reported takings down by as much as 40%, with generally, small town centre pubs and inner city bars being the worse affected due to lack of outside areas for smokers.

---

[5] Dodona – Cinemagoing 18 (2009)

[6] The Fitness Industry Association - Health Clubs & Leisure Centres Market Report (2009)

[7] Mintel – Health and Fitness Clubs (May 2007)

34. Whilst the ban has seen the decrease in 'wet' sales, there has been an increase in food sales within both pubs and restaurants. The British population now spend more per annum on eating in restaurants than they do in supermarkets.

35. The amount spent on eating out of the home within the UK has fallen for the first time in 40 years, as a result of a shift in consumer expectations that will continue after the recession[8]. The Eating Out in the UK report tracked the eating habits of thousands of consumers, and revealed that the value of eating out would fall in 2009, with one in nine meals eaten away from the home in 2009, down from one in eight in 2008. This is the first time there has been a decline since the informal eating-out market emerged in the 1960s.

Hotels

36. The UK hotel sector performed strongly between 2004 and 2007. However, there has been a decrease in the number of mid range hotels, with budget hotels proving to be increasingly popular during the recession. On the whole the hotel sector has weakened, as a result of fewer holidays or breaks away being taken, and with people opting for holidays involving camping or caravanning.

Bingo

37. The introduction of the smoking ban has already led to a decline in bingo participation and it is anticipated that this decline will continue.

38. The sector has seen the emergence, in the past two or three years, of a "burgeoning online bingo market" which is estimated to represent 20% of the total bingo market. Although this has been advantageous for some in offsetting their falling profits, it has inevitably attracted a number of club bingo customers away from the bingo halls, which has added to the operator's woes[9].

---

[8] Eating Out in the UK (2009)

[9] Steve McKenna, The Times (22 June 2009)

Influence of Surrounding Centres outside of the District of Selby

39. The Study is supported by the findings of a household and street survey commissioned by Drivers Jonas LLP on behalf of Selby District Council and undertaken by NEMS Market Research in July and August 2009.

40. The findings illustrate that the surrounding centres exert a strong influence on the spending patterns of residents within the District, particularly in terms of their non food shopping and leisure trips.

41. In 2009, there is £323.22 million of comparison goods[10] and £205.25 million of leisure goods[11] expenditure available within the District as a whole. The detailed analysis in **Chapter 4** and **Appendices 5 and 6** reveal that the District retains 30.4% and 35.6% of this available expenditure respectively, attracted to the facilities lying within its administrative boundary. York City Centre has the greatest individual 'centre' market share for both comparison and leisure goods, at 36.4% and 29.8% respectively.

42. The influence of surrounding centres on convenience retailing is more limited due to the more localised nature of convenience shopping. The District as a whole has a convenience market share of 65% with the remaining expenditure leaking to the large superstores on the periphery of the District, including the Tesco Extra on Tadcaster Road, York and Tesco in Goole.

43. The analysis of the survey data reveals that the surrounding areas exert a strong influence on the District as a whole and each of its centres. This reflects the geography of the area and the regional hierarchy of centres. Given the higher order nature of those centres to which expenditure is currently flowing, in order to seek to increase the District's market share for these types of goods, an improvement of the offer would be needed.

---

10 See Appendix 5: Comparison Goods Analysis - Table 3a

11 See Appendix 6: Leisure Analysis – Table 3a

Health Checks and Vitality and Viability of Centres

Selby

44. Over the past decade, the ranking of Selby town centre nationally (as ranked by Management Horizons MHE Index) has improved and it is performing well against centres of a similar role and function within the Yorkshire and Humber Region.

45. However, the Centre has a restricted offer in terms of comparison retailing compared to the national average, particularly the representation of national multiple retailers, although the independent sector is a strength of the centre. Vacancy levels are higher than the national average and demand from retailers is limited, with just 11 outstanding requirements at the start of 2009.

46. Investor confidence has not increased in Selby since 2006, with rents and yields remaining static since this date.

47. Selby can however be considered to have improved over recent years and has signs of a good level of vitality and viability. The 'market town' character, recent renaissance works and the Abbey create an attractive environment which should be used as a foundation for new investment to ensure that its current health is sustained and enhanced, particularly if surrounding competing centres increase their offer and attractiveness.

Tadcaster

48. Tadcaster town centre is largely dominated by service and administrative uses, and has a significant under representation of convenience and comparison retailing compared to the national average. There is also a lack of representation by national retail and leisure operators.

49. The centre also has high vacancy rates, with units reported to remain vacant for extended periods of time.

50. Tadcaster does display some indicators of being a healthy centre, but the inability to convert potential demand for floorspace into take-up has serious implications for the health of the Centre and its future vitality and viability. Whilst vacancies remain high, it will be difficult for the Centre to increase its offer and attractiveness, and enhance its vitality and viability.

Sherburn in Elmet

51. Sherburn displays signs of being a vibrant and viable Centre, particularly with a low vacancy and quick take up rates, a strong independent sector and a good evening economy.

52. However, to ensure that the Centre remains healthy into the future, measures should be taken to tackle the under-representation within the comparison retail sector.

Assessment of Need

53. This Study assesses the potential need for additional floorspace for "town centre uses". Two test years have been utilised – 2017 and 2026.

54. There are inherent risks attached with making long-term projections for the provision of additional retail and town centre uses. PPS6 requires local authorities to accommodate requirements in terms of at least a five year horizon and beyond (especially for Development Plan purposes).

55. A test year of 2017 has been considered to represent sound and logical base on which to inform policy making. This would also reflect the current economic context which would indicate that the delivery of major development projects in the short term will prove to be challenging and a relatively static period of activity may ensue in the immediate term.

Convenience Retail

56. The Study analysis indicates that there would be insufficient capacity to support a substantial amount of additional convenience goods floorspace within the Primary Catchment Area during the Study period assuming all of the planned commitments are implemented, even with appropriate increases in market share.

57. The Primary Catchment Area is influenced by the provision of stores outside of the area, which in some cases are more convenient for a number of residents who live within the area. It is considered unlikely that the market share of the Primary Catchment Area as a whole for convenience retailing could be increased significantly over the Study period.

58. However, the small surplus convenience goods capacity identified by 2017 would be sufficient to support either a modest extension to an existing 'top four' food store (up to 1,000 sq m net convenience sales area), a 'metro'

style 'top four' food store or a combination of smaller facilities such as a typical 'discounter' food store and 'express' or 'local' type facilities[12].

59. The proposed distribution of any such need has been informed by the analysis of shopping patterns within the relevant Study zones.

60. In the case of Selby, the only capacity identified to support additional convenience goods retail floorspace would arise from the non-implementation of either or both of the commitments to extend the Morrisons and Tesco stores. This could release capacity to support facilities of a similar nature or a combination of smaller facilities. However, given these commitments are in place, it is not recommended that any specific policy that would encourage the provision of additional convenience goods retail provision, either through a specific site allocation policy or an extension to the Primary Shopping Area, should be made. It is recommended that criteria-based policies should be used to assess the appropriateness of any future proposal having regard to the status of the commitments at that time.

61. In the case of Tadcaster, the existing convenience goods market share is to be expected considering the presence of one major foodstore within the Town Centre and the competing, large format stores to the north and west, including the Tesco Extra on Tadcaster Road, York and Morrisons in Wetherby. Limited capacity has been identified for additional convenience provision to support Tadcaster's role as the centre for local shopping in the north western part of the District but insufficient to warrant an extension to the Town Centre boundary or allocation of a specific development opportunity. There are opportunities to improve the shopping offer and provision within the existing Town Centre boundary and in the immediate term, this should be the focus for planning policies.

62. In the case of Sherburn in Elmet, the low market share reflects the limited facilities available within the relevant Study zone. It is considered unrealistic to achieve a substantial increase in convenience goods market

[12] 'Top four' food stores would include Asda, Morrisons, Sainsbury's and Tesco. A 'metro' style store is a store operated by a 'top four' retailer but of a smaller format selling a more limited range of products (e.g. Tesco Metro). An 'express' style store is akin to a small local convenience store (e.g. Tesco Express, Sainsbury's Local).

share without a considerable change in shopping provision, which is believed to be unlikely to materialise and could potentially reduce the market share of other zones within the Primary Catchment Area. It is considered that it would be inappropriate to seek a significant quantitative improvement of convenience goods facilities within Sherburn in Elmet.

Comparison Retail

63. The comparison goods market share for the whole of the Primary Catchment Area in 2009 is some 30.4%. This is considered to be appropriate and reflective of the role of the existing Centres within the wider regional hierarchy and the influence of competing centres in particular York, Doncaster and Leeds.

64. Assuming current market shares are retained, the Study analysis indicates that there would be insufficient capacity to support a substantial amount of additional comparison goods floorspace in the Primary Catchment Area at the current market share until around 2021. This conclusion should however be treated with caution as population and expenditure growth rates may be subject to change over such a long period.

65. Should the Council consider that it would be appropriate to seek an increase in market shares so that a greater level of expenditure is retained within the District, there is sufficient surplus expenditure available to support additional comparison goods floorspace. The market share of the District could be increased through the provision of appropriate additional comparison goods facilities such as larger stores and / or a department store. Such provision would offer an additional attraction which would have the effect of retaining more trade within the Primary Catchment Area. For the increase in market share to materialise, the additional provision would have to be of a kind to increase attractiveness (through for instance larger stores selling clothing, footwear, household goods etc) rather than a replication of existing facilities.

66. It is suggested that any such growth would be directed towards existing centres and, in particular, Selby Town Centre as the most appropriate location for development. Suitable sites preferably within or failing that on the edge of the Primary Shopping Area could be considered. Such sites could be identified for the provision of larger more modern units to attract higher-order retailers and also address a qualitative need.

67. In relation to Tadcaster, there is limited capacity for additional comparison goods floorspace, even with an allowance for an increased market share. Furthermore, as the survey results indicate an underperformance of existing facilities, there is no particular justification to plan for a major increase in comparison goods floorspace within Tadcaster.

68. In relation to Sherburn in Elmet, this has a very low comparison goods market share. This level of market share is considered to be unduly low and it is recommended that the Council should seek to plan for a modest improvement in facilities, to help raise the market share. This would promote more sustainable shopping patterns and help safeguard the future vitality and viability of the Centre.

Commercial Uses

69. Building upon the GVA Grimley Employment Land Study of 2007, it is considered that the delivery of higher value service sector employment activities is important for the District as it seeks to diversify its local economy.

70. Office uses are defined in PPS6 as a main town centre use. There is the potential for office uses to form part of mixed use developments within town centres and the attraction of office workers to a town centre can help its vitality and viability. This should be an important local policy objective.

71. Draft PPS4 indicates that Local Development Frameworks should make provision for a broad range of business types such as small start-up businesses through to small and medium sized enterprises as well as larger commercial or industrial premises. The potential for start-up business space to assist the vitality and viability of existing Centres, in particularly in Selby and Tadcaster, should be encouraged.

72. However it also has to be recognised that in the case of Selby District, there may be appropriate locations outwith the town centres that could accommodate office development which would meet wider economic and sustainability objectives.

73. The use of policies to help direct office development to town centre locations but also to identify specific office locations, outwith the town centres, where office use would be appropriate in principle are recommended. It is also recommended that the Council considers a clustering approach to encouraging a supply-led response to the need for

additional office floorspace by selecting appropriate sites that can complement potential provision within town centres. This could include, for instance, the established employment area near Leeds Road or a new employment area in Tadcaster, the Sherburn in Elmet industrial estate area and also Selby Business Park and the Olympia Park site in Selby. The Council should consider making key allocations the subject of specific Strategic Site Allocations in the Core Strategy, in an Area Action Plan or in the Allocations Development Plan Document.

74. Policies that would encourage the small scale provision of office space in rural locations which can have a role in diversifying the rural economy and also support the role of local village centres are also recommended.

75. The Surveys have identified a good provision of service uses throughout the various Town Centres. Service uses can contribute to strong and vibrant town centres and they play an important role in Selby, Tadcaster and Sherburn in Elmet. The study has not identified any particular service uses which would justify the specific allocation of additional sites or an extension to the relevant shopping area and town centre boundaries for that purpose. There is a need however to control the provision of service uses in specific locations, such as within Primary Shopping Frontages.

76. In relation to car showrooms and builders merchants, these are uses which are generally located in edge or out of centre locations. They may be inappropriate uses within town centres in terms of design and access requirements. They tend to be attracted to areas that are especially accessible by car and on sites which attract lower land values than typically associated within town centre locations. It is important however to control the sale of goods and the services offered to ensure that these facilities do not take on a wider retail function which would be more appropriately sited within a town centre location. The Council may wish to consider the wording of policies relating to employment areas and whether there are particular sites that those forms of use should be directed towards.

Leisure Uses

77. The need for additional leisure uses has been considered in terms of various leisure categories.

78. For restaurants and bars, the analysis has shown that although there is a good level of restaurant and bar provision within the District, it retains less

than a third of expenditure available for this sector. Although within the regional hierarchy there will always be a high level of outflow to places such as York, it is considered that the Primary Catchment Area should be aiming to retain a higher level of expenditure.

79. Restaurants and bars are defined as main town centre uses. The use of general policies to promote such uses within such locations is recommended. There are development opportunities that can be identified, for instance in the case of Selby close to the Bus and Rail stations and alongside the riverfront, where additional restaurants and bars could support wider renaissance objectives.

80. In relation to cinemas, although there is theoretical capacity for up to six screens by the year 2026, taking into account existing provision surrounding the Primary Catchment Area and the qualitative considerations, it is not considered that there is sufficient capacity to support a cinema of this size, as this would require all trips to cinemas outside of the PCA to be effectively diverted to support this new facility.

81. However, it is considered however that a smaller 1 or 2 screen cinema could be supported, and such a use would help diversify the offer of a town centre. Policies to direct such a use to Selby Town Centre, as the higher order centre, are recommended as it would assist in the diversification of the town centre offer and widen the attraction of the Centre as a whole, as well as support the important tourism and visitor sectors.

82. Other specific forms of leisure use have been assessed. There are potential qualitative benefits in being able to accommodate an ice rink in the District. It is suggested that such a use would be directed towards Selby Town Centre and it is understood that there is some market interest in the delivery of such a facility. The Study recommends the drafting of general town centre policies which would direct the provision of leisure uses such as an ice rink to a town centre location or potentially to an established leisure facility location, subject to relevant tests.

83. The Study analysis also identifies the potential for additional health and fitness centres within the District, which should be directed towards town centres. Particular capacity for additional ten pin bowling or bingo facilities is not identified. If there was market interest in the provision of those type of facilities, then the general town centre policies should be used to ensure

that the preferred location has regard to the sequential approach. However, there is no particular over-riding need to identify a specific site or widen the town centre boundary to specifically accommodate such provision at this stage.

Summary of Needs

84. In summary, the analysis has indicated the capacity to plan for:

- In Selby, (assuming that the Council considers that it would be appropriate to seek an increase in market share), an appropriate level of additional comparison goods floorspace (up to 10,000 sq m by 2017) together with additional leisure facilities.
- In Tadcaster, to plan for the protection of the existing retail, commercial and leisure offer, but not to seek any significant increase in provision.
- In Sherburn, to plan for the protection of the existing retail, commercial and leisure offer as well as plan for a modest increase in comparison goods floorspace, in order to increase local market share.

Implications for Plan and Policy Making

Network and Hierarchy

85. Regard has to be made to the Regional Spatial Strategy for Yorkshire and The Humber (2008) (RSS) in assessing the retail hierarchy. Selby is identified in the RSS as a Principal Town and Tadcaster is identified as a Local Service Centre. There is no specific reference in the RSS to the status of Sherburn in Elmet (although the District Council's emerging Core Strategy defined Sherburn in Elmet as a Local Service Centre, which is also supported by this Study's analysis).

86. The RSS indicates that the role of Selby as a Principal Town is to be developed and Selby is designated as a focus for economic growth. In particular, the RSS states that development should be promoted to foster the regeneration of Selby and strengthen and diversify its economy.

87. The Study Analysis has shown that Selby performs a more dominant role than the other two Town Centres. It has a higher market share, greater level of retail provision as a whole and is a key retail destination that serves in particular the central, southern and eastern parts of the District, but also the workforce and visitors that come to Selby.

88. Tadcaster performs an important role as a Centre that serves the north western part of the District. Its role as a Local Service Centre should be subservient to that of Selby and this should be reflected in planning policies which relate to the appropriate scale of any new development.

89. Sherburn in Elmet also performs an important role as a Centre which predominantly serves the Sherburn in Elmet and South Milford communities, and also the surrounding rural settlements. Again the scale of development in Sherburn in Elmet Centre needs to be effectively controlled in order that it retains its appropriate place in the retail hierarchy. However our Analysis indicates that there is a particular need to seek to strengthen the comparison goods market share of Sherburn in Elmet to support a more sustainable pattern of retailing.

Town Centre Status

90. The roles of the Centres of Tadcaster and Sherburn in Elmet in particular have been considered. Both Centres play an important role in the development of those towns as sustainable communities and include a variety of uses, not just retail, which would typically by found in a Town Centre. Sherburn in Elmet is often referred to as a village, reflecting its historic roots, although it has the characteristics of a small town. Both should be appropriately protected and promoted and thus it is considered that this would be best achieved through their designations as Town Centres, subject to appropriate tests within policy that ensure that new development is of scale appropriate to the locality and that both Tadcaster and Sherburn in Elmet remain subservient in function to Selby.

91. It is considered to be inappropriate to plan for major retail-led growth in either of those two centres, which may have to rely upon the diversion of significant levels of trade from Selby, potentially undermining that Centre's role as a Principal Centre. However, it would be important to consider the impact on these Centres from development proposed in out of centre locations.

Distribution of Growth

92. Consideration has to be given as to how best to distribute any identified growth and whether there is a need to rebalance the network of centres to ensure that the District is not overly reliant in any one Centre, in this case Selby. The review of retail provision, market shares and future need has

included a zone-by-zone review to see what scope there is for new development within each relevant part of the District.

93. No evidence has been found to indicate that Tadcaster or Sherburn in Elmet currently attract levels of trade which undermine the role of Selby Town Centre. Conversely, evidence has not been found to indicate that the future of Tadcaster or Sherburn in Elmet Town Centres would be unduly undermined by any directed new growth into Selby Town Centre at the level which is being recommended.

94. Recommendations have been made as to the need and scope for future development to meet specific requirements that will sustain the retail hierarchy and ensure a balanced distribution of facilities in relation to the role of each of the existing Centres.

Town Centre Boundaries and Primary Shopping Frontages

95. The extent of the Town Centre, and the definition of the Town Centre boundary, will influence the scope for each of the Centres to accommodate new development. The recommended boundaries for Tadcaster and Sherburn in Elmet are geographically much smaller than Selby Town Centre in that respect, which reflects the current make-up of each Centre. However, it is also necessary to maintain control over the scope for new development and to ensure that each Centre falls within the natural and recommended hierarchy that maintains Selby's elevated hierarchical position in practice.

96. PPS6 advises that smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the Primary Shopping Area, therefore the Town Centre may not extend beyond the Primary Shopping Area. In the case of Tadcaster and Sherburn in Elmet the Primary Shopping Area and the Town Centre boundary are effectively the same.

97. It is considered that there would be merit in specifically defining a Primary Shopping Area for Selby, which would be tighter than the Town Centre boundary. It should encompass the shopping streets of Gowthorpe, Micklegate, Market Place, Market Lane and Abbey Yards as well as the shopping centre of Abbey Walk, Church Hill and the western part of Ousegate.

98. Illustrative plans of the recommendations for the three Town Centre boundaries are contained at **Appendices 8, 9** and **10**.

Potential Development Sites

99. There are no existing Development Site Allocations that are suggested to be carried forward to the new Local Development Framework documents.

100. The following Sites for consideration as future Development Site allocations have been identified:

- Selby – Back Micklegate car park;
- Selby – Bus Station site;
- Selby – Former Wood Yard site;
- Selby – Ousegate North site;
- Tadcaster – Central Car Park;
- Tadcaster – Bus Station site;
- Tadcaster – PowerPlus site;
- Sherburn in Elmet – Social Club / Kirkgate.

101. The potential of these sites to meet the scale and type of need identified has been reviewed.

102. The Selby District Council Civic Centre site has also been considered. There are proposals for the Civic Centre to be relocated and the site could be available for development from 2011 onwards. It is not considered that the site currently functions as part of the Town Centre nor has any capacity needs within the Study period been identified which could justify a proposed extension to the boundary at this stage. However it is suggested that the Site be the subject of a rigorous development options review which would assess in particular how the Site could better contribute to the renaissance of the Town Centre through development for an appropriate set of uses.

Conclusions and Next Steps

103. The Local Planning Authority should utilise the findings of the Selby Retail, Commercial and Leisure Study 2009 to form a robust policy base as part of its Local Development Framework.

104. These policies should include:

- General policies on retail hierarchy and town centres which could be appropriate for the Core Strategy;
- Specific policies and strategies which are more appropriate for the Selby Area Action Plan;
- Specific policies and strategies for Tadcaster and Sherburn in Elmet for use in other Development Plan documents; and,
- Criteria based policies for the Development Management DPD.

1. Introduction

1.1 In May 2009, Drivers Jonas LLP was commissioned by Selby District Council to prepare a detailed Study of the retail (both food and non food), commercial and leisure sectors within the District.

1.2 The purpose of the Study is to form part of the evidence base to the Council's emerging Local Development Framework (LDF) and to provide a robust background against which decisions on major retail, commercial and leisure applications can be made. It will assist the Council in developing a robust framework through which policies and proposals will be made.

1.3 The Study provides an assessment of the need for further development for retail, commercial and leisure uses up to 2026 (to correspond with the proposed LDF Plan period). It also assesses deficiencies in current provision and the capacity of existing centres to accommodate new development.

1.4 The Study is structured as follows:

- A review of Retail, Commercial and Leisure Planning Policies at a national, regional and local level;
- A review of Trends in the Retail, Commercial and Leisure Sectors;
- An examination of the influence of centres outside of the District on the shopping and leisure habits of residents, through a consideration of the survey results;
- A description of the current health of the three main centres within the District: Selby, Tadcaster and Sherburn in Elmet;
- An assessment of the strengths, weaknesses, opportunities and challenges for each of these centres, and their current vitality and viability;
- An analysis of retail need and capacity for both convenience and comparison goods;
- An analysis of commercial (Class A2 and B1) need and capacity;
- An analysis of leisure and recreation need and capacity;
- An assessment of the implications of the findings on plan and policy-making; and,
- Conclusions and recommendations.

2. Review of Retail, Commercial and Leisure Planning Policy

2.1 To set the context for the Study and to inform its recommendations, we have undertaken a review of the current and emerging planning policy at a national, regional and local level.

National Guidance

2.2 This Study has been undertaken in accordance with current Government guidance particularly that of Planning Policy Statement 6: Planning for Town Centres (PPS6) (2005). It also has regard to the recently published Draft Planning Policy Statement 4: Planning for Prosperous Economies (Draft PPS4) which, in its final form, will replace current guidance.

2.3 The Government's overarching approach to delivering sustainable development through the planning system is also taken into account and guided by Planning Policy Statement 1: Delivering Sustainable Development (PPS1).

PPS1 - Delivering Sustainable Development (2005)

2.4 PPS1 outlines the key principles for the delivery of sustainable development. These include:

- Promoting national, regional, sub-regional and local economies by providing a positive planning framework for sustainable economic growth to support efficient, competitive and innovative business, commercial and industrial sectors;
- Promoting urban and rural regeneration to improve the well being of communities by improving facilities, promoting high quality and safe development and creating new opportunities for the people living in those communities. This includes promoting mixed use developments in locations that allow the creation of linkages between different uses thereby creating more vibrant places;
- Promoting communities which are inclusive, healthy, safe and crime free, whilst respecting the diverse needs of communities and the special needs of particular sectors of the community;
- Bringing forward sufficient land of a suitable quality in appropriate locations to meet the expected needs for housing, for industrial

development, for the exploitation of raw materials such as minerals, for retail and commercial development, and for leisure and recreation – taking into account issues such as accessibility and sustainable transport needs, the provision of essential infrastructure, including for sustainable waste management, and the need to avoid flood risk and other natural hazards;

- Providing improved access for all to jobs, health, education, shops, leisure and community facilities, open space, sport and recreation, by ensuring that new development is located where everyone can access services or facilities on foot, bicycle or public transport rather than having to rely on access by car;
- Focussing developments that attract a large number of people, especially retail, leisure and office development, in existing centres to promote their vitality and viability, social inclusion and more sustainable patterns of development;
- Reducing the need to travel and encouraging accessible public transport provision to secure more sustainable patterns of transport development;
- Promoting the more efficient use of land through higher density, mixed use development and the use of suitably located previously developed land and buildings;
- Enhancing as well as protecting biodiversity, natural habitats, the historic environment and landscape and townscape character; and,
- Addressing the causes and impacts of climate change, the management of pollution and natural hazards, the safeguarding of natural resources, and the minimisation of impacts from the management and use of resources.

PPS6 - Planning for Town Centres (2005)

2.5 The Government's key objective for town centres is to promote their vitality and viability by:

- planning for the growth and development of existing centres;
- promoting and enhancing existing centres, by focusing development in such centres; and
- encouraging a wide range of services in a good environment, accessible to all.

2.6 There are other Government objectives which need to be taken account of in the context of the above:

- enhancing consumer choice by making provision for a range of shopping, leisure and local services, which allow genuine choice to meet the needs of the entire community, and particularly socially-excluded groups;
- supporting efficient, competitive and innovative retail, leisure, tourism and other sectors, with improving productivity; and
- improving accessibility, ensuring that existing or new development is, or will be, accessible and well-served by a choice of means of transport.

2.7 Section 2 of the Guidance sets out specific requirements in respect of Local Plans, which because of their particular relevance are quoted below.

"The Role of Plans at the Local Level

Local planning authorities should adopt a positive and proactive approach to planning for the future of all types of centres within their areas. Having regard to the regional spatial strategy and reflecting their community strategy, local planning authorities should, through the core strategy development plan document, set out a spatial vision and strategy for the network and hierarchy of centres, including local centres, within their area, setting out how the role of different centres will contribute to the overall spatial vision for their area.

Local planning authorities should work in conjunction with stakeholders and the community to:

- *assess the need for new floorspace for retail, leisure and other main town centre uses, taking account of both quantitative and qualitative considerations;*
- *identify deficiencies in provision, assess the capacity of existing centres to accommodate new development, including, where appropriate, the scope for extending the primary shopping area and/or town centre, and identify centres in decline where change needs to be managed;*
- *identify the centres within their area where development will be focused, as well as the need for any new centres of local importance, and develop strategies for developing and strengthening centres within their area;*

- *define the extent of the primary shopping area and the town centre, for the centres in their area on their Proposals Map (see Annex A);*
- *identify and allocate sites in accordance with the considerations set out below (paragraphs 2.28–2.51);*
- *review all existing allocations and reallocate sites which do not comply with this policy statement;*
- *develop spatial policies and proposals to promote and secure investment in deprived areas by strengthening and/or identifying opportunities for growth of existing centres, and to seek to improve access to local facilities (paragraphs 2.55–2.59); and,*
- *set out criteria-based policies, in accordance with this policy statement, for assessing and locating new development proposals, including development on sites not allocated in development plan documents.*

In addition to defining the extent of the primary shopping area for their centres, local planning authorities may distinguish between primary and secondary frontages (see Annex A). These frontages should be realistically defined. Having regard to the need to encourage diversification of uses in town centres as a whole, primary frontages should contain a high proportion of retail uses, while secondary frontages provide greater opportunities for flexibility and a diversity of uses. Where frontages are identified the appropriate local development documents should include policies that make clear which uses will be permitted in such locations."

2.8 Our Study has regard to this guidance.

Draft PPS4 – Planning for Prosperous Economies (May 2009)

2.9 Draft PPS4: Planning for Prosperous Economies (May 2009) sets out the Government's policy framework for planning for sustainable economic development in urban and rural areas, including town centres.

2.10 This draft PPS has been published so as to achieve three key outcomes:

- Update the draft PPS4 - Sustainable Economic Development (published in December 2007);
- Update the draft PPS6 - Town Centres (published in July 2008); and,

- Consolidate national planning policy on economic development into a single streamlined planning policy statement.

2.11 In its final form, Draft PPS4 will replace PPG4: Industrial, Commercial Development and Small Firms (1992), PPG5: Simplified Planning Zones (1992) which will be republished as practice guidance and PPS6: Planning for Town Centres (2005). It will also replace parts of PPS7: Sustainable Development in Rural Areas and paragraphs 53, 54 and Annex D of PPG13: Transport.

2.12 It is intended to bring together in one place all of the Government's key planning policies relating to the economy and create a coherent and modern set of policies designed to meet economic challenges, both in the short and long term.

2.13 The Government's key policy outcomes in relation to the draft document are to:

- achieve sustainable economic growth;
- raise the productivity growth rate of the UK economy – by promoting investment, innovation, competition, skills and enterprise and providing job opportunities for all;
- build prosperous communities by improving the economic performance of areas, promoting regeneration and tackling deprivation;
- deliver more sustainable patterns of development, and respond to climate change;
- promote high quality and inclusive design, improving the quality of the public realm and open spaces;
- improve accessibility, ensuring that existing or new development is, or will be, accessible and well-served by a choice of means of transport including reducing the need to travel and providing alternatives to car use;
- promote the vitality and viability of town and other centres; and,
- promote social inclusion, ensuring that communities have access to a range of main town centre uses, and that deficiencies in provision in areas with poor access to facilities are remedied.

2.14 Key proposed national policies within Draft PPS4 include:

- **From Draft PPS4 (May 2009):** considering planning applications for economic growth favourably unless there is good reason to believe the costs outweigh the benefits. Developing plans that take account of long term economic benefits, including for the wider regional and national economy such as job creation, and promoting opportunities to regenerate deprived areas and support business diversification in rural areas.

- **From Draft PPS6 (July 2008):** promoting the vitality of town centres, consumer choice and retail diversity. Removing the "needs test" as part of the planning application, which requires developers to show there is need for their proposal. Retaining the sequential test, which requires developers to seek the most central sites first, and a tougher "impact test" which assesses a proposal against economic, social and environmental criteria so that Councils can assess its impact on the town centre in reaching their decision.

Planning for Town Centres – Good Practice Guide on Need, Impact and the Sequential Approach (GVA Grimley 2009)

2.15 This document was produced following the publication of consultation changes to PPS6 in July 2008. Once finalised, it is intended to become statutory guidance alongside PPS4 and provide a firm basis on which to make decisions on retail planning applications.

2.16 The guidance was prepared by GVA Grimley on behalf of the Department of Communities and Local Government (CLG). It includes and re-iterates some of they key points discussed in the PPS4 Consultation document, and aims to provide a further summary into the objectives of this combining of key policy documents.

2.17 Its primary aim is to help encourage a greater degree of consistency and transparency in terms of the approach and key data required in assessing planning applications, as well as aiding in the production, and review of the impact and sequential assessment process, as part of the submission of a retail application.

2.18 The Good Practice Guide is split into four key sections:

- General Principles;
- Positive Planning and Plan Making;
- Undertaking sequential site assessments and measuring impacts; and,
- Decision Making, both in policy formulation and development management.

CLG Select Committee – Need and Impact: Planning for Town Centres (July 2009)

2.19 The House of Commons Communities and Local Government Select Committee published its Tenth Report of the Session 2008–09, 'Need and Impact: Planning for Town Centres' on Saturday July 25th 2009.

2.20 This notes that the proposed removal of the needs test has given rise to significant concerns amongst those anxious to protect the vitality and viability of town centres. These concerns include whether the removal of the needs test will lessen the protection of town centres against out-of-centre development, and if the new impact test will improve decision-making in respect of applications for such developments.

2.21 The recommendation of the Select Committee is that following the publication of PPS4 and the introduction of the changes, the removal of the needs test is revisited in 18 months to two years to ensure that effective monitoring has been undertaken and that the new policy is effectively protecting and enhancing the vibrancy and vitality of town centres. This will allow appropriate adjustments to be made to the policy in light of the experience of the operation of the new framework and changing economic circumstances.

Planning Policy Guidance 13 - Transport (2001)

2.22 Government guidance on transport reinforces PPS6, directing retail and leisure development to existing centres, and to locations well served by a choice of means of transport to reduce reliance on the private car.

2.23 In terms of jobs, shopping, leisure and services, a key planning objective is that these uses are in locations that are highly accessible by public transport, walking and cycling. Where development comprising jobs, shopping, leisure and services is proposed outside the preferred locations in the Development Plan, the onus will be on the developer to demonstrate why they cannot fit into the preferred locations, and to illustrate how the proposed development will be accessible by all modes of transport.

Regional Guidance

Regional Spatial Strategy for Yorkshire and The Humber (2008)

2.24 The Yorkshire and Humber Regional Spatial Strategy (RSS) was published in May 2008 and provides the Regional Spatial Strategy for 24 Planning Authorities to 2026, addressing matters such as the scale and distribution of provision for new housing, priorities for the environment including countryside and biodiversity protection, transport, infrastructure, economic development, agriculture, mineral extraction and waste treatment and disposal.

2.25 The following RSS policies are relevant to this particular Study:

- **YH4: Regional Cities and Sub Regional Cities and Towns** – this sets out that the prime focus for housing, employment, shopping, leisure, education, health and cultural activities and facilities in the region should be the Regional Cities and Sub Regional Cities and Towns. Selby is defined under Policy YH5 as a Principal Town within the Yorkshire and Humber area.
- **Y1: York Sub Area Policy** - Plans, strategies, investment decisions and programmes for the York sub area should:
  - Develop the role of York as a Sub Regional City and support the roles of Selby and Malton as Principal Towns;
  - Spread the benefits of York's economic success to other parts of the sub area and ensure that all members of the community have access to employment opportunities;
  - Deliver economic growth at Selby and Malton in line with their roles as Principal Towns;
  - Focus most development on the Sub Regional City of York, whilst safeguarding its historic character and environmental capacity;
  - Promote development at Selby to foster regeneration and strengthen and diversify its economy within the Leeds City Region;
  - Elsewhere in the sub area, use a managed approach to development to focus on meeting local housing needs and appropriate economic diversification.

- **LCR1: Leeds City Region Sub Area Policy** - Plans, strategies, investment decisions and programmes for the Leeds City Region include:
  - Strengthen the service roles of Principal towns;
  - Spread the benefits of the Leeds economy, particularly to the Sub Regional Cities and Towns, and Principal Towns;
  - Support the indigenous growth of the economies of the Sub Regional Cities and Towns and Principal Towns;
  - Promote development at the Principal Towns to strengthen their service centre roles and where necessary to aid regeneration and/or to provide more affordable housing.
- **E2: Town Centre and Major Facilities** - Plans, strategies, investment decisions and programmes should strengthen the role and performance of existing city and town centres.
  - The centres of Regional Cities and Sub Regional Cities and Towns should be the focus for offices, retail, leisure, entertainment, arts, culture, tourism and more intensive sport and recreation across the region;
  - The centres of Principal Towns, and District Centres within Regional and Sub Regional Cities and Towns, should be the focus for local services and facilities;
  - Development, environmental enhancements, accessibility improvements, and town centre management and promotional activities should take place to create a distinctive, attractive and vibrant sense of place and identity for each centre;
  - No further development of new, or large-scale expansion of existing, out-of-centre regional or sub-regional shopping centres should be permitted. Proposals for smaller scale expansion should be assessed in line with PPS6.

Local Planning Policy Guidance

Selby District Local Plan (2005)

2.26 The Selby District Local Plan was formally adopted on 8th February 2005. The Local Plan develops and underpins many of the aims and objectives of the Council and provides a comprehensive land-use framework for promoting, co-ordinating and controlling future development.

2.27 As well as allocating land for new homes and jobs, the Plan promotes policies to protect the heritage of the District and to ensure the provision of affordable housing, open space and other facilities.

2.28 Under the provisions of the Planning and Compulsory Purchase Act 2004 a number of obsolete policies in the Selby District Local Plan expired on the 7th February 2008. All other policies have been 'saved' by Direction of the Secretary of State, and will continue to be used in making planning decisions until replaced by new policies in the Council's Local Development Framework (LDF), which is currently being prepared.

2.29 The key 'saved' policies relating to Retail, Commercial and Leisure uses are referenced below:

- **EMP2: The Location of Economic Development** – new employment development will be concentrated in and around Eggborough, Selby, Sherburn in Elmet and Tadcaster. Encouragement will also be given to proposals for small-scale development in villages and rural areas in support of the rural economy;
- **S1: Existing Shopping Centres** – shopping provision will be concentrated in the commercial and shopping centres of Selby, Tadcaster and Sherburn in Elmet;
- **S2: Edge-of-Centre and Out-of-Centre Development** – retail proposals within these locations will only be permitted where: there are no more suitable, viable and available alternative sites in accordance with the sequential approach; the proposal would not individually or cumulatively harm the vitality and viability of existing centres; and the proposal is sited so as to reduce the number and length of car journeys and can serve not only car-borne shoppers but is also accessible to those on foot, bicycle or who rely on public transport;
- **S3: Local Shops** - Outside defined shopping and commercial centres, proposals for local shops (Class A1) and commercial premises such as financial and professional services, public houses, cafes, restaurants and takeaways (Class A2 and A3) will be permitted provided all the following criteria are met:
    - The proposal is within defined development limits;

- The proposal is intended to serve a purely local function or there is a demonstrable need for the particular outlet in the locality (including facilities related to tourism);
- The scale of provision would be appropriate to the locality;
- The proposal would not create conditions prejudicial to highway safety or the free flow of traffic;
- Satisfactory parking and servicing could be achieved, and the site is accessible and safe for pedestrians and cyclists; and
- The proposal would not have a significant adverse effect on residential amenity or the character and appearance of the area.

Outside Selby, Tadcaster and Sherburn in Elmet, proposals involving a loss of retailing (Class A1) use, or loss of a public house (Class A3), will not be permitted unless it can be demonstrated that there is alternative provision for a similar type of use within reasonable walking distance; or it can be shown that the business is no longer viable for retail purposes within its existing use class, and that it has remained unsold or un-let for a substantial period of time, despite genuine and sustained attempts to market it on reasonable terms;

- **S4: Retail Development in the Countryside** - Outside defined development limits, proposals for retail shops (Class A1) and commercial premises such as financial and professional services, public houses, cafes, restaurants and takeaways (Class A2 and A3) will only be permitted where:
  - The proposal is ancillary to an existing use; or
  - It would secure the preservation of a building of architectural or historic importance; or
  - There is a demonstrable need for the particular outlet in the locality (including facilities related to tourism).

  and provided that:
  - The scale of provision would be appropriate to the locality;
  - The proposal would not create conditions prejudicial to highway safety or which would have a significant adverse effect on local amenity; and

- The proposal would not have a significant adverse effect on the character and appearance of the countryside.

- **S5: Garden Centres** - Proposals for garden centres will only be permitted within or close to defined development limits or within the grounds of a historic park or garden, provided the proposal: is located along or close to a road with the capacity to accommodate the additional traffic generated; would not have a significant adverse effect on the character and appearance of the countryside; is not located within green belt; would not create conditions prejudicial to highway safety or which would have a significant adverse effect on local amenity; and a significant part of the site is devoted to the cultivation or sale of plants.

- **SEL/8: Additional Retail Floorspace in Selby Shopping and Commercial Centre** - Proposals for the establishment or extension of retail uses (Class A1) within the defined shopping and commercial centre of Selby will be permitted provided: satisfactory parking and servicing arrangements can be achieved; the traffic generated can be satisfactorily accommodated on the local highway network; the proposal would not result in the loss of residential accommodation in accordance with Policy H5; and, the proposal would not have a significant adverse effect on residential amenity or the character and appearance of the area.

- **SEL/10: Service and Commercial Uses in the Town Centre** - Proposals for the establishment or extension of commercial uses such as financial and professional services, public houses, cafes, restaurants and takeaways (Classes A2 and A3), within the defined shopping and commercial centre of Selby, will be permitted provided that the proposal would satisfy the provisions of POLICY SEL/8; and in the case of ground floor premises within core shopping frontages, the predominantly retail character of the frontage will be retained by ensuring:

  - That not more than two non-retail premises are located side by side; and

  - That not more than one third of each frontage is devoted to non-retail uses.

  In addition, in assessing the impact of the proposals on the retail function of the frontage, and the centre, the following other factors will be taken into account:

  - The location and prominence of the premises within the shopping frontage;

  - The floorspace and frontage of the premises;
  - The particular nature and character of the use proposed, including the level of activity associated with it; and
  - The impact of the proposal in terms of noise, smell or other environmental problems.

- **SEL/11: Office Uses in the Town Centre** - Proposals for office use (Class B1) involving development on previously undeveloped or redundant land, redevelopment of land or premises, or the conversion or change of use of buildings, will be permitted within or adjacent to the defined shopping and commercial centre of Selby provided the proposal:
  - Is of a scale and design appropriate to the locality;
  - Would not have a significant adverse effect on the character and vitality of the town centre;
  - Would not create conditions prejudicial to highway safety or which would have a significant adverse effect on local amenity;
  - Would achieve satisfactory parking and servicing arrangements; and
  - Would not result in the loss of residential accommodation in accordance with POLICY H5.

- **SHB/5: Additional Retail floorspace and service/commercial uses in Sherburn Local Centre** - Proposals for the establishment or extension of retail uses (Class A1) and commercial uses such as financial and professional services, public houses, cafes, restaurants and take-aways (Class A2 and A3) within the defined local centre of Sherburn in Elmet, will be permitted provided the proposal:
  - Is of a scale and character appropriate to Sherburn in Elmet;
  - Would not create conditions prejudicial to highway safety; and,
  - Would not have a significant adverse effect on residential amenity or the character and appearance of the area.

- **TAD/5: Additional Retail Floorspace and Services/Commercial Uses in Tadcaster Shopping and Commercial Centre** - Proposals for the establishment or extension of retail uses (Class A1) and commercial uses such as financial and professional services, public houses, cafes, restaurants and takeaways (Class A2 and A3) within the defined shopping and commercial centre of Tadcaster, will be permitted provided:

- The proposal is of a scale and character appropriate to Tadcaster;
- The proposal will preserve or enhance the character and appearance of the conservation area and will not adversely affect the setting of any listed building;
- Satisfactory parking and servicing arrangements can be achieved;
- The traffic generated can be satisfactorily accommodated on the local highway network;
- The proposal will not have a significant adverse effect on residential amenity or the character and appearance of the area; and
- The proposal will meet the provisions of Policy H5 with regard to the retention of residential accommodation.

- **TAD/6: Office Uses in the Town Centre** - Proposals for business uses (Class B1) involving development on previously undeveloped or redundant land, redevelopment of land or premises, or the conversion or change of use of buildings, within or adjacent to the defined shopping and commercial centre of Tadcaster, will be permitted, provided the proposal:
  - Is of a scale and design appropriate to the locality;
  - Will not create an undesirable concentration of non-shopping frontage or otherwise have a significant adverse effect on the character, viability or vitality of the town centre;
  - Will not create conditions prejudicial to highway safety or which would have a significant adverse effect on local amenity;
  - Will achieve satisfactory parking and servicing arrangements; and
  - Will not result in the loss of residential accommodation in accordance with Policy H5.

3. Trends in the Retail, Commercial and Leisure Sectors

UK Retail Property Market

3.1 The past 18 months has been a particularly turbulent time for the retail property market. The "US sub prime crisis" of 2007, which quickly evolved into the "Credit Crunch" of 2008, has transformed itself into a widespread, global recession.

3.2 Across the UK in particular, rising employment, falling house prices, sluggish wage growth and fears over the overall health of the economy have resulted in more difficult personal circumstances and low levels of consumer confidence. This in turn has lead to a prolonged fall in consumer spending across the board and stifled levels of business investment.

3.3 As a result, it is now widely accepted that the UK economy will experience a significant contraction in 2009, and that this in turn will lead to a widening of the output gap. Price pressure in the economy is expected to remain weak for some time and resultantly, prices have been falling.

3.4 Given the high level of debt (in terms of both household and corporate) in the UK economy, a period of deflation is a real risk. This would mean a period of increased real debt burden, which would necessitate further retrenchment in both household and corporate spending and further dampen any prospect of short-term economic recovery, including that of the retail sector.

3.5 Looking forward, conditions for retailers are expected to remain extremely difficult. The UK retail property market has entered into a period of significant uncertainty, as the economy as a whole is predicted to decline into the first quarter of 2010 and unemployment rises are expected into 2010. Whilst there are predictions of a recovery (albeit slow and cautious, particularly in the medium term) it is vital that landlords, investors and Local Authorities are alive to the pressures facing the retail sector, particularly if they want to be in a strong position at a time of recovery.

Town Centre Retailing

3.6 Town centre retailing is the most important sales channel in UK retailing, although it has been significantly hit by the global economic recession.

High street retailer failures have become commonplace in the last 12 months (including Woolworths, Sofa Workshop, Whittards, Streetwise Sports, Ethel Austin and the fashion group Mosaic) and there remains concern that more will follow.

3.7 In terms of vacancy rates, presently, primary stock remains fairly fully occupied: hence the frenzied cherry-picking of the best Woolworths' stores when the group failed. Retailer demand across the board however remains subdued, and following the predicted multiple branch closures across the coming months, it is considered that secondary and tertiary areas, as well as older shopping centres in some circumstances, will be worst hit by the increase in vacancy rates.

3.8 In terms of new development coming forward, the shopping centre pipeline for the UK in 2009 and 2010 has shrunk quite dramatically from 1.5 million sq m as at June 2008 to 530,000 sq m in December 2008. This is a result of delays to town centre regeneration schemes such as Chester Northgate, the Bridgefield development in Stockport and Trinity Walk in Wakefield.

3.9 With development activity plummeting, non-food retail sector expansion requirements in town centres – for a lengthy period – will have to be largely met by the occupation of disposed of units.

3.10 On a more positive note, there are some new entrants to the UK market (including Steve Madden Footwear and Hollister) and more are looking to expand (including Bank Fashion, Primark and Fat Face). Other retailers such as H&M and Halfords are investing in their existing store formats.

Out-of-Town Retailing

3.11 The out-of-centre retailing market has been particularly susceptible to the economic downturn, especially bulky goods retailers.

3.12 A number of out of town fascias have been placed into administration over the past twelve months, including Floors 2 Go, MFI, Rosebys, Au Naturale, Sleep Depot, ILVA, ScS and Big W (Woolworths).

3.13 There are some more positive trends taking place in this particular sector however. For example, there remains some interest to expand further into this market including from operators such as the Steinhoff Group (including Bensons for Beds and Harveys the Furniture Store), the Carphone Warehouse, Peacocks, Kutchenhouse, Dreams and Pets at Home.

3.14 Elsewhere, operators are taking advantage of empty properties, for example, B&M and Home Bargains. Discounter retailers are also being acquisitive on retail parks, in particular Lidl and Aldi.

3.15 Other operators who opened stores in 2008, but are not currently progressing their expansion programmes, for example Tesco Home Plus, BHS Home and Marks and Spencer, are expected to resume their growth when the conditions begin to pick up.

3.16 An emerging market for temporary occupiers is also predicted as occupiers can negotiate cheaper and flexible terms and can cover the landlords' rates burden.

3.17 There is also continued interest in releasing areas of car parking to build units (often referred to as Pods) for retailers and restaurateurs with requirements of between 1,500 and 3,500 sq ft (140 to 325 sq m), as well as coffee and sandwich shop operators.

Grocery and Food Retailing

3.18 The supermarket sector continues to grow, with 2008 witnessing food and grocery specialists defying the wider retail market gloom and increasing their combined sales by 5.0% to £124.1bn[13]. Grocers (such as Tesco and Asda) performed especially well with sales ahead by 5.6% - their strongest growth since 2001[14].

3.19 Indeed, despite the deteriorating economic conditions within the UK, grocers' sales have continued to grow over the past year. In part, this is a result of steep food price inflation in 2008, however, improved performances from the likes of Morrisons and Asda have also been highly influential, as has the continued roll out of new floorspace and product innovation within the sector. Generally, grocers have shown themselves to be more adept in reacting to the changing market conditions than retailers within other sectors.

3.20 The 'Top Four' supermarkets (Tesco, Sainsbury's, Asda and Morrisons) have become more flexible in their criteria for new site selection, have worked hard to increase floorspace at their existing outlets (particularly

[13] Verdict – UK Grocery Food and Retailers (2009)

[14] Verdict – UK Grocery Food and Retailers (2009)

through the installation of mezzanine floors) and diversified into new formats such as non food only stores. Also included within the sales of grocers' superstores are the online sales that are serviced by these outlets - this has provided a strong sales boost over the past decade.

3.21 The non food market within the supermarket sector has been hit particularly hard by the economic climate. Whereas food represents an essential purchase, non food purchases are becoming increasingly more discretionary. This is reflected in recent trading updates from Tesco, which has a large proportion of non food within its sales mix. Nevertheless, grocers as a whole have managed to outperform the non food market by editing their ranges carefully to reflect more cautious purchasing behaviour and by focusing even more closely on price[15].

3.22 Verdict expect the recession to intensify and for GDP growth to turn negative in 2009 and 2010, meaning that grocers will not be immune from the economic turmoil. Promotional activity and price reductions will test the gross margins and the non food offer will continue to drag for the likes of Tesco and ASDA – though space growth and increased use of other sales mediums such as the internet and catalogues (known as adopting a 'multi-channel' approach) is expected to offset the worst conditions[16].

3.23 'Hard discounters' such as Aldi, Lidl and Netto have substantially increased their advertising expenditure over the last couple of years and have been busy opening new stores in a bid to increase their market share. While these types of stores have previously struggled to make significant inroads into the UK market, they are now attracting new customers, including a proportion of more affluent shoppers. Verdict predicts that this will continue well into the future to coincide with the ever deteriorating economy[17].

3.24 There has also been a key change in consumer shopping patterns. Many more consumers shop around for the best prices and attempt to avoid waste by only buying what they need. This represents price as the top consideration for consumers against a weaker pound pushing up the price of imports. M&S Food is under the most pressure from its competitors, due

[15] Verdict – UK Grocery Food and Retailers (2009)

[16] Verdict – UK Grocery Food and Retailers (2009)

[17] Verdict – UK Grocery Food and Retailers (2009)

to its upmarket position and low success in initiatives such as meal deals and other promotional activity.

3.25 This has resulted in a key shift to lower price point products, with a wider range and variety of promotional activities and expansion or launches of retailers own brand discount ranges (for example Waitrose).

3.26 The role of Multi-channel retailing[18] is also becoming increasingly more important to the grocery sector. Many of the top four grocers (Tesco, Sainsbury's, Asda and Morrisons) have increased their capacity and geographical coverage, and the growth in online shopping has driven their sales.

3.27 For Grocers to survive the recession, they need to have an ability to react and adapt to short term market issues and remain committed to long term strategies. In short, those that can adapt quickly will benefit the most.

E-Retail

3.28 Shopping patterns have shifted significantly in the past decade due to internet retailing, and it now accounts for a large proportion of retail sales within the UK.

3.29 Most retailers continue to value retail stores above all other forms of retailing. However, retailers are adopting a 'multi-channel' approach – using physical store, websites and catalogues to sell their merchandise, and many are also at the forefront of internet retailing as they have an existing brand loyalty, strong buying power and efficient distribution networks, and to that extent, the internet is another means of attracting custom.

3.30 The effect of the internet on some retail categories including electricals, books, music and travel has been highly significant, as price led shoppers seek such items on the internet, where they can be found at lower prices. For example, in 2006 Dixons withdrew from the High Street completely to become a wholly on-line retailer. These categories must adapt quickly in order to maintain a retail presence on the High Street due to the fact that consumers are becoming increasingly comfortable in buying these products without handling them.

[18] Multichannel retailing is where retailers provide customers with more than one way to buy their goods: e.g. through providing both a physical retail store and an online store.

3.31 Some companies who began on the internet, now recognise the advantage of having regionally based shops. This strategy shows that the internet may be the nursery for new independent retailers.

3.32 Electricals and food and grocery continue to dominate online retailing, with a market share of 25.7% and 25.3% respectively[19]. Even in the recession, the sector continues to perform well, and saw a growth of 25% to £18.4 billion in 2008[20], a growth which is predicted to continue. This is a result of an increased number of internet users, resulting in more shoppers and more transactions taking place online.

3.33 As prices are frequently cheaper than on the high street, the main issue deterring customers from shopping online is the cost of delivery. 59.4% of shoppers[21] say that free delivery is an important incentive to online shopping, hence the retailers that offer this more are likely to be more successful in the market place. E-retailers which offer free delivery options already include Play, Waitrose and Amazon.

3.34 In the future, the Internet is set to become more complex and competitive and this will present more long term growth opportunities. Many retailers are using social networking sites more readily to interact with customers. Retailers need to target key, affiliate sites and utilise an online marketing strategy which will stand out. Website design is also important, as those websites which are easier to use and more convenient have a higher satisfaction rating among customers.

3.35 However, high broadband costs are limiting the further growth of this sector, and usage is limited within some socio-economic and age groups. There is a low appreciation of the E-retail sector by those aged 55+, but this age group is becoming increasingly more 'technology savvy', and this is likely to result in the growth of E-retail within this age band.

3.36 According to the IMRG Capgemini E-Retail Sales Index, UK online sales increased by 8.2% year on year in May 2009, to £3.7 billion, the smallest rate of increase in the index's history, and far behind the rise of 30.9% year on year in May 2008. The £3.7 billion of online sales in May 2009 was also down 3.5% from April 2009.

---

[19] Verdict – UK e-Retail 2009

[20] Verdict – UK e-Retail 2009

[21] Verdict – UK e-Retail 2009

3.37 Where internet access exists in rural areas, the use of online shopping is generally higher than average due to its increased convenience respective to urban areas. This is a result of increased distances to the nearest shopping area (especially for specialist goods) in rural areas.

Commercial Sector

Investment

3.38 2008 was a tough year for investors. Activity slowed in all markets as the effects of the "credit crunch" and the associated economic downturn continued. 2008 saw the total value of investment transactions fall by 65% across the UK[22] – the second consecutive year the UK recorded a fall of this level and yields continued to move out across all locations.

3.39 DJ Research anticipates that there could be further upward yield movement[23] across the UK in 2009, and does not envisage confidence in the wider investment market returning until the severity of the impact of the economic slowdown rental market is more fully understood. In some Regional Cities, such as Leeds, there is emerging evidence that the yields and values for prime, fully let properties are stabilising, with several purchases of major office buildings in the first half of 2009 by property companies buying in at what they perceive to be the bottom of the cycle in terms of investment values.

Offices

3.40 UK wide occupier demand will inevitably be weaker in 2009, and the majority of transactions will be driven by occupiers who have key lease events, although landlords will inevitably work hard to stop occupiers leaving their existing buildings. The market has moved firmly in the favour of the occupier, and those who do move will be offered strong incentive packages and have a greater choice of commercial buildings.

3.41 In a market town, such as Selby, a relatively high proportion of office based businesses own the premises they occupy. This trend is common in

[22] Drivers Jonas LLP: Office Trends – UK Key Cities (2009)

[23] The commercial yield represents the return to the investor for risk taking. An upward shift in yields signifies a reduced confidence amongst property investors.

market towns where the office investment market is more limited and occupiers can purchase premises at relatively affordable freehold values. The trend was particularly driven by Government policy on private pensions, which enabled those with Self-Invested Pension Plans (SIPPS) to benefit from a number of tax advantages in purchasing property to hold in SIPPS, whilst the owner then granted a lease to the occupying business (which they also owned).

3.42 The combination of the economic slowdown and its impact on confidence, together with the difficulty that many small and medium enterprises report in accessing capital at reasonable cost, however means there is likely to be a lower number of businesses willing to purchase premises for their own occupation.

3.43 The office rental market is likely to become more muted in line with the national trend. Existing occupiers will hold the whip hand at lease renewal and in rent review negotiations, whilst landlords will have to work hard to avoid tenants being attracted by more competitive terms offered by rival landlords.

3.44 One particular sector that is likely to find the office market more difficult in the near future is any new business, or small business, that is looking to make the step change from a home based business to one with office space. Landlords may be very cautious about the financial strength of such businesses, and might insist on significant rental deposits and/or guarantee arrangements. These could become onerous and prevent businesses from taking on new premises. It is important that consideration is given to how these new or very small businesses can access office accommodation to provide a platform for their continued growth.

Leisure Sector

3.45 The commercial leisure sector within the UK is dynamic, and similar to the retail sector, relatively unpredictable.

3.46 The consolidation of the leisure industry has been the significant trend across recent years, resulting in:

- Three companies (Cineworld, Vue and Odeon) operating 85% of all UK cinema screens;

- Three companies operating 90% of all UK private sector Health and Fitness clubs; and,
- Three operators controlling the majority of the UK's bowling venues.

3.47 However, it is still considered that there are enough operators for competitive bidding to occur for units in good locations, and to continue to drive upward rental growth in the future.

Leisure Services Expenditure

3.48 Expenditure on leisure services grew, on average, by 2.4% per annum between 1967 and 2007[24].

3.49 Table 3.1 shows Experian's estimates of spending on leisure services in 2007, and illustrates that spending is dominated by the restaurants and cafes category (including pubs). Experian estimates that this category accounts for about 60% of total leisure spend and 6% of total spending by UK residents at home.

Table 3.1 Estimates of Spending on Leisure Services in 2007[25]

Description	Total Spending (£m)	UK Spend per Head (£)
Recreational and Sporting Services	7,561	123
Cultural Services	15,262	244
Games of Chance	9,905	163
Restaurants, Cafes etc	73,273	1,143
Accommodation Services	14,338	130
Hairdressing Salons and Personal Grooming Establishments	5,513	89
Total	128,852	1,893

3.50 Consumer spending on leisure services is generally more vulnerable than other sectors, therefore in a time of slowing consumer growth there is likely to be some impact on the leisure sector. It is estimated that spending will contract during 2009 and 2010 (by -3.4% and -1.6% respectively), before

[24] Experian Retail Planner Briefing Note Update (April 2007)

[25] Experian Retail Planner Briefing Note 6.1 (October 2008, Revised January 2009)

growth resumes in 2011 by 0.7% per annum, increasing to 1.6% per annum in 2012[26].

Cinemas

3.51 Dodona's latest annual report on cinema going within the UK[27] reveals that despite an uplift in the number of screens by 10%, the UK cinema market has remained constant since the release of the third and final Lord of the Rings film in 2003.

3.52 Since 2007, there has been an increase in the number of screens within the UK from 3,514 to 3,610. However, this growth in screens coupled with a relatively small increase in overall admissions from 162.4 million in 2007 to 164.2 million in 2008[28] has resulted in a decrease in the number of admissions per screen.

3.53 Nearly three quarters of UK cinema screens are within purpose built multiplexes with more than 5 screens and Dodona illustrates that there are a total of 2,680 multiplex cinema screens in the UK, an increase from 2,578 in 2007. In the same period, the number of traditional cinema screens has reduced from 936 in 2007 to 921 in 2008[29].

3.54 From the 500 films a year that pass through cinemas, the UK box office (i.e. domestic films made within the UK) has seen a growth in its market share from 16% in 2003, doubled to 31% in 2008[30].

3.55 Dodona calculates that within the UK, the average population per cinema screen is 12,503. In terms of audience, historically it has always been the younger age groups who have dominated cinema audiences, however in more recent times, this has shifted with three quarters of over 35s claiming to visit the cinema on a regular basis.

3.56 Overall, the audience is younger than the general population, is of a higher socio economic group, but identical in gender distribution. Art house audiences however have an age profile closer to that of the overall population, but skewed towards higher socio economic groups.

---

[26] Experian Retail Planner Briefing Note Update (April 2007)

[27] Dodona – Cinemagoing 18 (2009)

[28] Dodona – Cinemagoing 18 (2009)

[29] Dodona – Cinemagoing 18 (2009)

[30] Dodona – Cinemagoing 18 (2009)

3.57 In terms of the future of cinema going, Dodona predicts that cinema-going will continue to be a popular pursuit amongst a range of age groups, and the introduction of many films now in "3D" will rival the download and DVD rental markets.

3.58 According to the Cinema Advertising Association, UK cinema attendances have hit a seven-year high, as consumers turn to the big screen as a cheaper form of entertainment. Box office ticket sales have hit 83 million in the first half of 2009 and June 2009 saw an increase of 5.6% on the previous year with 12.5 million ticket sales[31].

Health and Fitness

3.59 The Fitness Industry Association state that there are more than 5,700 public and private gyms in the UK, resulting in more than 90% of UK population living no more than 20 minutes from their nearest gym[32]. However, despite the market value of the health and fitness sector being estimated at £2.3 billion a year[33], only 9.4% of the adult population pays to go to a private club (12% if including public leisure centre memberships are included).

3.60 The health and fitness sector has evolved in the past 3 to 5 years. Gyms now provide a wider range of facilities and services, including a higher number of classes per week, particularly due to the growth in popularity of modern classes including Yoga, Pilates and Powerplate.

3.61 Child membership also increased by 40% in the last 3 years, with Health Centres becoming increasingly popular with families[34]. In response to tackling obesity in the UK, free gym membership is being offered to under 5 year olds as part of a joint venture with the NHS.

3.62 Gym membership is expected to fall further as the current climate prevails and people become more frugal on the services that they require. It has been noted by Target Group Index (TGI) that only 27% of people regularly use their gym membership, thus leaving over 70% of accounts dormant.

---

[31] Brand Republic (20/07/2009)

[32] The Fitness Industry Association - Health Clubs & Leisure Centres Market Report (2009)

[33] Mintel – Health and Fitness Clubs (May 2007)

[34] The Fitness Industry Association - Health Clubs & Leisure Centres Market Report (2009)

Restaurants, Bars and Pubs

3.63 The trading performances of national pub and restaurant chains showed positive growth during 2006 and 2007. However, the ban on smoking in pubs and restaurants, which came into force in July 2007, has had an impact on this sector. Some pubs have reported takings down by as much as 40%, with generally, small town centre pubs and inner city bars being the worse affected due to lack of outside areas for smokers.

3.64 The British Beer and Pub Association (BBPA) estimate that, currently, 52 pubs a weeks are closing, leading to a loss of 24,000 jobs in the past year. This trend has been blamed on the recession, increased beer taxes and additional 'red tape'.

3.65 Whilst the smoking ban has seen a decrease in 'wet' sales, there has been an increase in food sales within both pubs and restaurants. The British population now spend more per annum on eating in restaurants than they do in supermarkets.

3.66 It is predicted that a two-tier restaurant/bar/pubs market is likely to evolve. The one tier is represented by large chain brands that are increasingly being converted into female and family-friendly food-based establishments, alongside the rise of the 'gastro-pub' market. Meanwhile, the more traditional pubs, which represent the other tier are more restricted by their physical fabric, are predicted to see lower profits and potential closures.

3.67 The amount spent on eating out of the home within the UK has fallen for the first time in 40 years, as a result of a shift in consumer expectations that will continue after the recession[35]. The Eating Out in the UK report tracked the eating habits of thousands of consumers, and revealed that the value of eating out would fall 0.5% from 2008 to £40.3 billion in 2009, with one in nine meals eaten away from the home in 2009, down from one in eight in 2008. This is the first time there has been a decline since the informal eating-out market emerged in the 1960s.

3.68 The public is becoming increasingly discerning about the way in which they spend their money, and this is starting to affect the performance of the sector. It is predicted that growth will return in 2010, with the market hitting

---

[35] Eating Out in the UK (2009)

£47.5 billion by 2014 thanks to rising trends in affluence, mobility, more youthful older customers and an Olympics boost in 2012[36].

Hotels

3.69 The UK hotel sector performed strongly between 2004 and 2007 and it has been reported that, on average, the total profit per hotel room increased by 5.8% in 2006, with the growth in revenue per available hotel room growing by 8%[37]. A study undertaken by Melvin Gold Consulting, recorded that the total number of accommodation rooms in the UK stood at 716,500 in 2007, with the budget sector currently accounting for 85,665 (12% of the total market).

3.70 There has been a decrease in the number of mid range hotels, with budget hotels proving to be increasingly popular during the recession. On the whole the hotel sector has weakened, as a result of fewer holidays or breaks away being taken, and with people opting for holidays involving camping or caravanning.

3.71 It has recently been reported that the UK now has the most expensive hotel rooms in Europe, with the average price of a night's stay exceeding £100[38].

Bingo

3.72 The online bingo market was worth an estimated £500 million in 2008[39]. Improved availability of broadband and higher levels of consumer sophistication have combined to make the UK the most experienced and developed online bingo market in the world.

3.73 Mintel (April 2009) summarise the recent changes within the sector:

> *A younger, more affluent crowd of players has been drawn into the market, so that while still a niche activity at heart (between 3-4 million players), it has become a more dynamic market, with increased investment in facilities, games and technology. Unfortunately, this new market dynamism has taken a severe knock since 2007.*

[36] Eating Out in the UK (2009)

[37] Insight Leisure (October 2007)

[38] Mintel (01/07/2009)

[39] Mintel – Bingo (April 2009)

> *Legislative changes like the smoking ban and restrictions on gaming machines in clubs, plus the rise of the online version of the game, have led to falling admission numbers and falling revenue from stake money and ancillary activities.*

Mintel - Bingo (April 2009)

3.74 The introduction of the Smoking Ban Law across England on 1 July 2007 has already led to a decline in bingo participation and it is anticipated that this decline will continue.

3.75 Following the Gambling Act 2007, gaming and betting employers can now advertise their services. 17 new regional casinos were also proposed in the Act which if constructed would result in new job opportunities.

3.76 The passing of the Unlawful Internet Gambling Enforcement Act (UIGEA) 2006 within America is predicted to lead to an increase in US online gaming providers relocating to the regulated UK market, as it will lead to internet gambling transactions in US States where gambling is prohibited being blocked by US financial institutions. Mergers between US and UK online gambling companies are likely to occur.

3.77 The capping of the working week to 48 hours, minimum-wage legislation and limitations on night-shift working hours are expected to affect the sector's future. Changes to the culture of long working hours will increase the sector's reliance on part-time shift workers, in particular in the online gaming and betting industries.

3.78 This sector has seen the emergence, in the past two or three years of a "burgeoning online bingo market" which is estimated to represent 20% of the total bingo market. Although this has been advantageous for some in offsetting their falling profits, it has not benefited everyone, especially with a wealth of new competitors entering the market as online operators only. Furthermore, online bingo has, inevitably, attracted a number of club bingo customers away from the bingo halls, which has added to the operator's woes[40].

[40] Steve McKenna, The Times (22 June 2009)

4. Influence of Surrounding Centres

4.1 This chapter examines the influence of centres outside of the District on the shopping habits of residents.

4.2 It summarises the findings of the household and street surveys, commissioned by Drivers Jonas LLP on behalf of Selby District Council, and undertaken by NEMS Market Research in July and August 2009.

Selby Household Survey (July 2009)

4.3 In July 2009, NEMS Market Research undertook a telephone survey of 706 people across the District of Selby and the surrounding area to inform the Selby Retail, Commercial and Leisure Study.

4.4 **Appendix 1** to the Study illustrates the extent of the survey area. The full results of the survey (organised by the catchment area for the quantitative assessment zones - see Paragraphs 7.5-7.11 for a detailed explanation of the survey and quantitative assessment zones) can be found at **Appendix 2**.

4.5 This Chapter details the shopping habits across the whole survey area as identified by the household survey.

Where do you usually go to do your main food and grocery shopping?

4.6 Across the Survey Area, the Morrisons store in Selby Town Centre received the greatest number of respondents (12%) choosing it as their first choice destination for convenience shopping. Within Zone 1 (Selby), this increased to 35.8%.

4.7 Tesco in Selby Town Centre is the next most popular destination, with 10.3% of all respondents using this store as their first choice destination (37.7% of Zone 1 Respondents).

4.8 Other notable responses include Tesco in Goole (9.8% overall, 65.8% from Zone 5 and 15.8% from Zone 6), the Morrisons store in Knottingley (9.3% overall, 33.8% from Zone 2), Tesco Extra, on Tadcaster Road in York (7.2% overall, 29.7% from Zone 3), and Morrisons in Wetherby (6.7% overall, 30% from Zone 3).

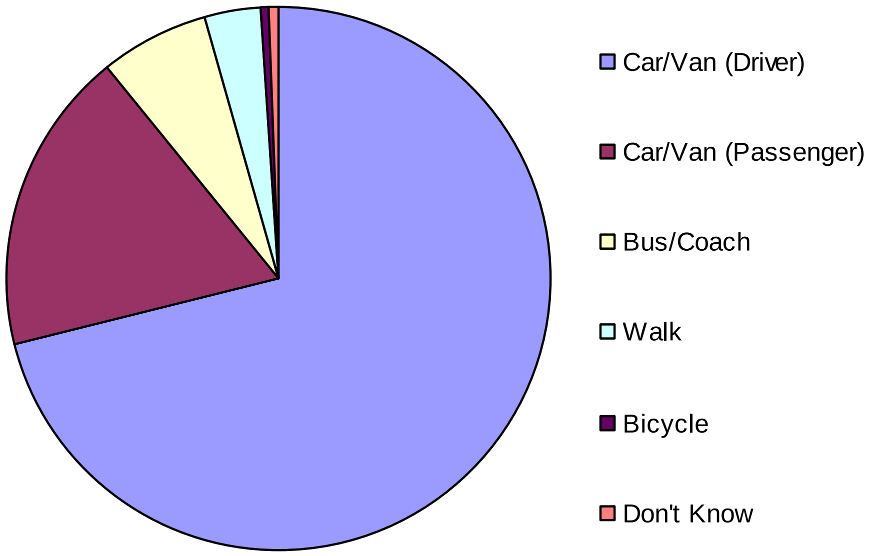
4.9 Those who stated the recently opened Sainsbury's on Abbey Walk, Selby as their first choice destination (1.7% overall, 6.6% from Zone 1), were also asked about their shopping habits prior to the store opening.

4.10 A third used to shop in Morrisons, Selby prior to the opening of Sainsbury's, with other shoppers drawn from Sainsbury's Monk Cross in York, Sainsbury's Foss Bank in York, Asda Monks Cross and Tesco in Selby. Only one respondent used to shop at the former Somerfield, which the Sainsbury's store replaced.

What mode of transport do you normally use to travel to your main food and grocery shopping destination?

4.11 The chart below shows the mode of transport utilised to undertake respondents main food and grocery shopping trips across the survey area as a whole. The dominance of the private car/van (as either a driver or passenger) (89% overall) is consistent across all six zones (ranging between 86 and 94%).

Figure 4.1: Main Food and Grocery Trip – Mode of Transport



How often do you normally do your main food and grocery shopping?

4.12 Overall, over two thirds of those interviewed undertake their main food and grocery shopping trip once a week (68.8% overall). This is consistent across the six zones, with between 63% and 73% shopping once a week.

4.13 12.9% of respondents undertake their main food and grocery trip more than once a week. Zone 1 (Selby) had the highest percentage of respondents undertaking more than one trip a week (19.9%). This could be a reflection of three large foodstores being located within the Town Centre.

About how much of your household expenditure on food and grocery is spent in your main shopping trip?

4.14 Across the six zones, 40.9% spend between 76-100% of their household expenditure on food and grocery shopping in their first choice shopping destination.

4.15 However across the survey area, a significant number of respondents (17.6%) were unsure on how much of their household expenditure they spent on food and grocery shopping or said it varied. These results will be extrapolated from the data for the quantitative analysis.

Do you visit any other locations before / after your main food and grocery shopping trip?

4.16 The majority of respondents do not visit other locations before or after their main food and shopping trip (55.4%).

4.17 30% of respondents visited other locations either before or after their main food and grocery shopping trip. Locations visited were varied and the most popular include:

- Selby Town Centre;
- Goole Town Centre;
- Wetherby Town Centre;
- Pontefract Town Centre;
- York City Centre;
- Visiting Friends and relatives; and,
- Work.

In addition to your main destination, where is your main 'small scale' top up food shopping location / destination?

4.18 There is no overriding destination across the six zones which is most popular for top up food shopping. This may be as a result of the large amount of options available to respondents for top up shopping in and around the survey area.

4.19 Sainsbury's Millgate in Tadcaster was the most popular across the zones, drawing 5.8% of those interviewed (26.5% within Zone 3). Other popular destinations include Morrisons Selby (4.2% overall) and Morrisons Knottingley (4.1% overall).

4.20 The Local Shops in Sherburn in Elmet and Selby also draw top-up expenditure. Overall, 3.7% use local shops within Sherburn in Elmet (13.9% of Zone 2 and 3.3% of Zone 3 respondents) and 2.6% use local shops within Selby Town Centre (8.6% of Zone 1 respondents plus small numbers in Zones 2, 4 and 6).

Where would you normally go to buy or look for clothing and footwear?

4.21 Across the six zones, York City Centre is the most popular destination to go to buy or look for clothing and footwear (44.8%), with Leeds the second most popular destination (12.5%), followed by Doncaster (6.9%) and Selby Town Centre (6.1%).

4.22 The most popular destination varies across the six zones. York is the dominant centre in Zones 1 (61.6%), 3 (51.0%), 4 (78.2%) and 5 (39.5%), whilst Zone 2 looks towards Leeds (29.8%) and Zone 6 to Doncaster (52.6%). Hull also exerts a strong draw on Zone 5 (15.8%).

4.23 Selby Town Centre has a strong draw within Zone 1 (19.2%), but this is 5.3% (Zone 6) or less in the other zones.

Where else would you go to buy or look for clothing and footwear?

4.24 Again, across the six zones, York City Centre is the most popular second choice destination to buy or look for clothing and footwear (14.6%), and is the most popular in all zones excluding Zone 2, who look to Leeds instead, as within the first choice answers.

4.25 Selby Town Centre came third in terms of secondary shopping location for clothing and footwear, with 5.1% across all six zones, with the strongest draw from Zone 6 (11%).

4.26 Other centres exerting a draw as a secondary destination include Castleford (4.8% overall, 9.8% from Zone 2), Doncaster (4.5% overall, 11.9% and 12.3% from Zones 5 and 6 respectively), Hull (2.7% overall, 17.9% from Zone 5) and Wakefield (2.7% overall, 10.5% from Zone 2).

Roughly what proportion of your expenditure on clothing and footwear would you spend at your main destination to go to buy or look for clothing and footwear?

4.27 Across the six zones, 42.4% spend between 76-100% of their expenditure on clothing and footwear in their first choice shopping destination.

4.28 However across the survey area, a significant number of respondents (16.6%) were unsure on how much of their expenditure they spent in their main choice destination or said it varied. These results will be extrapolated from the data for the quantitative analysis.

Where would you normally go to buy or look for goods such as books, music and DVD's and toys?

4.29 York City Centre is the most popular destination to buy or look for books, music, DVD's and toys, with 24.8% of respondents stating this destination. York's draw for these types of goods is strongest in Zones 1, 3 and 4 (35.8%, 25.8% and 57.4% respectively).

4.30 Leeds is again the second most popular (5.7%) overall, with its strongest draw in Zones 2 and 3 (11.9% and 9.9%). Selby Town Centre is the third destination, with 5.0% of respondents overall using it as their second choice destination for these types of goods. Selby's draw is strongest in Zone 1 (16.6%). Doncaster (2.37% from Zone 6), Goole (17.1% from Zone 1) and Pontefract (10.6% from Zone 2) all exert an influence over individual zones for the books, music, DVD's and clothing categories.

4.31 Across all zones, 22.0% of respondents stated that these goods are normally purchased from Catalogue / Mail Order and the Internet. These results will be extrapolated from the data for the quantitative analysis, as allowances have already been made for expenditure spent in Non-Store Retail Destinations.

Where would you normally go to buy or look for chemist goods, toiletries and cosmetics?

4.32 Selby is the most popular destination across all six zones for chemist goods, toiletries and cosmetics, with 22.8% of all respondents. This is due to the high proportion of Zone 1 respondents which are using Selby Town Centre for this purpose (83.4%).

4.33 The second most popular destination is York City Centre (16.6%), which exerts its strongest draw on Zones 3 and 4, where it is the most popular destination (23.2% and 56.4% respectively). Pontefract has the strongest draw in Zone 2 (33.1%; 7.8% overall), Goole in Zone 5 (55.3%; 7.4% overall) and Doncaster in Zone 6 (25.0%; 2.8% overall).

4.34 Tadcaster exerts a strong influence over Zone 3, with 21.2% of respondents using Tadcaster as their main destination for chemist goods, toiletries and cosmetics (4.8% draw from all six zones).

Where would you normally go to buy or look for furniture, carpets and soft furnishings?

4.35 Across all six zones, 18.8% of respondents visit York to buy furniture, carpets and soft furnishings. York's draw for these goods is strongest in Zone 1 (21.9%), Zone 3 (29.8%) and Zone 4 (36.6%).

4.36 Selby is the second most popular destination, with 30.5% of Zone 1 respondents using the centre to buy or look for these goods, and 10.1% overall. Leeds exerts a strong influence over Zones 2 and 3 (11.9% and 13.9% respectively; 7.6% overall), Goole over Zone 5 (26.3%; 4.2% overall) and Doncaster over Zone 6 (22.4%; 3.4% overall).

4.37 The survey results do not reveal a strong draw of furniture, carpets and soft furnishings expenditure to retail warehouse parks. The Three Lakes Retail Park has the largest draw across the six zones of all facilities of this type, but this is limited to only 1.4% of all respondents.

4.38 Again across the survey area, a significant number of respondents (38.6%) either did not buy these types of goods, or their destination varied. These results will be extrapolated from the data for the quantitative analysis.

Where would you normally go to buy or look for electrical goods e.g. Computers, TV's, Washing Machines, Cookers etc?

4.39 The most popular destination to buy or look for electrical goods is York City Centre, attracting 20.8% of respondents overall, with the strongest draw from Zones 1, 3 and 4 (28.5%, 31.8% and 37.6% respectively).

4.40 Selby has the strongest draw from Zone 1 (33.4%) and is the second most popular destination overall with 10.9% of respondents using Selby to buy or look for these goods. Pontefract exerts the largest influence over Zone 2 (29.1%), Goole over Zone 5 (35.5%) and Doncaster on Zone 6 (26.3%).

4.41 Retail Warehouse facilities have a small draw for these types of goods. Clifton Moor Retail Park, York attracts 1.6% overall (mainly from Zone 4), Parkside and Pontefract Retail Parks in Pontefract attract 1.3% and 0.7% overall (entirely from Zone 2) and the Three Lakes Retail Park attracts 0.6% overall (mainly from Zone 1).

4.42 Across all zones, 14.7% of respondents stated that these goods are normally purchased from Catalogue / Mail Order and the Internet. These results will be extrapolated from the data for the quantitative analysis, as allowances have already been made for expenditure spent in Non-Store Retail Destinations.

4.43 Again, a significant number of respondents (19.1%) either did not buy these types of goods, or their destination varied. These results will also be extrapolated from the data for the quantitative analysis.

Where would you normally buy or look for household goods, glass, china and tableware?

4.44 York is by far the most dominant location across the survey area, attracting 23.7% of all respondents overall, compared to the second and third choice locations, Selby and Leeds, with 7.9% and 7.5% respectively. York is the most popular destination in Zones 1, 3 and 4 (29.8%, 33.1% and 42.6%).

4.45 The most popular destinations in Zones 2, 5 and 6 are Pontefract (15.2% of Zone 2), Hull (17.1% of Zone 5) and Doncaster (27.6% from Zone 6).

4.46 Again, a significant number of respondents (38.3%) either did not buy these types of goods, or their destination varied. These results will also be extrapolated from the data for the quantitative analysis.

Where would you normally go to buy or look for DIY, hardware and gardening goods?

4.47 Across the six zones, York is the most popular centre to go to buy or look for DIY, hardware and gardening goods (22.1%; 35.8% from Zone 3, 71.3% from Zone 4), followed by Selby (15.6%; 55% from Zone 1), Castleford (7.8%; 27.8% from Zone 2), Goole (6.4%; 11.8% from Zone 6) and Pontefract (6.2%; 27.2 from Zone 2).

4.48 The Three Lakes Retail Park attracts 4.4% of respondents overall, with a draw from all six zones. Its strongest draw is on Zone 1, where 11.3% of respondents chose Three Lakes as their main destination.

Which centre serves as your prime destination for leisure activities?

4.49 York is the prime destination across the survey area for leisure activities, attracting 16.9% overall, followed by Selby Town Centre with 7.9% and Castleford with 7.5%.

4.50 On a zone by zone basis, Selby is the most popular destination for respondents within Zone 1 (25.2%), although York maintains a strong draw from this zone also (19.9%). Castleford dominates Zone 2, attracting 20.5% compared to the next most popular destinations of Pontefract (4.6%), Sherburn in Elmet (4.0%) and York (4.0%).

4.51 Zone 3 respondents look towards York as their prime leisure destination (23.2%), although Tadcaster is the next most popular centre, with 7.9% stating this centre as their prime destination. York has a strong draw for leisure activities from Zone 4, attracting 41.6% compared to just 3% to Selby and Pocklington, the next most popular destinations.

4.52 Goole is the main destination for respondents within Zone 5 (24.5%), followed by Howden (10.5%) and York (7.9%). Respondents within Zone 6 are equally as likely to look to Selby or Doncaster (10.5% each), with 9.2% drawn to Castleford instead.

4.53 Again, a significant number of respondents (44.6%) either did not undertake leisure activities or their destination varies. These results will also be extrapolated from the data for the quantitative analysis.

How often do you visit your prime destination for leisure activities?

4.54 Overall, across the six zones, most respondents visit their prime leisure destination either once a week or once a month (21.5% each), followed by 18.4% who visit once a fortnight and 17.6% who visit 2-3 times a week.

4.55 These frequencies are consistent across the individual zones, the only slight anomaly being Zone 6 where 19.4% visit their prime leisure destination once every 1-3 months, compared to the survey area average of 9.7%.

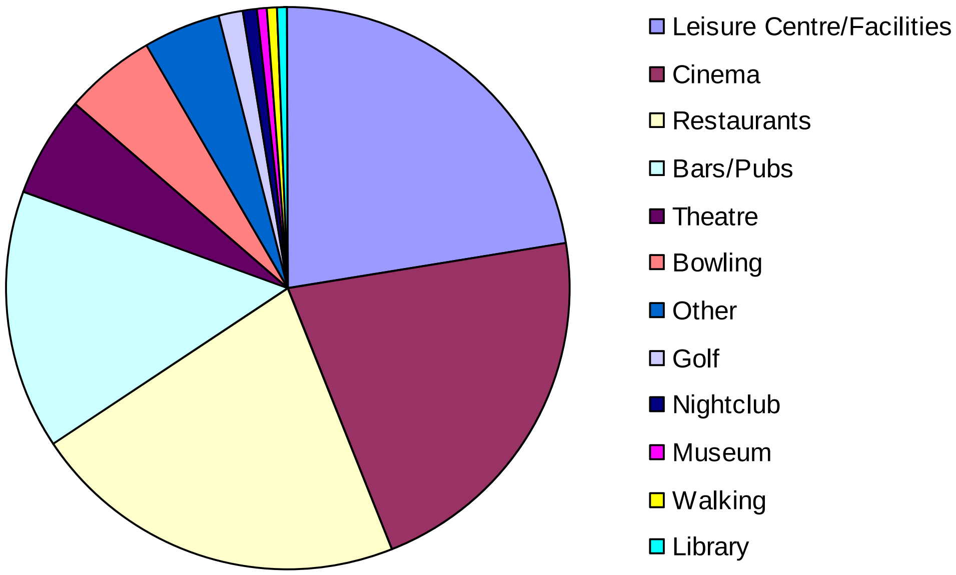
Which leisure facilities within your prime destination do you use?

4.56 The most popular leisure facilities are leisure centres/facilities (35%), cinemas (33.5%) and restaurants (33.5%) across all six zones.

4.57 The use of cinemas varies significantly from zone to zone, reflecting provision. Within Zone 4, 47.5% use cinemas in their prime leisure destination, compared to just 14% in Zone 5.

4.58 Other uses also have a strong representation in some zones, which could either be an indicator of provision in the most popular prime destination or of the socio-economic characteristics of that particular zone. For instance, 15.6% and 19.7% respectively of Zone 3 and 4 respondents visit their prime destination to attend the theatre, whereas this is between 2 and 7% for all other zones. Bowling is higher than average (8.4% overall) in Zones 2 (15.2%) and 6 (13.9%), and Zone 6 respondents who visit their prime destination to use a swimming pool (16.7%) is significantly higher than the average of 2.3%.

Figure 4.2: Leisure Facilities used in Prime Leisure Destination



Do you visit your prime leisure destination for leisure purposes in the evening?

4.59 Overall, 54.7% of respondents do visit their prime leisure destination in the evening for leisure purposes.

4.60 This pattern is consistent across all zones excluding Zone 5 where only 39.5% visit in the evening for leisure purposes. The leisure destinations attracting Zone 5 residents are Goole and Howden, so this anomaly could be a reflection of these centre's leisure offer or accessibility to Zone 5 respondents in the evening.

Where do you usually go to the cinema?

4.61 Cineworld at Xscape, Castleford is the most popular destination for cinema trips across the survey area, attracting 23.2%. Xscape's draw is especially high in Zones 1 (28.5%), 2 (51%) and 6 (34.2%).

4.62 The Vue Cinema in York is the next most popular destination, with 10% of respondents overall and the strongest draws in Zone 4 (28.7%), Zone 3 (19.2%) and Zone 1 (11.3%). The City Screen Picture House is York also attracts respondents from Zones 4 (22.8%) and 1 (13.2%), with a 9.2% draw overall.

4.63 Other cinema destinations include Vue Doncaster (19.7% from Zone 6), Wetherby Film Theatre (8.6% from Zone 3), and the Odeon in Hull (10.5% from Zone 5), amongst a wide range of other destinations attracting less than 1% of respondents.

4.64 Again, a significant number of respondents (48.2%) either did not go to the cinema or their destination varies. These results will also be extrapolated from the data for the quantitative analysis.

Do you use any villages / local centres for shopping, leisure or services?

4.65 Across all six zones, only 41.9% of respondents use their villages and local centres for shopping, leisure or services.

4.66 Zone 4 respondents use local villages/centres the most, with 67.3% answering positively. This is in comparison to just 30.5% of Zone 1 respondents.

4.67 Of those who said yes, the villages and local centres attracting more than 5% of all respondents were:

- Sherburn in Elmet: 13.2% overall (50% from Zone 2 and 16.7% from Zone 3);
- Snaith: 7.4% overall (54.3% from Zone 6);
- Boston Spa: 6.8% overall (33.3% from Zone 3);
- Howden: 6.4% overall (51.5% from Zone 5); and,
- Tadcaster: 5.7% overall (25% from Zone 3).

4.68 These villages / local centres are used for a variety of purposes including (based on first choice destination – Question 24a): top-up food shopping (58.1%); non food shopping (32.1%); the post office (24.0%); drinking out/visiting the pub (17.6%); leisure activities (17.6%); and, eating out (17.2%).

Selby On-Street Survey (July/August 2009)

4.69 An On-Street Centre Survey was commissioned by Drivers Jonas LLP on behalf of the Council and conducted by NEMS in late July/early August 2009 on a Monday, Thursday and Saturday.

4.70 The survey was commissioned primarily to establish the shopping patterns and characteristics of the area, alongside public perception of Selby Town Centre.

4.71 The full results are attached at **Appendix 3** but following is a summary of the key responses.

Mode of Travel

4.72 59.3% of respondents had travelled by car, either as a driver or passenger. 28% of respondents walked, 2% cycled and 10.7% used the bus. No respondents had used the train.

Purpose of Visiting the Town Centre

4.73 The main purpose for visiting the Town Centre was for shopping with 52.7% of respondents visiting Selby to shop (26% non food and 26.7% food). The second most popular reason why respondents were visiting Selby was for work purposes (12%), followed by services (11.3%) and meeting friends / relatives (7.3%).

4.74 Only 2.7% of respondents said the main purpose of their visit was to go to the market. However, it should be noted that the survey was conducted across three days, only one of which the market was trading on.

4.75 A relatively low proportion of respondents were visiting the Town Centre for leisure purposes (3.3%) with only 1.3% visiting to eat out.

4.76 The primary reason why people had chosen Selby as their destination was because the Town Centre is close to work or home (70.7%).

Frequency of Visit

4.77 73.4% of respondents visited Selby at least once a week for food goods and 30.8% for non food goods.

Table 4.1: Frequency of visits to Selby Town Centre

Source: NEMS On-street Survey (August 2009)

	Frequency Food Goods (%)	Frequency Non Food Goods (%)	Frequency Leisure (%)
Every Day	10.7	2.7	0
2-3 Times a week	30.7	5.5	22.5
Weekly	32	22.6	35.5
Fortnightly	4.7	14.4	17.5
Monthly	2	15.8	20
Once every 1-3 Months	4	9.6	2.5
Once every 4-6 Months	1.3	5.5	0
Once a year	0.7	0	0
First time today	0.7	0.7	0
Never	13.3	23.3	2.5 (Don't Know)

Primary Food Shopping Destination

4.78 The three main food shopping destinations of the on street survey respondents are:

- Morrisons Market Cross Selby – 35.3%;
- Tesco, Portholme Road, Selby – 14.7%; and,
- Sainsbury's, Abbey Walk, Selby - 16.7%.

4.79 In order to understand the affect of Sainsbury's opening in the Town Centre respondents were asked *'where was your main food shopping location / destination prior to Sainsbury's opening in November 2008?'.* The main destinations were:

- Morrisons Market Cross Selby - 64%; and
- Tesco, Portholme Road, Selby – 16%;

4.80 In terms of small scale top up shopping, Morrisons (25.3%) and Sainsbury's (14.7%) were the most popular destinations. Only 4% of respondents stated that Tesco, Portholme Road was their choice for top up shopping, and both the Co-op on Flaxley Road and Local Village Centres scored higher than Tesco (5.3% and 4.7% of respondents respectively). 1.3% stated they used the Tesco Express in Brayton for small scale, top-up shopping.

Primary Non-Food Shopping Destination

4.81 31.3% of respondents stated that Selby Town Centre was their primary non food shopping destination, followed by York (26%) and Leeds (12.7%).

Leisure Provision

4.82 26.7% of respondents stated that Selby was their main destination for leisure provision. The most popular leisure destination was York with 30.2% of respondents stating this as their primary destination for leisure activities.

4.83 The most popular leisure facilities within Selby Town Centre are bars / pubs, with 75% of respondents who visit Selby as their main leisure destination stating they used such facilities. Other popular facilities included restaurants (23%) and nightclubs (25%).

4.84 12.35% of respondents used the JJB gym and pool and a further 7.5% used Abbey Leisure Centre.

Perception of Selby Town Centre

4.85 Table 4.2 illustrates the perception of Selby Town centre of respondents.

Table 4.2: Selby Town Centre Perceptions

Source: NEMS On Street Survey (August 2009)

	Very Good	Good	Neutral	Poor	Very Poor	Don't Know
Choice of Shops	2.7	31.3	24.7	33.3	7.3	0.7
Quality of Shops	3.3	35.3	29.3	25.3	6	0.7
Specialist Shops	1.3	20	27.3	37.3	9.3	4.7
Quality of the Environment	4	38	30.7	20.7	1.3	5.3
Access by Car	2.7	37.3	26.7	20	6.7	6.7
Cost and Availability of Parking	1.3	31.3	26	22	4	15.3
Access by Public Transport	3.3	28	30	7.3	2.7	28.7
Entertainment Facilities	0.7	14.7	27.3	30	12.7	14.7
Leisure Facilities	0.7	14.7	33.3	26.7	10	14.7
Eating and Drinking	2.7	38	32.7	14	2.7	10
Events	0.7	13.3	30.7	19.3	10.7	25.3

	Very Good	Good	Neutral	Poor	Very Poor	Don't Know
Ease of Circulation by Foot	6.7	48.7	20.7	15.3	6	2.7
Safety and Security	4	48	33.3	10.7	1.3	2.7
The Market	1.3	27.3	32	14.7	12.7	12

4.86 There are mixed perceptions with regard to choice and mix of shops within the Town Centre, although the market is considered good. Entertainment and leisure facilities are considered to be relatively poor, although eating and drinking facilities are considered good.

4.87 The Town Centre is considered safe and easy to circulate by foot.

Aspects Most Liked / Disliked

4.88 The most common response by respondents when asked what they liked about Selby Town Centre was 'close to home / work' (42%). The most common response when asked what do you dislike most was 'poor choice / variety of shops' (26.7%).

Suggested Improvements to the Town Centre

4.89 The most commonly given suggestion as to what would improve the Town Centre was a 'wider range of shops' (36%). Other suggested improvements included the introduction of a department store, more leisure facilities, more places to eat and drink and a cinema.

Summary of Influences of Surrounding Centres

4.90 The findings of the household and street surveys illustrate that the surrounding centres exert a strong influence on the spending patterns of residents within the District, particularly in terms of their non food shopping and leisure trips.

4.91 Utilising the survey results and the expenditure generated within the District, it is possible to calculate the market share from the District of individual centres for convenience, comparison and leisure goods[41]. This analysis is contained in Tables 5 and 6 of **Appendices 4, 5 and 6**.

[41] Market Share of each Centre is from the Primary Catchment Area/District of Selby only. Centres draw trade from other locations in addition to this.

4.92 Tables 4.3 and 4.4 below illustrate the market shares of the District as a whole, the three key centres of Selby, Tadcaster and Sherburn in Elmet, and the surrounding competing centres for comparison and leisure goods.

Table 4.3: Key Centres Market Share for All Comparison Goods from the Primary Catchment Area (PCA)

Centre	Survey Derived Expenditure from PCA spent in Location in 2009 (£m)	Location Market Share of PCA Expenditure
All PCA Facilities	£98.14	30.4%
Selby Town Centre	£80.46	24.9%
Tadcaster	£4.19	1.3%
Sherburn in Elmet	£.2.72	0.84%
York	£117.53	36.4%
Leeds	£31.73	9.8%
Doncaster	£18.78	5.8%
Castleford	£11.49	3.6%

Table 4.4: Key Centres Market Share for All Leisure Goods from the Primary Catchment Area (PCA)

Centre	Survey Derived Expenditure from PCA spent in Location in 2009 (£m)	Location Market Share of PCA Expenditure
All PCA Facilities	£73.15	35.6%
Selby Town Centre	£52.74	25.7%
Tadcaster	£6.61	3.2%
Sherburn in Elmet	£.3.99	1.9%
York	£61.14	29.8%
Leeds	£5.26	2.6%
Doncaster	£5.46	2.7%
Castleford	£34.34	16.7%
Goole	£5.75	2.8%
Pontefract	£4.74	2.3%

4.93 In 2009, there is £323.22 million of comparison goods[42] and £205.25 million of leisure goods[43] expenditure available within the District as a whole. As Tables 4.3 and 4.4 above demonstrate, the District retains 30.4% and 35.6% of this expenditure respectively, which is attracted to facilities lying within its administrative boundary. York City Centre has the greatest individual 'centre' market share for both comparison and leisure goods, at 36.4% and 29.8% respectively.

4.94 The market shares for comparison retailing and leisure are commented on only, as the influence of surrounding centres on convenience retailing is more limited due to the more localised nature of convenience shopping. The District as a whole has a convenience market share of 65% with the remaining expenditure leaking to the large superstores on the periphery of the District, including the Tesco Extra on Tadcaster Road, York and Tesco in Goole.

4.95 The analysis of the survey data reveals that the surrounding areas exert a strong influence on the District as a whole and each of its centres. This reflects the geography of the area and the regional hierarchy of centres. Given the higher order nature of those centres to which expenditure is currently flowing, in order to seek to increase the District's market share for these types of goods an improvement to the offer would be needed.

[42] See Appendix 5: Comparison Goods Analysis - Table 3a

[43] See Appendix 6: Leisure Analysis – Table 3a

5. Health Checks

Introduction

5.1 The Government's key objective for town centres is to promote their vitality and viability. PPS6 (Planning for Town Centres) identifies the following indicators by which Council's can measure and monitor the vitality, viability and health of their town centres and how they are changing over time:

- **diversity of main town centre uses** (by number, type and amount of floorspace): the amount of space in use for different functions – such as offices; shopping; leisure, cultural and entertainment activities; pubs, cafes and restaurants; and, hotels;
- **the amount** of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations;
- **the potential capacity for growth or change of centres in the network**: opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development;
- **retailer representation and intentions to change representation**: existence and changes in representation of types of retailer, including street markets, and the demand of retailers wanting to come into the centre, or to change their representation in the centre, or to reduce or close their representation;
- **shopping rents**: pattern of movement in Zone A rents within Primary Shopping Areas (i.e. the rental value for the first 6 metres depth of floorspace in retail units from the shop window);
- **proportion of vacant street level property**: vacancies can arise even in the strongest town centres, and this indicator must be used with care. Vacancies in secondary frontages and changes to other uses will also be useful indicators;
- **commercial yields on non-domestic property (i.e. the capital value in relation to the expected market rental):** demonstrates the confidence of investors in the long-term profitability of the centre for retail, office and other commercial developments. This indicator should be used with care;
- **pedestrian flows (footfall**): a key indicator of the vitality of shopping streets, measured by the numbers and movement of people on the streets,

in different parts of the centre at different times of the day and evening, who are available for businesses to attract into shops, restaurants or other facilities;

- **accessibility**: ease and convenience of access by a choice of means of travel, including – the quality, quantity and type of car parking; the frequency and quality of public transport services and the range of customer origins served; and, the quality of provision for pedestrians, cyclists and disabled people and the ease of access from main arrival points to the main attractions;
- **customer and residents' views and behaviour**: regular surveys will help authorities in monitoring and evaluating the effectiveness of town centre improvements and in setting further priorities. Interviews in the town centre and at home can be used to establish views of both users and non-users of the centre, including the views of residents living in or close to the centre. This information could also establish the degree of linked trips;
- **perception of safety and occurrence of crime**: should include views and information on safety and security, and where appropriate, information for monitoring the evening and night-time economy; and
- **state of the town centre environmental quality**: should include information on problems (such as air pollution, noise, clutter, litter and graffiti) and positive factors (such as trees, landscaping and open spaces).

Structure of Chapter

5.2 Town Centre health checks have been conducted for the centres of Selby, Tadcaster and Sherburn in Elmet. These have taken the form of, and included:

- Site visits;
- Stakeholder involvement discussions;

as well as analysis of:

- key statistics;
- town centre rental levels;
- commercial yields;
- vacancy rates; and
- town centre rankings.

5.3 The health checks analysis has utilised and updated (in July 2009) the Selby District Council Town Centre Surveys for Selby, Tadcaster and Sherburn in Elmet.

5.4 The Chapter also incorporates the findings of the on-street survey, commissioned by Drivers Jonas LLP on behalf of the Council and undertaken by NEMS in August 2009. Stakeholder discussions include liaison with Selby Town Council, Selby Chamber, Sherburn Parish Council and Tadcaster Town Council.

Selby

5.5 Selby is located centrally within the Yorkshire and Humber Region and is influenced by York to the north, Doncaster to the south, and Pontefract and Castleford to the west, and Leeds further west. Selby is the main town within the District and was once an important inland port.

5.6 Selby Town Centre has a population of 13,012 [44]. Selby as a whole is not a particularly affluent area, with an above average proportion of adults of working age categorised within the least affluent social groups (which includes those in skilled and unskilled manual employment, the unemployed and those on state benefits) and an under-representation of the most affluent social groups (including those in managerial and professional occupations).

5.7 Selby Town Centre is at the top of the District's retail hierarchy and regionally it performs the role of a Major District Centre (as defined by Management Horizons). Aside from retailing, the Centre also performs a major service role.

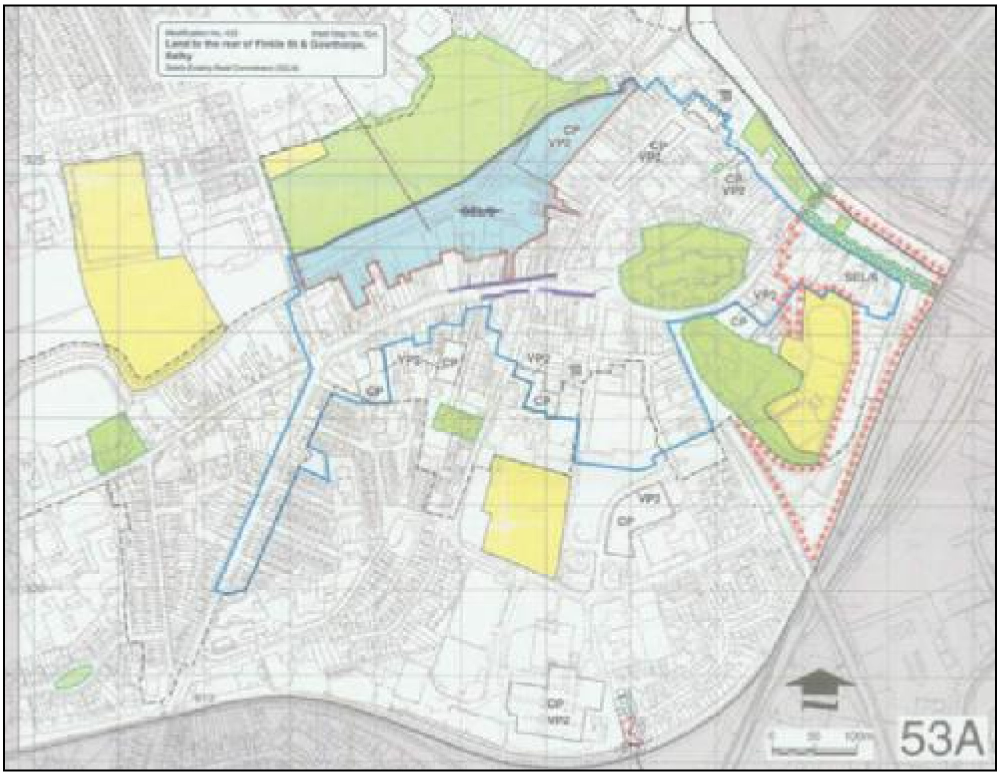
Existing Primary Shopping Area and Town Centre Boundary

5.8 The existing shopping and commercial centre as defined by the Selby District Local Plan (February 2005) broadly encompasses the streets of Gowthorpe, Finkle Street, Micklegate, The Crescent, Brook Street, and Ousegate. There are a number of subsidiary shopping areas included, which are focused around Market Cross Shopping Centre, Abbey Walk, Abbey Yard and Park Street.

[44] Selby Town Council – www.selbytowncouncil.gov.uk (2009)

5.9 A copy of the Local Plan Proposals Map is provided below:

Figure 5.1: Selby District Local Plan (2005) Extract - Selby Town Centre



5.10 The Shopping and Commercial Centre within Selby Town Centre, as defined by the Selby District Local Plan, comprises some 65,649 sq m (706,640 sq ft) of commercial floorspace. This figure is comparable to the 42,865 sq m (461,400 sq ft) figure supplied by Goad (2008). The difference is a result of Goad assuming a more concentrated boundary for the Town Centre, excluding parts of the secondary and tertiary areas.

5.11 For the purposes of this Study, we have utilised the current Selby District Council definition of the Centre. The Goad figures are provided for comparative purposes only and are not utilised within the quantitative analysis.

Environment and Physical Structure

Overview

5.12 Historically, the east of the Town Centre was the primary focus with Selby Abbey, the park and the River providing a focal point. However, this focus has now changed towards Gowthorpe and Abbey Walk.

5.13 The top three streets in Selby (as ranked by Focus) are Gowthorpe, Market Cross and Abbey Walk, all of which are located towards the west of the Town Centre. This area also includes Brook Street, at the western end of Gowthorpe.

5.14 The remainder of the Town Centre primarily consists of The Crescent, New Street, James Street, Park Street, Finkle Street, Micklegate, Ousegate, Church Hill and Church Lane.

5.15 When visiting the Town Centre the general environment is good, and the Conservation Areas and Listed Buildings create an attractive centre overall.

5.16 Abbey Walk provides public open space and the area surrounding, and including, Selby Abbey is well maintained and attractive. However, elsewhere within the Town Centre there is limited landscaping and street furniture; an increased number of vacant units and low quality signage on many of the shops, which all serve towards creating a less pleasant environment.

5.17 The public consider the Town Centre to be safe and there is little graffiti or litter in Selby.

5.18 In addition, although outside the Town Centre boundary as defined by the Selby District Local Plan (2005), the Park, bowling greens and memorial field provide well maintained green spaces. The River Ouse runs parallel with Ousegate, however, it is not positively linked to the Town Centre.

Street Characteristics

5.19 Gowthorpe performs the role of what can be considered as a ‘high street’ running centrally through the Town Centre from the west towards Selby Abbey.

5.20 Gowthorpe itself appears rundown and unattractive in places, with many vacant units, limited character, street furniture or landscaping, and it does not form a pleasant shopping environment at the time of survey (July 2009).

5.21 There are some multiple retailers[45] along Gowthorpe. The multiples include Timpson, Clarks Shoes, Clinton Cards, W H Smith, Dolland & Aitchison, Jack Fulton Frozen Food, Birthdays, Specsavers, Superdrug, New Look, Bonmarche, Quick Silver, Blockbuster Video alongside banks and building societies. The remainder of Gowthorpe is predominately characterised by service units.

5.22 The viability and vitality of Gowthorpe appears to be decreasing with increases in the number of vacant units (including the large vacant unit of the former Woolworths store) and the public perception of the street is reducing. It is felt that the street no longer fulfils its role as a prime shopping destination and is becoming increasingly service orientated.

Gowthorpe

5.23 Brook Street lies to the south west of Gowthorpe and is somewhat detached from the remainder of the Town Centre. The Town Centre boundary only relates to those units on the eastern side of the street.

5.24 The street is characterised by terraced houses many of which have been converted to retail or services uses. There are a number of vacancy boards along the street relating to both residential and commercial use.

45 Multiple retailers are retailers which operate from more than one location. National multiple retailers operate from a number of locations UK wide and usually have widely recognisable fascias.

5.25 Those retail / service units generally include independent retailers and contain some higher order specialist retailers[46]. However, these are dispersed along Brook Street, rather than providing a continuous frontage, resulting in a lack of identity at present.

Brook Street

5.26 Market Cross forms one of the two purpose built shopping centres within Selby, and is located to the south of Gowthorpe. The centre is un-covered and contains primarily 'lower order' good stores[47] including Jack Fultons, Home Bargains and the X-Catalogue shop. The Centre itself is characterised by narrow walkways.

5.27 The Market Cross development suffers in terms of the quality of its links with the rest of the Town Centre and its frontages to Market Lane, James Street and New Lane.

[46] Higher order retailers sell goods which consumers are generally more willing to travel longer distances for and tend to be sold at higher prices. John Lewis Partnership is an example of a higher order retailer.

[47] Lower Order Retailers sell goods which consumers would not be willing to travel longer distances for and tend to be sold at lower prices. A newsagent is an example of a lower order retailer.

Market Cross

5.28 Abbey Walk is the second dedicated purpose built shopping area and is located to the north of Gowthorpe. It contains large modern retail units and is home to a number of national multiple retailers including Sainsbury's, Wilkinsons, Savers, Peacocks and Select Clothing.

5.29 Abbey Walk contains an area of public open space incorporating street furniture and some landscaping in the west of the Town Centre which appears well used.

5.30 The shopping centre is linked to the remainder of the Town Centre by a narrow alley way between Units 16 and 18 Gowthorpe. The primary access (for car users) is from Abbey Walk (via Scott Road), and there is good quality car parking associated with the Sainsbury's store.

5.31 Abbey Walk acts as a primary focus of retail activity within the Town Centre. The shopping centre appears to be functioning successfully in comparison to some parts of the Town Centre.

Abbey Walk

5.32 To the north east of Gowthorpe is Finkle Street which leads onto Micklegate. This forms a continuation of what has the feel of a main shopping area ('high street'). As with Gowthorpe the street is characterised by lower order shops and services with poor signage. Here the units are slightly smaller than those on Gowthorpe.

5.33 In addition to retail uses there are a number of cafes with some outside seating. This results in the street being more animated.

5.34 Micklegate contains a wealth of attractive buildings. A market is held on Micklegate on Mondays, again increasing the pedestrian activity in this area and adding to the streetscape. For the remainder of the week, Micklegate is used as a car park, which plays an important role that compromises pedestrian quality to some extent.

Finkle Street and Micklegate

5.35 The Crescent links to the south east of Gowthorpe (following on from Market Place). The Crescent is home to the town's only large department store – Wetherells. Wetherells is an attraction in its own right to visitors and customers, helping to increase activity in this part of the Town Centre.

5.36 Selby Abbey is the most prominent landmark within Selby Town Centre and is located on The Crescent. The Abbey is set in a well maintained area of public open space and forms one of the main attractions within the Town Centre.

5.37 Surrounding Selby Abbey to the north are a number of buildings which are used primarily for offices and dwellings, the style of which complement the Abbey and create a sense of place and identity for Selby Town Centre.

5.38 Park Street is located off The Crescent and contains primarily office uses. Facing Park Street is the Park which helps to provide an attractive environment.

5.39 On the eastern boundary of the Town Centre is Ousegate, which fronts on to the River (albeit the River cannot be viewed from street level). There are a number of high quality restaurants and bars along Ousegate, adding to the vibrancy of this part of the town in the evening.

Selby Abbey and Surrounding Area

Pedestrian Flows

5.40 Footfall within Selby Town Centre is considered low for a centre of its type. Footfall levels are highest along Abbey Walk, Finkle Street and Micklegate.

5.41 Circulation throughout the Town Centre is generally good. Gowthorpe forms what can be considered as the 'high street' and access to all the main town centre streets from Gowthorpe is good.

5.42 However, the linkages between Abbey Walk to Gowthorpe could be improved upon, as could those from Market Cross Shopping Centre.

Access

5.43 Selby is easily accessible by train and bus from the surrounding area and the cities of Leeds, York, Hull, Wakefield and Doncaster. Two trains per hour run between Selby and Hull on weekdays and Saturdays and there is at least one per hour on Sundays. There are two trains an hour between Selby and Leeds on weekdays and Saturdays and one every two hours on Sundays. The train to Leeds also travels onwards to Manchester Piccadilly and, less frequently, to Manchester Airport.

5.44 Bus services run to and from Wakefield and Doncaster every hour and to Leeds twice every hour. Return services from Leeds are once every hour. The bus service to and from York runs frequently throughout the day. Times for all bus services differ at weekends.

5.45 In terms of parking, Selby is the only Town Centre within the District which charges for car parking. There are nine pay and display car parks, with short stay prices ranging from 40p (up to an hour) to £4.50 (over 2 hours) and long stay from £1.00 (up to 3 hours) to £2.50 (over 3 hours). Parking is free on Sundays. Charging times are generally 8am-6pm Monday to Saturday. In addition, free car parking is available at the three supermarkets and at the Civic Centre at weekends.

5.46 In terms of access via the private car, Selby is well connected to the road network. Both the A63 and A19 run through Selby connecting to the wider road and motorway network (M1 and M62).

On-Street Survey

5.47 An On-Street Centre Survey was commissioned by Drivers Jonas LLP on behalf of the Council and conducted by NEMS Market Research in late July/early August 2009. The survey was commissioned primarily to establish the shopping patterns and characteristics of the area, alongside the public perception of Selby Town Centre.

5.48 The full results are discussed in Chapter 4 and attached at **Appendix 3**.

Diversity of Uses and Retail Floorspace

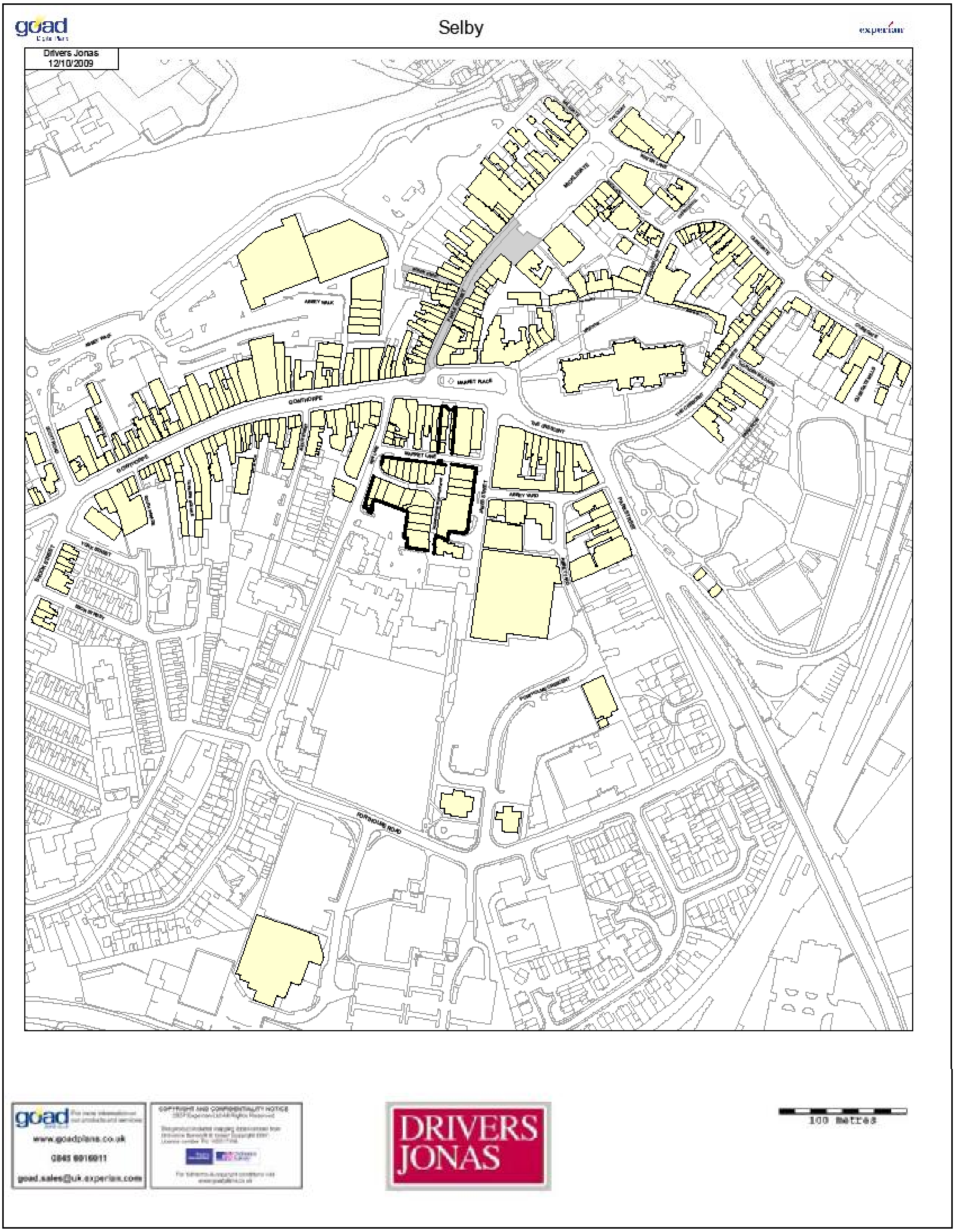
5.49 Selby District Council undertook a Town Centre Survey in 2008. This assessed all ground floor units within the Town Centre Boundary as defined by the Selby District Local Plan 2005 and also those units which fell outside the Town Centre boundary.

5.50 This survey data has been updated by Drivers Jonas LLP through conducting a street assessment to obtain any changes in town centre uses at ground or first floor level. This has been conducted for those units within the defined Town Centre Boundary as defined by the Local Plan 2005.

5.51 In addition Goad (2008) have completed a Town Centre Survey for Selby. However, as commented above, the Goad boundary differs from the Selby Local Plan 2005. The Goad Centre Boundary is illustrated below:

DRIVERS JONAS

Figure 5.2: Selby Town Centre Goad Boundary



5.52 To ensure ease of comparison and assessment the Centre has been analysed in terms of its provision of the following uses (as categorised by Goad[48]):

- Convenience;
- Comparison;
- Services: *Hairdressing, Beauty and Health, Launderettes and Dry Cleaners, Travel Agents, Banks and Financial Services, Building Societies, Estate Agents and Auctioneers;*
- Restaurants, Cafes, Fast Food and Takeaways;
- Miscellaneous: *Employment, Careers, Post Offices and Information;* and,
- Vacant.

5.53 Table 5.1 provides a breakdown of those units within Selby Town Centre Boundary as identified in the 2005 Local Plan. The data has been updated in July 2009 and categorises the uses in line with the GOAD use categories above.

Table 5.1: Number of units within Selby (Local Plan 2005 Town Centre Boundary)
Source: Selby District Council Data 2008 (Updated by Drivers Jonas LLP – July 2009)

Unit	Number of Units	Percentage (%)	National Average (%)
Convenience	17	4.58	9.52
Comparison	106	28.57	43.98
Services	102	27.49	18.97
Pubs, Cafes and Restaurants	47	12.67	14.9
Miscellaneous	46	12.40	1.27
Vacant	53	14.29	11.36
Total	371	100.00	100

5.54 Selby is significantly under-represented in terms of comparison and convenience units with only 28.57% of units in comparison retail use and

48 Goad's categorisations do not strictly accord with Use Classes – for example Travel Agents and Hairdressers which fall into the Use Class A1 are classified as Service Uses

4.58% in convenience use, against a national average of 43.98% and 9.52% respectively.

5.55 Selby is over-represented in terms of service uses (27.49% against a national average of 18.97%) and miscellaneous units (12.40% against a national average of 1.27%). This is to be expected for a centre such as Selby, as the national average includes larger regional centres, which by their nature and size, are likely to contain lower proportions of miscellaneous use in comparison to those in retail or leisure use.

5.56 Table 5.2 below provides a breakdown of number of units as provided by Goad (2008).

Table 5.2: Number of Units within Selby (Goad Town Centre Boundary)

Source: Goad 2008

Unit	Number of Units	Percentage	National Average (%)
Convenience	22	9.65	9.52
Comparison	101	44.30	43.98
Services	50	21.93	18.97
Pubs, Cafes and Restaurants	26	11.40	14.9
Miscellaneous	2	0.88	1.27
Vacant	27	11.84	11.36
Total	228	100.00	100

5.57 Utilising the more concentrated Town Centre Boundary, the number of units within each of the six categories are much closer to the national averages. Therefore, the periphery of the Town Centre (as included by the Local Plan Town Centre Boundary but not Goad) must be dominated by service and miscellaneous uses, resulting in the overrepresentation of these use categories when the larger definition of the Town Centre is analysed.

5.58 Table 5.3 provides a breakdown of floorspace in Selby Town Centre based on the Council Town Centre Study 2008, updated in July 2009.

Table 5.3: Floorspace within Selby (Local Plan 2005 Town Centre Boundary)

Source: Selby District Council Data 2008 (Updated by Drivers Jonas LLP – July 2009)

Unit	Floorspace (sq m)	Percentage (%)	National Average (%)
Convenience	9,043	13.77	17.23
Comparison	23,020	35.07	49.84
Services	12,094	18.42	12.42
Pubs, Cafes and Restaurants	7,334	11.17	9.63
Miscellaneous	6,963	10.61	1.04
Vacant	7,195	10.96	9.84
Total	65,649	100	100

5.59 Again there is a clear underrepresentation in the amount of floorspace occupied by both comparison and convenience uses, particularly comparison which is almost 15% lower than the national average. Conversely, there is an overrepresentation of services and miscellaneous use floorspace.

5.60 The following table provides a breakdown of retail floorspace in Selby Town Centre as recorded by Goad (2008).

Table 5.4: Floorspace within Selby (Goad Town Centre Boundary)

Source: Goad 2008

Unit	Floorspace (sq m)	Percentage (%)	National Average (%)
Convenience	12,133	28.31	17.23
Comparison	19,324	45.08	49.84
Services	4,961	11.57	12.42
Pubs, Cafes and Restaurants	2,842	6.63	9.63
Miscellaneous	641	1.50	1.04
Vacant	2,964	6.91	9.84
Total	42,865	100	100

5.61 There are some notable differences between the two data sets. The first is the overrepresentation of convenience floorspace illustrated by Goad, which is a result of Goad including Tesco on Portholme Road within its definition of the Town Centre Boundary. Secondly, the floorspace of services and restaurants / cafes are significantly lower than the data received from the Council and updated in July 2009. This is a reflection of using the tighter Goad Town Centre boundary, which omits some of the secondary and tertiary areas which contain a high proportion of these uses.

Vacancy Rates

5.62 It is worthwhile noting that a number of stores which were previously present within Selby are closed including Woolworths and Currys, which will have an effect on vacancy rates.

5.63 Vacancy rates within Selby Town Centre are higher within the figures from the Council Town Centre Report (updated in July 2009) than within the Goad analysis. This illustrates some 53 units are vacant representing 14.29% of all units against a national average of 11.36%. The unit count is considerably higher than that from Goad (27 units), which reflects the smaller area surveyed and can partly also be attributed to the date of survey (2008), which will not have taken into consideration those units which have recently become vacant such as the former Woolworths store.

5.64 Similarly, the analysis of vacant floorspace within the Centre is higher looking at the Local Plan boundary, with 7,195 sq m of vacant floorspace equating to 10.96% of all floorspace in comparison to the national average of 9.84%. Again, Goad's vacant floorspace count is lower (2,964 sq m) at 6.91% of all floorspace, which is lower than the national average vacancy rate of 9.84% of all floorspace.

Retailer Representation

5.65 The largest non-food retail stores within Selby Town Centre (as defined by the Selby District Local Plan) are:

- Wilkinsons – Abbey Walk;
- Wetherells – The Crescent; and,
- M & Co – Market Place.

5.66 Convenience needs are met by Sainsbury's, Morrisons, a few frozen food stores and a number of smaller and independent retailers. In addition, Tesco, which falls outside the Town Centre boundary, also meets convenience needs.

5.67 In 2008, 40% of the top 20 retailers were present in Selby (Focus 2008), including Boots, Argos, WH Smith, Superdrug, Wilkinson and New Look. This calculation included Woolworths and Roseby, both of which are no longer trading and which were previously present in the Town Centre. In addition, Dorothy Perkins has a concession within the Wetherells store.

5.68 The top 20 retailers not present within Selby include Marks and Spencer, Debenhams, John Lewis, BHS, Next, Dixons, Lloyds Pharmacy, Co-op Department Store, Primark, HMV and Waterstones.

5.69 The Town Centre itself generally contains lower order retailers and there is a distinct lack of offer and variety, reflecting the high proportion of service uses.

Comparative Analysis

5.70 In order to place Selby within a national and regional retail hierarchy, the Management Horizons UK Shopping Index (2008) (MHE) has been utilised:

> *"The MHE Shopping Index is a database of over six thousand retail locations that enables the user to rank and sort the UK's shopping venues against a range of different criteria, for example:*
> *- By market size (the overall index score)*
>
> *- By location type (e.g. town centre, retail park, outlet centre etc.)*
>
> *- By market position (e.g. luxury to value)*
>
> *- By sector (rankings based on sector e.g. catering index, financial services index etc.)*
>
> *For developers and planners, the Index is a useful tool for assessing where a particular location sits in the overall retail hierarchy. The Index also helps users to assess the relative strengths and weaknesses of a particular location (and therefore also the opportunities and threats) relative to other existing or planned shopping venues.*

5.71 The ranking of Selby Town Centre compared to other relevant centres is detailed in Table 5.5 below:

Table 5.5: Management Horizons Index

Source: Management Horizons UK Shopping Index (2008)

Centre	Location Grade	Score	Rank
Leeds	Major City	490	8
Hull	Major Regional	394	13
York	Major Regional	333	23
Doncaster	Major Regional	268	45
Castleford	Major District	95	366
Selby	Major District	84	393
Pontefract	District	73	486
Goole	District	62	533
Wetherby	Major District	31	1,175
Knottingley	Local	18	1,866
Sherburn in Elmet	Minor Local	10	2,779
Tadcaster	Minor Local	1	5,720

5.72 MHE calculate a score of 84 for Selby, ranking it 393rd out of over 6,000 centres across the UK and classifying it as a Major District Centre. Selby is ranked higher than the surrounding town centres of Pontefract, Goole, Wetherby and Knottingley but below Doncaster and Castleford.

Historic Analysis

5.73 Utilising previous data sets from Management Horizons, it is possible to see how Selby has been ranked over recent years, indicating changes in the quality of the retail provision within the Town Centre compared to other Centres.

Table 5.6: Historic Analysis of Selby's Ranking

Source Management Horizons

1998/99	2000/01	2003/04	2008	Change1999-2008
431	398	336	393	+38

5.74 The above table illustrates that Selby's positioning in the national hierarchy has increased over the past ten years in terms of its overall ranking. However, the centre reached its peak in 2003/04, when it was ranked 336th out of all centres. Since then, it has fallen 57 places back down the rankings to 393rd.

Rental Values

5.75 The annual Focus Town Reports (Prepared by Colliers CRE) indicates that prime rental rates in Selby have steadily increased from June 2001 to June 2005 from £35 per sq ft. (£3.25 per sq m) to £50 per sq ft (£4.65 per sq m). Since 2005, prime rental rates have remained static.

Investment Yields

5.76 The commercial yield on a property investment represents the return, in the form of a rent, on the capital value of a property, expressed as a percentage. The yield represents the return to the investor for risk taking. Investing in the Primary Shopping Area is considered less risky than secondary shopping areas and an investor will generally demand a lower initial return when investing in the Primary Shopping Area.

5.77 The absolute value of yields at any one time is of limited use since yields are linked to alternative investments in the form of equities and gilts which are determined by broader macro-economic policies. However, the trend in yields in a town compared to national and regional trends is important in demonstrating investor confidence in that town.

5.78 Factors affecting yields are complex, and need to be interpreted with reference to the circumstances in each individual town. Broadly speaking, however, low yields indicate that a town is considered to be attractive and as a result be more likely to attract investment than a town with high yields.

5.79 The Valuation Office Property Market Report indicates that Selby had a stable yield of 8% from April 2000 to January 2006, with yields hardening to 6% since 2006 indicating increased investor confidence within the centre. We expect updated figures would show reduced investor confidence since 2007/2008.

Demand for New Floorspace and Development

5.80 In order to understand the nature of demand for retail and other town centre floorspace, it is important to understand the parties involved and their motivations.

5.81 First and foremost, trends in retailing are driven by **consumers** who are increasingly mobile and now demand more choice combined with a more pleasurable overall shopping experience.

5.82 In order to win their business, the **retailers** compete fiercely for the strongest trading positions in the centre (those where footfall is highest). They are also continually developing new formats and trading strategies to increase both turnover and profitability.

5.83 The third force is the **investors** who are primarily interested in asset value and the cash flows that a property investment generates. Traditionally the long-term investors are the pension and life funds. However, when the market prospects are suitable, they are joined by property companies who usually seek to “work their assets” either to keep or sell on.

5.84 A fourth participant, who can sometimes be more obstructive than dynamic, is the **landowner**. City and town centres can often have complex and/or historic ownerships which need resolving before developments can go ahead. Often landowners may have unrealistic expectations of the development potential of their assets known as **hope value** which can be fueled as much by Development Plan allocations and Planning Briefs as by genuine developer interest.

5.85 The actors in the middle of these participants are **developers** who put together the commercial packages to meet the requirements of interested parties.

5.86 The last, but certainly not the least agent for change, is the **Local Authority** in their capacity as statutory planning authority, land owner or development facilitator.

5.87 The identification and promotion of key development sites to achieve an overall strategy for the centre should be a careful component in the process. As a landowner, an Authority can take an even stronger part in stimulating the schemes it wants to see. Even where it is not a landowner, it can be a development facilitator using, for example, compulsory purchase powers.

5.88 An essential pre-cursor to identifying development sites is an assessment of the need for new floorspace. The quantitative assessment in the later Chapters of this study is a key input to this as is an assessment of retailers' and other operators/occupiers' demand for new floorspace.

Demand from Retailers

5.89 The following table provides some historic information on the numbers of requirements from retailers:

Table 5.7: Historic Retailer Requirements for Selby Town Centre

Source Focus 2008

No. Of Requirements	Ranking (1 = Highest Ranking)	Date
11	403	Jan 09
12	560	Oct 07
12	572	Apr 07
11	581	Oct 06
13	512	Apr 06
6	756	Oct 05
7	690	Apr 05
8	650	Oct 04
8	592	Apr 04

5.90 The data in Table 5.7 illustrates that the number of retailer requirements for Selby Town Centre has been steadily increasing over the last 5 years.

5.91 In order to assess in detail the *current* demand for floorspace from retailers, information from the EGi Database has been utilised.

5.92 However, this list must be treated with some caution for three reasons: firstly, operators may simply adopt a broad regional approach to new store locations and having satisfied this in one location, simply leave their requirements on the database despite not having an active desire to be represented in any other town; secondly, the list of requirements includes those operators who currently operate from the town centre or on existing out of town retail parks but wish to relocate to new premises; and thirdly, many would operate under a non Class A1 use.

5.93 It must also be borne in mind that some national retailers do not add their names to requirement lists, such as that maintained by EGi, and pursue confidential inquiries through specialist independent retail agents.

5.94 Notwithstanding these reservations, the EGi Database does provide an insight into the types of operators who have expressed a desire to be located within Selby Town Centre. Details of individual operators which the EGi Database revealed as having requirements for Selby (accessed in August 2009) are listed below:

- Burger King;
- Carphone Warehouse;
- Costa Coffee;
- Greggs;
- Monsoon Accessorize;
- Sainsbury's;
- Tesco;
- KFC;
- Primark;
- Subway.

5.95 The most notable factor regarding the operators identified above is the general absence of the higher quality, national retailers, particularly in relation to the high street fashion sector. There is also an absence of evidence of requirements from higher order department/variety store operators.

Quality and Mix of Other Uses

5.96 Selby Town Centre is focused primarily on shopping and service uses. The only cluster of offices can be found along Park Street and around Selby Abbey.

5.97 Selby Business Park is located outside the Town Centre at Bawtry Road and contains approximately 18 businesses and a hotel. Development is still ongoing on the site. Those interviewed for the On Street Survey were asked whether they intended on visiting Selby Business Park that day. Only 6.7% of respondents answered ‘yes’.

5.98 In terms of leisure provision (Class D2) this is again somewhat limited. There is no major provision within the Town Centre Boundary (Local Plan 2005).

5.99 Abbey Leisure Centre is located on Scott Road and contains a swimming pool, fitness suite and outdoor all weather pitches. There are a number of other leisure facilities in the Town including a bowling green at the Park, a bowling alley on Bawtry Road (at the time of writing closed for refurbishment – due to reopen in October 2009), Bingo Hall on Portholme Road, a snooker centre and squash club on Flaxley Road and the JJB Fitness Centre at the Three Lakes Retail Park, which accommodates a swimming pool.

Town Centre Uses Outside the Town Centre Boundary

5.100 There are a number of areas outside the Town Centre Boundary which contain ‘Town Centre Uses’. These include:

- Bawtry Road - this contains a number of uses including a bowling alley (currently closed). The Three Lakes Retail Park and Selby Business Park are also located along Bawtry Road.
- Brook Street – Some of Brook Street (on the east side of the road towards the remainder of the Town Centre) is included within the Town Centre Boundary, however, there are a number of other units moving away from the Town Centre and on the west side of the road, including a number of guest houses.
- Canal Road – this area lies parallel to the Canal and contains a number of services and comparison uses.
- Denison Road – located some distance from the Town Centre it contains some service and comparison uses.
- Scott Road – Scott Road is the main access to Abbey Walk and contains some service and comparison uses.
- Flaxley Road – Flaxley Road extends off Scott Road and contains a number of town centre uses including services, comparison retailers, restaurants, a snooker club, squash club and a post office.
- Millgate – to the north of the Town Centre, this street contains a number of pubs.

- Station Road – this road includes Selby Train Station and a number of services on Station Road.
- Portholme Road – to the south of the Town Centre this road includes Tesco and Walkers Bingo and Social Club.
- Union Lane – this lane joins Brook Street to Portholme Road and contains some services and restaurants.

Out Of Town Retail Development – Three Lakes Retail Park

5.101 The Three Lakes Retail Park is located on Bawtry Road (A1041) approximately 1 mile from Selby Town Centre. The Park opened in December 2003.

5.102 The table below provides a breakdown of those operators present within Three Lakes Retail Park:

Table 5.8: Three Lakes Retail Park

Source EGI (July 2009)

Occupier	Floorspace sq m	Floorspace Sq ft
Aldi	1,208	13,000
Homebase	3,252	35,000
McDonalds	232	2,500
Brantano	465	5,000
Carpetright	465	5,000
Pets at Home	325	3,500
Halfords	570	3,135
JJB Fitness (rebranded DW Fitness)	2,090	22,500
Argos	929	10,000
Frankie & Benny's	325	3,500
B&M Bargains	762	8,200
Total	10,626	114,335

5.103 There is a mix of uses accommodated within the Three Lakes Retail Park, with primarily bulky goods uses present in large scale units.

5.104 The retail park has 280 car parking spaces[49] and is reported to be well used.

5.105 The On-Street Survey questioned respondents as to whether they were intending on visiting Three Lakes Retail Park that day for which 18% said 'yes'. 74.4% of these respondents said the reason they were visiting the Retail Park was for non food shopping and 14.8% for food shopping. Only 3.7% said it was for leisure activities.

Stakeholder Consultation

5.106 The following key stakeholders within Selby Town Centre were consulted as part of the Study:

- Selby Town Council – 27th July 2009; and,
- Selby Chamber – 24th August 2009.

Selby Town Council

5.107 Although there were differing opinions with regard to the status of Selby Town Centre and its role, there was a general consensus amongst the Council on how the town could possibly progress.

5.108 The Town Council generally considered that Selby needs to market itself as a typical "Yorkshire Market Town", as well as encouraging the independent sector to support the economy and help attract shoppers and visitors to the Centre, as well as seeking to improve the evening economy to help attract visitors throughout the whole of the day.

5.109 Selby Town Council also raised more general concerns relating to car parking and congestion within Selby.

Selby Chamber

5.110 The Chamber sees Selby as a strong market town that suffers in terms of leakage of expenditure from its catchment to competing centres.

5.111 The Centre is recognised as having a number of niche and independent retailers which are successful, but the lack of choice (especially in terms of women's clothing) is a concern to the Chamber. However, they feel it is questionable that the Town could ever provide the range of choice that is available in competing centres.

---

[49] EGI (July 2009)

5.112 Selby Chamber feels that the tourism sector is not as strong as it could be and the most significant opportunities relating to the Abbey are under-exploited. The connections with York could be built on to expand the local tourism sector.

5.113 The evening economy is now viewed by the Chamber as a successful component of the Town Centre offer, through the introduction of new restaurants and a good range of public houses. They feel a cinema may be beneficial to the Town, but question whether there is the demand and if it could capture the current flow of residents to cinema facilities outside of the District, especially Xscape in Castleford.

5.114 Good quality car parking in the Town Centre is viewed as important by the Chamber, and there is a feeling that Selby is currently reliant on the foodstores to provide this. If the car parking policies at these stores were more rigorously enforced in terms of length of stay, then the issue of lack of quality car parking provision could be even greater within the Centre.

5.115 Selby Chamber believes that any future opportunities for growth need to be carefully considered to ensure that future development does not undermine the success of smaller shops already present within Selby.

Tadcaster

5.116 Tadcaster is located some 13 miles to the north west of Selby and has a population of approximately 6,140[50].

5.117 Tadcaster performs the role of a Minor Local Centre (as defined by Management Horizons). The Centre primarily serves local convenience needs. Aside from retailing the centre includes a number of pubs, cafes and restaurants and service units.

5.118 The Council undertook a survey of Tadcaster in 2008, which has been updated as part of this assessment.

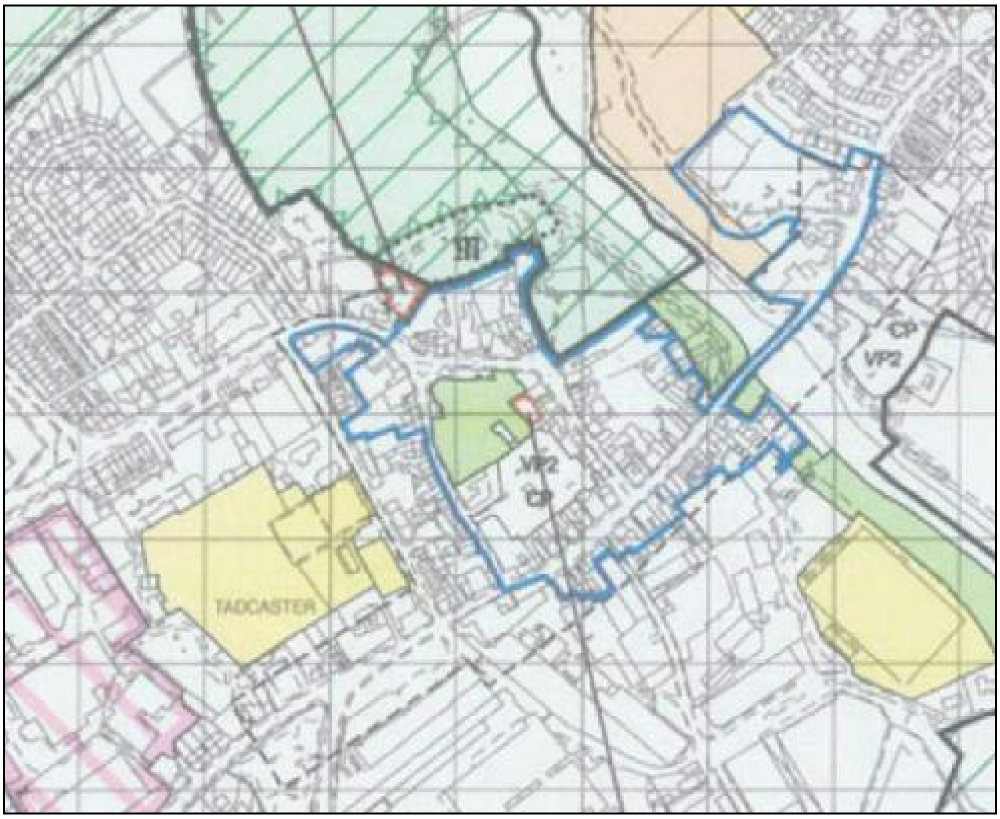
Existing Primary Retail Area and Town Centre Boundary

5.119 The existing shopping and commercial centre as outlined in the Selby District Local Plan (2005) broadly encompasses Bridge Street, High Street, Commercial Street, Kirkgate, Westgate and Chapel Street.

[50] North Yorkshire County Council Population Estimate (2007)

5.120 A copy of the Local Plan Proposals Map is provided below.

Figure 5.3: Selby District Local Plan (2005) Extract – Tadcaster



Environment and Physical Structure

5.121 The centre is considered to be attractive physically. Tadcaster Town Centre was designated as a Conservation Area in 1973 and as such provides a high quality streetscape including Georgian period buildings.

5.122 Despite the relatively attractive nature of Tadcaster, public perception of the Centre is considered to be low. Tadcaster is not considered as a prime shopping destination due to the limited variety of consumer choice. The Centre is not considered to be vibrant, as there are a high number of vacant units and the number of visitors is low. It is felt that Tadcaster has lost its sense of community and is somewhat considered a dormitory town.

5.123 The environmental quality of Tadcaster is relatively high. It has a large, well maintained area of open space in the Centre surrounding the war memorial with further open space around Hodgson's Terrace. Although well maintained, these areas are not well used, particularly the area which surrounds the war memorial.

5.124 Within the Centre, there is a limited amount of street furniture, although this is likely to be due to the relatively narrow pavements. Outside the Town Centre Boundary there are further areas of open space along the river and around St Marys Church.

5.125 The centre is dominated by a large car park which is unsightly, but well hidden from street view.

5.126 The focus of the Town Centre is centred around Bridge Street and High Street. Bridge Street and High Street contain the only national representatives in Tadcaster: a number of banks and a William Hill betting shop. This area primarily contains local comparison, convenience and service uses such as florists, cafes, banks and lower order comparison stores interspersed with a number of public houses.

5.127 The lower end of High Street has a number of vacant units and sites (Units 4, 6 and 8 have been demolished and provide an unattractive gap in what could otherwise be an appealing street in terms of its appearance).

5.128 Kirkgate, Westgate and Chapel Street perform a secondary / ancillary function containing more service uses and housing. Again there are a number of vacant units on Kirkgate and Westgate. The streetscape is dominated by services such as solicitors, dentists and restaurants.

5.129 Although the top of Chapel Street is integrated into Westgate through a number of shops and services, most notably the Post Office, the remainder of the Street towards the High Street contains housing.

5.130 Wharf Bank Terrace and Wharf Bank Mews face the River to the north of Bridge Street on the east. Wharf Bank Mews contains a number of employment uses and houses which face an area of open space in front of the River. Wharf Terrace contains service and employment uses.

5.131 The Sainsbury's food store is located off Commercial Street on the opposite side of the River and appears somewhat 'cut off' from the rest of the Town Centre, although it is only a short walking distance (over the bridge). It is not particular well connected to the rest of the Town Centre.

5.132 The remainder of the Town Centre Boundary includes those businesses which are on the west of Commercial Street, including a Costcutter convenience store and small local businesses.

5.133 The approach to the bridge along Commercial Street contains a number of businesses including a garage, kitchen store and a carpet shop – these units are generally of a lower quality in appearance than the rest of the Town Centre.

5.134 Although mainly outside the Town Centre Boundary (Local Plan 2005), Tadcaster is dominated by the breweries at the western end and south of High Street.

Pedestrian Flows

5.135 The Town Centre has a relatively low flow of pedestrians. Pedestrian footfall is highest along High Street and Bridge Street with low footfall elsewhere particularly along Commercial Street and Kirkgate.

Access

5.136 There is no access to Tadcaster by train but there are a number of bus services that run between York and Leeds throughout the day, usually two per hour. These include services that run as far as Whitby and Scarborough. There are also hourly services to Selby and Sherburn in Elmet throughout the week and on Saturdays.

5.137 Access via private car is good. Tadcaster is located off the A64 which connects to Leeds and York and the main motorway network (M1).

5.138 Circulation throughout Tadcaster is good, including the access from Bridge Street and High Street to the remainder of the Centre. However, High Street and Bridge Street are also the main thoroughfares for vehicles and can create a barrier for pedestrians. In addition, the Bridge acts as a further barrier between Commercial Street, the Sainsbury's store and the remainder of the Town Centre.

5.139 Car parking in Tadcaster is free and there are two car parks, Central Area and Britannia, providing together nearly 250 spaces. Alternatively car parking is available at Sainsbury's. These car parks are well used during the weekday, including by brewery workers. However, during the weekend, they are underused.

Diversity of Uses and Retail Floorspace

5.140 Selby District Council undertook a Town Centre Survey in 2008. This assessed all ground floor units within the Town Centre Boundary as defined by the Selby District Local Plan 2005 and also those units which fell outside the Centre.

5.141 This survey data has been updated by Drivers Jonas LLP through conducting a street assessment to obtain any changes in town centre uses at ground or first floor. This has been conducted for those units within the defined Centre Boundary as defined by the Local Plan 2005.

5.142 To ensure ease of comparison and assessment the Town Centre has been analysed in terms of its provision of the following uses (as categorised by Goad[51]):

- Convenience;
- Comparison;
- Services: Hairdressing, Beauty and Health, Launderettes and Dry Cleaners, Travel Agents, Banks and Financial Services, Building Societies, Estate Agents and Auctioneers;
- Restaurants, Cafes, Fast Food and Takeaways;
- Miscellaneous: Employment, Careers, Post Offices and Information; and,
- Vacant.

5.143 The table below provides a breakdown of the type of units in Tadcaster Town Centre, based on the Council Town Centre Survey 2008, updated in July 2009.

[51] Goad's categorisations do not strictly accord with Use Classes – for example Travel Agents and Hairdressers which fall into the Use Class A1 are classified as Service Uses

Table 5.9: Number of units within Tadcaster

Source: Council Town Centre Study 2008 (Updated by Drivers Jonas LLP July 2009)

Unit	Number of Units	Percentage (%)	National Average (%)
Convenience	7	5.83	9.52
Comparison	23	19.17	43.98
Services including offices	30	25.00	18.97
Pubs, Cafes and Restaurants	17	14.17	14.9
Miscellaneous	21	17.50	1.27
Vacant	22	18.33	11.36
Total	120	100.00	100

5.144 Tadcaster Town Centre has a total of 120 units of which 19.17% are comparison units, significantly below the national average of 43.98%. Tadcaster again is under-represented in terms of the number of convenience units (5.83% against a national average of 9.52%).

5.145 There is clearly an overrepresentation of service use units within Tadcaster Town Centre with a percentage of 25% against a national average of 18.97%. This category includes a variety of uses including hairdressers, banks, laundrettes and travel agents.

5.146 Tadcaster is also significantly over-represented in terms of miscellaneous units which incorporate employment uses, training centre, council buildings and any other use which does not fit into the above tabled categories (17.50% against a national average of 1.27%).

5.147 The following table provides a breakdown of gross floorspace in Tadcaster Town Centre as recorded by the Council Town Centre Survey 2008, updated in July 2009.

Table 5.10: Floorspace in Tadcaster

Source Council Town Centre Survey 2008 (Updated by Drivers Jonas LLP July 2009)

Unit	Floorspace (sq m)	Percentage (%)	National Average (%)
Convenience	2,251	13.27	17.23
Comparison	3,423	20.18	49.84
Services including offices	3,292	19.41	12.42

Unit	Floorspace (sq m)	Percentage (%)	National Average (%)
Pubs, Cafes and Restaurants	2,873	16.94	9.63
Miscellaneous	2,934	17.30	1.04
Vacant	2,189	12.91	9.84
Total	16,962	100	100

5.148 Again, it is notable that Tadcaster Town Centre is under-represented in terms of both convenience and comparison floorspace. Convenience uses account for 13.27% of all floorspace compared to the national average of 17.23%, and comparison uses 20.18%, compared to 49.84% nationally.

5.149 Conversely, in terms of both service and miscellaneous uses, Tadcaster is again over-represented, particularly with regard to miscellaneous units.

5.150 There is no Goad data available for Tadcaster.

Vacancy Levels

5.151 When visiting the Town Centre vacancy levels appear high. Altogether there are 22 vacant units within the Town Centre boundary, representing 18.33% of all units, significantly above the national average of 11.36%. In terms of floorspace, vacancy levels are again higher than the national average (12.91% against 9.84%). These figures do not take into account the demolished units on High Street.

5.152 Units in Tadcaster are reported to often remain vacant for long periods of time, up to and beyond 10 years apparently in some cases.

Comparative Analysis

5.153 Table 5.5 illustrates the ranking of Tadcaster by the Management Horizons Index as a Minor Local Centre with a ranking of 5,720th nationally (with a ranking of 1 being the highest). The centre scores only one point and 5,720th is the lowest ranking within the Index, although nearly 1,000 centres are ranked equally, scoring just one point. These include Airmyn near Goole and Wadworth in Doncaster .

5.154 The historical rankings of Tadcaster are not available.

Retailer Representation

5.155 With the exceptions of the national banks, William Hill, Sainsbury's and Cost Cutter, there are no other national retailers in the Town Centre.

5.156 The Town Centre consists primarily of local small scale, independent businesses. Although it may seem that the offer is limited, the Town Centre can be described as distinctive.

5.157 In terms of convenience provision, Sainsbury's is clearly dominant. This store however, is relatively small in terms of the 'top four' retailers. The second largest convenience store is Costcutter with the remainder of convenience units being independent bakers, butchers, delicatessen and a chocolate shop. Other than the Auto Express unit, there are no national comparison retailers and all the comparison provision comprises of local small scale independent businesses.

5.158 There is little competition within Tadcaster in terms of the variety and number of different retailers and there is a distinct gap in the offer which Tadcaster provides, in terms of retail provision. There are no menswear shops, book / art / craft shops, footwear shops, gift / card stores, sport wear shops, DVD or music shops.

5.159 Although unit sizes within Tadcaster are small, this is representative of this type of centre. Independent retailers do not often require or demand large units.

Rental Values

5.160 Rental values have been gained from reviewing those units currently being marketed and speaking with local agents. Due to the limited number of units, local agents were unable to provide a precise figure for Zone A rents.

5.161 Overall rents vary from around £15 per sq ft (£1.39 per sq m) to £20 sq ft (£1.86 per sq m).

Investment Yields

5.162 Due to the limited number of transactions which take place in Tadcaster investment yield data is not available for this Centre.

Demand

5.163 There is no data available on operator demand in Tadcaster, therefore demand has been gauged from speaking to local agents who consider that interest for retail units in Tadcaster is reasonably good. However, it is felt that this is not translated into the occupation of vacant units.

Quality and Mix of Other Uses

5.164 Although not within the Town Centre Boundary, Tadcaster is well provided for in terms of sports and recreational activities with football pitches, tennis courts, the leisure centre, bowling green, facilities at the schools including an all weather pitch at the Grammar School and a number of youth clubs at the schools and the Methodist Church. It is considered by the Town Council that these facilities need to be promoted together and taken full advantage of.

5.165 In terms of employment facilities the breweries on the edge of the Town Centre are a significant form of local employment.

Town Centre Uses Outside the Town Centre Boundary

5.166 There are a number of areas with a cluster of services, comparison and convenience retailers outside the defined Centre, focused around Leeds Road, York Road, St Josephs Street, Station Road and Stutton Road.

Stakeholder Consultation

5.167 Tadcaster Town Council was consulted as part of the Study on 22nd July 2009.

5.168 The overall view of the Town Council is that Tadcaster is not currently very vibrant, is losing its sense of community and becoming a dormitory town

5.169 Tadcaster Town Council is wanting to be ambitious and would like to assist in Tadcaster developing and becoming more vibrant. To date, Tadcaster is seen as not having capitalised on its advantages for example the river / open countryside and its by-pass. The Town Council is of the view that in order for Tadcaster to develop and become more vibrant, the footfall within the Town Centre needs to increase. It feels that this can only happen with more housing within the surrounding area.

Sherburn in Elmet

5.170 Sherburn in Elmet is located some 9 miles to the east of Selby and has an estimated population of 6,850[52].

5.171 Sherburn in Elmet performs the role of a Minor Local Centre (as defined by Management Horizons) and the Centre primarily serves a local convenience function. Aside from retailing, the Centre includes a number of pubs, cafes, restaurants and service uses.

5.172 The Council undertook a survey of Sherburn in Elmet in 2008, which has been updated for the purposes of this assessment.

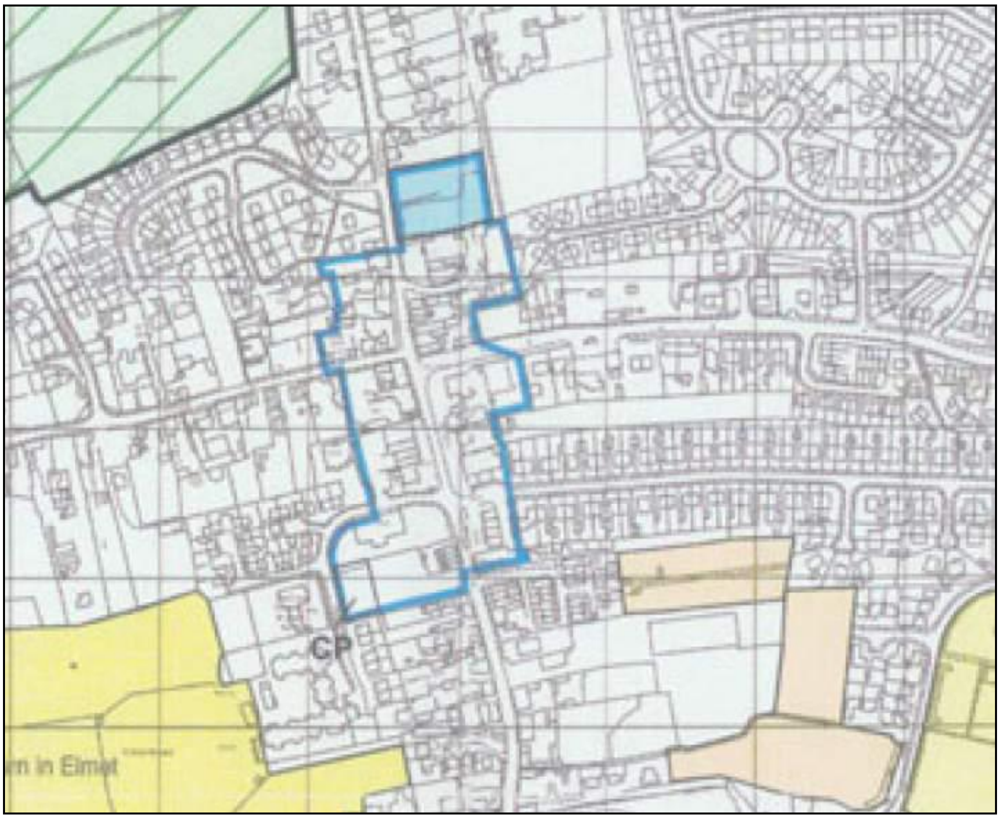
Existing Primary Catchment Area and Town Centre Boundary

5.173 The existing Town Centre as outlined in the Selby District Local Plan (February 2005) broadly encompasses Finkle Hill and Low Street, alongside some subsidiary streets and yards.

5.174 A copy of the Local Plan extract is provided below:

52 North Yorkshire County Council Population Estimates 2007

Figure 5.4: Selby District Local Plan (2005) Extract – Sherburn in Elmet



Environment and Physical Structure

5.175 Sherburn contains a number of successful local businesses and the Centre itself is vibrant and is considered to have a good night time economy.

5.176 Despite this, the appearance of the Centre is somewhat uninviting, and the majority of the buildings are red brick with generally low quality shop frontages. However, occupancy levels are high which helps towards creating a positive image of Sherburn in Elmet when visiting the Centre.

5.177 The environmental quality within the Centre is good, there is little graffiti, the streets are clean without litter, and there are a small number of trees located outside Worsley Parade. However, there is limited street furniture and green space..

5.178 Finkle Hill represents what can be described as the upper part to the 'High Street'. The Co-op food store is located at the top of the Centre with the remainder of Finkle Hill containing local retailers and services. Sherburn Library, which contains a Sure Start Children's Centre, is located to the rear of Units 12 – 20 Finkle Hill.

5.179 Branching off from Finkle Hill are two courtyards. The first is located to the rear of 8 and 10 Finkle Hill and contains housing and a small barbers shop. The second is located behind 5 Finkle Hill and contains a hairdressers, tattoo studio and charity shop. Although the entrance to the rear of Unit 5 includes business signage, both the courtyards are uninviting and contain low quality frontages.

5.180 The Centre is focused around Low Street with the Post Office located within the Spar and a number of other national retailers including Tesco Express, Jack Fultons and some banks.

5.181 A number of local retailers and services are located on Worsley Parade, set back from Low Street, including two convenience stores (Crusties Bakers and C&G Starkey Butchers) and services (estate agents, hairdressers and fish and chip shop).

5.182 Low Street also contains the two Public Houses in Sherburn in Elmet - The Red Bear, which is currently undergoing refurbishment and The White Swan. The only other large scale leisure provider is the Elmet Social Club on Low Street.

5.183 The Town Centre Boundary also encompasses Corn Mill Court, a residential development.

5.184 Although not within the Town Centre Boundary, an area in the southern part of Low Street contains further local shops and services.

Pedestrian Flows

5.185 Pedestrian activity is relatively low and focused towards the bottom of Low Street, particularly around Wolsey Parade. Those retailers located on Finkle Hill suffer from a lack of footfall.

5.186 Pedestrian flow is restricted by the junction at Finkle Hill and Low Street which could be seen to create a perceived barrier between the two parts of the Centre.

Access

5.187 There is limited train access to Sherburn in Elmet with only four trains stopping on the way to York from Selby (two from Hull via Selby) and only three returning along the same route (all to Hull) during the week and on Saturdays. A further two trains run on the Sheffield (including Meadowhall) to York line, Monday to Saturday. There are two services on the Sheffield to York line on Sundays.

5.188 Buses run to Leeds from Selby via Sherburn twice an hour and once every two hours on a Sunday. Return services from Leeds are roughly one per hour from Leeds Monday to Saturday and once every two hours on a Sunday.

5.189 There is one free car park on Church Lane, otherwise provision is generally by way of on street parking.

5.190 The infrastructure in Sherburn in Elmet is considered poor for both public transport and vehicles, preventing passing trade.

Diversity of Uses and Retail Floorspace

5.191 Selby District Council undertook a Town Centre Survey in 2008. This assessed all ground floor units within the Town Centre Boundary as defined by the Selby Local Plan 2005 and also those units which fell outside the Centre.

5.192 This survey data has been updated by Drivers Jonas LLP through conducting a street assessment to obtain any changes in town centre uses (at ground or first floor). This has been conducted for those units within the defined Centre boundary as defined by the Local Plan 2005.

5.193 To ensure ease of comparison and assessment the Centre has been analysed in terms of its provision of the following uses (as categorised by Goad[53]):

- Convenience;
- Comparison;

[53] Goad's categorisations do not strictly accord with Use Classes – for example Travel Agents and Hairdressers which fall into the Use Class A1 are classified as Service Uses

- Services: Hairdressing, Beauty and Health, Launderettes and Dry Cleaners, Travel Agents, Banks and Financial Services, Building Societies, Estate Agents and Auctioneers;
- Restaurants, Cafes, Fast Food and Takeaways;
- Miscellaneous: Employment, Careers, Post Offices and Information; and,
- Vacant.

5.194 Table 5.11 provides a breakdown of the type of units in Sherburn in Elmet Town Centre as recorded by the Council Town Centre Survey, updated in July 2009.

Table 5.11: Units in Sherburn in Elmet

Source Council Town Centre Survey (updated by Drivers Jonas LLP July 2009)

Unit	Number of Units	Percentage (%)	National Average (%)
Convenience	8	15.38	9.52
Comparison	10	19.23	43.98
Services	22	42.31	18.97
Pubs, Cafes and Restaurants	10	19.23	14.9
Miscellaneous	0	0.00	1.27
Vacant	2	3.85	11.36
Total	52	100.00	100

5.195 Sherburn in Elmet has a total of 52 units (excluding the post office which is located inside the Spar). Of those units 19.23% are comparison uses which is considerably lower than the national average (43.98%). With regard to convenience retail, Sherburn in Elmet has 8 convenience units which account for 15.38% of all units, higher than the national average of 9.52%.

5.196 There is an overrepresentation of service use units within Sherburn in Elmet, at 42.31% of the units, against a national average of 18.97%. Pubs, Cafes and Restaurants represent 19.23% of all units which is higher than the national average of 14.9%.

5.197 The following table provides a breakdown of gross floorspace in Sherburn in Elmet as recorded by the Council Town Centre Survey, updated in July 2009.

Table 5.12: Floorspace in Sherburn in Elmet

Source Council Town Centre Survey (updated by Drivers Jonas LLP July 2009)

Unit	Floorspace (sq m)	Percentage (%)	National Average (%)
Convenience	2,411	35.07	17.23
Comparison	805	11.71	49.84
Services including offices	2,073	30.16	12.42
Pubs, Cafes and Restaurants	1,176	17.11	9.63
Miscellaneous	0	0.00	1.04
Vacant	409	5.95	9.84
Total	6,874	100	100

5.198 There is a significant overrepresentation of convenience floorspace in Sherburn in Elmet at 35.07%; almost double the national average of 17.23%. There is also a significant over provision of service use floor space. This is representative of a centre with Sherburn's role and function.

5.199 In terms of comparison retail, this is again considerably lower than the national average with only 11.71% of all floorspace utilised for the sale of comparison goods against a national average of 49.84%.

Vacancy Levels

5.200 There are only two vacant units in Sherburn, representing just 3.01% of all units, considerably below the national average. At the time of survey, there is understood to be significant interest in one of these units, with the remaining unit having been recently let.

Retailer Representation

5.201 Sherburn in Elmet has a mixture of both national and local retailers.

5.202 In terms of national retailers, Co-op, Spar, Tesco Express, Jack Fulton and some national banks are present. All the national retailers present are within the convenience goods sector.

5.203 The convenience sector is clearly dominant within Sherburn in Elmet with a number of local independent convenience businesses including Jackson's Butchers and Grocers, Crusties and C & G Starkey.

5.204 It is considered that the convenience provision within Sherburn in Elmet is the Centre's main attraction.

5.205 With regard to comparison goods, there are no national retailers present and there is a distinct lack of representation from certain goods sectors. For example: there are no stores providing an electrical, DVD/video, men's clothing, sportswear, books, furniture, toys or a departmental store offer. Given the nature of Sherburn and its role within the retail hierarchy, this is not wholly unusual or unexpected.

5.206 The majority of the units accommodate small independent retailers and although unit sizes within Sherburn in Elmet are small, this is representative of this type of centre.

Comparative Analysis

5.207 Table 5.5 illustrates the ranking of Sherburn in Elmet by the Management Horizons Index as a Minor Local Centre with a score of 10 and a ranking of 2,779th nationally (with a ranking of 1 being the highest).

5.208 Sherburn in Elmet is ranked higher than Tadcaster nationally (5,720th) due to the scoring system utilised by the Management Horizons Index. Centres are rated using a weighted scoring system, which takes account of each location's provision of retailers and anchor store strengths. Sherburn in Elmet has a higher proportion of national retailers present than Tadcaster, hence has a higher score and rank.

5.209 The historical rankings of Sherburn in Elmet are not available.

Rental Values

5.210 Rental values have been gained from reviewing those units currently being marketed and speaking with local agents. Due to the limited number of vacant units within Sherburn In Elmet, local agents were unable to provide a precise figure for Zone A rents.

5.211 Rents vary from around £15 per sq ft (£1.39 per sq m) to £20 per sq ft (£1.86 per sq m).

Investment Yields

5.212 Due to the relatively limited number of transactions which take place investment yield data is not generally available for this Centre.

Demand

5.213 There is no data available on retail, commercial or leisure operator demand in Sherburn in Elmet, therefore demand for units has been obtained from speaking to local agents, who consider it to be strong with units remaining vacant for short periods of time with multiple interest received on vacant units.

5.214 In addition, Selby District Council's Sites and Premises Register shows three requirements for floorspace within Sherburn since April 2008:

- 0 – 5,000 sq ft (0-465 sq m) unit – for an unspecified use;
- 0- 2,000 sq ft (0-186 sq m) unit - for a mechanics/car repair use;
- 1.5 acres (0.6 ha) of land – for an unspecified use.

Quality and Mix of other uses

5.215 Outdoor leisure facilities are catered for with a good number of football/rugby pitches.

5.216 The Moor Lane Trading Estate is one of the largest within the Country and this has a number of positive knock-on effects for Sherburn In Elmet Town Centre through lunch time trade for example. This can create issues in relation to car parking and general access.

Town Centre Uses Outside the Town Centre

5.217 There are a number of services / comparison retailers towards the southern end of Low Street which are not included within the Local Plan Town Centre Boundary (2005). Kirkgate and Moor Lane also contain a number of town centre uses and are not included within the current Town Centre Boundary.

Stakeholder Consultation

5.218 Sherburn in Elmet Parish Council was consulted with as part of the Study on 20th July 2009.

5.219 It stated that Sherburn In Elmet is the second largest settlement in Selby and that many are not aware of its size and function; instead it is perceived as a small centre without a primary function.

5.220 The Parish Council views Sherburn in Elmet as a village / small town which is trying to re-establish its identity. The Parish Council considers it to have a vibrant centre and a good evening economy, with some bars and restaurants. It believes that Sherburn in Elmet plays an important role as a local convenience service centre.

5.221 The Parish Council realise that Sherburn In Elmet may need to expand, despite the reservations on its growth by the local population. In order for this expansion to take place, it is seen as critically important that development is managed and that there is sufficient infrastructure and facilities in place to cater for any growth.

Conclusions on the Current Health of the Centres

5.222 The results of the Health Check contained within this Chapter will be utilised, alongside other data gathered as part of this Study, to draw conclusions on the current health of each centre, in terms of their vitality and viability, within **Chapter 6**.

6. Vitality and Viability of Centres

6.1 Utilising the results of the Health Checks contained in Chapter 5, alongside the findings of the consultation with local stakeholders and members of the public (through the household and street survey results), we have examined the strengths, weaknesses, opportunities and challenges (SWOC) of each centre and prepared a summary SWOC analysis for each.

6.2 The results of the analysis inform our assessment of the vitality and viability of the defined centres, and the potential for further retail, commercial and leisure uses within the centres as well as the opportunities for the introduction of focused action planning to encourage further investment and regeneration where appropriate.

Selby Town Centre

Selby: Strengths, Weaknesses, Opportunities and Challenges

6.3 The SWOC analysis for Selby Town Centre is set out in Table 6.1:

Table 6.1: Selby Town Centre SWOC Analysis

Strengths	Weaknesses
Good transport links (by both public and private modes of transport)	Under representation of Class A1 retail floorspace (although high representation by large foodstore operators)
Good, high quality, public open space	Over representation of service and miscellaneous uses
Overall good general environment, maintenance and attractiveness and high quality street scene (Conservation Areas and Lusted Buildings)	Low representation by national retailers and higher order comparison retailers
The Abbey – strong sense of town's identity and tourism attraction	Above average levels of vacancies throughout the Centre, including along key retail streets
The monthly farmers market on Micklegate	Relatively low levels of footfall
The weekly market on Micklegate (each Monday)	Dominance of service uses along Gowthorpe
Ousegate – a number restaurants and bars supporting the evening economy	Limited retail/leisure draw from outside the PCA – due to competition from nearby centres of the same / higher order
Pedestrianisation in key retail areas (Market Cross, Abbey Walk)	Brook Street and Market Cross appear detached from the remainder of the Centre
Good number of independent retailers present, especially along Brook Street	Limited use of Town Centre as a leisure destination
Limited litter or graffiti problems	Lack of Cinema Provision
Perception by the public that Selby is 'safe'	

Opportunities	Challenges
Improvements to Gowthorpe to reinvigorate the high street and seek to attract additional national, higher order retailers to the Centre	Ensuring that Gowthorpe does not further decline through increased vacancies and low footfall
Tourism, capitalising on the draw of the Abbey and the riverside	Attracting national, higher order non food retailer to the town given the lack of existing suitable units
To provide improved linkages between the river and the Town Centre	Proximity to higher order centres, including York, Doncaster and Leeds
Alternative uses for MIcklegate on non market days, replacing car park uses	Investment in nearby competing centres of a similar role and function could potentially increase leakage from Selby
Brook Street – promote support for the independent sector to create a strong identity for the street	

Selby: Conclusions on Vitality and Viability

6.4 Over the past decade, the ranking of Selby town centre nationally (as ranked by Management Horizons MHE Index) has improved and it is performing well against centres of a similar role and function within the Region.

6.5 However, the Centre has a restricted offer in terms of comparison retailing compared to the national average, particularly the representation of national multiple retailers in the Town. Vacancy levels are higher than the national average and demand from retailers is limited, with just 11 outstanding requirements at the start of 2009.

6.6 Investor confidence has not increased in Selby since 2006, with rents and yields remaining static since this date.

6.7 Selby can however be considered to have improved over recent years and has signs of a good level of vitality and viability. The 'market town' character, recent renaissance works and the Abbey create an attractive environment which should be used as a foundation for new investment to ensure that its current health is sustained and enhanced, particularly if surrounding competing centres increase their offer and attractiveness.

Tadcaster

Tadcaster: Strengths, Weaknesses, Opportunities and Challenges

6.8 The SWOC analysis for Tadcaster Town Centre is set out in Table 6.2:

Table 6.2: Tadcaster Town Centre SWOC Analysis

Strengths	Weaknesses
Attractive town centre environment	Under-representation of Class A1 retail floorspace
Distinct character due to high representation by independent retailers	Limited variety of shops, resulting in some goods not being catered for (i.e. menswear)
High quality streetscape created by the large numbers of historic buildings	Higher than average vacancy levels and units are reported to remain vacant for long periods
Designated as a Conservation Area	Over representation of service and miscellaneous uses
Good, high quality, public open space	Public space under used
Good accessibility by private car and public transport (bus)	No access by train
Large amount of free car parking provision (under utilised at weekends)	The bridge and River act as barriers and detach the Sainsbury's store from the remainder of the Centre
	Main retail street is also a key traffic through-fare route
	Low pedestrian footfall and visitor numbers
	Performs a dormitory role to York and Leeds

Opportunities	Challenges
Expansion of retail and leisure offer through diversifying uses and creating competition, increasing the attractiveness of the Centre	Land ownership issues – compulsory purchase orders may be required to assemble sites for redevelopment
Marketing of the existing leisure and recreational offer of the centre to increase visitor numbers	Attracting national, higher order non food retailer to the town given the lack of existing suitable units and the proximity of competing centres
Reuse of existing vacant units	Conflict between traffic and pedestrian movement in places

Tadcaster: Conclusions on Vitality and Viability

6.9 Tadcaster town centre is largely dominated by service and administrative uses, and has a significant under representation of convenience and comparison retailing compared to the national average. There is also a lack of representation by national retail and leisure operators.

6.10 The centre also has high vacancy rates, with units reported to remain vacant for extended periods of time despite the reported high interest in floorspace within Tadcaster.

6.11 Tadcaster does display some indicators of being a healthy centre, but the inability to convert potential demand for floorspace into take-up has serious implications for the health of the Centre and its future vitality and viability. Whilst vacancies remain high, it will be difficult for the Centre to increase its offer and attractiveness, and enhance its vitality and viability.

Sherburn in Elmet

Sherburn in Elmet: Strengths, Weaknesses, Opportunities and Challenges

6.12 The SWOC analysis for Sherburn in Elmet is set out in Table 6.3:

Table 6.3: Sherburn in Elmet Town Centre SWOC Analysis

Strengths	Weaknesses
Successful independent sector	Under representation of comparison retail floorspace
Very low vacancy rate and quick take-up of units	Over representation of convenience and services uses
Vibrant evening economy	Limited range of comparison goods – some goods categories not catered for. Lower order goods dominate
Good mix of national and independent traders	Low pedestrian flows
	Limited open space
	Restricted access and parking – existing arrangements do not allow for passing trade to be captured

Opportunities	Challenges
Demand from operators – potential to create additional floorspace to accommodate demand	Many existing units small and do not meet demand
Expansion of retail and leisure offer through diversifying uses, increasing the attractiveness of the centre	Perception of Sherburn as a secondary and not primary destination for retail and leisure activities
Increased accessibility	Lack of parking

Sherburn in Elmet: Conclusions on Vitality and Viability

6.13 Sherburn displays signs of being a vibrant and viable Centre, particularly with a low vacancy and quick take up rates, a strong independent sector and a good evening economy.

6.14 However, to ensure that the Centre remains healthy into the future, measures should be taken to seek to diversify the uses and to tackle the under-representation within the comparison retail sector.

7. Convenience Retail Analysis

Introduction

7.1 Set out below and contained within the Tables of **Appendix 4** is the assessments of need for convenience (food) goods floorspace during the period up to 2026.

7.2 It must be noted at the outset that projections of expenditure over a period as extensive as this are relatively unreliable and findings for the later years of the Study should be treated with caution. It is recommended that the analysis which is contained within this Study be reviewed regularly in order to ensure that it remains up to date and reliable.

Methodology

7.3 A logical step by step methodology to the assessment for both the convenience and comparison goods has been adopted. Essentially, the steps in each case are as follows:-

(i) Establish the population of each of the ten ‘zones’ within the Study Area[54].

(ii) Establish the expenditure per head within each of these zones for both convenience (both main food and top-up shopping) and comparison goods (a range of goods categories[55]).

(iii) By a combination of steps (i) and (ii) establish the total available expenditure for both convenience (both main food and top-up shopping) and comparison goods (a range of goods categories).

(iv) Assess how much of the total available expenditure identified at step (iii) is being spent at facilities within the Study Area utilising

---

[54] See Paragraphs 7.5 to 7.11 for a definition of the Study Area and how it was derived

[55] 1st and 2nd choice Clothing and Footwear shopping locations; Books, Music and DVDs and Toys; Chemist Goods, Toiletries and Cosmetics; Furniture, Carpets and Soft Furnishings; Electrical Goods, Computers, TVs, Washing Machines and Cookers; Household Goods, Glass, China and Tableware; and DIY, Hardware and Gardening Goods.

Household Telephone Survey data (identifying the Study Area's 'Market Share').

(v) Detail the existing floorspace and approved schemes within the Study Area together with their turnovers.

(vi) By comparing the total expenditure currently being spent at facilities within the Study Area identified at step (iv) against the expected turnover of the existing facilities compared to their company averages (step (v)) any surplus expenditure can be established.

(vii) This surplus expenditure can then be converted into floor area to establish an indication of the degree of need for further provision within the District.

7.4 The analysis has been undertaken on a goods basis, utilising the most up to date population and retail data available (from Experian MicroMarketer using the Census 2001 where relevant).

The Study Area

7.5 In order to inform the quantitative analysis the results of a Household Telephone Survey undertaken by NEMS in July 2009 have been utilised.

7.6 The survey comprised a 706 respondent survey of residents within and immediately around the District of Selby.

7.7 The survey results are annexed at **Appendix 2.** A summary of the findings of the Household Telephone Survey are contained in **Chapter 4**.

7.8 The extent of the Study Area was determined using judgements in relation to the size and quality of existing shops in and around the District of Selby and the geographical areas these shops are likely to attract most of their trade from. As shopping patterns do not correspond to Local Authority boundaries, areas outside the District of Selby are included in the Study Area. The extent of the Study Area is defined by postcode sector boundaries, which are the lowest geographical scale at which data to assess actual shopping patterns can be collected.

7.9 The Study Area is made up of a 'Primary Catchment Area' (PCA) within which most residents would be expected to look to Centres within the District of Selby for their shopping needs and 'Fringe' areas where although the majority of residents within these areas may not look to Centres within Selby District as their main Shopping Location, the facilities within Selby District still attract notable amounts of trade from these areas.

7.10 The Primary Catchment Area is made up of four 'Zones':

- Zone 1 – Selby;
- Zone 2 – Sherburn in Elmet;
- Zone 3 – Tadcaster; and
- Zone 4 – Eggborough / South Selby.

7.11 The remainder of the Study Area is made up of the six 'Fringe' zones (Zones 5-10). A map of the Study Area can be found at **Appendix 1.**

Population

7.12 The existing population figures of the respective Zones within the Study Area are set out in Convenience Table 1 contained within **Appendix 4.**

7.13 The base year for the population is 2007 and was obtained from Experian MicroMarketer in July 2009. The MicroMarketer population data is based upon the 2001 census and adjusted annually using mid-year estimates.

7.14 The population is projected forward using growth rates from Office for National Statistics Population Projections published in 2008. The change in population over the study period is summarised in Table 7.1 below.

Table 7.1: Summary of Population Change in Study Area up to 2026 (Using ONS Projections)

	2007	2017	2026
Study Area Population	156,592	172,738	189,272
Increase from 2007	-	14,784	32,680
% Increase	-	9.44%	20.87%

Expenditure Per Head

7.15 Convenience Table 2a contains the Convenience goods expenditure per head data for each of the Zones within the Study Area. The base data has been obtained from Experian MicroMarketer in July 2009 and is in 2007 prices. This base data has been projected forward using Experian's Ultra-long Term Trend Growth Rate (0.5%) as advised in Retail Planner Briefing Note 7.1 (published August 2009).

7.16 The Ultra-long Term Trend Growth Rate has been used as it is considered more accurate to calculate growth in retail expenditure over the longer term (up to 2026) based upon past trends and patterns rather than the Forecast Growth Rates that are based upon economic conditions that can vary considerably over even the short term.

7.17 Convenience Table 2b then deducts the figure of Non-Store Retail Trade (NSRT) from this expenditure per head figure, as is advised by Experian. NSRT is the element of expenditure which passes through mediums other than conventional 'shops' such as markets, mail order shopping, vending machines and the internet. Deducting NSRT then provides the amount of available expenditure each person in the Study Area spends in shops.

7.18 Experian predict that NSRT will rise as a proportion of retail expenditure until 2015 after which it will grow in line with traditional shopping. The change in convenience goods expenditure per head of residents within the Study Area – both the PCA and the 'Fringe' Zones (the amount of money each person, on average has to spend on food shopping) is summarised in Table 7.2 below.

Table 7.2: Convenience Goods Expenditure per head in Study Area up to 2026 (Not including NSRT)

	2007	2017	2026
Convenience Goods Expenditure per Head	£1,731	£1,776	£1,847

Total Available Expenditure

7.19 Convenience Table 3a takes the expenditure per head from Convenience Table 2b and multiplies this by the population from Convenience Table 1 to obtain the Total Available Expenditure per Zone within the Study Area.

7.20 Convenience Tables 3b and 3c then apportion the amount of Total Available Convenience Goods Expenditure from Table 3a into amounts of expenditure available for 'main food' and 'top-up' shopping respectively. The proportion of how much residents within the Study Area spend on their main food and top-up shopping was calculated from data collected through the Household Telephone Survey. The Total Available Expenditure for convenience goods within the Study Area is presented in Table 7.3 below.

Table 7. 3: Total Available Convenience Goods Expenditure in Study Area up to 2026 (£m)

	2007	2017	2026
Convenience Goods Total Available Expenditure (£m)	£270.12	£305.77	£348.57

Trade Draw

7.21 Convenience Tables 4a and 4b present the findings of the Household Telephone Survey to identify what percentage of residents within the Study Area shop at particular locations both within and outside the Study Area for main food and top-up shopping purposes respectively.

Flows of Expenditure

7.22 Convenience Tables 5a and 5b multiply the Total Available Expenditure for main food and top-up shopping respectively from Convenience Tables 3b and 3c by the percentage of residents within the Study Area shopping at particular facilities from Convenience Tables 4a and 4b to gauge the flows of expenditure within and out of the Study Area.

7.23 Convenience Table 5c calculates the Total Convenience Goods flow of expenditure by adding the respective figures for main food and top-up shopping contained in Convenience Tables 5a and 5b.

Overall Market Share

7.24 Convenience Tables 6a, 6b and 6c detail the market share of the Primary Catchment Area and the four Zones within it, the Study Area as a whole and the 'Fringe' Zones respectively. This is calculated by multiplying the Total Available Expenditure for a particular area identified in Convenience Table 3a by the amount that is being spent by residents from that area at shops within the area from Convenience Table 5c. The convenience goods market shares for the PCA as a whole and each of its respective Zones are presented in Table 7.4 below. These are commented upon in the Retail Findings section further below.

Table 7.4: Convenience Goods Market Share of PCA Zones in 2009

	Convenience Goods Market Share (2009)
Zone 1 – Selby	79.2%
Zone 2 – Sherburn in Elmet	31.6%
Zone 3 – Tadcaster	49.6%
Zone 4 – Eggborough/South Selby	20.9%
PCA Total	64.6%

Turnover of Existing Stores

7.25 Convenience Table 7 details the floorspace of existing foodstores within the Study Area and their estimated turnover based upon company averages.

7.26 The floorspace data for the existing foodstores within the Study Area has been gathered from the IGD Foodstore Database (2008) and Experian GOAD (July 2009). The turnover per sq m and proportion of floorspace allocated for the sale of comparison and convenience goods are taken from Retail Rankings (2009 Edition) and Verdict on Grocers (2009 Edition).

7.27 The amount of floorspace contained in ‘Other Stores’ within each Zone is based upon the number of respondents who identified that they shopped at these ‘Other Stores’ in the Household Telephone Survey. For example, 13% of the expenditure of residents within Zone 1 was spent in shops within Zone 1 other than those named in Convenience Table 7. It is therefore calculated that these stores make up 13% of the net convenience goods floorspace within the Zone.

7.28 The ‘benchmark’ turnover of each store is calculated by multiplying its net sales area by the published average turnover per sq m for the particular operator of that store. For the ‘Other Stores’ category, a turnover of £2,500 per sq m has been used based on previous experience for similar areas.

Commitments

7.29 Convenience Table 8 applies the same process as Convenience Table 7 but for shops that were not operating at the time the Telephone Survey was conducted but are under construction or have planning permission so are likely to be trading within the next few years. For simplicity, it is assumed that all commitments will begin trading in 2009. Details of Commitments have been provided by Selby District Council.

Survey Derived Turnover vs. Company Averages

7.30 Convenience Table 9 compares the expected 'benchmark' turnovers of the stores in Convenience Table 7 with the amount of trade they are drawing from residents within the Study Area as identified in Convenience Table 5c and based upon Telephone Survey responses. Convenience Table 9 gives an indication of how stores may be 'over-trading' or 'under-trading' i.e. have a turnover over or under what would be expected for a store of that size for a particular operator. The results of this Table should be treated with caution as benchmark turnovers do not take account of variations in the format of a store or local conditions.

Capacity

7.31 Convenience Tables 10a, 10b, 10c, 10d and 10e identify the amount of available Capacity for Convenience Goods in the Primary Catchment Area and Zones 1-4. This is calculated by multiplying the amount of Total Available Expenditure in Convenience Table 3a by the market share identified in Convenience Table 6a. This gives the amount of expenditure being spent at shops within the area by residents from that area. Added to this is the amount of trade flowing to this area from other Zones within the Study Area. The turnover of existing facilities and committed development is then deducted from this to give a figure of 'Surplus Expenditure.' This is the amount available to support new Convenience goods facilities within that area.

7.32 Convenience Table 11 converts the Surplus Expenditure identified in the Primary Catchment Area from Convenience Table 10a into figures of net and gross floorspace. The table presents two scenarios of floorspace, either a 'Top Four' sales density, an average of Tesco, Sainsbury's, Asda and Morrisons (£11,656/sq m) or a 'Discounter' sales density; an average of Aldi, Netto, Lidl and Iceland (£5,715/sq m). The respective Top-Four and Discounter figures of net floorspace (the actual area used for selling goods) are then converted into gross floorspace (the actual area of the store) by assuming that 60% of the stores would be allocated to sales floorspace.

Summary of Convenience Retail Findings

7.33 Following the methodology outlined above produces figures of quantitative need / capacity for both convenience (food) and comparison (non-food) goods up to 2026. These findings are reviewed below along with views on how existing shopping patterns and flows of expenditure in the Study Area may change within the study period (up to 2026).

District Wide Findings

7.34 As discussed earlier, the Primary Catchment Area is the four main ‘Zones’ within the Study Area (Selby, Sherburn in Elmet, Tadcaster and Eggborough/South Selby).

7.35 The above data is used in conjunction with the methodology outlined in the previous chapter to ascertain a figure of available expenditure to support new facilities within the Primary Catchment Area (PCA) if the market share of the PCA remains the same. The market share for the whole PCA for convenience goods in 2009 is 64.6%. This is considered a reasonable figure when considering the size and frequency of convenience goods shopping facilities contained within the PCA. This figure is not higher due to the number and popularity of facilities just outside the Study Area, most notably, the Asda at Glasshoughton and Tesco Extra at York.

7.36 Table 7.5 below displays the theoretical convenience goods capacity to support new floorspace over the study period.

Table 7.5 Convenience Goods Surplus Expenditure Available to Support New Floorspace – Current Market Share

	2017	2026
Convenience Goods Surplus Expenditure (£m)	£8.12	£19.48

7.37 The amount of surplus expenditure in 2017 allows for the expenditure allocated to commitments in 2009. It is estimated that the convenience goods turnover of current planning permissions within the PCA in 2009 would be £32.37m. The majority of the turnover of commitments is accounted for by the extensions to the Tesco and Morrisons foodstores (£13.22m and £12.51m respectively).

7.38 Convenience Table 10d of **Appendix 4** converts the figure of surplus capacity into figure of available floorspace for 'Top Four' turnover per square metre (an average of the turnover per sq m of Tesco, Sainsbury's, Asda and Morrisons) and 'Discounter' turnover per square metre (an average of the turnover per sq m of Aldi, Netto, Iceland and Lidl). This conversion is calculated through dividing the surplus capacity available by the average turnover per sq m, to illustrate the net convenience floorspace which could be supported. This is then converted into the gross convenience floorspace through applying a gross: net ratio (assumes 60%).

7.39 The findings of this table are presented in Table 7.6 below.

Table 7.6: Convenience Goods Surplus Expenditure Available to Support New Floorspace – Current Market Share – Using gross to net ratio of 60%

	2017	2026
'Top Four' Grocers Gross Floorspace Equivalent (sq m)	1,105	2,534
'Discounter' Grocers Gross Floorspace Equivalent (sq m)	2,253	5,168

7.40 The above table indicates that there would be insufficient capacity to support a substantial amount of convenience goods floorspace within the PCA during the study period assuming all commitments are implemented.

7.41 By 2017 the surplus capacity would be able to support either an extension to an existing 'Top-four' foodstore of circa 1,100 sq m, a 'Metro' style 'Top-four' foodstore or a limited combination of smaller facilities including a typical 'Discounter' foodstore.

Impact of Non-Implementation of Commitments on the District Wide Findings

7.42 The analysis above assumes all extant planning permissions for convenience floorspace within the District are implemented.

7.43 We have tested the implications on the convenience goods surplus expenditure of either one or both of the two main convenience commitments not being implemented. These are:

- The Morrisons Extension at Market Cross 205/1328/FUL – 14th November 2006); and,
- The Tesco Extension at Portholme Road (2008/1035/FUL – 23rd April 2009).

7.44 Convenience Table 8 of **Appendix 4** estimates the convenience turnover of these two store extensions in 2009 as £12.51 million (Morrisons) and £13.22 million (Tesco).

7.45 To test the implications of either or both not coming forward, we have re-run the analysis excluding these commitments on available expenditure. Table 7.7 illustrates the results.

Table 7.7: Convenience Goods Surplus Expenditure Available to Support New Floorspace – Current Market Share and Non Implementation of Major Convenience Commitments

	2017	2026
Both Commitments Implemented	£10.73 million	£23.33 million
Morrisons Extension Commitment Not Implemented	£21.25 million	£33.33 million
Tesco Extension Commitment Not Implemented	£21.99 million	£34.11 million
Both Commitments Not Implemented	£35.01 million	£47.72 million

7.46 Should one or both of the two extant foodstore extension planning permissions not be implemented and become expired, this would create additional convenience capacity on top of that identified in Tables 7.5 (£23.33 million in 2026) of between £10 and £24 million in 2026, based on current market shares.

7.47 Converting this to potential additional gross convenience floorspace utilising the average turnover per sq m for either the Top 4 Grocers (Tesco, Sainsbury's, Asda and Morrisons) or a Discounter, this additional capacity could support the following gross floorspaces:

Table 7.8: Additional Convenience Goods Surplus Expenditure Available to Support New Floorspace in 2017 and 2026 – Current Market Share and Non Implementation of Major Convenience Commitments – Using gross to net ratio of 60%

	Top 4 Grocer (sq m)[56]	Discounter (sq m)[57]
2017		
Morrisons Extension Commitment Not Implemented	1,431	2,919
Tesco Extension Commitment Not Implemented	1,532	3,124
Both Commitments Not Implemented	3,303	6,737
2026		
Morrisons Extension Commitment Not Implemented	1,300	2,653
Tesco Extension Commitment Not Implemented	1,402	2,860
Both Commitments Not Implemented	3,172	6,470

7.48 Therefore, in 2026, if either commitment alone is not implemented, it produces additional capacity to support a similar quantum of development/extension as the extant permissions (assuming the floorspace is occupied by a Top 4 Grocer) or to support two discounter foodstores.

7.49 If both Permissions are not implemented, the additional floorspace which could be supported District-wide in 2026 could take the form of a medium sized supermarket, several ‘Metro’ style ‘Top-four’ stores or a number of discounters/smaller facilities.

District /PCA Wide Sensitivity Testing

7.50 Although it is considered that the convenience goods market share of 64.6% is appropriate for a Primary Catchment Area of its characteristics, an increase in market share of 2.5% and 5% (to 67.1% and 69.6% respectively) has been tested to ascertain the effects of this change in shopping patterns on the amount of surplus expenditure in the PCA. It is

[56] Utilises Average Top 4 Turnovers projected to 2017 and 2026 of £12,252/sq m in 2017 and £12,815/sq m in 2026

[57] Utilises Average Discounter Turnovers projected to 2017 and 2026 of £6,007/sq m in 2017 and £6,283/sq m in 2026

assumed that inflow from the 'Fringe' Zones within the Study Area would also increase by 2.5% and 5% for the respective scenarios.

7.51 It is necessary to consider changes in market share to take account of the dynamic nature of shopping habits and the effect that the implementation of commitments and other improvements to shopping facilities may have on the market share of the PCA.

7.52 The results of this testing is presented in Tables 7.9 and 7.10 below.

Table 7.9: Convenience Goods Surplus Expenditure Available to Support New Floorspace – Increase in Market Share of 2.5% – Using gross to net ratio of 60%

	2017	2026
Convenience Goods Surplus Expenditure (£m)	£12.79	£24.79
'Top Four' Grocers Gross Floorspace Equivalent (sq m)	1,740	3,225
'Discounter' Grocers Gross Floorspace Equivalent (sq m)	3,550	6,577

Table 7.10: Convenience Goods Surplus Expenditure Available to Support New Floorspace – Increase in Market Share of 5% – Using gross to net ratio of 60%

	2017	2026
Convenience Goods Surplus Expenditure (£m)	£17.47	£30.11
'Top Four' Grocers Gross Floorspace Equivalent (sq m)	2,376	3,916
'Discounter' Grocers Gross Floorspace Equivalent (sq m)	4,846	7,986

7.53 Even with increases in market share and allowing for all existing commitments to come forward (including the Tesco and Morrisons extensions) as modelled in the above tables, there is still likely to be insufficient capacity even by the end of the study period in 2026 to support, for example, a new, modern format 'Top-four' foodstore.

7.54 It is considered unrealistic to model higher increases in market share due to the geography of the Study Area and the location of existing facilities.

7.55 The majority of existing facilities are concentrated in the centre of the Study Area in and around Selby. As a result, a relatively high number of residents within the Study Area live physically closer to facilities outside of the Study Area. This is especially the case to the north and west of the PCA and it would be unlikely that these residents would shop within the PCA however much facilities were improved in the three towns of Selby, Sherburn in Elmet and Tadcaster.

District / PCA Wide Recommendations

7.56 The current market share of the Primary Catchment Area is fairly high for its geography and quality of existing provision and compares favourably to other market towns. It is therefore considered unlikely that the market share of the PCA could be increased significantly over the study period. The baseline position or an increase in market share of 2.5% represents the scenarios that are most likely to occur.

7.57 The surplus convenience goods expenditure available in these scenarios by 2017[58] would be sufficient to support either a modest extension to an existing ‘Top-four’ foodstore, a ‘metro’ style ‘top-four’ foodstore or a combination of smaller facilities such as a typical ‘Discounter’ foodstore and ‘Express’ or ‘Local’ type facilities.

7.58 The distribution of these facilities around the PCA should be informed by the individual Zones’ analysis below.

Zone 1 - Selby Findings

7.59 Zone 1 has a market share of 79.2% which is appropriate to the scale of facilities within the zone and compares favourably to other market towns. There is also a large amount of inflow from other zones within the PCA and ‘Fringe’ zones (£16.34m in 2009).

7.60 Table 7.11 below displays the convenience goods capacity to support new floorspace over the study period within Zone 1 – Selby.

Table 7.11: Convenience Goods Surplus Expenditure Available to Support New Floorspace in Zone 1– Current Market Share

	2017	2026
Convenience Goods Surplus Expenditure (£m)	-£8.99	-£2.65

[58] Baseline Scenario in 2017 ranges from 1,105 sq m (Top 4 Grocer) to 2,253 sq m (Discounter); 2.5% Market Share increase Scenario in 2017 ranges from 1,740 sq m (Top 4 Grocer) to 3,550 sq m (Discounter)

7.61 The analysis does not show any capacity for additional convenience retail floorspace within Zone 1 across the Study Period.

7.62 Table 7.11 should be treated with caution. The analysis allows for the implementation of all commitments (including both the Tesco and Morrisons extensions) however, it assumes that the market share of Zone 1 remains constant at the current level. In reality, the implementation of all these commitments would result in the market share of the zone improving, hence the figures in Table 7.11 will slightly understate the capacity available for additional convenience floorspace in Zone 1, as no allowance for an increase in market share or inflow is made. Potential increases in market share and inflow are sensitivity tested in the Section below.

Impact of Non-Implementation of Commitments on the Zone 1 Findings

7.63 As with the District Wide Findings, this analysis assumes that both the Tesco and Morrisons extant Planning Permissions are implemented.

7.64 Assuming that either or both of these commitments are not implemented, produces the following additional convenience capacity by 2017 and 2026:

- Non Implementation of Morrisons: £4.36 million by 2017, £11.65 million by 2026;
- Non Implementation of Tesco: £5.10 million by 2017, £12.42 million by 2026;
- Non Implementation of Both: £18.12 million by 2017, £26.04 million by 2026;

7.65 Hence, capacity to support additional convenience floorspace within Zone 1 would be created if either or both commitments do not come forward. This capacity would support a similar level of floorspace to that which would not be implemented, assuming occupation by a 'Top 4' grocer.

Zone 1 - Sensitivity Testing

7.66 Although Zone 1 currently has a high market share of almost 80%, for illustration purposes, increases of 2.5% and 5% have been modelled. These are presented in Table 7.12 below.

Table 7.12: Convenience Goods Surplus Expenditure Available to Support New Floorspace in Zone 1 – Selby – Increases in Market Share of 2.5% and 5%

	2017	2026
Convenience Goods Surplus Expenditure (£m) – 2.5% Increase in Market Share	-£6.30	£0.38
Convenience Goods Surplus Expenditure (£m) – 5% Increase in Market Share	-£3.61	£3.41

7.67 The sensitivity tests illustrate that even allowing for modest increases in market share, there would be no capacity to support new floorspace until the end of the Study period and this would be limited, unless some of the extant planning permissions are not implemented.

Zone 1 – Recommendations

7.68 Although the implementation of commitments would be likely to increase the market share of and inflow to Zone 1, there would still be negative capacity within the Study Area until 2021 even with the most optimistic increase in market share.

7.69 The only capacity to support additional floorspace within Zone 1 would arise from non-implementation of the Morrisons and/or Tesco commitments. These would release capacity roughly equivalent to their estimated turnovers and could therefore support facilities of a similar nature to the extensions or a combination of smaller facilities.

Zone 2 – Sherburn in Elmet Findings

7.70 Zone 2 has a convenience goods market share of 32% which reflects the more limited facilities within this zone when compared to Zone 1. There is a very limited amount of inflow of expenditure from other PCA Zones and 'Fringe' Zones into Zone 2.

7.71 Table 7.13 below displays the convenience goods capacity to support new floorspace over the study period within Zone 2: Sherburn in Elmet.

Table 7.13: Convenience Goods Surplus Expenditure Available to Support New Floorspace in Zone 2 – Current Market Share

	2017	2026
Convenience Goods Surplus Expenditure (£m)	£3.06	£4.10

7.72 The limited amount of surplus expenditure is as a result of the low initial Total Available Expenditure and low market share. This amount of capacity would be insufficient to support a 'Discounter' foodstore at current market share.

Zone 2 – Sensitivity Testing

7.73 An increase in market share of 2.5% and 5% have been tested for Zone 2. These are presented in Table 7.14 below.

Table 7.14: Convenience Goods Surplus Expenditure Available to Support New Floorspace in Zone 2 – Sherburn in Elmet – Increases in Market Share of 2.5% and 5%

	2017	2026
Convenience Goods Surplus Expenditure (£m) – 2.5% Increase in Market Share	£3.84	£4.98
Convenience Goods Surplus Expenditure (£m) – 5% Increase in Market Share	£4.61	£5.86

7.74 As the increases in market share tested are limited, only a small increase in capacity is produced by the sensitivity results.

7.75 It is considered unrealistic to achieve a higher increase in market share in Zone 2 without a substantial change in shopping provision, which in reality is unlikely to materialise and would reduce the market share of other Zones within the PCA, through diverting trade from existing facilities.

Zone 2 Recommendations

7.76 There is only a limited surplus of expenditure available for additional facilities within Zone 2 throughout the study period, even with an allowance for a modest increase in market share and inflow. At most, in 2021 (assuming a 2.5% increase in market share), Zone 2 only has capacity to support an additional 400 sq m (Top 4 Occupier) to 800 sq m (Discounter Occupier) of net convenience floorspace.

7.77 It is therefore inappropriate to seek any substantial (i.e. greater than 500 sq m net sales area) increase of convenience goods floorspace within Zone 2 across the study period.,

Zone 3 – Tadcaster Findings

7.78 Zone 3 has a convenience goods market share of 49.6%, reflecting the location of a major convenience store within the zone (Sainsbury's, Millgate, Tadcaster) and the proximity of the larger foodstores in York, a short distance to the north-east.

7.79 Table 7.15 shows the capacity of the zone to support additional convenience floorspace to 2026.

Table 7.15: Convenience Goods Surplus Expenditure Available to Support New Floorspace in Zone 3 – Current Market Share

	2017	2026
Convenience Goods Surplus Expenditure (£m)	£7.17	£8.66

7.80 The surplus identified is not sufficient to support a significant amount of new convenience retail floorspace within Zone 3 to 2026. Dependent on retailer format, in 2017 this surplus could support between 900 and 2,000 sq m of gross floorspace, increasing to between 1,125 and 2,300 sq m by 2026.

Zone 3 – Sensitivity Testing

7.81 Again, increases in market share of 2.5% and 5% have been sensitivity tested for Zone 3. The results are presented in Table 7.16 below.

Table 7.16: Convenience Goods Surplus Expenditure Available to Support New Floorspace in Zone 3 – Tadcaster – Increases in Market Share of 2.5% and 5%

	2017	2026
Convenience Goods Surplus Expenditure (£m) – 2.5% Increase in Market Share	£7.86	£9.44
Convenience Goods Surplus Expenditure (£m) – 5% Increase in Market Share	£8.55	£10.22

7.82 The modest increases in market share result in a uplift in capacity, but this is not significant enough to support any large scale additional convenience retail floorspace within Tadcaster.

Zone 3 - Recommendations

7.83 Given the geographical positioning of Zone 3 and its proximity to competing stores within York and to the west, there is limited surplus of expenditure available for additional facilities within Zone 3 throughout the study period, even allowing for a modest increase in market share and inflow.

7.84 It is therefore inappropriate to seek a significant increase of convenience goods floorspace (more than 1,000 sq m by 2017) within Zone 3 across the study period.

Zone 4 – Eggborough

7.85 A review of the capacity within Zone 4 (Eggborough / South Selby) has not been produced as part of this Study.

7.86 The characteristics of the zone and current food shopping patterns (the survey revealed that none of the respondents visit facilities within Zone 4 for main food shopping trips, 30% undertake their main food shopping trip at facilities in Zone 1, and the remainder visit to facilities outside of the PCA including Morrisons in Knottingley (23%) and Tesco in Goole (25%)), illustrate that the zone does not act as a catchment for any centres within the zone and residents look further afield to the surrounding centres (including Selby) to meet their convenience food needs.

7.87 Therefore, due to the lack of a sizeable centre within Zone 4 and the existing shopping characteristics, it would not be appropriate to capture the leakage of expenditure from the zone to support additional floorspace within this area. Hence, it is recommended that the other three Centres within the PCA remain the appropriate shopping locations for residents within Zone 4.

8. Comparison Goods Analysis

8.1 Set out below and contained within the Tables of **Appendix 5** is the assessments of need for comparison (non-food) goods floorspace during the period up to 2026.

8.2 It must be noted at the outset that projections of expenditure over a period as extensive as this are relatively unreliable and findings for the later years of the Study should be treated with caution. It is recommended that the analysis which is contained within this report be reviewed regularly in order to ensure that it remains up to date and reliable.

Methodology

8.3 The comparison goods analysis utilises the same study area and populations as the convenience goods analysis, as set out in **Chapter 7**.

Expenditure Per Head

8.4 Comparison Table 2a contains the comparison goods expenditure per head data for each of the Zones within the Study Area. This base data was obtained from Experian MicroMarketer in July 2009 and is in 2007 prices. This base data has been projected forward using Experian's Ultra-long Term Trend Growth Rate (4.7% per annum) as advised in Retail Planner Briefing Note 7.1 (published August 2009).

8.5 Comparison Table 2b adjusts the comparison goods expenditure per head figure from Comparison Table 2a to remove Non-Store Retail Trade (NSRT) from this expenditure per head figure, as is advised by Experian. NSRT is the element of expenditure which passes through mediums other than conventional 'shops' such as markets, mail order shopping, vending machines and the internet. Deducting NSRT then provides the amount of available expenditure each person in the Study Area spends in shops.

8.6 The change in comparison goods expenditure per head – both the PCA and the 'Fringe' Zones (the amount of money each person, on average has to spend on non-food shopping) is summarised in Table 8.1 below.

Table 8.1: Comparison Goods Expenditure per head in Study Area up to 2026 (Not including NSRT)

	2007	2017	2026
Comparison Goods Expenditure per Head	£3,176	£4,866	£7,397

8.7 Comparison Tables 2c-l contain the expenditure per head available for seven particular goods categories within the wider umbrella of comparison goods. These are:

- Clothing and Footwear;
- Books, CDs and Toys;
- Chemist Goods and Personal Care;
- Furniture, Carpets and Soft Furnishings;
- Electrical Goods;
- Household Goods, Glass, China and Tableware; and
- DIY, Tools and Maintenance Goods.

8.8 The base data for the above categories has also been projected forward using Experian's Ultra-long Term Trend Growth Rate (4.7% per annum).

8.9 Comparison Tables 2m-w then adjust the figures per goods category to remove Non-Store Retail Trade as advised by Experian to provide the amount of expenditure per goods category per person in the Study Area available to spend in shops.

Total Available Expenditure

8.10 Comparison Tables 3a-j then take the expenditure per head from Comparison Tables 2b and 2m-w and multiply these by the population from Comparison Table 1 to obtain the Total Available Expenditure per Zone within the Study Area for all comparison goods (table 3a) and per goods category (tables 3b-j). The Total Available Expenditure for comparison Goods within the Study Area is presented in Table 8.2 below.

Figure 8.2: Total Available Comparison Goods Expenditure in Study Area up to 2026 (£m)

	2007	2017	2026
Comparison Goods Total Available Expenditure (£m)	£492.26	£831.95	£1,385.85

8.11 Comparison Tables 3c and 3d present the amount of Total Available Expenditure available at residents' first and second choice clothing and footwear shopping locations. This is calculated by multiplying the Total Available Expenditure for clothing and footwear by the proportion residents in the Study Area identified that they spend at their first and second choice clothing and footwear shopping locations as recorded in the Telephone Survey.

Trade Draw

8.12 Comparison Tables 4a-h present the findings of the Household Telephone Survey to identify what percentage of residents within the Study Area shop at particular locations both within and outside the Study Area for their first and second choice clothing and footwear shopping locations and for the other six comparison goods sub-categories identified above.

Flows of Expenditure

8.13 Comparison Tables 5a-I multiply the Total Available Expenditure for each of the goods categories (including first and second choice clothing and footwear locations) from Comparison Tables 3b-j by the percentage of residents within the Study Area shopping at particular facilities from Comparison Tables 4a-h to gauge the flows of expenditure for all of the goods categories both within and out of the Study Area.

8.14 Convenience Table 5j calculates the total Comparison Goods flows of expenditure by adding the respective figures for each of the goods categories from Comparison Tables 4a-h.

Overall Market Share

8.15 Comparison Tables 6a, 6b and 6c detail the market share of the Primary Catchment Area and the four Zones within it, the Study Area as a whole and the 'Fringe' Zones respectively. This is calculated by multiplying the Total Available Expenditure for a particular area identified in Comparison Table 3a by the amount that being spent by residents from that area at shops within the area from Comparison Table 5j. The comparison goods market shares for the PCA as a whole and each of its respective Zones are presented in Table 8.3 below. These are commented upon in the Retail Findings section further below.

Table 8.3: Comparison Goods Market Share of PCA Zones in 2009

	Comparison Goods Market Share (2009)
Zone 1 – Selby	41.1%
Zone 2 – Sherburn in Elmet	4.5%
Zone 3 – Tadcaster	9.0%
Zone 4 – Eggborough/South Selby	4.3%
PCA Total	30.5%

Turnover of Existing Facilities

8.16 Comparison Tables 7a, 7b and 7c detail the floorspace of existing facilities within the Primary Catchment Area and their estimated turnover based upon company averages.

8.17 The floorspace data for the Centres within the Primary Catchment Area (Selby, Sherburn in Elmet and Tadcaster – contained within Comparison Table 7a) has been provided by Selby District Council (2008 Survey Updated in July 2009). The floorspace data for Three Lakes Retail Park (contained within Comparison Table 7b) was obtained from EGi (July 2009). Floorspace data for existing foodstores contained within the Primary Catchment Area (contained within Comparison Table 7c) has been gathered from the IGD Foodstore Database (2008) and Experian GOAD (July 2009).

8.18 The turnover per sq m and proportion of floorspace allocated for the sale of comparison and convenience goods for foodstores are taken from Retail Rankings (2009 Edition) and Verdict on Grocers (2009 Edition). The gross to net ratios of other comparison goods facilities are Drivers Jonas' estimates.

8.19 The amount of floorspace contained in 'Other Stores' within each Zone is based upon the population of that Zone. Based on previous experience it is considered that there is an additional 3% comparison goods floorspace within the Primary Catchment Area outside of the main centres of Selby, Sherburn in Elmet and Tadcaster. This 3% of additional floorspace has been apportioned to each of the four Zones based on their population.

8.20 For example, Zone 1, Selby, has an estimated population in 2009 of 48,378. This is 51% of the total of the Primary Catchment Area (94,832) therefore it is calculated that Zone 1 contains 51% of the 'Other' comparison goods floorspace in the Primary Catchment Area (itself 3% of the total combined comparison goods floorspace of Selby, Sherburn in Elmet and Tadcaster).

8.21 The 'benchmark' turnover of each store is calculated by multiplying its net sales area by the average turnover per square metre for the particular operator of that store. For the 'Other Stores' category, a turnover of £2,500 per sq m has been used based on previous experience.

Commitments

8.22 Comparison Table 8 applies the same process as Comparison Table 7 but for shops that were not operating at the time the Telephone Survey was conducted but are under construction or have planning permission so are likely to be trading within the next few years. For simplicity, it is assumed that all commitments will begin trading in 2009. Details of Commitments have been provided by Selby District Council.

Capacity

8.23 Comparison Table 9a displays the Surplus Capacity available within the Primary Catchment Area. This is calculated by multiplying the amount of Total Available Expenditure in Comparison Table 3a by the market share identified in Comparison Table 6a. This then gives the amount of comparison goods expenditure available to spend within the Primary Catchment Area from residents who live within the Primary Catchment Area. The turnover of facilities and commitments from the PCA is then deducted from this and inflow from 'Fringe' Zones within the Study Area added to this to provide the Surplus Expenditure available to support additional comparison goods floorspace.

8.24 The turnover of facilities within the PCA from the Study Area is calculated by taking the total estimated benchmarks turnovers identified in Comparison Tables 7a, 7b and 7c and removing the 21% of Selby Town Centre's comparison goods trade that is calculated to come from beyond the Study Area. This is based upon results of an on-street survey which it was found that 21% of people surveyed in Selby Town Centre were from outside the Study Area. As facilities within other Centres in the Study Area are more limited, it is considered that they will draw no material amount of trade from outside the Study Area.

8.25 Comparison Tables 9b, 9c, 9d and 9e repeat the above calculations for Zones 1, 2, 3 and 4 respectively although taking into account inflow from other Zones within the Primary Catchment Area as well as 'Fringe' Zones within the Study Area.

8.26 Comparison Table 10 then converts the Surplus Expenditure identified in the Primary Catchment Area from Table 9a into figures of net and gross floorspace.

8.27 Comparison Table 10 presents two scenarios of floorspace, either a 'Selby Town Centre' floorspace equivalent using the survey derived sales density from the Study Area (£3,830/sq m in 2007) or a typical Retail Warehouse sales density (£3,000/sq m – based on previous experience). The respective Selby Town Centre and Retail Warehouse net floorspace equivalents (the actual area used for selling goods) are converted into gross floorspace (the actual area of the store) by assuming that 70% of the Selby Town Centre stores and 80% of the Retail Warehouses would be allocated to sales floorspace.

8.28 The results of the above analysis are reviewed below.

Summary of Comparison Retail Findings

District Wide / Primary Catchment Area Findings

8.29 The market share for the whole PCA for comparison goods in 2009 is 30.4%. Although this is likely to be lower than nearby towns and cities from their respective PCAs (such as Doncaster, York, Leeds etc) it compares favourably to other market towns[59].

---

[59] For Example:

- Beverley 12% comparison goods market share (England and Lyle Town Centres and Retail Study for the East Riding of Yorkshire – March 2009).
- Ripon 2.5% comparison goods market share (NJL Consulting Harrogate Retail Study – 2007).
- Malton 32.73% comparison goods market share (Roger Tym and Partners Ryedale Retail Capacity Study – May 2006).

8.30 It is considered that the market share is to be expected given the current provision in the three centres (Selby, Sherburn in Elmet and Tadcaster) as there is relatively little higher order comparison goods provision and the survey results show that most residents travel outside the Study Area, to York in particular, for these goods.

8.31 Table 8.5 displays the comparison goods capacity to support additional floorspace over the study period.

Table 8.5: Comparison Goods Surplus Expenditure Available to Support New Floorspace – Current Market Share

	2017	2026
Comparison Goods Surplus Expenditure (£m)	-£14.36	£48.99

8.32 There is a negative capacity up to 2019. This reflects that the retail warehouse provision and comparison goods elements of the foodstores within the PCA are likely to be under-trading when compared to their national averages. This may not indicate that these stores are loss-making however as rental levels at these facilities are likely to be less than national averages

8.33 Comparison Table 11a of **Appendix 5** converts the figure of surplus capacity into the potential available floorspace, utilising an average Selby Town Centre turnover per sq m and an average retail warehouse turnover per sq m. The findings of this table are presented in Table 8.6 below. Study years before 2020, which show a negative floorspace figure, have not been included.

- Mold 24.72% comparison goods market share (Roger Tym and Partners Flintshire Retail Study – April 2008).

Table 8.6: Comparison Goods Surplus Expenditure Available to Support New Floorspace – Current Market Share – Using gross to net ratio of 60%

	2020	2022	2024	2026
Selby Town Centre Floorspace Equivalent (sq m)	612	3,892	7,265	10,840
Retail Warehouse Floorspace Equivalent (sq m)	999	6,666	13,046	20,412

8.34 The above table indicates that there would be insufficient capacity to support a substantial amount of comparison goods floorspace in the PCA at current market share until around 2021/2022. This finding should be treated with caution as assumptions used in the Study such as population and expenditure growth rates may be subject to change over such a long period.

District Wide/PCA Sensitivity Testing

8.35 Three additional capacity scenarios have been tested:

- Comparison Table 10b presents an increase in market share to 35%;
- Comparison Table 10c presents an increase in market share to 40%; and,
- Comparison Table 10d presents an increase in market share to 40% couple with an increase in inflow from 'Fringe' Zones of 50%.

8.36 The sensitivity findings are presented in Tables 8.7, 8.8 and 8.9 below.

Table 8.7: Comparison Goods Surplus Expenditure Available to Support New Floorspace – Increase in Market Share to 35% and 40% and increase in Inflow from Fringe Zones of 50%.

	2017	2026
Comparison Goods Surplus Expenditure (£m) – 2.5% Increase in Market Share	£7.71	£85.74
Comparison Goods Surplus Expenditure (£m) – 5% Increase in Market Share	£30.91	£123.18
Comparison Goods Surplus Expenditure (£m) – 5% Increase in Market Share + Increased Inflow	£35.13	£129.57

Table 8.8: Comparison Goods Gross Floorspace Equivalent for Selby Town Centre Resulting from Increase in Market Share to 35% and 40% and increase in Inflow from Fringe Zones of 50% - Assumed gross to net ratio of 70%.

	2017	2026
Comparison Goods Floorspace (sq m) – 2.5% Increase in Market Share	2,112	18,973
Comparison Goods Floorspace (sq m) – 5% Increase in Market Share	8,466	27,256
Comparison Goods Floorspace (sq m)) – 5% Increase in Market Share + Increased Inflow	9,623	28,669

Table 8.9: Comparison Goods Gross Floorspace Equivalent for Retail Warehouses Resulting from Increase in Market Share to 35% and 40% and increase in Inflow from Fringe Zones of 50% = Assumed gross to net ratio of 80%.

	2017	2026
Comparison Goods Floorspace (sq m) – 2.5% Increase in Market Share	3,212	35,727
Comparison Goods Floorspace (sq m) – 5% Increase in Market Share	12,879	51,325
Comparison Goods Floorspace (sq m)) – 5% Increase in Market Share + Increased Inflow	14,638	53,986

8.37 The above tables show that with an increase in market share and possible increase in inflow within the PCA, there would be a sufficient surplus in available expenditure to support new comparison goods floorspace.

8.38 It is considered that if market share were to increase to 40%, this would also result in increased inflow from the 'Fringe' Zones adjacent to the PCA of around 50% from their base of around £5.5 million.

8.39 The findings illustrated in Tables 8.7 to 8.9 should be treated with caution for several reasons. Firstly, any projections across such an extended time period should be regularly revisited to ensure that any changes in population and expenditure growth rates over time can be taken into account. Secondly, the translation of monetary values to floorspace will vary dependant on the operator and type of facility. Finally, the sensitivity analysis results are dependent on the increase in market share of the District – to achieve this, additional floorspace would need to be provided to increase the retention of expenditure within the District and stem leakage to competing facilities.

District Wide/PCA Recommendations

8.40 Should Selby District Council consider it appropriate to increase the market share of the Primary Catchment Area, this could be achieved through an improvement in comparison goods facilities. This should be directed towards existing Centres in line with national planning policy and Selby Town Centre would represent the most appropriate location for this development. The appropriate scale of any additional new floorspace provided within Selby Town Centre to achieve this uplift in market share would be approximately 10,000 sq m by 2017.

8.41 Suitable sites within or adjacent to Selby Town Centre should be considered for accommodating such provision. The provision of modern units and the creation of a ‘critical mass’ should increase the attractiveness of Selby Town Centre to some higher-order retailers. This would enable residents of the District to meet more of their higher-order shopping needs locally, retaining more expenditure within the local economy and reducing the need to travel.

Zone 1 - Selby Findings

8.42 Zone 1 has a comparison goods market share of 41.1% which as with its equivalent convenience goods market share is appropriate to the scale of facilities within the zone and compares favourably with the comparable figures for other market towns. There is also a large amount of inflow from other zones within the PCA and ‘Fringe’ zones (£27.13m in 2009) which reflects the importance of the facilities in this Zone (principally Selby Town Centre and Three Lakes Retail Park) compared to other Zones in the Study Area.

8.43 Table 8.10 below displays the comparison goods capacity to support new floorspace over the study period within Zone 1 – Selby.

Table 8.10: Comparison Goods Surplus Expenditure Available to Support New Floorspace in Zone 1 – Current Market Share

	2017	2026
Comparison Goods Surplus Expenditure (£m)	-£12.65	£38.71

8.44 As with the position for the whole of the PCA, there is negative capacity for comparison goods floorspace within Zone 1 until 2020 at current market share (see full tables in **Appendix 5**). The negative capacity identified is likely to be accounted for by under-trading of out-of-centre retail facilities and comparison goods floorspace within foodstores compared to their national averages.

8.45 The above table should be treated with caution in that it does not take into account the increase in market share and inflow that would be likely to occur as a result of the implementation of the commitments. The comparison goods turnover of commitments, assuming all are implemented, in 2009, would be circa £21 million. This represents an increase in turnover of circa 20% compared to existing provision. Potential increases in market share are tested below.

Impact of Non-Implementation of Commitments on the Zone 1 Findings

8.46 As with the convenience analysis, the majority of the turnover of commitments within Zone 1 is accounted for by the proposed turnovers of the Morrisons and Tesco extensions (£8.06m and £6.06m respectively for comparison goods).

8.47 Should either or both of these extant permissions not be implemented then there would be the following amounts of surplus capacity by 2017 and 2026:

- Non Implementation of Morrisons: -£3.01 million by 2017, £50.5 million by 2026;
- Non Implementation of Tesco: -£5.43 million by 2017, £47.50 million by 2026;
- Non Implementation of Both: £4.32 million by 2017, £59.57 million by 2026.

8.48 Hence, assuming that both are not implemented, there will be a positive, although modest, surplus of expenditure to support additional comparison floorspace in Zone 1 by 2017. By 2026, this modest surplus has increased significantly due to the year-on-year growth in expenditure per head exceeding the growth in the turnover of existing facilities. As previously set out, the findings to 2026 should be treated with caution as population and expenditure growth rates may be subject to significant change over a time period of this length.

Zone 1 - Sensitivity Testing

8.49 Zone 1 currently has a market share of 41.1%. For illustration purposes, increases to 45% and 50% have been modelled.

8.50 It is considered that these market shares could be achieved if there was an improvement of comparison goods shopping offer and facilities within Selby Town Centre. It is unrealistic to model a higher market share due to the proximity of Zone 1 to other Centres (notably York, Leeds and Doncaster) that have more substantial, higher-order comparison goods shopping provisions.

8.51 The sensitivity analysis findings are illustrated in Table 8.11 below:

Table 8.11: Comparison Goods Surplus Expenditure Available to Support New Floorspace in Zone 1 – Selby – Increases in Market Share to 45% and 50%

	2017	2026
Comparison Goods (£m) – 45% Market Share	-£3.04	£54.72
Comparison Goods (£m) – 50% Market Share	£9.22	£75.04

8.52 As with the current market share scenario, the allowance for the turnover of committed floorspace results in a limited capacity for additional comparison floorspace until 2018 (see full tables in **Appendix** 5) assuming an increase in market share to 45%, or 2016, assuming an uplift to 50% market share.

Zone 1 – Recommendations

8.53 As with the PCA as a whole, should Selby District Council consider it appropriate to increase the market share of Zone 1, there could be a modest amount of surplus comparison goods capacity available to support new floorspace towards the mid-point of the study period (2015-2018). If some of the commitments are not implemented, additional capacity could be created as these consents expire.

8.54 It is considered that overall however, as the facilities within Zone 1 (principally Selby Town Centre and Three Lakes Retail Park) draw a significant proportion of trade from outside Zone 1, the PCA or Study Area as a whole should be viewed as the appropriate Catchment Area for similar facilities as opposed to the more limited Zone 1.

Zone 2 – Sherburn in Elmet Findings

8.55 Zone 2 has a very low comparison goods market share of 4.5%. This reflects the relatively poor provision of such facilities within the Zone. There is also only a small amount of inflow to Zone 2 from other Zones within the PCA and 'Fringe' Zones (£0.63m in 2009).

8.56 Table 8.12 below displays the comparison goods capacity to support new floorspace over the study period within Zone 2 – Sherburn in Elmet.

Table 8.12: Comparison Goods Surplus Expenditure Available to Support New Floorspace in Zone 2 – Current Market Share

	2017	2026
Comparison Goods Surplus Expenditure (£m)	-£0.58	£1.12

8.57 As the existing market share of Zone 2 is low, there is limited capacity available to support additional comparison goods floorspace even at the end of the study period in 2026 (the analysis does not show any capacity until 2021).

8.58 There are no comparison goods commitments in Zone 2. Potential increases in market share are tested below.

Zone 2 – Sensitivity Testing

8.59 Increases in market share to 7.5% and 10% from the base of 4.5% have been tested for Zone 2. It could be difficult to achieve a higher increase in market share due to the local geography and nature of the existing provision of facilities within the Zone.

8.60 The sensitivity results are presented in Table 8.12 below.

Table 8.12: Comparison Goods Surplus Expenditure Available to Support New Floorspace in Zone 2 – Sherburn in Elmet – Increases in Market Share to 7.5% and 10%

	2017	2026
Comparison Goods (£m) – 7.5% Market Share	£1.84	£5.14
Comparison Goods (£m) – 10% Market Share	£3.88	£8.54

8.61 As can be seen, even allowing for an increase to 10% in market share there is still limited additional capacity to support new floorspace to 2026.

Zone 2 Recommendations

8.62 Despite Zone 2 containing the defined Local Service Centre Sherburn in Elmet, it has a very low existing market share of 4.5%.

8.63 This is due to the proximity of areas of the zone to higher order centres such as Castleford and Pontefract to the West, and Selby Town Centre immediately to the East. Residents of Zone 2 spend £6.37m in Selby, £5.91m in Castleford and £6.53m in Pontefract compared to only £2.43m in Sherburn in Elmet[60].

8.64 It is recommended that Selby District Council seek to support a modest improvement in facilities that would seek to raise the market share of Zone 2 to around 10%. This 'modest' improvement would take the form of up to a maximum of an additional 1,500 sq m net comparison floorspace by 2021. This would promote more sustainable shopping patterns through allowing more of residents' shopping needs to be met locally whilst not challenging Selby Town Centre's status as the primary shopping within the PCA for residents within the Selby District.

8.65 Any new floorspace proposed of an appropriate scale (as identified above) that would serve the relevant catchment area should be located in Sherburn in Elmet as a first priority, in line with national planning policy advice.

Zone 3 – Tadcaster Findings

8.66 Zone 3 has a comparison goods market share of 9.0%, less than Zone 1 (41.1%) but higher than Zone 2 (4.5%). This reflects the provision and volume of floorspace in each of the zone's main centres (Selby is approximately seven times bigger than Tadcaster, which in turn is four times the floorspace of Sherburn).

8.67 Most of Zone 3 also only lies a short drive away from York along the A64 which is reflected in the high market share of York from Zone 3 (£25.94m spent in York on comparison goods by residents of Zone 3 compared to £3.86m in Tadcaster). However, there is a modest amount of inflow to

[60] From Comparison Table 6 of Appendix 5.

Zone 3 from other Zones within the PCA and 'Fringe' Zones (£2.52m in 2009).

8.68 Table 8.13 below displays the comparison goods capacity to support new floorspace over the study period within Zone 3 – Tadcaster.

Table 8.13: Comparison Goods Surplus Expenditure Available to Support New Floorspace in Zone 3 – Current Market Share

	2017	2026
Comparison Goods Surplus Expenditure (£m)	-£2.63	£0.40

8.69 As a result of a combination of low Total Available Expenditure (the lowest of the PCA Zones), low market share and the turnover of existing floorspace, there is no surplus expenditure available to support new floorspace until 2026. Even in 2026, the surplus identified is extremely limited and would only support less than 200 sq m of net comparison floorspace.

Zone 3 – Sensitivity Testing

8.70 Potential increases in market share to 12.5% and 15% have been sensitivity tested and are summarised in Table 8.14 below.

Table 8.14: Comparison Goods Surplus Expenditure Available to Support New Floorspace in Zone 3 – Tadcaster – Increases in Market Share to 12.5% and 15%

	2017	2026
Comparison Goods (£m) – 12.5% Market Share	-£0.21	£4.42
Comparison Goods (£m) – 15% Market Share	£1.51	£7.29

8.71 Assuming an increase in market share to 12.5%, there is no capacity for additional comparison floorspace until 2018 and then only limited capacity by 2026 (£4.4 million).

8.72 If Zone 3's market share is increased further to 15%, a limited capacity of £1.5 million is available in 2017, growing to £7.3 million by 2026.

Zone 3 - Recommendations

8.73 There is limited capacity for additional floorspace within Tadcaster, even allowing for a modest increase in market share to 15%.

8.74 Given this, coupled with the underperformance of existing facilities identified by the household survey[61], it is considered that no substantial additional comparison goods floorspace should be actively promoted in Tadcaster throughout the study period.

8.75 It may be necessary to secure small improvements to meet local needs but these should be assessed on a case by case basis. In addition, across the Study Period, development opportunities may come forward within the Town Centre. Subject to these fully according with the relevant policy tests, these should be supported by the Local Planning Authority as an opportunity to add to the vitality and viability of the Centre.

Zone 4 – Eggborough

8.76 A review of the capacity within Zone 4 (Eggborough / South Selby) has not been produced as part of this Study.

8.77 The characteristics of the zone and current non shopping patterns (the survey revealed that none of the respondents visit facilities within Zone 4, only 10% undertake their main non food shopping trip at facilities in Zone 1, and the remainder visit to centre outside of the PCA including Doncaster (41%) and York (31%))[62], illustrate that the zone does not act as a catchment for any centres within the zone and residents look further afield to the surrounding centres (including Selby) to meet their non food needs.

8.78 Therefore, due to the lack of a sizeable centre within Zone 4 and the existing shopping characteristics, it would not be appropriate to capture the leakage of expenditure from the zone to support additional floorspace within this area. Hence, it is recommended that the non food offer within Zone 1 is improved, to seek to increase the retention of non food expenditure from Zone 4 within the District.

---

[61] The Household Survey identified £10.09m being spent by PCA residents in Sherburn in Elmet compared to £5.54m in Tadcaster, despite the latter having more comparison goods floorspace.

[62] Using Clothing and Footwear as a Indicator – See Table 4a of **Appendix 5**

9. Commercial Analysis

Introduction

9.1 This Chapter includes an analysis of the existing commercial floorspace within Selby, Tadcaster and Sherburn in Elmet Town Centres. It seeks to identify the types of commercial floorspace to be accommodated within each of the centres and for appropriate uses elsewhere including car showrooms and builders' merchants.

Methodology

9.2 The analysis is informed by the most recent Employment Land Study, undertaken by GVA Grimley in July 2007 and recent land use surveys of Selby, Tadcaster and Sherburn town centres undertaken by Selby District Council in 2008, updated and supplemented by data gathered during town centre visits undertaken by Drivers Jonas in July 2009. The analysis of commercial floorspace in Selby Town Centre has also been informed by the most recent Experian Goad plan, published in 2008. Other data sources utilised are EGi, Promis and Focus.

9.3 The analysis of Selby Town Centre is benchmarked against centres with a similar role and function[63] to identify if there is an over or under provision of commercial floorspace. This benchmarking, alongside the future trends in commercial floorspace established in Chapter 3 of the Study, defines if there is a need to promote (or restrict) each type of commercial floorspace within the District and inform future policies for these uses and their locations in policy terms.

9.4 For the purposes of this assessment we have defined 'commercial' uses as those falling within Class A2 'Financial and Professional' and Class B1 'Business'.

9.5 In terms of Goad definitions, these two Use Classes can be categorised as either:

[63] Towns designated with a similar role and function within the Yorkshire and Humber RSS e.g. Beverley and Wetherby

- Services[64] - including Hairdressing, Beauty and Health, Launderettes and Dry Cleaners, Travel Agents, Banks and Financial Services, Building Societies, Estate Agents and Auctioneers; or,
- Miscellaneous: including Employment, Careers, Post Offices and Information.

9.6 Car showrooms and builders' merchants do not fall within any particular use class and are defined as 'Sui Generis'. These uses will be commented upon separately.

GVA Grimley Employment Land Study (July 2007)

9.7 In July 2007 GVA Grimley published an Employment Land Study for the Selby District, as part of the preparation for the Local Development Framework (2007).

9.8 The Study provided a detailed assessment of future employment land and supply, taking account of econometric forecasts and business surveys, take-up rates and market conditions, reflecting the wider role of the Selby District within the Leeds City Region as well as the wider Yorkshire and Humber Region.

9.9 We provide a summary of the key Study conclusions and recommendations below:

- The next fifteen years and beyond will be a period of challenge and opportunity for the Selby District with the local economy showing signs of restructuring towards a modern service economy. There remains a strong stock of indigenous employment activity within the District - specifically linked to manufacturing and distribution / warehousing.
- The District also currently provides a dormitory role, providing a highly qualified workforce to adjacent centres, including York and Leeds. GVA Grimley advise that this can only be reversed through the delivery of higher value service sector employment activities within the District.
- At headline level there is a significant over-supply of employment land over the emerging plan period. However, over 20% of the total allocated land supply (in the Selby District Local Plan) is currently 'highly constrained' and a significant proportion also 'medium constrained'. There are no unconstrained sites or 'low

[64] Some of the uses classified as 'Services' by Goad (such as Travel Agents and Hairdressers) are in fact within the A1 Use Class.

constrained' sites allocated within the District. The viability of development for employment purposes across the area is therefore in question.

- There is a need to focus upon a supply-led approach economic development within the District. GVA Grimley advise that by bringing forward an appropriate range of employment land (of the appropriate scale in the right location) there is an opportunity to ensure that a portfolio of sites for business and sustainable growth across the District.
- The portfolio of sites identified by GVA Grimley include prime 'Grade A' office core within Selby Town Centre including the area to the north of the railway line, as well as office provision at key sites within the urban hinterland (bound by the bypass) for B1 uses as part of mixed use sites, including the land at Olympia Park. These sites are likely to include a proportion of residential uses. It is advised that the scale and phasing of development in the urban hinterland are given careful consideration and assessed against appropriate criteria.
- Tadcaster offers significant opportunities to develop higher value knowledge related facilities - which are underpinned by the strengths of Tadcaster's resident population in terms the high levels of economic activity, skills and qualification, industrial profile and occupational profile. Tadcaster is in a key strategic location.
- Sherburn in Elmet, and the A63 corridor have existing market strengths. The supply-led approach advocates the promotion of this location, maximising the potential as an established and affordable alternative to the immediate A1(M) and M62 corridors.
- Eggborough / J34 of M62 and the A19 are highlighted as strategic employment locations.
- No employment de-allocations are recommended to be made in the District. All existing employment allocations are to be protected.

Existing Provision

Selby Town Centre

9.10 The existing shopping and commercial centre as outlined in the Selby District Local Plan (February 2005) can broadly be described as encompassing Gowthorpe, Finkle Street, Micklegate, The Crescent, Brook Street, and Ousegate.

9.11 Selby Town Centre is focused primarily on shopping and service uses. According to a recent survey by Selby District Council (which has been updated for this Study), Selby Town Centre comprises some 65,649 sq m (706,640 sq ft) of commercial floorspace.

9.12 Within the Town Centre there is a cluster of office provision along Park Street with some offices around Selby Abbey. There are some vacant properties for commercial use along Brook Street, to the south west of Gowthorpe.

9.13 Park Street is located off The Crescent and contains primarily office space. Facing Park Street is the Park which provides an attractive working environment.

9.14 Surrounding Selby Abbey to the north are a number of buildings which are used primarily for offices and dwellings the style of which complement the Abbey and create a sense of place and identity for Selby Town Centre.

9.15 Selby Business Park is located outside of the town centre on Bawtry Road and accommodates approximately 18 businesses and a hotel. Development is still ongoing on this site, most notably for purpose built office accommodation.

Breakdown of Units / Floorspace

9.16 The Town Centre Survey undertaken by Selby District Council in 2008 categorised all units in terms of their use. This survey data has been updated by Drivers Jonas LLP in July 2009.

9.17 The two categories relating to commercial uses are as follows:

- Services - including Hairdressing, Beauty and Health, Launderettes and Dry Cleaners, Travel Agents, Banks and Financial Services, Building Societies, Estate Agents and Auctioneers; and,
- Miscellaneous: including Employment, Careers, Post Offices and Information.

9.18 Selby Town Centre has the following breakdown of 'commercial' units and floorspace:

Table 9.1: Number of units in Selby Town Centre Boundary (Local Plan 2005)

Source Council Data 2008 (Updated by Drivers Jonas LLP – July 2009)

Unit	Number of Units	Percentage	National Average (%)
Services	102	27.49	18.97
Miscellaneous	46	12.40	1.27

Table 9.2: Floorspace in Selby in Selby Town Centre Boundary (Local Plan 2005)

Source: Source Council Data 2008 (Updated by Drivers Jonas LLP - July 2009)

Unit	Floorspace	Percentage	National Average (%)
Services	12,020	18.42	12.42
Miscellaneous	6,963	10.61	1.04

9.19 In terms of number of units, Selby Town Centre has a higher than average provision in both services uses (27.5% against a national average of 18.97%) and miscellaneous uses (12.4% against a national average of 1.27%). This figure is much higher than the national average as the national average is calculated utilising all centres' floorspace including larger Regional Centres that are likely to contain much lower proportion of 'miscellaneous' uses by nature of their size[65].

9.20 In terms of quantum of floorspace, Selby Town Centre has a higher provision of services, some 6% above the national average. The Town Centre also has a well above average provision of miscellaneous floorspace.

9.21 The Goad (2008) plan for Selby Town Centre provides slightly different data in terms of the breakdown of units and floorspace, as a result of the town centre boundary utilised (see Chapter 5):

65 For example, a city such as York may have five times the number of retail units that Selby has. It is however unlikely to have five times the number of Town Halls, Housing Offices and Masonic Halls for example that constitute some of the 'miscellaneous' uses.

Table 9.3: Number of Units In Selby.

Source: Goad 2008.

Unit	Number of Units	Percentage	National Average (%)
Services	50	21.93	18.97
Miscellaneous	2	0.88	1.27

Table 9.4: Floorspace in Selby.
Source: Goad 2008.

Unit	Floorspace	Percentage	National Average (%)
Services	4,961	11.57	12.42
Miscellaneous	641	1.50	1.04

9.22 Goad (2008) records that the service provision in Selby Town Centre is lower in terms of both number of units and floorspace than the Selby Town Centre Survey (2008) data which was updated in July 2009.

Tadcaster Town Centre

9.23 Tadcaster's existing shopping and commercial centre, as outlined in the Selby District Local Plan (February 2005), can broadly be described as encompassing Bridge Street, High Street, Commercial Street, Kirkgate, Westgate and Chapel Street. There is also an established employment area to the west of the Town Centre which includes largely industrial and workshop space.

9.24 Tadcaster has a long standing association with the brewing industry. There are three breweries within the Town, which continue to play a significant role in terms of both character and employment. The three breweries are the Tower Brewery, John Smiths Brewery and Samuel Smith's Old Brewery.

Breakdown of Units / Floorspace

9.25 The Town Centre Survey undertaken by Selby District Council in 2008 categorised all units in terms of their use. This survey data has been updated by Drivers Jonas LLP in July 2009.

9.26 As above the commercial uses were broken down into the two categories of 'service' and 'miscellaneous', as categorised by Goad.

9.27 Tadcaster Town Centre has the following breakdown of 'commercial' units and floorspace:

Table 9.5: Number of units in Tadcaster.
Source Council Town Centre Survey 2008 (Updated by Drivers Jonas LLP July 2009)

Unit	Number of Units	Percentage	National Average (%)
Services including offices	30	25.00	18.97
Miscellaneous	21	17.50	1.27

Table 9.6: Floorspace in Tadcaster.
Source Council Town Centre Survey 2008 (Updated by Drivers Jonas LLP July 2009)

Unit	Amount of Floor Space	Percentage	National Average (%)
Services including offices	3,292	19.41	12.42
Miscellaneous	2,934	17.30	1.04

9.28 In terms of number of units, there is clearly an over representation of service uses at 25% against a national average of 18.97%. Tadcaster is also significantly over-represented in terms of miscellaneous units (17.5%) against the national average (1.27%). As with Selby Town Centre, this figure is higher than the national average due to the inclusion of centres in the calculation which would have much lower proportions of 'miscellaneous' floorspace when compared to Tadcaster.

9.29 In terms of quantum of floorspace, Tadcaster is again over-represented in relation to service and miscellaneous uses.

Sherburn in Elmet Town Centre

9.30 Sherburn in Elmet Town Centre as outlined in the Selby District Local Plan (February 2005) can broadly be described as encompassing Finkle Hill and Low Street with some subsidiary streets and yards. The town centre contains a number of successful local businesses.

9.31 Sherburn Industrial Estate is located just outside of Sherburn and is a well established location with a mixture of industrial, office and warehouse space. Approximately 3,000 people[66] are currently employed on the site, including those at Eddie Stobart (logistics), OMEC (engineering) and Pecan Deluxe (food manufacture).

Breakdown of Units / Floorspace

9.32 The Town Centre Survey undertaken by Selby District Council in 2008 categorised all units in terms of their use. This survey data has been updated by Drivers Jonas LLP in July 2009.

9.33 As above the commercial uses were broken down into the two categories of 'service' and 'miscellaneous', as categorised by Goad. Sherburn Town Centre has the following breakdown of 'commercial' units and floorspace:

Table 9.7: Number of units in Sherburn in Elmet

Source Council Town Centre Survey 2008 (Updated by Drivers Jonas LLP July 2009)

Unit	Number of Units	Percentage	National Average (%)
Services	22	42.31	18.97
Miscellaneous	0	0.00	1.27

Table 9.8: Floorspace in Sherburn in Elmet

Source Council Town Centre Survey (updated by Drivers Jonas LLP July 2009)

Unit	Amount of Floor Space	Percentage	National Average (%)
Services including offices	2,073	30.16	12.42
Miscellaneous	0	0.00	1.04

9.34 In terms of number of units there is an over-representation of services (including offices) within Sherburn Town Centre with 42.3% of the units, against a national average 18.97%. There is also a significant over-representation of service uses in terms of floorspace.

9.35 The surveys undertaken revealed that there is no provision of 'miscellaneous' uses within Sherburn Town Centre.

[66] www.york-england.com

Comparison with Other Centres

Market Take-Up

9.36 The existing office market within the Selby District has been compared with other centres within Yorkshire and Humber. In particular, we have sought to compare Selby with towns designated within the same hierarchy in the Yorkshire and Humber Plan (RSS) (May 2008) to establish how it is performing as an office location.

9.37 There are no official sources for market take-up. Information used in this report has come from the Estates Gazette database of office deals. It must be acknowledged that this represents only an imperfect window on the operation of local markets.

9.38 Data has been collected for office deals which have been completed since 1st January 2009. In summary the following office rents have been achieved:

Table 9.9: Regional Office Deals in 2009

Source: EGi (August 2009)

Location	Floorspace (sq m / Sq ft)	Agreed Rent (per annum)
Regional Cities		
Hull	420 sq m / 4,525 sq ft	£132.76 per sq m/ £12.33 per sq ft
Leeds	203 sq m / 2,180 sq ft	£161.46 per sq m / £15 per sq ft
Bradford	57 sq m / 618 sq ft	£143.69 per sq m / £13.35 per sq ft
Sheffield	39 sq m / 415 sq ft	£159.53 per sq m/ £14.82 per sq ft
Sub Regional Cities and Towns		
Harrogate	36 sq m / 390 sq ft	£151.80 per sq m/ £14.10 per sq ft
Rotherham	467 sq m / 5,023 sq ft	£145.31 per sq m/ £13.50 per sq ft
Barnsley	564 sq m / 6,070 sq ft	£145.31 per sq m/ £13.50 per sq ft
Doncaster	128 sq m/ 1,380 sq ft	£136.50 per sq m/ £12.68 per sq ft
Principal Towns		
Dinnington	142 sq m / 1,532 sq ft	£115.93 per sq m/ £10.77 per sq ft
Selby	165 sq m / 1,778 sq ft	£139.93 per sq m/ £13 per sq ft
Beverley	142 sq m / 1,532 sq ft	£91.34 per sq m/ £8.49 per sq ft

Location	Floorspace (sq m / Sq ft)	Agreed Rent (per annum)
Driffield	53 sq m / 570 sq ft	£108.58 per sq m/ £10.09 per sq ft
Shipley	650 sq m / 7,000 sq ft	£148.01 per sq m/ £13.75 per sq ft
Wetherby	49 sq m / 525 sq ft	£78.94 per sq m/ £7.33 per sq ft

9.39 As shown in the table above, in terms of office deals achieved during 2009, Selby is performing on a par with other 'Principal Towns', and has also matched some of the rents achieved within Sub-Regional Cities such as Doncaster and even the Regional City of Hull.

Availability

9.40 Data has also been collected utilising EGi Property Link for office space currently available for rent within Selby and other 'Principal Towns' in Yorkshire and the Humber.

Table 9.10: Office Space currently available in Yorkshire and the Humber 'Principal Towns'

Source: EGi Property Link August 2009

Location	Address	Floorspace (sq ft)	Rent (per annum)
Selby	St James Terrace	1,700 sq ft	£8.82 per sq ft
Beverley	Norwood Road	1,045 sq ft	£7.65 per sq ft
Castleford	Leeds Road	1,183-4,314 sq ft	£17 per sq ft
Keighley	Clara House	8,100 sq ft	£6.70 per sq ft
Knaresborough	Caven House	-	£9 per sq ft
Pontefract	King Charles II House	-	£7 per sq ft
Whitby	The Ropery	-	£15 per sq ft

9.41 As shown, the office space currently available within Selby is seeking to achieve similar rental values to other centres within the Region of similar size.

Other Commercial Uses

Car Showrooms

9.42 Car Showrooms fall into the category of Sui Generis uses (they do not fall into other Use Classes). Generally, these type of uses are not located within town centres as they require sufficient space for the displaying of cars and benefit from being easily accessible by car, with parking available for customers.

9.43 The District of Selby is reasonably well provided for through eight car showrooms / dealerships, including the following:

- M Trueman - Station Road;
- Selby Ford - Canal Road;
- Walkers of Selby - Flaxley Road;
- Topflite Motors - Brook Street;
- Michaels Garage - Chapel Haddlesey;
- Haws & Barkers Kia – South Milford;
- Lawtons of Tadcaster;
- Robinson of Colton.

9.44 The car showrooms within Selby are largely located on sites on the edge of the town centre, such as Walkers of Selby, situated on Flaxley Road. One exception is M Trueman which is located in closer proximity to the Town Centre, adjacent to Selby train station.

Builders' Merchants

9.45 Builders' Merchants are also classed as a 'Sui Generis' use (they do not fit into a particular Use Class). Builders' Merchants are generally located in edge or out of centre locations, often operating within an industrial / trade park. Builders' merchants generally require being easily accessible by car/van, and requiring sufficient space for the loading and unloading of goods.

9.46 Builders' Merchants by definition have a trade counter within them, for the sale of goods directly and predominantly to members of trades.

9.47 Selby appears to have a reasonable representation of builders' merchants, including the following:

- Travis Perkins Trading Co. Ltd - Bawtry Road Industrial Estate;
- Moorside Building Supplies Ltd - Hull Road;
- Howdens Joinery Co - The Vivars Industrial Centre;
- Jewson Ltd - Three Lakes Industrial Estate; and,
- MKM – Selby Business Park.

9.48 The builders' merchants within Selby are primarily situated within Industrial Estates in out of town locations.

Conclusions

9.49 As highlighted by GVA Grimley in the Employment Land Study published in July 2007, the Selby District is now entering a period of challenge and opportunity. The Study identified that while there continues to be a strong manufacturing and distribution presence within the District, it is anticipated that there will be some shift towards a more modern service economy over the next decade.

9.50 It was also identified that the District to some extent fulfils a dormitory role for larger centres within Yorkshire and Humberside such as York and Leeds, and despite there being evidence of a skilled workforce living within the District many are travelling outside of the District for work purposes.

9.51 As GVA Grimley recommend, the delivery of higher value service sector employment activities within the District would seek to reverse this trend, with the focus upon a supply-led approach to promoting economic development within Selby, Tadcaster and Sherburn in Elmet.

9.52 The District is well connected within the region, particularly due to the good road links via the M62 and A1(M) motorways - this benefit should be built upon for the promotion of new commercial opportunities within the District.

9.53 In terms of the future supply of employment land within the District there is currently an oversupply, however, a significant proportion of the allocated employment land is either highly or medium constrained, restricting its development potential.

9.54 We would therefore recommend that new commercial floorspace is promoted as part of mixed use schemes where appropriate. Within town centre locations this integrated approach to land use would help promote both sustainable working practices and vitality in town centres.

9.55 Evidently, there is some new floorspace proposed within the District in the pipeline, particularly for new Class B1 uses, thus increasing the provision of high quality commercial floorspace. However, alongside this development there should also be a focus upon the improvement of the existing provision of both Class B1 (Business) and Class A2 (Financial and Professional) uses.

9.56 In raising the standard of existing floorspace, alongside the development of new floorspace, the Selby District will improve its commercial offer across the board.

9.57 Within Selby Town Centre, surveys undertaken have identified a high representation of service uses. This suggests that there should be a focus on improving the existing provision of Class B1 and A2 uses, rather than actively seeking new ‘commercial’ floorspace to accommodate service uses in Town Centres. Within Selby Town Centre, the attractiveness of the Abbey and the pleasant working environment of the surrounding streets should be maximised.

9.58 Research into office deals achieved during 2009 (with the caveat that the number of deals overall is not high) has revealed that Selby is currently performing on a par with other ‘Principal Towns’. Furthermore, the office space currently available within Selby is seeking to achieve similar rental values to other centres within the Region of similar size. It is important that the current high level of rents being achieved is maintained through the continuous improvement of existing provision to enable it to continue to compete effectively with other centres within the Region.

9.59 The surveys revealed that both Tadcaster and Sherburn in Elmet were well represented in terms of commercial floorspace for service uses, and therefore the focus should be upon improving the existing provision rather than the creation of new floorspace.

9.60 There are a number of business parks within the District, which provide a large quantity of Class B1 floorspace, including the Selby Business Park and Sherburn Industrial Estate. These provide high quality, purpose built and accessible office space within the District. It is important that the quality of these facilities is maintained.

Car Showrooms and Builder's Merchants

9.61 We consider that car showroom and builders' merchant's uses are generally suited to edge or out of centre sites.

9.62 We consider that appropriate conditions will need to be imposed on these types of uses to control operation so that they do not become Class A1 retail uses. This will protect against such uses slowly morphing into retail uses overtime through the trade counter element being gradually increased, and thus potentially impacting detrimentally upon the retail facilities within the town centres.

9.63 We would also recommend that appropriate policies are in place to protect against these types of uses occupying vacant Class A1 units within town centres unless a particular need case can be demonstrated in Selby Town Centre.

9.64 In addition, to discourage these uses from being developed on high priority employment allocations, we recommend that appropriate policies are put in place to protect the most important employment allocations, in order that future requirements for these uses are directed to lower grade employment allocations/non office park locations.

10. Leisure Analysis

Introduction

10.1 This Chapter of the Selby Retail, Commercial and Leisure Study 2009 analyses whether there is the capacity for additional leisure and recreation facilities within the District.

10.2 The analysis has been informed by the Household and Street Surveys carried out on behalf of Selby District Council by NEMS Market Research in July and August 2009. These surveys sought to reveal the shopping and leisure patterns of the survey area population, including the use of the three key centres (Selby, Tadcaster and Sherburn in Elmet) as destinations for recreation and leisure purposes.

10.3 The leisure assessment is also informed by a Sports and Leisure Report supplied by CACI in August 2009. The analysis uses data derived from the data supplied by CACI to inform the capacity conclusions. Other data sources utilised include Experian Micro-Marketer, EGi Research and Dodona's Report on Cinemagoing 2009.

10.4 The analysis considers the current use of leisure facilities within the District as a whole, followed by an analysis of the individual leisure and recreational uses and an assessment of whether the District has capacity for additional facilities.

Selby District Leisure Market Share

10.5 The Household Survey results revealed that across the PCA, only 36% of respondents visit centres within the PCA as their main leisure destination.

10.6 Utilising average expenditure per head figures on leisure goods and services for the PCA, obtained from Experian's Micro-Marketer, the total available leisure expenditure within the District has been calculated. Using the survey results, the amount of the expenditure identified which is being spent at leisure facilities within the PCA has been assessed, to identify the market share.

10.7 The full analysis is contained with Tables 1-6 of **Appendix 6**. Table 10.1 below illustrates the leisure market shares of the individual zones and PCA/District as a whole.

Table 10.1: PCA Leisure Market Shares

	Zone 1	Zone 2	Zone 3	Zone 4	Total PCA
Market Share	39.5%	18.6%	22.4%	3.8%	35.6%

10.8 An overall PCA market share of 35.6%, given the strong competition to the District from surrounding centres and facilities, is reasonably healthy. However, looking at the individual zonal market shares for Zones 1-3, arguably, particularly in the case of Zone 1, these could be increased to reflect the role of the key centres within each zone within the retail hierarchy.

10.9 Given the diverse nature of leisure and recreation uses, in order to make recommendations on whether there is the capacity for additional facilities within the PCA, the individual uses have been analysed below and conclusions drawn for each type of facility as follows:

- Restaurants and Bars;
- Cinemas;
- Ice Rinks;
- Water Based Recreation;
- Health and Fitness;
- Bingo; and,
- Bowling.

Restaurants and Bars

Existing Provision

10.10 The Town Centre Surveys, updated as part of the Health Checks, revealed the following number of units and floorspace utilised for Pub, Café and Restaurant uses in the three centres, compared to the national average:

Table 10.2: Number of Units in Pub, Café and Restaurant Uses

Source: SDC Data 2008 (Updated by Drivers Jonas LLP – July 2009)

Centre	Number of Units	% of Units	National Average (%)
Selby	47	12.67%	14.9%
Tadcaster	17	14.17%	
Sherburn in Elmet	10	19.23%	

Table 10.3: Floorspace in Pub, Café and Restaurant Uses

Source: SDC Data 2008 (Updated by Drivers Jonas LLP – July 2009)

Centre	Floorspace (sq m)	% of Units	National Average (%)
Selby	7,334	11.17%	9.63%
Tadcaster	2,873	16.94%	
Sherburn in Elmet	1,176	17.11%	

10.11 All centres have an above average proportion of floorspace utilised for restaurant and bar uses, and only Selby has a below average number of units.

10.12 We have also calculated the PCA's market share for this type of leisure service only, based on the Household Survey Results, using the same approach as above. This analysis is contained in Tables 5c, 5d and 6d of **Appendix 6**. This has been calculated through isolating the main leisure destination quoted at Question 18 of only those respondents who either answered either 'restaurants' or 'bars and pubs' to Question 20 of the survey.

10.13 Table 10.4 below illustrates the 'restaurant and bar' market shares of the individual zones and PCA/District as a whole.

Table 10.4: PCA Leisure Market Shares – Restaurant and Bars Only

	Zone 1	Zone 2	Zone 3	Zone 4	Total PCA
Market Share	33.8%	23.1%	23.3%	0%	29.8%

10.14 Hence, the analysis above shows that although there is already a good level of restaurant and bar provision within the District, it retains less than a third of expenditure available for this sector.

10.15 The survey results reveal that of the remaining two thirds of expenditure available within the PCA, the majority is being spent in York, which 40% of the PCA use as their main leisure destination (those who answered 'restaurants' or 'bars and pubs' to Question 20 only), followed by Castleford (12.6%) and Leeds (5.2%).

10.16 Whilst the regional hierarchy will always result in an element of leisure expenditure flowing to higher order centres such as York, even allowing for once or twice monthly trips to these higher centres, the PCA should be aiming for a higher retention of expenditure within the PCA than 30%.

Quantitative Need

10.17 As with the analysis of potential retail floorspace within the District, we have modelled a series of scenarios based on the existing market share (29.8%) and what could be supported if this market share was increased by 10% and 20%.

10.18 The analysis of the potential floorspace capacity follows a step by step methodology:

(i) Identify the total expenditure available within the PCA to spend on restaurants and bars from Experian Micro-Marketer, and project forward to the test years;

(ii) Apply the PCA market share to identify the amount retained within the PCA;

(iii) Calculate the inflow of expenditure from outside the PCA, based on the findings of the Household Survey;

(iv) Add the retained and inflow expenditure to identify the total expenditure available to support restaurant and bar floorspace within the PCA;

(v) Assuming an equilibrium between available expenditure and existing provision turnover in the base year, calculate the growth in expenditure between the base and test years available to support additional restaurant and bars uses;

(vi) Allow for the turnover of any commitments which will come forward before the test years;

(vii) Calculate the residual surplus growth in expenditure, following commitments, available to support additional restaurant and bars uses; and,

(viii) Apply an average turnover per sq m for the PCA to convert the surplus into the floorspace which can be supported.

10.19 Table 7 of **Appendix 6** contains the full analysis, as summarised in Table 10.5.

Table 10.5: Restaurant and Bar Capacity

	2017	2026
Existing Market Share (29.8%)		
Surplus Expenditure Available (£m)	-£1.08m	£12.44m
Potential Net Floorspace (sq m)	-169	1,620
Potential Gross Floorspace (sq m)	-211	2,025
Increase in Market Share of 10% (40%)		
Surplus Expenditure Available (£m)	£3.13m	£21.78m
Potential Net Floorspace (sq m)	492	2,836
Potential Gross Floorspace (sq m)	615	3,545
Increase in Market Share of 20% (50%)		
Surplus Expenditure Available (£m)	£7.25	£30.92
Potential Net Floorspace (sq m)	1,139	4,026
Potential Gross Floorspace (sq m)	1,423	5,033

10.20 Assuming a constant market share of 29.8% to 2026 results in a quantitative need for a further 2,000 sq m of restaurant and bar gross floorspace to the end of the Study period.

10.21 Allowing for a modest increase to a market share of 40% results in an additional 600 sq m being required by 2017, increasing to 3,500 sq m by

2026. To allow 50% of all expenditure to be retained, a further 1,500 sq m will be required to 2017, increasing to 5,000 sq m by 2026.

10.22 Looking at the quantitative need for the three individual towns instead of the District as a whole, this results in the following requirements for additional gross floorspace:

- Selby Town Centre:
  - Current Market Share (33.8%): neutral in 2017 increasing to 1,450 by 2026.
  - Increase Market Share by 10% (43.8%): c. 400 sq m in 2017 increasing to 2,200 sq m by 2026.
  - Increase Market Share by 20% (53.8%): 800 sq m in 2017 increasing to c.3,000 sq m by 2026.
- Sherburn In Elmet Town Centre:
  - Current Market Share (23.1%): 1,700 sq m in 2017 increasing to c.2,200 by 2026.
  - Increase Market Share by 10% (33.1%): c. 2700 sq m in 2017 increasing to 3,400 sq m by 2026.
  - Increase Market Share by 20% (43.1%): 3,700 sq m in 2017 increasing to 4,500 sq m by 2026.
- Tadcaster Town Centre:
  - Current Market Share (23.3%): 2,800 sq m in 2017 increasing to 3,300 by 2026.
  - Increase Market Share by 10% (33.3%): c. 4,000 sq m in 2017 increasing to 4,700 sq m by 2026.
  - Increase Market Share by 20% (43.3%): 5,300 sq m in 2017 increasing to 6,100 sq m by 2026.

10.23 The floorspaces identified above should be treated with caution, as the translation of monetary values to floorspace will vary dependant on the operator and type of facility. For example, a larger format chain pub/restaurant is likely to have a lower turnover per sq m than a small independently run restaurant/bar.

Qualitative Need

10.24 The diversification of uses should be encouraged within centres, including uses which contribute to the evening economy, to ensure that centres are vibrant and viable.

10.25 Interrogation of the EGi database revealed that there were no outstanding specific requirements for the District of Selby by restaurant or bar operators. However, there are over 100 nationwide searches which have not specified a town, but will consider all locations[67].

Restaurant and Bars: Conclusions and Recommendations

10.26 The District as a whole should be seeking to retain the PCA expenditure spent in restaurants and bars, achieving a higher market share than at present (30%).

10.27 There is clear qualitative and quantitative need for additional floorspace across the PCA as a whole, and within each of the three centres, even without assuming any increase in market shares.

Cinemas

Existing Cinema Patterns and Provision

10.28 At the time of writing, the PCA/District of Selby does not contain any cinema provision.

10.29 The Household Survey asked respondents where they usually went to the cinema (Question 22). Table 10.6 illustrates the current patterns across the PCA.

[67] www.egi.co.uk/research - operator requirements (accessed 14 September 2009)

Table 10.6: PCA Respondents Current Cinema Destination

Cinema	Number of Screens	% of PCA[68]
Cineworld, Xscape, Castleford	14	50.0%
Vue, York	12	21.7%
Cityscreen Picture House, York	3	20.0%
Vue Doncaster	7	3.04%
Wetherby Film Theatre	1	2.17%
Showcase, Leeds	16	0.43%
Vue, The Light, Leeds	13	1.3%
Pocklington Arts Centre Cinema	1	0.43%
Vue, Kirkstall Road, Leeds	9	0.43%
Cineworld, Wakefield	9	0.43%

10.30 The results reveal that three cinemas dominate the PCA, with over 90% of respondents choosing these as their current destination. These are the two large multiplexes at Castleford and York, and the smaller 3-screen Cityscreen Picture House in York.

Quantitative Need

10.31 We have used a logical, step-by-step methodology utilising data derived from Dodona's Cinemagoing 2009 to assess the quantitative need for cinema screens within the PCA:

(i) Establish the population of the PCA and projected this forward to each of the Study Years;

(ii) Identify the average number of cinema trips per person in 2008 and forecasts for the Study Years[69];

(iii) Apply the average number of trips per person to the PCA Population to establish the total number of cinema trips in the PCA per annum;

---

[68] Survey Results Rebased to exclude those who do not undertake cinema visits (187 across PCA, 328 across Study Area)

[69] Dodona Cinemagoing 2009: Forecast Average Admissions per Person 2008-2013 (assumed constant post 2013)

(iv) Identify the average number of admissions per cinema screen in 2008 and forecasts for the study years[70]; and,

(v) Divide the total number of PCA cinema trips by the average number of admissions per screen to calculate the number of screens which the PCA can support.

10.32 The analysis is contained with Table 8a of **Appendix 6.**

10.33 The findings reveal that, in theory, the PCA could support 5 screens in the base year of 2007, increasing to 6 in 2017 and 2026, but this should be treated with caution – see following section.

Qualitative Need

10.34 Although, in theory, there is a need for up to 6 screens within the PCA, the quantitative assessment assumes that the PCA residents are not currently undertaking any cinema trips due to the lack of provision within the District.

10.35 In reality, this is not the case, as the results of the Household Survey (see Table 10.6 above) illustrate.

10.36 In assessing the qualitative need for the provision of cinema screens within the PCA, we have looked at the demand from operators, current trends within the cinema sector and the current patterns of cinemagoing by the PCA residents.

Operator Demand

10.37 The cinema sector is driven by market and operator demand, which is not solely based on the capacity of an area to accommodate additional screens.

10.38 Interrogation of the EGi database for the District of Selby revealed two current cinema operator requirements: Cineworld and Everyman Cinemas[71]. Both these requirements are part of a nationwide search and neither company has specified a town, but will consider all locations.

---

[70] Dodona Cinemagoing 2009 Page 40: Forecast Number of admissions Per Screen per Annum 2008-2013 (assumed constant post 2013)

[71] www.egi.co.uk/research - operator requirements (accessed 14 September 2009)

Trends within the Cinema Sector

10.39 Following a boom in the construction of very large multiplexes during the 1990's/early 2000's, these have now largely fallen out of favour. The opening of the 14 screen Odeon in October 2008, as part of the Liverpool ONE development, was the first cinema of this size to open since 2004[72].

10.40 This reflects the fact that cinemas are increasingly being built in smaller catchment areas, hence resulting in fewer screens being supported. A specific example from Dodona's Cinemagoing 2009 reflects this trend: two recent Vue Cinema openings (Merthyr Tydfil and Cwmbran), although both contain 8 screens, only have approximately 1,200 seats instead of the usual 2,000+ for a cinema of 8 screens.

10.41 Recent years have arguably seen an increase in the popularity of smaller cinemas of six screens or less, including Everyman and Reeltime cinemas.

Current PCA Cinemagoing Patterns

10.42 The results of the survey showed that most PCA residents were visiting the large multiplexes at Xscape, Castleford or York (71.74%). Without providing a similar type of facility and wider offer, it is unlikely that these trips could be diverted to remain within the District of Selby instead.

10.43 However, 22.6% visit smaller, independent cinemas as their main destination. The most popular of these is the CityScreen PictureHouse in York (20%). By way of illustration, if the 22.6% who visited these smaller cinemas were diverted to remain in the catchment area, this would result in 53,656 trips per annum – enough to support one cinema screen (46,500 trips per screen).

Cinemas: Conclusions and Recommendations

10.44 Although there is a quantitative capacity for up to six cinema screens within the District to 2026, taking into account the existing provision surrounding the PCA and the qualitative considerations, we do not feel that in reality there is sufficient capacity to support a cinema of this size.

10.45 The cinema sector is market driven and it is unlikely that a major operator/cinema this size could be secured within the District given the

[72] Dodona Cinemagoing 2009 Page 14

surrounding competition. However, there is some capacity within the District and a small 1 or 2 screen venue could be supported.

10.46 Examples of this type of venue can be found nearby the PCA, including the CityScreen Picturehouse in York, which has three screens and is the central feature of a riverside regeneration project. The cinema also includes a café-bar, sky lounge, basement bar which hosts music, poetry and comedy events, as well as exhibition space.

10.47 Others include the Wetherby Film Theatre, Pocklington Arts Centre and the Picturehouse in Keighley.

10.48 Given the centre hierarchy within the District, the preferred location for such a facility would be Selby Town Centre. It is recommended that further feasibility tests are carried out.

Ice Rinks

Existing Provision

10.49 At the time of writing, there is no ice rink provision within the District of Selby. The nearest facilities are:

- The Dome, Doncaster;
- Xtra Ice at Xscape, Castleford;
- Hull Ice Arena;
- Grimsby Ice Rink;
- Ice Sheffield; and,
- Bradford Ice Rink.

Quantitative Need

10.50 To assess the quantitative need for the provision of an ice rink within the PCA, we have analysed the existing participation rates within the District for ice-based sports, and compared these to the national average.

10.51 This analysis is informed by a Sports and Leisure Report supplied by CACI in August 2009 and uses data derived from the data supplied by CACI to inform the conclusions.

10.52 We have considered two ice based sports: ice skating and ice hockey. For the base and test years, we have applied the District and National participation rates obtained from CACI to the PCA population, to understand whether the PCA has an above or below average participation within each sport.

10.53 Tables 10.7 and 10.8 below illustrate the results of this analysis.

Table 10.7: Ice Skating Analysis for PCA

	2007	2017	2026
PCA Population	93,113	102,615	112,334
PCA Participation Rate (%)	4.3%	4.3%	4.3%
PCA Participants	4,004	4,412	4,830
National Participation Rate (%)	3.8%	3.8%	3.8%
PCA Participants (National Rate)	3,538	3,889	4,269
Difference/Capacity	+466	+513	+562

Table 10.8: Ice Hockey Analysis for PCA

	2007	2017	2026
PCA Population	93,113	102,615	112,334
PCA Participation Rate (%)	0.1%	0.1%	0.1%
PCA Participants	93	103	112
National Participation Rate (%)	0.2%	0.2%	0.2%
PCA Participants (National Rate)	186	205	225
Difference/Capacity	-93	-103	-112

10.54 In terms of ice skating, the analysis shows that the PCA has an above average participation within the sport, a reflection of the nearby facilities, particularly to the south/south east in Doncaster and Xtra Ice at Xscape.

10.55 Conversely, the PCA participation rate in ice hockey (0.1%) is only half of the national average for the sport (0.2%). Therefore, to increase participation rates to bring in line with national participation, additional facilities would need to be provided.

10.56 It should be noted that the national average includes areas where there is no provision for these types of sports, hence, areas where high quality facilities are provided will have a much higher participation rate than the national average.

Qualitative Need

10.57 The lack of a facility within the PCA is a qualitative indicator of need itself, as the PCA residents have to travel to facilities outside of the District to participate in the sports. However, a lack of a facility within the District has not constricted participation within ice skating.

Ice Rinks: Conclusions and Recommendations

10.58 Whilst there is not an overwhelming quantitative need for the provision of an ice rink within the District, qualitatively, there could be in theory some benefits to accommodating such a facility within the PCA.

10.59 In accordance with the centre hierarchy within the District, the preferred locations for such a facility would be within one of the three main centres, preferably Selby Town Centre.

10.60 We understand that there are proposals for such a facility within the development pipeline. For facilities of this type to be commercially viable, generally assistance from the public or private sector (as part of a wider mixed use scheme) may be required. We would recommend that further feasibility and viability testing of any proposals be carried out.

Water Based Recreation

10.61 Water based recreation takes a variety of forms: from active sports including sailing and water skiing; to gentler activities, such as riverside walks, boating and fishing.

10.62 The District of Selby has a number of assets which can be utilised for water based recreation, including the Rivers Ouse, Aire and Wharfe, the Selby and Aire and Calder canals and the Three Lakes, near Selby Town Centre, plus the White Cross Power Boat and Ski Club at Rythergate and The Blue Lagoon scuba-diving facility at Wolmersley.

10.63 In addition, following the most recent major floods in Selby and Tadcaster in 2000, flood defences have been put into place and a wider water Masterplan has been produced as part of the Selby District Renaissance Strategic Development Framework (SDF). This proposes the following facilities which could accommodate water based activities:

- The creation of holding areas for water along the principal rivers;
- The creation of riverside parks which incorporate flood defences;
- Riverside improvements in Tadcaster incorporating flood defences and a new circular walk;
- The development of a marina within Selby; and,
- The creation of a Regional Water Park ('Yorkshire Water Park') which would have functions as a regional tourist facility, wildlife reserve and a mechanism for holding flood waters.

Quantitative Need

10.64 As a general indicator for the use of inland waterways for recreational purposes, we have utilised participation rates for water based activities. These participation rates were provided by CACI in August 2009 and the analysis uses data derived from the data supplied by CACI to inform the conclusions.

10.65 These indicators do not include all types of activities which may take place in such a facility, as there is limited data available on the propensity to undertake gentle walks etc. However, they give a flavour to how the residents of the District currently utilise the waterways and whether there is a need to increase or improve the provision of associated facilities.

10.66 Table 10.9 sets out the number of participants in water based activities within the District in each of the Study Years.

Table 10.9: Water Based Recreation Participation Rates in Selby

	2007	2017	2026
PCA Population	93,113	102,615	112,334
No of Fishing Participants (6%)	5,587	6,157	6,740
No of Sailing / Motor Boating Participants (0.7%)	652	718	786
No of Water Skiing Participants (0.6%)	557	616	674
No of Wind Surfing Participants (0.1%)	93	103	112
Total Water Based Recreation Participants	6,889	7,594	8,312

10.67 Based on current participation rates, across the District, approximately 7% of the population undertake organised water based recreation activities.

The participation rates within the District for fishing and sailing reflect the national averages (6% and 0.7% respectively) and for windsurfing the participation (0.1%) is only half of the national rate of 0.2%. However, the District population has a significantly higher than average propensity to water ski, with a participation rate of 0.6% compared to the national average of 0.1%.

10.68 Therefore, although there is currently a lack of any formal water-based recreational development within the District, the population are currently undertaking water based activities. The provision of further facilities would increase participation rates further.

Qualitative Need

10.69 Providing the opportunity for residents to increase their participation or start participating in water based activities, whether in a passive or active role, should be encouraged for the wider benefits it achieves, including health.

10.70 Water-based recreation development, because of its wider amenity value, can bring environmental, social and economic benefits in urban and rural areas.

Water Based Recreation: Conclusions and Recommendations

10.71 Residents of the District are already undertaking more formal water based recreational activities, and the provision of additional facilities would have amenity, environmental, social, economic and health benefits to the District. Therefore, the opportunity to increase participation in these activities should be encouraged.

10.72 A full review of the existing water based recreation facilities should be carried out as part of any update to the Selby Recreation Open Space Strategy (ROSS) 2006 to identify whether there is a physical deficiency in provision across the District for this type of open space in PPG17 terms.

Other Leisure Activities

10.73 In addition to the leisure and recreation uses analysed in detail above, we have also undertaken a brief assessment of the provision of the following uses within the District: Health and Fitness, Bowling and Bingo. The findings are set out below.

Health and Fitness

10.74 The District has a number of existing health and fitness facilities including:

- JJB Sports (rebranded as DW Fitness), Three Lakes, Selby;
- Abbey Leisure Centre, Selby;
- Flexible Fitness, Brackenholme;
- BodiBitz, Micklegate, Selby;
- Fitness Motion, Sherburn in Elmet; and,
- Tadcaster Sports and Leisure Centre, Tadcaster.

10.75 In addition, there are a number of large private member clubs surrounding the PCA, including the David Lloyd in York and Xercise Health & Fitness Club at Xscape, Castleford.

10.76 Across the District, 30.6% of the population visit a health club or gym, compared to a national average of 34% (from CACI). This equates to circa 29,000 participants across the PCA.

10.77 By estimating the membership numbers of the existing facilities within the District (utilising an average number of users for the public leisure centres), it is possible to compare the number of participants within the District to the number of members, to assess whether there is a over or under-provision of facilities to meet demand. Table 10.10 contains this brief analysis.

Table 10.10: Capacity for Additional Health and Fitness Provision within Selby

	Estimated Number of Members in 2009
Facility	
JJB Sports (DW Fitness)	2,500[A]
Abbey Leisure Centre	1,000[B]
Flexible Fitness	500[C]
BodiBitz	500[C]
Fitness Motion	500[C]
Tadcaster Sports and Leisure Centre	1,000[B]
Total Estimated Membership of PCA Facilities	6,000
Number of Participants within District	29,000
Surplus	23,000

A – Average Membership from Operators

B - Leisure Centre Users not Formal Memberships – DJ Estimate

C – DJ Estimate based on Experience

10.78 This analysis reveals that the District has an under-provision of facilities compared to demand and that the surplus identified must be using facilities which fall outside the District boundary.

10.79 Hence, the analysis reveals that there is the potential within the District, subject to market demand, for at least one or more further health and fitness facility, preferably accommodated by a higher quality operator to provide competition to similar facilities lying outside the District.

Ten Pin Bowling

10.80 There is one bowling alley within the District of Selby: Bowl'n'Fun on Bawtry Road, which has 12 lanes. This is currently closed for refurbishment and is due to reopen at the end of October 2009.

10.81 Selby has a participation rate for ten-pin bowling of 1.8%, the same as the national average (data from CACI).

10.82 On average, 1,250 people are required to support one ten-pin bowling lane. Assuming a participation rate of 1.8% (from CACI), the PCA will generate 1,706 ten-pin bowling trips in 2009. This increases to 2,800 across the wider Study Area.

10.83 Hence, (assuming that the existing bowling alley reopens in October 2009), the District does not require any additional ten pin bowling provision.

Bingo

10.84 The PCA contains one existing bingo hall: Walkers Bingo and Social Club on Portholme Crescent in Selby.

10.85 The District of Selby has a 1.1% participation rate for Bingo (data from CACI). Assuming the national participation rate of 2.1%, 1,991 people within the PCA should attend a bingo hall in 2009, rising to 3,349 across the wider Study Area.

10.86 Utilising the assumption that on average, each of these participants will play twice a month, this results in between 48,000 and 80,000 trips per annum. Given a Bingo Club needs approximately 75,000 visits per annum to support it, the current participation rates within the District would not justify the need any further facilities.

11. Implications of Selby District Council's Housing Projections

Introduction

11.1 In addition to the capacity for additional floorspace which can be supported across the Study Period as a result of increased population based on ONS projections, we have also assessed the potential additional increase in population which could be produced as a result of the District's Housing Requirement established in RSS, which will cause increases in population above the levels anticipated by the standard ONS projections.

11.2 The Yorkshire and the Humber Plan (RSS) sets a target for Selby District Council of 7,480 additional new dwellings to 2026. ONS projections are based on natural increases in population and migration rates. The migration rates are based upon past housing completions within the District, so any increase in population as a result of accommodating the higher housing growth planned will be over and above the level as a result of past completions within the District.

11.3 Following discussions with ONS, it is calculated that the planned housing growth in the District represent an increase of roughly 50% above the completions utilised by ONS in calculating their projections.

Assessment of Additional Capacity Generated within the District as a result of Planned Housing Growth

11.4 The capacity tables in **Appendix 7** model the increase in population as a result of the planned housing growth utilising the assumption that 50% of this increase has already been accounted for by ONS.

11.5 The following section reviews how apportioning these additional dwellings around the District, in line with the emerging Core Strategy[73], will influence capacity within the PCA Zones.

11.6 Further scenarios based on alternative distribution of growth around the District are contained within the Housing Growth Analysis Tables presented in **Appendix 7.**

[73] The Preferred Housing Distribution Option in relation to the Core Strategy will be the subject of further consultation in February 2010.

11.7 Tables 5a and 5b of **Appendix 7** set out the extra capacity available within each Zone if the housing completions reflect the Council's emerging Core Strategy Preferred Housing Distribution Option.

11.8 It must be noted that for these levels of capacity to materialise, completions much reach levels equivalent to planned growth. This is difficult to predict exactly up to 2026, due to changes in economic conditions that may restrict or increase the supply of and demand for new dwellings.

11.9 Tables 5a presents the number of dwellings to be accommodated in each of the following areas: Selby, Sherburn in Elmet, Tadcaster, Designated Service Villages and Secondary Villages. These figures are then halved[74] to take account of completions already included in ONS projections then multiplied by the average household size to create a population increase caused by the planned housing growth over and above the ONS population projections.

11.10 These population increases are then distributed into the Primary Catchment Area Zones in Table 5b based upon the figures for the three main Centres plus the number of dwellings in Designated Service Villages and Secondary Villages based upon the proportion of these such villages contained within the zone. For example, Table 1 shows that Zone 1 (Selby) has 46% of the Designated Service Villages, it therefore receives 46% of the population

---

[74] A 50% adjustment has been made to take account of the completions already included in the ONS Projections. Investigation of the ONS figures reveal that they do not factor in RSS Housing Requirements, but do allow for migration in and out of the District. This migration into SDC will have a relationship to the completion rates of housing within the District.

ONS data for Selby shows a net migration into the District between 2002-2007 at an average of 600 people per annum. Assuming Average Household size (2.4), this equates to 250 dwellings required per annum to accommodate this migration.

Between 2005-2009, the average housing completion rate within the District was 578 dwellings per annum. Therefore, we can reasonably assume that approx 50% of the residential completions are accounted for by migration into the District and the remainder from hidden households already within the District.

Hence, the Selby RCLS should allow for 50% of the Total New Dwellings Required within the sensitivity testing.

increase attributed to Designated Service Villages through the emerging Core Strategy Preferred Housing Distribution Option.

11.11 The population increases for each Zone are multiplied by the Expenditure per Head for both convenience and comparison goods to ascertain the Total Available Expenditure within each zone created by the additional households. This is multiplied by the particular Zone's market share for each goods category to calculate how much additional expenditure is available to be spent within that zone. The results of this analysis are presented in Table 11.1 below.

Table 11.1: Additional Comparison and Convenience Goods Expenditure Available within Each Zone as a Result of Preferred Housing Distribution Option in 2026.

	Available Convenience Goods Expenditure in 2026 (£m)	Available Comparison Goods Expenditure in 2026 (£m)
Zone 1 – Selby	£8.68	£17.94
Zone 2 – Sherburn in Elmet	£0.66	£0.37
Zone 3 - Tadcaster	£1.16	£0.86
Zone 4 – Eggborough / South Selby	£0.18	£0.15
'Fringe' Zones	£0.00	£0.02

11.12 The findings of the above Table should be treated with caution for two reasons. Firstly, the figures of available expenditure do not exclusively represent money to support new facilities - a proportion of this would be spent at existing facilities within the Zones. Secondly, these levels of Available Expenditure could only be achieved if housing completions meet or exceed planned growth.

11.13 The table shows that across the Study period to 2026 there is limited additional expenditure derived as a result of Selby District Council's Planned Housing Growth, above that identified in the convenience and comparison assessments.

11.14 For convenience goods, assuming that in Zone 1 (Selby), 50% of the £8.68m identified additional expenditure was available to support new floorspace and 50% was spent at existing provision, the additional £4.34

million would support approximately 372 sq m (net) of 'Top Four'[75] grocers floorspace or 759 sq m (net) of 'Discounter'[76] floorspace.

11.15 For comparison goods, again assuming that only 50% of expenditure is available to support new floorspace, the £8.97 million additionally available would be able to support approximately 1,396 sq m of additional 'Selby Town Centre' floorspace[77] or 2,990 sq m of Retail Warehouse floorspace[78].

Housing Growth: Conclusions and Recommendations

11.16 From the analysis of the potential implications of the District's emerging preferred housing distribution strategy on the capacity for additional new floorspace within the District, it is clear that the additional expenditure generated by these new residents would not result in the need to plan for a material change in the role or function of existing centres.

11.17 In addition, it would not require the Local Planning Authority to plan for any additional significant levels of floorspace over and above that identified within the convenience and comparison assessments.

[75] Utilising an average of the turnover per sq m of Tesco, Sainsbury's, Asda and Morrisons.

[76] Utilising an average of the turnover per sq m of Aldi, Lidl, Netto and Iceland.

[77] Utilising a turnover per sq m of £6,424.

[78] Utilising a turnover per sq m of £3,000.

12. Implications for Plan and Policy Making

Context

12.1 The Stage 1 analysis indicates the results from the analysis of:

- The capacity for additional retail floorspace for 2009 through to 2026;
- The requirements for additional commercial floorspace and needs;
- The scope for additional leisure facilities.

12.2 These results should be used to generate:

- General policies on retail hierarchy and town centres which could be appropriate for the Core Strategy;
- Specific policies and strategies which would be appropriate for the Selby Area Action Plan;
- Specific policies and strategies for Tadcaster and Sherburn in Elmet for use in other Development Plan documents.

12.3 The results can also inform the suggested proposals for:

- The definition of town centre and primary shopping area boundaries;
- The identification of sites to meet identified needs;
- Site specific policies to maximise the potential of development sites.

National Planning Policy Framework

12.4 Regard is had to the national planning policy framework set in particular through PPS6 on Planning for Town Centres and emerging guidance contained in Draft PPS4 on Planning for Prosperous Economies. There are consistent themes between the current and draft guidance notes in relation to the delivery of sustainable patterns of development, improving accessibility, promoting the vitality and viability of town and other centres as well as ensuring that communities have access to a range of main town centre uses.

12.5 In relation to retailing, Draft PPS4 promotes the vitality of town centres, consumer choice and retail diversity. However, it includes a proposal to remove the ‘needs test’ as part of the determination of a planning application. This would have a particular implication on any criteria-based policies in local development plan policy.

12.6 Annex A Table 1 to PPS6 defines the types of centre and their main characteristics.

12.7 City centres are the highest level of centre. They will often be a regional centre and serve a wide catchment. The centre may be very large, embracing a wide range of activities.

12.8 Town centres will usually be the second level of centres after city centres. In many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres.

12.9 District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services as well as local public facilities.

12.10 Local centres include a range of small shops of a local nature, serving a small catchment. In rural areas, large villages may perform the role of a local centre.

12.11 The boundary of a town centre would include predominantly leisure, business and other main town centre uses within or adjacent to the Primary Shopping Area. The extent of the town centre should be defined on a proposals map.

12.12 The Primary Shopping Area is where retail development is to be concentrated. The extent of the Primary Shopping Area should be defined on a proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the Primary Shopping area, therefore the town centre may not extend beyond the Primary Shopping Area.

12.13 PPS6 defines main town centre uses as including:

- Retail;
- Leisure, entertainment and more intensive sports and recreation uses (including cinemas, restaurants, bars, pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls);
- Offices;
- Arts, culture and tourism (including theatres, museums, galleries, concert halls, hotels and conference facilities).

12.14 For purposes of national guidance, the 'centre' for a retail development constitutes the Primary Shopping Area. For all other main town centre uses the 'centre' should be regarded as the area embraced by the town centre boundary.

12.15 In relation to a definition of 'edge of centre', this for retail purposes would be a location that is well connected to and within easy walking distance (i.e. up to 300 metres) of the Primary Shopping Area. For all other main town centre uses, this is likely to be within 300 metres of a town centre boundary. For office development, locations outside the town centre but within 500 metres of a public transport interchange within the urban area should be considered as edge-of-centre locations.

Monitoring

12.16 Local planning authorities can use their annual monitoring reports to keep key matters under review and consider the impact of policies and development proposals, including the network and hierarchy of centres, the need for further development and the vitality and viability of centres.

12.17 Given the dynamic nature of the retailing and leisure sectors in particular this is an important consideration, with a need to review the evidence base at appropriate intervals and consider the implications on development plan policies.

Retail Hierarchy

12.18 Government policy is to plan for the growth and development of existing centres by focusing development in such centres. PPS6 requires local authorities to define a network and hierarchy of centres, each performing their appropriate role to meet the needs of their catchments.

Network and Hierarchy

12.19 There are three Centres within the Selby District.

12.20 Regard has to be made to the Regional Spatial Strategy for Yorkshire and The Humber (2008) (RSS) in assessing the retail hierarchy. Selby is identified in the RSS as a Principal Town. Tadcaster is identified as a Local Service Centre. There is no specific reference in the RSS to the status of Sherburn in Elmet.

12.21 The RSS indicates that the role of Selby as a Principal Town is to be developed and Selby is designated as a focus for economic growth. In particular, the RSS states that development should be promoted to foster the regeneration of Selby and strengthen and diversify its economy.

12.22 The Study Analysis has shown that Selby performs a more dominant role than the other two Town Centres. It has a higher market share, greater level of retail provision as a whole and is a key retail destination that serves in particular the central, southern and eastern parts of the District, but also the workforce and visitors that come to Selby.

12.23 Tadcaster performs an important role as a Centre that serves the north western part of the District. Its role as a Local Service Centre should be subservient to that of Selby and this should be reflected in planning policies which relate to the appropriate scale of any new development.

12.24 Sherburn in Elmet also performs an important role as a Centre which predominantly serves the Sherburn in Elmet and South Milford communities, and also the surrounding rural settlements. Again the scale of development in Sherburn in Elmet Centre needs to be effectively controlled in order that it retains its appropriate place in the retail hierarchy. However our Analysis indicates that there is a particular need to seek to strengthen the market share of Sherburn in Elmet to support a more sustainable pattern of retailing. This could be achieved through identifying development opportunity sites and promoting the development of new floorspace within the Town Centre. However the proposed increase in provision is relatively modest as a whole and would be intended to boost the low market share of Sherburn in Elmet for comparison goods shopping and not to unbalance the existing retail hierarchy.

Town Centre Status

12.25 We have considered the role of the Centres of Tadcaster and Sherburn in Elmet in particular. Both Centres play an important role in the development of those towns as sustainable communities and include a variety of uses, not just retail, which would typically by found in a Town Centre. We are aware that Sherburn in Elmet is often referred to as a village, reflecting its historic roots, although it has the characteristics of a small town. Both should be appropriately protected and promoted and thus we consider this would be best achieved through their designations as Town Centres, subject to appropriate tests within policy that ensure that new development is of scale appropriate to the locality and that both Tadcaster and Sherburn in Elmet remain subservient in function to Selby.

12.26 The designation of Sherburn in Elmet as a local centre may make it vulnerable to proposals for major development outside of the centre, which could have a detrimental impact upon the centre.

12.27 The scale of Tadcaster and Sherburn in Elmet could be similar to that of a district centre typically found in a city / urban area. The draft PPS4 no longer refers to the term ‘district centre’. Government policy requires a network and hierarchy of centres to be defined – the Town Centres of Tadcaster and Sherburn in Elmet should naturally fall within a lower tier of centre to that of Selby and Plan policies should be formulated to reflect that (so as to ensure that appropriate large scale development serving a more than local function is directed to the appropriate centre).

12.28 We consider that it would be inappropriate to plan for major retail-led growth in either of those two centres, which may have to rely upon the diversion of significant levels of trade from Selby, potentially undermining that Centre’s role as a Principal Centre. However, it would be important to consider the impact on these Centres from development proposed in out of centre locations.

12.29 The extent of the Town Centre, and the definition of the Town Centre boundary, will influence the scope for each of the Centres to accommodate new development. The recommended boundaries for Tadcaster and Sherburn in Elmet are geographically much smaller than Selby Town Centre in that respect, which reflects the current make-up of each Centre. However, it is also necessary to maintain control over the scope for new development and to ensure that each Centre falls within the natural and recommended hierarchy that maintains Selby's elevated position in practice.

12.30 PPS6 advises that smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the Primary Shopping Area, therefore the town centre may not extend beyond the Primary Shopping Area. In the case of Tadcaster and Sherburn in Elmet the Primary Shopping Area would be in effect the town centre.

Distribution of Growth

12.31 Consideration has to be given as to how best to distribute any identified growth and whether there is a need to rebalance the network of centres to ensure that the District is not overly reliant on any one Centre, in this case Selby. The review of retail provision, market shares and future need has included a zone-by-zone review to see what scope there is for new development within each relevant part of the District.

12.32 We have found no evidence to indicate that Tadcaster or Sherburn in Elmet currently attract levels of trade which undermine the role of Selby Town Centre. Conversely we have not found any evidence to indicate that the future of Tadcaster or Sherburn in Elmet Town Centres would be unduly undermined by any directed new growth into Selby Town Centre at the level which we are recommending.

12.33 We have made recommendations as to the need and scope for future development to meet specific requirements that will sustain the retail hierarchy and ensure a balanced distribution of facilities in relation to the role of each of the existing Centres.

New and Local Centres

12.34 There are no other Town Centres within the District and no centres designated as a District Centre.

12.35 We have not identified any Local Centres that could perform an appropriate role as a Town or District Centre and that we believe should be elevated in status within the retail hierarchy. Any potential future growth can be used and captured to support the vitality and viability of the existing Local Centres, as well as supporting the retail hierarchy.

12.36 In particular we have considered the needs of the Zone 4 area of the District, notably the Eggborough area. The scale of any additional floorspace which would be generated from this area is insufficient to accommodate a significant increase in local provision and we would suggest any future expenditure growth can be directed to support the vitality and viability of Selby Town Centre. However, this does not automatically mean that all of the additional expenditure generated can be automatically directed to Selby Town Centre to support additional floorspace. Based on current market shares, for non food shopping, facilities outside of the District have the greatest draw from this area (Doncaster 41% and York 31%). Selby currently has a market share of 10%. Therefore, for the all surplus expenditure generated within Zone 4 to support additional floorspace in Selby Town Centre, the market share of the Town Centre from Zone 4 would need to be significantly increased.

12.37 We see the Village Centres performing an important day-to-day local role that supports sustainable communities. We would recommend that the Council adopt policies which seek to protect the vitality and viability of local centres through, for instance, restrictions on the loss of retail floorspace. The Village Centres fulfil the role of Local Centres in terms of PPS6 and are not the focus for major growth or any specific new development allocations. There are opportunities however, to promote the future health of these Centres though policy and to seek to protect existing facilities from inappropriate change.

12.38 We consider that the retention of the existing hierarchy will meet the needs of the catchment and ensure that people's everyday needs are met locally.

Impact of Additional Housing Growth

12.39 We have considered the implications of a significant expansion of housing stock which could in theory have implications on retailing needs and trends in the medium to long term within Chapter 11.

12.40 We consider that it would be inappropriate to plan for a considerable amount of new development predicated on high levels of additional housing growth over and above that included in the Office of National Statistics projections (which already incorporates a degree of housing growth) but recommend that the housing growth context is monitored. We consider that additional growth could be used to support investment in existing centres, to the benefit of those centres as a whole, rather than support the development of any new centres.

The Need for Additional Development

Retail and Main Town Centre Uses

12.41 Local authorities are required to assess the need for new floorspace for retail, leisure and other main town centre uses, taking into account both quantitative and qualitative considerations. Local planning authorities are also required to actively plan for growth and to manage change in town centres within a regional context. This requires selecting appropriate centres to accommodate the identified need for growth, making better use of existing land and buildings (including where appropriate redevelopment) and, where necessary, extending the centre.

12.42 The extension of Primary Shopping Areas should be planned where there is a need for additional retail provision that cannot be accommodated within the existing Primary Shopping Area. Likewise, town centres could be extended where there is a need to accommodate other main town centre uses.

12.43 In particular, PPS6 requires authorities to consider the need for larger stores which may deliver benefit for consumers.

Need Assessments

12.44 The Study analysis assesses the potential need for additional floorspace. Two test years have been utilised – 2017 and 2026.

12.45 There are inherent risks attached with making long-term projections for the provision of additional retail and town centre uses. PPS6 requires local authorities to accommodate requirements in terms of at least a five year horizon.

12.46 We have considered the test year of 2017 as representing a sound and logical base on which to inform policy making. This would also reflect the current economic context which would indicate that the delivery of major development projects in the short term will prove to be challenging and a relatively static period of activity may ensue in the immediate term.

12.47 We have reviewed the potential needs relating to the three centres. We do not see any overriding requirement to identify any new centre nor to adjust the existing retail hierarchy. In accordance with national policy, then any need should be focused on the existing centres, of a scale appropriate to each of the centres.

Convenience Retail

12.48 The Study analysis indicates that there would be insufficient capacity to support a substantial amount of additional convenience goods floorspace within the Primary Catchment Area during the Study period assuming all of the planned commitments are implemented, even with appropriate increases in market share.

12.49 The Primary Catchment Area is influenced by the provision of stores outside of the area, which in some cases are more convenient for a number of residents who live within the area. It is considered unlikely that the market share of the Primary Catchment Area as a whole for convenience retailing could be increased significantly over the Study period.

12.50 The surplus convenience goods expenditure by 2017 would be sufficient to support either a modest extension (1,000 sq m or less net sales area) to an existing 'top four' food store, a 'metro' style 'top four' food store or a combination of smaller facilities such as a typical 'discounter' food store and 'express' or 'local' type facilities[79].

12.51 The proposed distribution of any such need has been informed by the analysis of shopping patterns within the relevant Study zones.

12.52 In the case of Selby, we have identified that the only capacity to support additional convenience goods retail floorspace would arise from the non-implementation of either or both of the commitments to extend the Morrisons and Tesco stores. This could release capacity to support facilities of a similar nature or a combination of smaller facilities. However, given these commitments are in place, we do not recommend making any specific policy that would encourage the provision of additional convenience goods retail provision, either through a specific site allocation policy or an extension to the Primary Shopping Area (see Paragraphs 12.81 to 12.92). We would recommend the use of criteria-based policies to assess the appropriateness of any future proposal having regard to the status of the commitments at that time.

12.53 In the case of Tadcaster, the existing convenience goods market share is to be expected considering the presence of one major foodstore within the Centre and the competing, large format stores to the north and west, including the Tesco Extra on Tadcaster Road, York and Morrisons in

[79] 'Top four' food stores would include Asda, Morrisons, Sainsbury's and Tesco. A 'metro' style store is a store operated by a 'top four' retailer but of a smaller format selling a more limited range of products (eg Tesco Metro). An 'express' style store is akin to a small local convenience store (eg Tesco Express, Sainsbury's Local).

Wetherby. We have identified limited capacity for additional convenience provision to support Tadcaster's role as the centre for local shopping in the north western part of the District but insufficient to warrant an extension to the Town Centre boundary or allocation of a specific development opportunity. There are opportunities to improve the shopping offer and provision within the existing Town Centre boundary and in the immediate term, this should be the focus for planning policies.

12.54 In the case of Sherburn in Elmet, the low market share reflects the limited facilities available within the relevant Study zone. It is considered unrealistic to achieve a substantial increase in convenience goods market share without a considerable change in shopping provision, which we consider is unlikely to materialise and could potentially reduce the market share of other zones within the Primary Catchment Area. We consider that it would be inappropriate to seek a significant quantitative increase in convenience goods facilities within Sherburn in Elmet.

Comparison Retail

12.55 The comparison goods market share for the whole of the primary catchment area in 2009 is some 30.4%. This is considered to be appropriate and reflective of the role of the existing Centres within the wider regional hierarchy and the influence of competing centres in particular York, Doncaster and Leeds.

12.56 The Study analysis indicates that, assuming current market shares are maintained, there would be insufficient capacity to support a substantial amount of additional comparison goods floorspace in the primary catchment area at the current market share until around 2021. This conclusion should however, be treated with caution as population and expenditure growth rates may be subject to change over such a long period.

12.57 If market shares are increased so that a greater level of expenditure is retained within the District, there is sufficient surplus expenditure available to support additional comparison goods floorspace, should the Council consider that it would be appropriate to seek this increase in market share. The market share of the District could be increased through the provision of appropriate additional comparison goods facilities such as larger stores and / or a department store. Such provision would offer an additional attraction which would have the effect of retaining more trade within the Primary

Catchment Area. For the increase in market share to materialise, the additional provision would have to be of a kind to increase attractiveness (through for instance larger stores selling clothing, footwear, household goods etc) rather than a replication of existing facilities.

12.58 We would suggest that any such growth would be directed towards existing centres and, in particular, Selby Town Centre as the most appropriate location for development. Suitable sites preferably within or failing that on the edge of the Primary Shopping Area could be considered. Such sites could be identified for the provision of larger more modern units to attract higher-order retailers and also address a qualitative need.

12.59 In relation to Tadcaster, there is limited capacity for additional comparison goods floorspace, even with an allowance for an increased market share. Furthermore, as the survey results indicate an underperformance of existing facilities, we see no particular justification to plan for a major increase in comparison goods floorspace within Tadcaster.

12.60 In relation to Sherburn in Elmet, this has a very low comparison goods market share. This level of market share is considered to be unduly low and we would recommend that the Council should seek to plan for a modest improvement in facilities, to help raise the market share. This would promote more sustainable shopping patterns and help safeguard the future vitality and viability of the Centre.

Commercial Uses

12.61 Building upon the GVA Grimley Employment Land Study of 2007, we consider that the delivery of higher value service sector employment activities is important for the District as it seeks to diversify its local economy.

12.62 Office uses are defined in PPS6 as a main town centre use. There is the potential for office uses to form part of mixed use developments within town centres and the attraction of office workers to a town centre can help its vitality and viability. This would be an important policy objective.

12.63 Draft PPS4 indicates that local development frameworks should make provision for a broad range of business types such as small start-up businesses through to small and medium sized enterprises as well as larger commercial or industrial premises and in particular the potential for start-up business space to assist the vitality and viability of existing Centres, in particularly in Selby and Tadcaster, should be encouraged.

12.64 However it also has to be recognised that in the case of Selby District, there may be appropriate locations outwith the town centres that could accommodate office development which would meet wider economic and sustainability objectives.

12.65 We would recommend the use of policies to help direct office development to town centre locations but also to identify specific office locations, outwith the town centres, where office use would be appropriate in principle. We would recommend that the Council considers a clustering approach to encouraging a supply-led response to the need for additional office floorspace by selecting appropriate sites that can complement potential provision within town centres. This could include, for instance, the established employment area near Leeds Road or a new employment area in Tadcaster, the Sherburn in Elmet industrial estate area and also Selby Business Park and the Olympia Park site in Selby. Site opportunities in Tadcaster within walking distance of the Town Centre could be considered. The Council should consider making key allocations the subject of specific Strategic Site Allocations in the Core Strategy, in an Area Action Plan or in the Allocations Development Plan Document.

12.66 We would recommend policies that would encourage the small scale provision of office space in rural locations which can have a role in diversifying the rural economy and also support the role of local village centres.

12.67 The surveys have identified a good provision of service uses throughout the various Town Centres. Service uses can contribute to strong and vibrant town centres and they play an important role in Selby, Tadcaster and Sherburn in Elmet. We have not identified any particular service uses which would justify the specific allocation of additional sites or an extension to the relevant shopping area and town centre boundaries for that purpose. There is a need however to control the provision of service uses in specific locations, such as within primary shopping frontages.

12.68 In relation to car showrooms and builders merchants, these are uses which are generally located in edge or out of centre locations. They may be inappropriate uses within town centres in terms of design and access requirements. They tend to be attracted to areas that are especially accessible by car and on sites which attract lower land values than typically associated within town centre locations. It is important however to control the sale of goods and the services offered to ensure that these facilities do not take on a wider retail function which would be more appropriately sited within a town centre location. The Council may wish to consider the wording of policies relating to employment areas and whether there are particular sites that those forms of use should be directed towards.

Leisure Uses

12.69 The need for additional leisure uses has been considered in terms of various leisure categories.

12.70 For restaurants and bars, the analysis has shown that although there is a good level of restaurant and bar provision within the District, it retains less than a third of expenditure available for this sector. Although within the regional hierarchy there will always be a high level of outflow to places such as York, we consider that the Primary Catchment Area should be aiming to retain a higher level of expenditure.

12.71 Restaurants and bars are defined as main town centre uses. We recommend the use of general policies to promote such uses within such locations. There are development opportunities that can be identified, for instance in the case of Selby close to the Bus and Rail stations and alongside the riverfront, where additional restaurants and bars could support wider renaissance objectives.

12.72 In relation to cinemas, then although there is theoretical capacity for up to six screens by the year 2026, taking into account existing provision surrounding the Primary Catchment Area and the qualitative considerations, we do not consider that there is sufficient capacity to support a cinema of this size, as this would require all trips to cinemas outside of the PCA to be effectively diverted to support this new facility.

12.73 We consider however that a smaller 1 or 2 screen cinema could be supported, and such a use would help diversify the offer of a town centre. We would recommend that policies be used to direct such a use to Selby Town Centre, as the higher order centre, as it would assist in the diversification of the town centre offer and widen the attraction of the

Centre as a whole, as well as support the important tourism and visitor sectors.

12.74 Other specific forms of leisure use have been assessed. We see the potential qualitative benefits in being able to accommodate an ice rink in the District. We would suggest that such a use would be directed towards Selby Town Centre and we understand there is some market interest in the delivery of such a facility. We would recommend the drafting of general town centre policies which would direct the provision of leisure uses such as an ice rink to a town centre location or potentially to an established leisure facility location, subject to relevant tests.

12.75 The Study analysis also identifies the potential for additional health and fitness centres within the District, which should be directed towards town centres. We do not identify any particular capacity for additional ten pin bowling or bingo facilities. If there was market interest in the provision of those type of facilities, then the general town centre policies should be used to ensure that the preferred location has regard to the sequential approach. However, we see no particular over-riding need to identify a specific site or widen the town centre boundary to specifically accommodate such provision at this stage.

Summary of Needs

12.76 In summary, our analysis has indicated the capacity to plan for:

- In Selby, an appropriate level of additional comparison goods floorspace (see Paragraphs 8.39 to 8.40) together with additional leisure facilities.
- In Tadcaster, to plan for the protection of the existing retail, commercial and leisure offer, but not to seek any significant increase in provision.
- In Sherburn, to plan for the protection of the existing retail, commercial and leisure offer as well as plan for a modest increase in comparison goods floorspace, in order to increase local market share.

12.77 In the next Section, we review the appropriateness of accommodating the additional floorspace identified within the existing Town Centre boundaries; and also whether these boundaries are still appropriate.

Town Centre Boundaries and the Use of Primary Shopping Areas

12.78 The definition of the Town Centre boundary for each of the three Centres largely sets the parameters for the delivery of new development. The scale of any new development proposed for any Centre should relate to the appropriate scale of that particular Centre as a whole.

12.79 We have reviewed the potential, for the first time within the District of Selby, to define a Primary Shopping Area for the existing Town Centres. For the purposes of the sequential approach, under PPS6, retail development should be considered in terms of its relationship with the Primary shopping Area. In contrast, other town centre uses are to be considered in relation to the town centre boundary. In many centres, the Primary Shopping Area will be a more tightly drawn area that defines the main area for retail.

12.80 At present there is no defined Primary Shopping Area for any of the existing town centres. In the case of Tadcaster and Sherburn in Elmet, we see no overriding necessity to define a Primary Shopping Area in addition to a town centre boundary. PPS6 states that smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the Primary Shopping Area, therefore the town centre may not extend beyond the Primary Shopping Area. Retail provision is broadly distributed throughout those town centres and additional retailing within the existing centre boundaries should generally be encouraged. To all intents and purposes the Primary Shopping Area and the town centre boundaries for the smaller centres would be the same.

12.81 We do consider that there would be merit in specifically defining a Primary Shopping Area for Selby, in order to control the potential development of edge of centre sites in particular and to seek to protect and support existing retailing areas.

Selby Town Centre and Primary Shopping Area Boundaries

12.82 There are two particular issues to focus on when considering the Town Centre boundary and the Primary Shopping Area boundary. Firstly, whether those boundaries reflect the existing pattern of land use and thus whether there is justification or not to amend them to more accurately reflect the current context. Secondly, whether the boundaries need to be adjusted to reflect the need to accommodate any additional floorspace that is forecasted to be required.

Selby Town Centre Boundary

12.83 The northern Town Centre boundary is currently set by the Selby Dam waterway. The Sainsbury's food store and adjacent large stores fall within it, as does the Abbey Walk car park and the car park to the east. This area has been the focus for new retail-led investment. We consider that the eastern car park has the potential to accommodate a more intensive form of use that could support a possible new circuit of pedestrian flows through onto Micklegate. This area of land is referred to for convenience as 'Back Micklegate'.

12.84 Although the area south of Micklegate around Abbey Place includes a number of arguably non-town centre uses, the area does logically form part of the Town Centre and has the potential to attract additional food and drink and office uses in particular.

12.85 The Town Centre Boundary currently incorporates much of Ousegate. The part that is north-west of New Street accommodates main town centre uses. The part to the south-east of New Street is more mixed. We consider that this part does have the potential to accommodate additional leisure uses and in particular food and drink uses, subject to meeting the requirements of development management policies relating for instance to residential amenity. We consider that it would be logical to retain those parts within the Town Centre.

12.86 The Park represents an important amenity resource for the Town Centre as a whole. There are also potential development sites to the east, the Former Wood Yard site, and to the south east, around the Bus Station and the Railway Station, which have the potential for more intensive development including main town centre uses, such as offices and leisure, as well as the re-provision of the Bus Station on site. They are considered somewhat remote from the Primary Shopping Area to be suitable for large scale retail use. The capacity assessment indicated the potential for additional leisure orientated development including food and drink outlets, a cinema and a health and fitness centre. Development for such uses in that general location would be highly accessible given its relationship to the bus and rail stations and within easy proximity of the River, which is a focus area for renaissance and tourism. We consider that there is merit in extending the Town Centre to include those areas.

12.87 In relation to the southern boundary, in the far west, the current Town Centre includes only the southern side of the linear Brook Street. We have considered whether it is appropriate to retain Brook Street within the Town Centre. The eastern part of it nearer to the Town Hall contains a number of comparison goods retailers. Including those units within the Town Centre could offer a degree of protection subject to appropriate policies that would prevent inappropriate changes of use. Activity however fades further west/south along Brook Street and we consider it questionable whether there is significant merit including those units within the Town Centre, Therefore, encouraging a tightening of the Boundary in this location would concentrate investment activity.

12.88 The rear yards to the south of Gowthorpe are largely outwith the Town Centre other than the South Parade pay and display car park. We do not see any merit in amending the boundary in this location however as land use patterns are highly fragmented and there is considered to be limited potential to realise additional development in those yards in the foreseeable future. We consider that the former Kwik Save store and the South Parade car park should be retained within the Town Centre, to encourage an appropriate new user who can contribute to the vitality and viability of this part of Gowthorpe in particular.

12.89 The current Boundary extends further southwards when moving east towards Morrisons. This encompasses the units around Market Lane. The Morrisons falls within the Town Centre boundary, as does part of its car park, and there are a number of food and drink outlets in particular along Park Street. We consider that the current boundary is reflective of land uses in this particular part of the Town Centre. We suggest however that the Council review the opportunity to extend the Boundary to the south to include the Morrisons car park and the Bingo hall building and car park, but not to promote specific units or development opportunities within this area at this stage.

12.90 The suggested Boundary does not extend any further south of the Morrisons car park and Bingo Hall, hence excludes the Telephone Exchange, Civic Centre and Tesco Store. These uses naturally fall outwith the Town Centre and occupy fringe locations, similar to for instance the

Leisure Centre. We do not identify any specific needs that would require a more extensive boundary to be drawn for the Town Centre at this stage. Any proposals for retail and other town centre uses in such locations would have to be subject to the relevant criteria-based tests including the sequential test.

12.91 The plan at **Appendix 8** illustrates our proposed boundary changes for Selby Town Centre.

Selby Town Centre Primary Shopping Area Boundary

12.92 PPS6 requires local authorities to consider the use of Primary Shopping Area definitions. The use of a Primary Shopping Area has the potential to focus retail-led development into certain locations; and to ensure that any edge of centre retail-led development is promoted where it can support activity within the retail core, subject to compliance with criteria-based policies.

12.93 We consider that there would be merit in defining a Primary Shopping Area for Selby that is tighter than the Town Centre boundary. It should encompass the shopping streets of Gowthorpe, Micklegate, Market Place, Market Lane and Abbey Yards as well as the shopping centre of Abbey Walk, Church Hill and the western part of Ousegate.

12.94 The plan at **Appendix 8** illustrates our proposed Primary Shopping Area boundary for Selby Town Centre.

12.95 In relation to vacancies, there is some concern over the number of vacant units in Gowthorpe, including the busier eastern section, as well as within Micklegate. Micklegate is an important historic part of the Centre that offers opportunity for the further intensification of existing land uses including investment in existing properties. The development of Abbey Walk has provided some larger stores in the heart of the Town Centre which is overall considered to be positive; though the layout of the development has limited its potential to link satisfactorily into Micklegate. If the retail core was to expand for instance south of the Town Centre, then there would be some concern that it could undermine the future role of Micklegate which would have not only economic but heritage implications.

12.96 The capacity assessments have demonstrated the scope for an amount of additional comparison goods retail floorspace. Government policy promotes the provision of larger stores and additional larger stores could attract a wider range of national multiple operators than exist at present and help increase the town centre's market share. The car park to the east of Abbey Walk – Back Micklegate - is a potential suitable development site, subject to the satisfactorily resolution of car parking provision within the Town Centre as a whole. Analysis of car parking surveys produced by Selby District Council[80] indicate that the car park usage for this car park is relatively low compared to other Town Centre car parks.

Tadcaster Town Centre Boundary

12.97 Tadcaster Town Centre primarily serves the role as a convenience centre, with day-to-day retailing as well as pubs, cafes, restaurants and services. It also has a number of independent and specialist retailers which diversify and widen the retail offer of the Centre.

12.98 The Survey data and consultation process revealed some concern over the lack of vibrancy within the Town Centre and the relatively high number of vacant units. There are also issues of environmental quality in particular for the large central car park. There is a gap site on the High Street itself and there are opportunities for the improvement and intensification of land uses within the current Town Centre boundary.

12.99 Kirkgate, Westgate and Chapel Street perform a more secondary role and include more service uses and housing. However they are considered appropriate locations for retailing and additional retail units on these streets would support the vitality and viability of the Centre as a whole. For that reason, it is suggested that those streets remain within the Town Centre boundary; and that there is no particular need to identify a Primary Shopping Area to which new retail development should be concentrated within as the retail provision is broadly distributed across the centre and to all intents and purposes the Primary Shopping Area and the town centre boundary for Tadcaster would be the same and can be described as such. There is a need to stimulate the provision of other convenience and comparison goods outlets throughout the Centre as a whole and to re-balance them against the provision of service outlets in particular.

12.100 Tadcaster Town Centre has expanded in its role eastwards, particular with the development of Sainsbury's. This performs an important role as the

[80] Selby District Council Car Parking Survey (2008)

major food supermarket for the locality. It is slightly divorced from the rest of the Town Centre and the potential for linked trips is undermined as a result. However there are other town centre uses east of the River Wharfe, as well as the town's Bus Station and service uses such as the medical centre, with the potential opportunity to intensify the use of land in this location.

12.101 The northern part of the existing Town Centre includes a number of public houses and restaurants, the cultural attraction of the Riley Smith Hall and a range of service outlets. It also incorporates largely residential development along the Churchyard. This area could logically be excluded from the Town Centre.

12.102 The western area includes the east side of Chapel Street but excludes the largely residential west side. Notwithstanding that the Street Market of Tadcaster has recently moved to a site further west of Chapel Street, we see no particular need to justify an extension of the Town Centre boundary in this location given the findings of the Study and the existing land use patterns

12.103 We consider that it is logical to include the whole of the land area bounded by Westgate, Chapel Street, High Street and Kirkgate within the Town Centre, including the Central Car Park.

12.104 We also see no particular reason or evidence to support a review of the Town Centre boundary on the east side of Kirkgate.

12.105 The southern boundary of the Town Centre is set back slightly from the southern side of the High Street. Land to the south of this largely forms part of the brewery complexes. We have considered the potential benefits of extending the Town Centre to the south of Wharfe Bank Terrace but the land to the rear is recreational in function, with associated uses, and has accessibility issues. We see no particular justification to amend the boundary in this location to accommodate any particular identified needs.

12.106 In particular we have reviewed the Town Centre boundary on the east side of the River Wharfe. This area currently includes Sainsbury's. We see no particular justification for the extension of the boundary to the north west of the Sainsbury's, as this could exacerbate the current concern that the food store location does not maximise the potential for linked trips.

12.107 The area to the south of Commercial Street could offer the potential for a more intensified form of development and includes the Bus Station and the car park site,. Consideration should be given to including this area within the Town Centre boundary at some future stage, potentially within any Development Plan review, which could have the effect of consolidating town centre activity on this side of the River. However, we suggest that priority for any development activity in the first instance should be given towards the Central car park area and for that reason, recommend that the bus station site be excluded from the Town Centre at present. We suggest that this is a matter for Development Plan review at the appropriate stage. In the meantime, any proposal for town centre uses on that site would need to be assessed in terms of its edge of centre credentials and associated impacts, in accordance with a criteria-based policy, as well as considerations of scale.

12.108 The plan at **Appendix 9** illustrates our proposed Town Centre / Primary Shopping Area boundary for Tadcaster.

Sherburn in Elmet Town Centre Boundary

12.109 Sherburn in Elmet performs an important role as a centre that generally serves the Sherburn and South Milford communities, plus the surrounding rural communities. It provides a mix of uses and occupancy levels are relatively high. There are areas of the Centre that could benefit from environmental improvements and consideration has to be given as to the potential for new development which could also address some of the environmental issues.

12.110 The Centre is split into two dominant areas with the north Finkle Hill area, including the Co-op, and the Low Street area, including the Tesco Express and Spar.

12.111 The existing Town Centre boundary north of Kirkgate reflects the existing town centre land use patterns and includes the Co-op store. We do not recommend any changes be made in this area.

12.112 The existing boundary to the south of Kirkgate reflects the existing patterns. There would be merit in extending the boundary slightly southwards to incorporate the town centre uses around the Oddfellows Arms area, although only those units only on the western side.

12.113 The capacity assessments indicate a need to boost the market share of Sherburn in Elmet through a limited amount of new comparison goods floorspace. We consider in the next Section the potential for a redevelopment around the Social Club site that could accommodate such uses.

12.114 We do not see any particular logical location in which to extend the Town Centre by any meaningful degree to accommodate additional growth, given that residential properties generally tightly surround the Centre.

12.115 The plan at **Appendix 10** illustrates our proposed Town Centre / Primary Shopping Area boundary for Sherburn in Elmet.

Primary Shopping Frontages

12.116 In addition to defining the extent of the Primary Shopping Areas, local authorities may choose to distinguish between primary and secondary frontages.

12.117 There is a need to encourage the diversification of uses generally within town centres. However, it can be justified to seek a higher proportion of retail uses within primary frontages.

12.118 We have reviewed the potential use of such a policy within the three Centres.

12.119 At present only Selby Town Centre includes defined Primary Shopping Frontages (currently called Core Shopping Frontage in the Selby District Local Plan). This takes in the northern side of Gowthorpe around its junction with Finkle Street and the southern side along with the frontages to The Crescent.

12.120 These are considered to be important retail frontages to be maintained. To the west there are also a number of other comparison goods retail outlets which would warrant protection given their significance in such a central location to the Centre. We therefore recommend that the existing Frontages be maintained but extended westwards along Gowthorpe on its northern side to include some additional retail units which are important to maintaining the retail frontages on this key street.

12.121 Finkle Street has not been incorporated into the defined Primary Shopping Frontages for the Town Centre due to the relatively high level of non-retail uses in this street.

12.122 We do not consider there to be a particular requirement to identify any Secondary Shopping Frontages. Secondary frontages provide greater opportunities for flexibility and a diversity of use. We suggest general policies which promote retail activity within the Primary Shopping Area and allow greater flexibility elsewhere in the Town Centre to be appropriate in the local context of Selby.

12.123 We have reviewed the potential for Primary Shopping Frontage policies in Tadcaster and Sherburn in Elmet but consider that, due to the current mix and distribution of uses, that such a policy approach would not be particular appropriate. In the case of Tadcaster, there could be merit in seeking to support retail activity on the High Street and prevent inappropriate changes of uses. However, there are existing service and food and drink outlets within that part of the Centre which are likely to compromise the integrity, and application, of such a policy approach.

Other Plan Policies

12.124 A review is required of other appropriate Plan policies that are recommended in the context of the Selby Core Strategy, the Selby Area Action Plan, the Site Allocations Document and the Development Management DPD.

12.125 PPS6 indicates that local authorities should also set criteria-based policies for assessing and locating new development proposals, including development on sites not allocated in development plan documents.

12.126 There is a need for policies to be flexible and to respond to changing economic circumstances. This is particularly important as the current economic context indicates a reduced rate of developer interest and occupier demand. Should economic conditions change, policies should be robust and flexible enough in order to determine planning applications in an appropriate manner without jeopardising the spatial strategy.

The Role of Town Centres

12.127 A general over-arching policy relating to the role of Town Centres is suggested as appropriate for the Core Strategy. That would define the spatial strategy relating to retailing and other main town centre uses.

The Protection of Town Centres

12.128 In particular a criteria-based approach can be used to assess the appropriateness of any future edge or out of centre proposal for town centre uses.

12.129 The current Local Plan (Policy S2) uses a criteria-based approach which reflects the current national planning policy framework. An alternative approach is, rather than set out a specific criteria-based approach, to make a simple reference to the need to comply with national policy. Indeed advice to local authorities is not to replicate national planning policy within development plan policies notwithstanding the advice in PPS6.

12.130 Draft PPS4 suggests that authorities should consider setting floorspace thresholds for the scale of edge of centre and out of centre development which should be the subject of an impact assessment and to specify the areas these thresholds will apply to and the types of impacts having particular importance which should be tested.

12.131 Both the criteria and the thresholds for the District should be reviewed as part of the formulation of future Development Plan Documents, including the Development Management Development Plan Document. Revisions to draft PPS4, and potential implications of a possible ‘competition’ test relating to food store developments would need to be considered at the appropriate time.

Diversification of Uses

12.132 Local planning authorities should encourage diversification of uses in the town centre. Authorities should prepare policies to help manage the evening and night-time economy in appropriate centres and that provision is made where appropriate for a range of leisure, cultural and tourism activities, considering the scale of leisure development they wish to encourage and their likely impact. Potential impacts could include anti-social behaviour, crime, security and the amenities of nearby residents.

Upper Floors

12.133 There is the opportunity to encourage the greater use of upper floors within Town Centres in particular for residential and office development. In new development proposals, the opportunity to provide additional uses on upper floors would have the potential to create additional interest to a development from both an economic and an urban design perspective, as well as encourage greater footfall within the Centres. This could be encouraged through policy.

Smaller Shops

12.134 Smaller shops play an important role in the make-up of the existing town centres and provide an opportunity to support independent and specialist retailers which add to the retail offer as a whole. They can enhance the character and vibrancy of a centre and make a valuable contribution to consumer choice.

12.135 It is considered that the provision of small scale retailing outside of the Primary Shopping Area of Selby but within the Town Centre would give rise to benefits which would outweigh the potential risk associated with any dispersal of retailing activity within the Centre as a whole. A policy to support such provision would be appropriate.

Markets

12.136 Markets can play an important role in the life of a town centre. There are established regular markets in the three town centres. We recommend that these should be supported and promoted though planning policy.

Local Shops

12.137 The current Local Plan includes a general policy on local shops (Policy S3). This policy would apply to proposals for local shops and commercial premises outside of defined shopping and commercial centres.

12.138 Local authorities should where appropriate seek to protect existing facilities which provide for people's day-to-day needs and seek to remedy deficiencies in local shopping and other facilities. There is a need to encourage the provision of local shops where they can promote sustainable communities. Such provision should be of a scale appropriate to the local catchment area. The current policy should be retained but updated to take into account the revisions to the Use Classes Order.

Protection of Local Shops

12.139 Local Plan Policy S3 also deals with the issue of protecting local shops from inappropriate change of use or redevelopment. Through consultation with stakeholders, this was noted as a local issue in particular locations.

12.140 PPS6 states in planning for local shops and services, local planning authorities should adopt policies which ensure that the importance of shops and services to the local community is taken into account in assessing proposals which would result in their loss of change of use.

12.141 We would recommend that, in the interests of maintaining sustainable communities, that a similar policy be adopted for use in an appropriate development plan document.

Retail Development in the Countryside

12.142 There are certain cases where it may be appropriate to allow small scale retail development outside of defined development limits but great care needs to be adopted to ensure that such uses are carefully controlled and would not undermine the District-wide strategy on retailing and town centre uses (as well as countryside and development management policies).

12.143 The Local Plan has a current Policy S4 which relates to such cases. It is suggested that there is no particular case to promote Class A2 uses (financial and professional services) in such locations, nor Class A5 hot foot takeaway uses. The likely appropriate end uses would be small scale retailing, relating to for instance tourism, and food and drink outlets, in particular restaurants, cafes and public houses. Policy can be drafted to make clear which end uses would be appropriate. The development of farm shops can also need to be covered by such a policy.

Car Parking

12.144 The existing Local Plan includes a policy which seeks to protect the car parks within Selby Town Centre. Proposals which would result in the loss of off-street car parking spaces as defined on the Proposals Map will not be permitted unless alternative provision, for at least the same number of spaces, can be made at an appropriate location, or it can be demonstrated that there is no longer a requirement for the existing level of car parking.

12.145 The car parks play on important role and function in supporting the vitality and viability of all of the centres. Car parks do offer however an opportunity for new development, linked to an intensification of their use, though for instance multi-storey car parks or management policies. The quality of car parks in terms of accessibility and environmental quality of course differ throughout centres. Evidence from the Selby Car Parking Survey of 2008 shows that certain car parks, such as Back Micklegate, have lower usage than others.

12.146 We consider there is a local need to have a policy approach that protects car parks and that these should be identified within the Site Allocations Document / Proposals Map. However the policy needs to be worded to include flexibility to allow for development where appropriate.

Garden Centres

12.147 Garden centres are uses that are typically promoted in out of centre locations. There is a need however to manage the provision of garden centres and in particular to control the range of goods that could be sold from them. There are also residual issues about encouraging the use of the private car for access – although garden centres are typically visited by car, it may be appropriate to encourage through policy the siting of garden centres in locations where they can support existing communities and enable access by those without access to a car.

Identifying Development Sites

The Approach

12.148 It is necessary to review the potential methods of accommodating future requirements for additional town centre floorspace and the appropriate locations to accommodate the identified need. This can be through:

- An extension of the Primary Shopping Area / town centre boundary;
- The identification of specific development site allocations, where sites can be defined;
- The identification of specific policy areas, where sites can only be generally defined.

12.149 This assessment has also required a re-consideration of existing allocations, as to whether they are realistic and feasible, and whether they need to be retained or re-allocated.

12.150 The identification of sites for development has taken into account:

- The need for development.
- The appropriate scale of development.
- The sequential approach to site selection.

- The impact of development on existing centres.
- That locations are accessible and well served by a choice of transport.

12.151 In assessing need and capacity for additional retail and leisure development, greater weight on quantitative need has been placed but qualitative considerations have also been taken into account.

12.152 The quantitative need assessments set out in the Study identify scope for additional comparison goods shopping in Selby and Sherburn in Elmet, convenience goods shopping in Tadcaster, a cinema and other leisure uses in Selby and food and drink uses throughout the District but particularly in Selby.

12.153 There are no specific needs that we can currently identify for the Plan period up to 2017 which we consider cannot be accommodated within redefined Town Centres. There is an opportunity to extend the Town Centre boundary of Selby to encompass existing mixed use areas which would also take in potential development areas which could respond in particular to the need for additional leisure and office development.

12.154 There is also the opportunity to define a Primary Shopping Area for Selby which could incorporate land as well as buildings which could accommodate the need for additional comparison goods retail development.

12.155 There is the potential for limited additional convenience goods retailing in Tadcaster. We consider there is the potential to accommodate that level of need within the existing Town Centre boundary – which we recommend is largely retained as existing.

12.156 We have identified a need for additional office accommodation. Town centres should be the focus for such uses. The delivery of office accommodation is largely to be supply-led and market driven although there may be opportunities for public sector-led office projects. We consider that there is a more limited potential for office accommodation in both Tadcaster and Sherburn in Elmet. We consider that there would be merit in considering allocating a site in Tadcaster for office development ideally where it could support the vitality and viability of the Town Centre but failing that, in an accessible location that could help diversify the local economic base.

12.157 Sites which are capable of accommodating different business models have been considered. These models include large retail stores, such as those operated by discount store outlets and the larger national multiples in for instance clothing and footwear sectors. The definition of the Town Centre and Primary Shopping Area boundaries, and the identification of development sites, takes this into account.

12.158 Consideration has to be given to the phasing of any development sites. This is particularly important when the scale of need is limited and there is a planning justification to concentrate new development in a certain location in the short-term. The longer term forecasts of need show the potential for a more significant level of new floorspace particular in the comparison goods sector. However long-term forecasts have to be treated with considerable caution and having regard to the health checks and qualitative issues we do not consider it appropriate to seek to plan for any additional floorspace over and above that set out above for the 2017 forecast level. To do so, would place at risk the health of existing stores and outlets and potentially undermine the vitality and viability of the town centres as a whole. We have had regard in particular to PPS6 guidance that indicates that local planning authorities should allocate sufficient sites to meet the identified need for at least the first five years from the adoption of their development plan documents. In that respect we consider the policy test year of 2017 to be appropriate.

12.159 Not only of course is there an opportunity to accommodate growth through extensions to Primary Shopping Areas and town centres as well as the allocation of new sites, there is also the potential to make better use of existing land and buildings including where appropriate redevelopment.

Review of Existing Allocations

12.160 The following sites are identified in the Selby District Local Plan:

Selby Town Centre

12.161 The Ousegate area is identified as a Special Policy Area for a mix of uses including B1 offices, studios, light industry, retail and associated uses (Use Classes A1, A2 and A4), tourism, leisure and residential under:

- Policy SEL/6 – Ousegate / New Street / Station Road Special Policy Area (Ousegate).

12.162 We would suggest that the inclusion of part of that area within the Town Centre Boundary would encourage the promotion of appropriate main town centre uses. Retail uses within that area would have to be considered against general policies as part of an approach to focus retail development on the Primary Shopping Area. We do consider that there is a need to provide more policy guidance in relation to the land to the south including the Wood Yard site and the Bus Station area (see below).

12.163 Policy SEL/9 relating to Abbey Walk was not 'saved' reflecting the delivery of development of that site.

Tadcaster Town Centre

12.164 There are no existing development site allocations in the adopted Local Plan.

Sherburn in Elmet Town Centre

12.165 The commitment for a retail development within the northern part of the Centre is recognised on the existing Local Plan Proposals Map, which has now been developed for a Co-op food store.

Potential Development Sites

12.166 There are no existing Development Site Allocations that we suggest are carried forward to the new Local Development Framework documents.

12.167 We have identified the following Sites for consideration as future Development Site allocations:

- Selby – Back Micklegate car park;
- Selby – Bus Station site;
- Selby – Former Wood Yard site;
- Selby – Ousegate North site;
- Tadcaster – Central Car Park;
- Tadcaster – Bus Station site;
- Tadcaster – PowerPlus site;
- Sherburn in Elmet – Social Club / Kirkgate.

12.168 We have also considered the Civic Centre site, on the edge of Selby Town Centre (see Paragraph 12.90). There are proposals for the Civic Centre to be relocated and the site could be available for development from 2011 onwards. We suggest that the Site be the subject of a rigorous development options review which would assess in particular how the Site could better contribute to the renaissance of the Town Centre through development for an appropriate set of uses.

12.169 We have reviewed the potential of sites to meet the scale and type of need identified, through examining the potential land uses which could be accommodated, alongside any opportunities or constraints to the sites redevelopment. This review is set out in Table 12.1 below.

Table 12.1 - Development Site Review

Site Location	Current Uses	Potential Land Uses	Opportunities	Constraints
Selby				
Back Micklegate car park	Existing car park with access from Millgate.	Non food retail-led development.	Close proximity to Micklegate, a key shopping street. Development could support the vitality and viability of Micklegate subject to satisfactory links. Open land in car parking use. Expected limited land assembly issues. Adjacent to Abbey Walk development. Potential to improve Selby Dam frontage.	May be a need to retain car parking that would limit the development potential of the site. Access issues from Millgate would need to be reviewed.
Bus Station site	Existing Bus Station and adjacent Social Club.	Town centre uses other than large scale retail e.g. cinema, restaurants, offices.	Proximity to railway station. May be able to rationalise the bus stands provision. Flat topography. Potential for a landmark development on key vantage point and in a gateway location. Positive site relationship with the Park and Abbey.	Rationalisation of bus station / stands facilities. Relocation of Club may be required. May be a need to rationalise existing highway land.
Former Wood Yard site	Brownfield site.	Town centre uses other than large scale retail e.g. cinema, restaurants, offices.	Proximity to railway station. Potential to improve the aspect to and from the Railway Station. Positive site relationship with the Park.	Potential land assembly issues.
Ousegate North site	Vacant site including former petrol filling station and wharf.	Town centre uses other than large scale retail. Potential for residential development, with ground floor commercial uses providing active frontages.	Mixed use development. Food and drink uses. Additional residential development within the Town Centre. Gateway site that could improve the attractiveness of the entrance into the Town Centre from the north.	Potential land assembly issues. Potential land contamination issues through former uses. Flood risk issues to review.

Site Location	Current Uses	Potential Land Uses	Opportunities	Constraints
Tadcaster				
Central Car Park	Car park.	Town centre uses including retail.	Largest realistically deliverable site within Tadcaster Town Centre. Mixed use development, retail-led particular where it can diversify the existing retail offer and expand the provision of small-scale convenience and comparison goods outlets. Potential to dramatically improve the environmental quality of this part of the Town Centre.	Potential land assembly issues. Need to review the requirement to retain town centre car parking.
PowerPlus site	Former garage and associated buildings, part vacant and part in retail use.	Town centre uses. Potential for residential development, with ground floor commercial uses providing active frontages	Gateway location, where development could improve the attractiveness of the 'entrance' to the Town Centre from the east. Opportunities to exploit the riverside frontage.	Potential land assembly issues. Flood risk issues to review.
Bus station site	Bus station, service uses, public houses.	Uses which could support the vitality and viability of the Town Centre. Could include leisure, residential and commercial uses. Potentially retail uses subject to satisfying the appropriate policy tests and not undermining the delivery of a scheme on the Central Car Park.	Potential to rationalise the car parking provision and bus station arrangements. Potential to redevelopment the public house and takeaway sites.	Potential land assembly issues. Would need to replan / reprovide the bus station. Car parking provision may need to be maintained.
Sherburn in Elmet				
Social Club / Kirkgate	Social Club and car park.	Town centre uses including retail. In particular comparison retail uses should be encouraged.	Highly visible site. Improvements to 'high street' appearance. Creation of a central public space.	Potential land assembly issues. May be a requirement to relocate the Club. Need to retain car parking provision to serve the town centre as a whole.

12.170 The evidence base would support the current identification of those projects within an appropriate Local Development Plan document, such as the Site Allocations Document and Proposals Map. The detail of any Site Allocation Policy would need to be drafted having regard to the context and conditions at the time.

13. Conclusions and Recommendations

13.1 This Study provides an assessment of the need for further development for retail, commercial and leisure uses up to 2026 (to correspond with the proposed LDF Plan period). It also addresses deficiencies in current provision and the capacity of existing centres to accommodate new development.

13.2 The conclusions and recommendations are summarised below.

Retail Uses

Convenience Retail

13.3 Chapter 7 sets out the assessment of whether there is the capacity for additional convenience floorspace within the District as a whole, and the centres of Selby, Tadcaster and Sherburn in Elmet.

13.4 The findings are summarised within Table 13.1:

Table 13.1: Convenience Retail Conclusions and Recommendations

Convenience Retail	Conclusions and Recommendations
District Wide	The analysis indicates that there would be insufficient capacity to support a substantial amount of convenience goods floorspace within the PCA during the study period assuming all commitments are implemented. The surplus convenience goods expenditure available assuming a small increase in market share by 2017 would be sufficient to support either a modest extension to an existing 'Top-four' foodstore, a 'metro' style 'top-four' foodstore or a combination of smaller facilities such as a typical 'Discounter' foodstore and 'Express' or 'Local' type facilities, in addition to the existing commitments. Should one or both of the two extant foodstore extension planning permissions not be implemented and become expired, this would create additional convenience capacity on top of that identified above. This could support between an additional 1,400-3,400 sq m. (Top 4 Grocers) to 2,900-7,100 sq m (Discounter) of gross convenience floorspace to 2026. The distribution of these facilities around the PCA should be informed by the individual Zones' analysis below.
Selby	The analysis does not show any capacity for additional convenience retail floorspace within Selby or Zone 1 across the Study Period, either based on current market share or allowing a modest increase. The only capacity to support additional floorspace within Zone 1 by 2017 would arise from non-implementation of both of the Morrisons and Tesco commitments (the non-implementation of just one or the other produces a negative surplus in 2017). These would release a capacity roughly equivalent to their estimated turnovers and therefore the non-implementation of either could support facilities of a similar nature to the extensions or a combination of smaller facilities.
Sherburn in Elmet	There is only a limited surplus of expenditure available for additional facilities within Zone 2 throughout the Study Period, even with an allowance for a modest increase in market share and inflow. It is therefore not necessary to plan to seek significant increase of convenience goods floorspace within Sherburn in Elmet across the study period.
Tadcaster	The surplus identified by the analysis is not sufficient to support a significant amount of new convenience retail floorspace within Zone 3 to 2026. Dependent on retailer format, in 2017 this surplus could support between 900 and 2,000 sq m of gross floorspace, increasing to between 1,125 and 2,300 sq m by 2026. Allowing for modest increases in market share results in a small uplift in capacity, but this is not significant enough to support any large scale additional convenience retail floorspace within Tadcaster. Given the geographical positioning of Zone 3, its proximity to competing stores within York and to the west, the limited surplus of expenditure available for additional facilities, it is therefore inappropriate to seek significant increase of convenience goods floorspace within Zone 3 across the study period.
Zone 4 - Eggborough	Although the analysis set out in Appendix 4 theoretically identifies capacity for additional floorspace within Zone 4, as outlined in Chapter 7, it is not appropriate in policy terms to promote or allow any significant new convenience floorspace in areas outside the three town centres in order to protect the role and hierarchy of the District's centres. Small scale, local or top-up convenience provision could be acceptable within the village centres providing that it was of an appropriate scale and in accordance with the relevant planning policy tests.

Comparison Retail

13.5 Chapter 8 sets out the assessment of whether there is the capacity for additional comparison floorspace within the District as a whole, and the centres of Selby, Tadcaster and Sherburn in Elmet .

13.6 The findings are summarised within Table 13. 2:

Table 13.2: Comparison Retail Conclusions and Recommendations

Comparison Retail	Conclusions and Recommendations
District Wide	The analysis indicates that there would be insufficient capacity to support a substantial amount of comparison goods floorspace in the PCA at current market share (30.4%) until around 2021. However, allowing for an increase in market share, there is sufficient surplus available expenditure to support new comparison goods floorspace. Should Selby District Council consider it appropriate to increase the market share of the Primary Catchment Area, this could be achieved through an improvement in comparison goods facilities. This should be directed towards existing Centres in line with national planning policy and Selby Town Centre would represent the most appropriate location for this development. Suitable sites within or adjacent to the Primary Shopping Area of Selby Town Centre should be considered for accommodating such provision. The provision of modern units and the creation of a 'critical mass' should increase the attractiveness of Selby Town Centre to some higher-order retailers. This would enable residents of the District to meet more of their higher-order shopping needs locally, retaining more expenditure within the local economy and reducing the need to travel. However, the Town Centre will never be able to retain all expenditure, due to the nature and offer of competing centres such as York and Leeds and their role at the top of the Regional Shopping Hierarchy.
Selby	There is negative capacity for comparison goods floorspace within Zone 1 until 2019 at current market share. As with the PCA as a whole, should Selby District Council consider it appropriate to increase the market share of Zone 1, there could be a modest amount of surplus comparison goods capacity available to support new floorspace towards the mid-point of the study period (2015-2018). If some of the commitments are not implemented, additional capacity could be created as these consents expire. It is considered that overall however, as the facilities within Zone 1 (principally Selby Town Centre and Three Lakes Retail Park) draw a significant proportion of trade from outside Zone 1, the PCA or Study Area as a whole should be viewed as the appropriate Catchment Area for similar facilities as opposed to the more limited Zone 1. Therefore, any applications for additional non food floorspace should utilise the wider PCA findings as the base for demonstrating that the proposals are acceptable in planning policy terms.
Sherburn in Elmet	As the existing market share of Zone 2 is low (4.5%), there is limited capacity available to support additional comparison goods floorspace even at the end of the study period in 2026 (the analysis does not show any capacity until 2021). Allowing for an increase to 10% in market share, there is a limited additional capacity to support new floorspace to 2026 (£8.5 million). Furthermore, the physical constraint of the centre would make its difficult to provide additional floorspace, therefore it is recommended that Selby District Council seek to support a modest improvement in facilities that would seek to raise the market share of Zone 2 to around 10%. This would promote more sustainable shopping patterns through allowing more of residents' shopping needs to be met locally whilst not challenging Selby Town Centre's status as the primary shopping location within the PCA for residents within the Selby District.
Tadcaster	There is limited capacity for additional floorspace within Tadcaster, even allowing for a modest increase in market share to 15%. Given this, coupled with the underperformance of existing facilities in Tadcaster Town Centre identified by the

Comparison Retail	Conclusions and Recommendations
	household survey, it is considered that no substantial additional comparison goods floorspace should be actively promoted in Tadcaster throughout the study period. It may be necessary to secure small improvements to meet local needs but these should be assessed on a case by case basis. It is recommended that the District Council seek to improve the level of vacancy rates and expand the diversity of the range of Town Centre uses within Tadcaster.
Zone 4 - Eggborough	Although the analysis set out in Appendix 5 theoretically identifies capacity for additional floorspace within Zone 4, as outlined in Chapter 8, it is not appropriate in policy terms to promote or allow any significant new comparison floorspace in areas outside the three town centres in order to protect the role and hierarchy of the District's centres. Small scale provision which serves a localised function could be acceptable within the village centres providing that it was of an appropriate scale and in accordance with the relevant planning policy tests.

Commercial Uses

13.7 Chapter 9 sets out the assessment of whether there is the capacity for additional commercial floorspace within the District.

13.8 The findings are summarised within Table 13. 3:

Table 13.3: Commercial Conclusions and Recommendations

Commercial Use	Conclusions and Recommendations
District Wide: Class A2 and B1 Floorspace	As highlighted by GVA Grimley in the Employment Land Study published in July 2007, the Selby District is now entering a period of challenge and opportunity. The Study identified that while there continues to be a strong manufacturing and distribution presence within the District, it is anticipated that there will be some shift towards a more modern service economy over the next decade. As GVA Grimley recommend, the delivery of higher value service sector employment activities within the District would seek to reverse this trend, with the focus upon a supply-led approach to promoting economic development within Selby, Tadcaster and Sherburn in Elmet. The District is well connected within the region, particularly due to the good road links via the M62 and A1(M) motorways - this benefit should be built upon for the promotion of new commercial opportunities within the District. In terms of the future supply of employment land within the District there is currently an oversupply, however, a significant proportion of the allocated employment land is either highly or medium constrained, restricting its development potential. Based on an analysis of the GVA Grimley Study and the analysis within Chapter 9, we would recommend that new commercial floorspace is promoted as part of mixed use schemes where appropriate. Within town centre locations this integrated approach to land use would help promote both sustainable working practices and vitality in town centres. Evidently, there is some new floorspace proposed within the District in the pipeline (including the floorspace currently under construction at Selby Business Park, particularly for new Class B1 uses, thus increasing the provision of high quality commercial floorspace. However, alongside this development there should also be a focus upon the improvement of the existing provision of both Class B1 (Business) and Class A2 (Financial and Professional) uses within the three town centres. In promoting the improvement of existing floorspace (which may be through economic development measures.), alongside the development of new floorspace, the Selby District will improve its commercial offer across the board.
Selby: Class A2 and B1 Floorspace	Within Selby Town Centre, surveys undertaken have identified a high representation of service uses. This suggests that there should be a focus on improving the existing provision of Class B1 and A2 uses, rather than actively seeking new 'commercial' floorspace to accommodate service uses. Within Selby Town Centre, the attractiveness of the Abbey and the pleasant working environment of the surrounding streets should be maximised.
Tadcaster and Sherburn in Elmet: Class A2 and B1 Floorspace	The surveys revealed that both Tadcaster and Sherburn were well represented in terms of commercial floorspace for service uses, and therefore the focus should be upon promoting the improvement of existing provision rather than the creation of new floorspace.
Existing Out of Centre Business Parks	There are a number of business parks within the District, which provide a large quantity of Class B1 floorspace, including the Selby Business Park and Sherburn Industrial Estate. These provide high quality, purpose built and accessible office space within the District. It is important that the quality of these facilities is maintained. However, any further applications for Class B1 floorspace within an out of centre location will need to ensure that they accord with planning policy, including the

Commercial Use	Conclusions and Recommendations
	sequential approach to site selection set out for offices by PPS6 (and any subsequent replacements).
Builders Merchants and Car Showrooms	We consider that car showroom and builders' merchants uses are generally suited to edge or out of centre sites. We consider that appropriate conditions will need to be imposed on these types of uses to control their operation so that they do not become Class A1 retail uses. This will protect against such uses slowly morphing into retail uses overtime through the trade counter element being gradually increased, and thus potentially impacting detrimentally upon the retail facilities within the town centres. We would also recommend that appropriate policies are in place to protect against these types of uses occupying vacant Class A1 units within town centres unless a particular need case can be demonstrated in Selby Town Centre. In addition, to discourage these uses from being developed on the high priority employment allocations, we recommend that policies are put in place protect most important allocation so that these uses are directed to lower grade employment/non office park locations. This could be done through the Development Management DPD.

Leisure and Recreation Uses

13.9 Chapter 10 sets out the assessment of whether there is the capacity for additional leisure and recreation facilities within the District.

13.10 The findings are summarised within Table 13.4:

Table 13.4: Leisure and Recreation Conclusions and Recommendations

Leisure Use	Conclusions and Recommendations
Restaurants, Pubs and Bars	SDC should encourage the diversification of uses within centres, including those which contribute to the evening economy, to ensure that centres are vibrant and viable. There is clear qualitative and quantitative need for additional restaurant and bar floorspace across the PCA as a whole, and within each of the three centres individually. Assuming a constant market share of 29.8% to 2026 results in a quantitative need for a further 2,000 sq m of gross floorspace across the whole District to the end of the Study Period. The District as a whole should be seeking to retain the PCA expenditure spent in restaurants and bars, achieving a higher market share than at present (30%). Therefore, we have modelled the capacity for additional restaurant and bar floorspace across the District assuming the following uplifted market shares: - 40%: 600 sq m by 2017, increasing to 3,500 sq m by 2026. - 50%: 1,400 sq m by 2017, increasing to 5,000 sq m by 2026.
Cinemas	The analysis reveals a theoretical quantitative need for up to six screens to 2026 (assuming no cinema trips were made to facilities outside of the District). However, taking into account the existing provision surrounding the PCA and the qualitative considerations, we do not feel that in reality there is sufficient capacity to support a cinema of this size. The cinema sector is market driven and it is unlikely that a major operator/cinema of this size could be secured within the District given the surrounding competition. However, there is some capacity within the District and a small 1 or 2 screen venue could be supported. It is likely that this would be most successful if promoted as part of a mixed use scheme, perhaps alongside other arts or cultural facilities. Given the centre hierarchy within the District, the preferred location for such a facility would be Selby Town Centre.
Ice Rinks	Whilst the Study has identified that the District's participation in ice skating is above average, there is not an overwhelming quantitative need for the provision of an ice rink within the District, qualitatively, there could be in theory some benefits to accommodating such a facility within the PCA. The lack of a facility within the PCA is a qualitative indicator of need itself, as the residents of the PCA have to travel to facilities outside of the District to participate in ice-related sports. . In accordance with the centre hierarchy within the District, the preferred locations for such a facility would be within one of the three main centres, preferably Selby Town Centre.
Water Based Recreation	Residents of the District are already undertaking formal water based recreational activities, and the provision of additional facilities would have amenity, environmental, social, economic and health benefits to the District. Therefore, the opportunity to increase participation in water based activities (include passive activities such as riverside walks) should be encouraged. A full review of the existing water based recreation facilities should be carried out as part of any update to the Selby Recreation Open Space Strategy (ROSS) 2006 to identify whether there is a physical deficiency in provision across the District for this type of open space in PPG17 terms.
Health and Fitness Facilities	Approximately 30% of the District's population (c. 29,000) attend a health and fitness facility. However, the six existing facilities only accommodate c. 6,000 members/users. Hence the remainder are currently using facilities located outside of the District. There is the potential within the District, subject to market demand, for at least one or more health and fitness

Leisure Use	Conclusions and Recommendations
	facilities, preferably accommodated by a higher quality operator to provide competition to similar facilities lying outside the District.
Ten Pin Bowling	The District has one existing facility: Bowl'n'Fun in Selby. At the time of the publication of this Study, this facility was closed for refurbishment and due to reopen during October 2009. The current participation rates within the District would not justify the need any further facilities.
Bingo	The District has one existing facility: Walkers Bingo and Social Club in Selby. The current participation rates within the District would not justify the need any further facilities.

Next Steps

13.11 The Local Planning Authority should utilise the findings of the Selby Retail, Commercial and Leisure Study 2009 to form a robust policy base as part of its Local Development Framework.

13.12 These policies should include:

- General policies on retail hierarchy and town centres which could be appropriate for the Core Strategy;
- Specific policies and strategies which are more appropriate for the Selby Area Action Plan;
- Specific policies and strategies for Tadcaster and Sherburn in Elmet for use in other Development Plan documents; and
- Criteria based policies for the Development Management DPD.