England & Lyle
Chartered Town Planners

Barnsley Town Centre Retail Study 2014

Final Report

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EXECUTIVE SUMMARY

1. England & Lyle have been appointed by Barnsley MBC to carry out the Barnsley Town Centre Retail Study 2014. The Study has been commissioned to support the emerging consolidated Local Plan for the Borough. It has been carried out in accordance with the most up-to-date guidance on the preparation of retail studies in the NPPF and Planning Practice Guidance in order to provide a robust evidence base for the Local Plan and its associated retail policies.

Existing Shopping Provision

2. The Study focuses on Barnsley town centre. The number of shops in the town centre has remained largely unchanged between 2008 and 2013, but with a small increase in comparison goods shops. The number of vacant units and vacancy rate has increased between 2008 and 2013. The number of services uses has fallen significantly since 2008. The total amount of floorspace has decreased significantly between 2008 and 2013, again in services. Retail floorspace is about the same in total. Convenience floorspace has increased, due principally to the opening of the Lidl supermarket in Peel Street.

3. The Barnsley Markets scheme is planned as a major town centre redevelopment which will have a key role in the regeneration of Barnsley town centre. The scheme is currently being revised as the Better Barnsley Markets Project.

Town Centre Health Check

4. A detailed health check has been carried out of Barnsley town centre as defined in the UDP, updating the previous health check in March 2011. New On-Street and household interviews surveys show a reasonable level of satisfaction with the town centre. Both surveys show that it is most popular because it is close to home but there is seen to be a lack of non-food shops and chain stores. There is strong evidence of linked trips to the town centre by shoppers using Morrisons for their food and grocery shopping. In the On-Street survey 78% of respondents said they use the markets, mostly for food items. The markets are rated as very good in the health check.

5. In the north-eastern part of the town centre, Barnsley Transport Interchange provides a ‘state of the art’ facility for combined bus, rail, coach and taxi travel services and a ‘park and ride’ facility. The town centre is well served by public transport services. Environmental quality in the town centre is generally of a high standard.

6. Overall the town centre has a better than average level of vitality and viability which has improved slightly compared with the previous health check in 2011. Barnsley’s strengths are the number of shops and amount of shopping floorspace; its leisure and cultural facilities; linked trips from Morrisons; the number of multiples; Barnsley market; the availability of food shopping; good pedestrian flow; car parking; good accessibility by public transport; ease of movement within the centre; safety and security; and the quality of the shopping environment. The main weaknesses are the high vacancy rate and vacant floorspace, and low retailer demand.

Shopping Patterns

7. The study area is based on Barnsley Borough but also takes in surrounding areas to analyse shopping patterns. A telephone household survey of 1,000 interviews was carried out in the study area in March 2014, across five zones.

8. For main food shopping Asda at Old Mill Lane has the largest market share, larger than that of Morrisons at Westway, Tesco at Wombwell Lane and Morrisons, Cortonwood. Asda also has a relatively high market share for top-up food shopping but for top-up shopping a much wider range of shops are used. Barnsley town centre is particularly well used for top-up shopping.

9. 30% of respondents in the household survey combine their main food shopping trips with other activities, mostly other food shopping and non-food shopping. Most respondents (45%) make linked trips to Barnsley town centre. There is a much higher incidence of linked trips by those shopping at Morrisons than at Asda and Tesco, and the vast majority of these linked trips are to Barnsley town centre.

10. Meadowhall and Barnsley town centre are the dominant centres used for clothes and footwear shopping. For furniture and carpets Barnsley town centre is also well used. DIY and hardware shopping is dominated by Cortonwood which has a B&Q store. For electrical goods most shoppers use Barnsley town centre and the Peel Centre Retail Park. Barnsley town centre is also predominant for other non-food goods. The retail warehouse parks most used for non-food shopping are Cortonwood and Meadowhall.

11. The main likes about Barnsley town centre in the household survey are that it is close to home and has a good market. The main dislikes are a lack of chain stores, rundown appearance and lack of range of non-food stores. Most people would like to have more chain stores, clothing shops and a refurbishment of the town centre.

12. An On-Street interview survey of 300 interviews was also carried out in Barnsley town centre in March 2014. The main reason people were visiting the town centre was to buy non-food goods followed by food items and financial services. Most respondents like the town centre because it is close to home. The main dislikes among those using the town centre are the lack of non-food stores and the number of vacant shops. Most respondents said that a better choice of clothing shops and shops in general would benefit the town centre.

Expenditure and Turnover

13. Population and expenditure estimates and forecasts have been made for the study area and zones for the base year 2012 and the forecast years 2018, 2023 and 2033. In convenience goods the forecast expenditure growth in the study area is 14% to 2023 and 28% to 2033. In comparison goods the forecast growth in expenditure is significantly greater with a growth of 39% to 2023 and 94% to 2033. An alternative expenditure growth scenario is proposed based on lower comparison expenditure forecasts between 2018 and 2033.

14. The base year expenditure data has been combined with market shares of expenditure by zone from the household survey to estimate expenditure flows in 2012 to Barnsley town centre. The town centre has a relatively low market share in convenience goods of 16% including the Morrisons store in Westway. The town centre’s overall market share for

comparison goods in the study area is 33% and it has fallen from 36% in 2007. At the same time Meadowhall's market share of comparison spending from the study area has increased from 11% to 13%.

Retail Capacity

15. Capacity is assessed in periods to 2018, 2023 and 2033. Three scenarios have been tested:

- **Scenario 1** – assuming constant market shares of Barnsley town centre within its catchment area in convenience and comparison goods (the 'no development' scenario);
- **Scenario 2** – based on a net increase in retail floorspace in the Barnsley Markets project with a small increase in Barnsley town centre's market share for comparison goods (and constant market share in convenience goods).
- **Scenario 3** – based on a smaller increase in market share of Barnsley town centre within its catchment area in comparison goods and lower expenditure growth 2018-2033 in comparison goods. There is no Scenario 3 for convenience goods.

It is assumed that the Markets project will be completed and trading by 2018.

16. In Scenario 1 it is assumed that the retention levels (market shares) for Barnsley town centre (excluding Morrisons) will remain constant for convenience and comparison goods. Scenario 2 takes account of the floorspace proposed in the Markets project. No increase in retention level is assumed in convenience goods but in comparison goods it is forecast that the retention level will increase slightly by 2018 then remain constant. In Scenario 3 it is assumed that the comparison retention level will increase very slightly and that there will be lower expenditure growth between 2018 and 2033.

17. There is a limited capacity for convenience goods floorspace in the town centre in addition to some new convenience floorspace in the Markets project, equivalent to two small convenience stores or a discount food store in 2023. In comparison goods there is greater capacity throughout the Local Plan period in addition to the floorspace proposed in the

Markets project. Taking Scenario 3 as the most realistic option, the floorspace capacity for comparison goods represents up to 8,300 sq.m. gross floorspace in 2023 and 17,500 sq.m. gross in 2033.

18. The Local Plan period extends to 2033 but we have cautioned against placing too much reliance on long term forecasts of expenditure growth, particularly in comparison goods. We would advise that the allocation of sites in the town centre should be based on the medium term floorspace capacity in 2023. The priority for Barnsley is to ensure the successful delivery of the Markets redevelopment project as the key to the regeneration of Barnsley town centre. This scheme is crucial to the Borough and needs protection as an in-centre scheme. The allocation of other large sites for retail development based on long term forecasts of floorspace capacity which are uncertain could have negative consequences for the implementation of the Markets project. It is important that demand for new shopping floorspace in the town centre is concentrated on the Markets project until such time as its commercial viability is achieved.

19. In the long term to 2033 there is forecast to be capacity for convenience goods floorspace equivalent to one medium-sized supermarket or two smaller foodstores. In comparison goods there is capacity in 2033 for 17,500 sq.m. gross floorspace in addition to the Markets scheme. The longer term capacity is greater than the amount of floorspace likely to be developed in the Markets project. However, we do not propose that sites should be allocated to accommodate all of this additional retail floorspace at the present time. We advise that the need for additional floorspace in the longer term should be re-considered when the Local Plan is reviewed.

Qualitative Need

20. There is a qualitative need for improvements in the centre. In particular the Local Plan should seek to cater for:

- A reduction in the vacancy rate

- An improvement in comparison goods shopping through the attraction of more national multiples, including a department store.
- Better quality shops including more independent non-food shops.
- An improvement in the shopping environment to attract more shoppers into the town centre and make the centre more family-friendly.
- Redevelopment of the market to make it even more attractive as one of the strengths of the town centre's retail offer.
- New leisure facilities within the town centre to complement the retail offer, such as a cinema and restaurants.

Town Centre Site Appraisals

21. Detailed appraisals have been made of sites in Barnsley town centre to assess their availability and suitability for future town centre uses. The Markets project remains the key regeneration opportunity within the town centre and should accommodate a retail-led redevelopment scheme, including large, modern format retail units and a replacement market, as well as incorporating leisure, office and car parking uses and a new high quality public space. In addition, it is considered that the southern part of the Courthouse site, land south of Kendray Street and the Heelis Street & New Street area offer potential to accommodate major retail-led developments in the longer term.

Advice on Boundaries

22. A review has been made of the town centre boundary in the UDP. It is proposed that the town centre boundary should be revised to exclude areas to the north of the centre which are predominantly residential and areas to the east of Harborough Hill Road. Advice is also given on the proposed primary and secondary frontages in the town centre. The Morrisons store at Westway is located within the existing and proposed town centre boundary but outside the proposed primary shopping area. However, to be consistent with the NPPF and Planning Practice Guidance, for retail policy purposes Morrisons should be regarded as a town centre store.

1. INTRODUCTION

1.1 England & Lyle have been appointed by Barnsley MBC to carry out the Barnsley Town Centre Retail Study 2014 (the "Study"). The Study has been commissioned to support the emerging consolidated Local Plan for the Borough, which will incorporate elements of the adopted Core Strategy (revised & updated), the Development Sites and Places DPD consultation draft and the draft Town Centre Area Action Plan. The Study will form a fundamental part of the evidence base for the emerging Local Plan and assist in the delivery of the Economic Strategy. It has been carried out in accordance with the most up-to-date guidance on the preparation of retail studies in the NPPF and Planning Practice Guidance in order to provide a robust evidence base for the Local Plan and its associated retail policies that is able to withstand scrutiny.

1.2 The Study takes account of national planning policy and practice guidance on town centre uses, several existing and draft Council policy documents and previous evidence which has been produced for the Council by England & Lyle on retail matters. We carried out the Barnsley Smaller Centres Study in November 2010, followed by the Town Centre Retail Capacity Study in March 2011 and the report Retail Impact Analysis of Potential Superstore Developments in Barnsley in May 2011.

1.3 The Council's Brief for the Study states that the main elements of the Study will be:

- an up to date retail capacity analysis supported by household and in-centre interview surveys;
- a comprehensive health check of Barnsley town centre; and
- a detailed analysis of the need to allocate additional suitable sites for retail development in or around the town centre in the Local Plan.

1.4 The Study focuses on Barnsley town centre and although a study area has been defined which extends beyond the Borough boundaries, and the household survey analyses shopping patterns across this area, the capacity analysis in the Study is for Barnsley town centre only.

2. EXISTING SHOPPING PROVISION IN BARNSLEY TOWN CENTRE

Goad Centre Report

2.1 An Experian Goad Centre report for Barnsley town centre was prepared in May 2013. The details are included in Appendix 1. The report shows the retail composition of the town centre in terms of number of outlets and gross floorspace in different uses, the percentages of each use and a comparison with the percentages in the UK as a whole. The May 2013 data can be compared with a previous Goad Centre report for Barnsley town centre in June 2008. The number of outlets in the main use categories is shown in the following table. The categories exclude a small number of miscellaneous office uses.

OUTLETS	June 2008			May 2013		
	number	percent	UK %	number	percent	UK %
Convenience goods	31	7%	9%	27	7%	9%
Comparison goods	149	33%	34%	154	39%	41%
All Retail	180	40%	43%	181	46%	50%
Service	209	46%	45%	141	36%	37%
Vacant	61	14%	12%	71	18%	13%
Total outlets	450	100%	100%	393	100%	100%

2.2 The gross floorspace in the main use categories is shown below. The categories exclude a small amount of floorspace in miscellaneous office uses.

FLOORSPACE (sq.m.)	June 2008	May 2013
Convenience goods	171,600	200,100
Comparison goods	394,500	361,700
All Retail	566,100	561,800
Service	423,800	218,500

Vacant	225,600	155,700
Total floorspace	1,215,500	936,000

Analysis of Shopping Provision

2.3 Barnsley town centre has a slightly lower proportion of retail outlets (46%) than the UK average (50%). The proportions are lower in both convenience and comparison goods. The proportion of services (36%) is about the same as the national average. Barnsley's vacancy rate of 18% is above the national average of 13%. However, the vacant units recorded include properties that have been vacated in advance of redevelopment for the Barnsley Markets project and are not being re-occupied. Therefore, the actual vacancy rate is lower than the figure in the Goad Centre report.

2.4 In convenience goods Barnsley has a relatively low representation of grocers and newsagents but a relatively high representation of bakers. In comparison goods Barnsley has a relatively low representation of furniture/carpets, bookshops, DIY shops, motor accessories and florists but a relatively high representation of footwear, mens clothing, jewellers and charity shops. In services Barnsley has a relatively low representation of cafes and restaurants, hairdressers and estate agents but a relatively high representation of travel agents, banks and building societies. There has recently been an increase in the number of cafes and there is no longer a deficiency in café provision.

2.5 The number of shops has remained largely unchanged between 2008 and 2013, but with a small increase in comparison goods shops. The number of vacant units and vacancy rate has increased between 2008 and 2013 but some of this increase is explained by properties being vacated in advance of redevelopment for the Barnsley Markets project. The number of services uses has fallen significantly since 2008. This may reflect a change in the survey area that was adopted for the town centre survey area in 2013 which would exclude service units in some peripheral areas of the town centre.

2.6 The total amount of floorspace has decreased significantly between 2008 and 2013, again in services. Retail floorspace is about the same in total. Convenience floorspace has increased, due principally to the opening of the Lidl supermarket in Peel Street. Barnsley has a higher proportion of convenience floorspace than the national average. Comparison floorspace has decreased slightly.

2.7 Vacant floorspace has decreased despite an increase in the number of vacant units but the town centre has a much higher proportion of vacant floorspace (17%) than the national average (11%).

2.8 The composition of retail and service uses is used in the town centre health check which is set out in Section 3.

Recent Developments and Commitments

2.9 Since the preparation of the Barnsley Smaller Centres Study in November 2010 and the Town Centre Retail Capacity Study in March 2011, there have been a number of new retail developments in Barnsley Borough. The developments which have been completed are listed below. Other new stores were opened in 2010 – Iceland at Lundwood and Tesco in Penistone. In addition, Asda has taken over the former Netto store in Royston.

Description/Location	Completion	Floorspace (sq.m. gross)
Asda extension, Goldthorpe	2011	573
Aldi, Barugh Green	2012	647
Lidl, Peel Street, Barnsley	2012	1,611
Quality Save discount store, Peel Street, Barnsley	2012	1,347

2.10 Of these new developments, only the Lidl and Quality Save stores in Peel Street are located within Barnsley town centre. Because they form part of existing shopping provision at the time of the household survey in April 2014, they are included in the analysis of existing shopping patterns and do not need to be allowed for as commitments in the capacity analysis.

2.11 There are a number of other retail development schemes that have been granted planning permission and have not yet been built, or are still under construction. These schemes are listed below. All of these schemes are located outside Barnsley town centre. Although they are commitments they do not form part of the capacity analysis for Barnsley town centre because the analysis is based on a market share approach and it takes account only of the town centre's market share of retail expenditure and commitments within the town centre that would take a share of future expenditure growth. Although the Barnsley Markets scheme in the town centre was approved in 2011, the scheme that has planning consent will not be implemented. A new scheme is being planned – the Better Barnsley Markets Project (see below).

Description/Location	Date approved	Floorspace (sq.m. gross)
Retail units, YEB site, Barnsley	2009	7,060
Tesco, Market Street, Hoyland	2011	2,594
Superstore development, New Street, Barnsley	2012	8,922
Retail units, Thurnscoe Hotel site, Thurnscoe	2012	650
Retail unit, Wakefield Road, Barnsley	2012	550
Supermarket, Midland Road, Royston	2013	3,141
Aldi, Birdwell	2013	1,581
Aldi, Barnsley Road, Cudworth	2013	1,355
Retail units, Barnsley Retail Park	2013	1,046

2.12 Better Barnsley is a major town centre redevelopment which has a key role in the regeneration of Barnsley town centre. The original scheme was granted planning permission in September 2011 but a revised scheme is currently being drawn up. A new planning application is expected to be made in September 2014. The plans include the following major programme of work:

- Demolition of the former County Council offices and adjacent shops
- Redesign and redevelopment of the Metropolitan Centre and indoor market

- Proposed purchase of the former Training and Enterprise (TEC) building and adjacent property to the north of Kendray Street
- Promotion of the Kendray Street site as a leisure and retail centre
- Construction of a new, purpose built central library/community hub
- Creation of a new public square to accommodate a new open market and town centre events
- Public realm improvements
- Work to attract new retail investment
- A cinema and facilities for families and the evening economy, and
- New surface car parking.

2.13 The Council has set aside £35m for the project that will also attract significant additional private sector investment. It will provide an opportunity for jobs to be safeguarded, and for additional jobs to be created. Work on the scheme is due to start in 2015.

2.14 The scheme granted planning approval in September 2011 will not now be implemented. It included a department store which was subsequently deleted. The new scheme will have a stronger markets offer and smaller high quality retail element. Details of the new scheme are not yet available but we understand that it will include a new indoor Market Hall of around 8,000 sq. metres and up to 21,000 sq.m. of retail and leisure floorspace. For the purposes of our retail analysis we assume that the gross retail floorspace would be around half of the total, say 10,500 sq. metres. This represents a small net increase in retail floorspace compared with existing provision. Details are given later in Appendix 10.

3. TOWN CENTRE HEALTH CHECK

Approach

3.1 The 2011 England & Lyle report on the Town Centre Retail Capacity Study (March 2011) contains a health check of Barnsley town centre. Much of the information in the 2011 health check remains relevant but we have updated some elements of this earlier health check in order to ensure that the range of indicators covered is fully consistent with the National Planning Policy Framework (NPPF) and the new Planning Practice Guidance (PPG) and to reflect changes since 2011 in key indicators such as vacancies, customer views and recent investment. In carrying out a review of the health of the town centre, we have updated those indicators where more recent information is available, for instance from the household and in-centre surveys and from our own observations of the town centre. The health check has been carried out for Barnsley town centre as defined in the UDP. The area covered corresponds broadly with the Town Centre Area Action Plan boundary but includes residential areas to the west of Sackville Street and east of Pontefract Road.

3.2 England & Lyle's approach to undertaking health checks is based on a systematic appraisal of a total of 36 factors based on the indicators listed in the new Practice Guidance which are broadly the same as those in the former PPS4. These factors are scored and an overall vitality and viability index is calculated which can be compared with other centres and used to monitor changes in a centre over time. Application of this approach in Barnsley town centre will provide the Council with comprehensive up-to-date assessment of the vitality and viability of all the centres in the Borough on a common basis.

3.3 This approach has been developed by England & Lyle over a period of years and has been used in numerous retail studies and assessments for local authorities and developers. It enables us to make appraisals of the vitality and viability of centres in a consistent manner. The approach is intended to be as objective as possible. The appraisals are carried out systematically and are based on considerable experience of similar appraisals elsewhere.

3.4 In updating the health check for Barnsley town centre we have used the findings of the previous 2011 health check, national comparisons from the Goad Centre Report, a FOCUS Town Report for Barnsley, general observation of the town centre and local information from the Council and other sources. Each factor on the Health Check Appraisal Sheet is scored on a 5-point scale of 1=very poor, 2=poor, 3=fair, 4=good and 5=very good. An average vitality and viability index for Barnsley has been calculated on the basis of the scoring on each of these factors. The health check appraisal is included in Appendix 2.

3.5 The number of 'factors' within the main indicators provides an in-built weighting to the health check appraisal. Because of the composition of indicators and factors, the key indicators of diversity of main town centre uses, retailer representation, accessibility and environmental quality have the greatest representation of different factors and carry greater weight than other indicators. In our experience this is a fair reflection of the relative importance of the different indicators. Most indicators and factors are self-explanatory but for clarification:

- Offices include financial and professional services such as banks, building societies, solicitors, estate agents, etc.
- Leisure, cultural and entertainment activities include cinemas, theatres, libraries, bingo halls, leisure centres, health & fitness clubs, etc.
- Multiple retailers represent national or regional non-food chains.

3.6 Some of the factors listed under the headings of diversity of main town centre uses, retailer representation and vacant properties are based on comparisons between the percentage of provision or facilities locally and national averages shown in the Goad report for the town centre. This is a conventional way of assessing how local conditions compare with national benchmarks. It is particularly relevant in the case of vacancy rates and the number and types of shops and services. A higher than average local representation would suggest a rating of 'good' and a lower than average local representation would suggest a rating of 'poor'.

Health Check Appraisal

Diversity of Main Town Centre Uses

3.7 The primary shopping area in Barnsley town centre is concentrated on Cheapside and Queen Street, taking in the Alhambra Shopping Centre, Metropolitan Centre and May Day Green. Secondary retail areas are situated on Market Street, New Street, Peel Square, Peel Street, Eldon Street and The Arcade.

3.8 According to the Goad report there is a total of 396 retail and service units in Barnsley town centre of which there are 181 occupied shops representing 46% of properties compared to 50% in the UK as a whole. The proportions of both convenience and comparison goods shops are slightly below the national averages. However, there is a good range of shops and Barnsley is an important sub-regional centre. We rate the number and type of shops as good.

3.9 In May 2013, there was a total of 87,420 sq.m. (941,100 sq.ft.) gross retail and commercial floorspace in Barnsley town centre. Convenience goods account for 21% of the town centre's total floorspace, which is above the national average. 38% of floorspace in the town centre is used for comparison goods, compared to 46% nationally. The amount of shopping floorspace is rated as good.

3.10 Service units account for 23% of retail floorspace in the centre, which is slightly below the national average of 25%, but the proportion of service units in the centre is consistent with the national average. There is a reasonable representation of banks and financial services and building societies. The supply of offices is rated as fair.

3.11 The mixed use development at Gateway Plaza provides contemporary hotel, pub/restaurant and office space. Some upper floors of properties are being used for office space with some financial and professional services available in the centre (solicitors and accountants), mainly concentrated on Regent Street. A Library, Theatre, Bingo venues and an Art Gallery provide leisure, cultural and entertainment facilities in the centre. The Metrodome Leisure Complex is located on the eastern edge of the town centre and provides for swimming, bowling and health & fitness activities. The town centre has recently benefitted from the opening of Experience Barnsley, a museum and discovery centre within the Town Hall building. Overall the provision of leisure, cultural and entertainment facilities is rated as good. The representation of pubs, cafes and restaurants in the centre is about the same as the national average and we rate it as fair. The availability of hotels is also fair. There is a Premier Inn in the town centre and other modern hotels outside the centre on the M1 at Dodworth.

Vacant Properties

3.12 According to GOAD, in June 2008 61 units in the town centre were vacant, representing 14% of all retail and commercial units, which was slightly higher than the UK national average (12%). In May 2013 there were 71 vacant properties with a vacancy rate of 18%, compared with the national average of 13%. The vacancy rate is poor. However, as noted earlier, vacant units include properties that have been vacated awaiting demolition for redevelopment in the Barnsley Markets project. The proportion of vacant floorspace in the town centre is 17%, again higher than the national average of 11%. Vacant floorspace is also rated as poor. However, vacant properties are fairly small and are spread along secondary areas on Market Street, Kendray Street, Eldon Street and New Street. Vacant units do not have a negative effect on the appearance of the centre and we rate this factor as fair.

Commercial Performance

3.13 According to the CoStar database average shopping yields in Barnsley have increased (worsened) in recent years to around 14% compared to around 11% in Sheffield. Shop rental levels in Barnsley town centre have increased gradually in recent years but are relatively low compared with Sheffield. Yields and rental levels are rated as fair.

Customer Views and Behaviour

3.14 The new On-Street and household surveys show a reasonable level of satisfaction with the town centre. Both surveys show that it is most popular because it is close to home but the surveys show that there is seen to be a lack of non-food shops and chain stores. The level of satisfaction is higher in the On-Street survey where three times as many respondents said there is nothing they dislike about the town centre compared with those who said they is nothing they like about it. Satisfaction is rated as fair. The need for changes and improvements is also fair. Both surveys show a need for a better choice of non-food shops, especially clothing, and better quality shops. About a fifth of respondents said that no improvements are needed.

3.15 There is strong evidence of linked trips to the town centre by shoppers using Morrisons for their food and grocery shopping. The sample of respondents in the On-Street survey making linked trips is small but in the household survey more than 40% of shoppers using Morrisons also make linked trips to the town centre for non-food and other food shopping. These linked trips have important spin-off benefits for the town centre and we rate this factor as good.

Retailer Representation

3.16 According to GOAD, Barnsley town centre includes 135 multiple outlets out of a total of 396 retail and commercial outlets. Barnsley has 18 of the 28 non-food retailers classed by Goad as major national retailers, including Argos, Boots, Burtons, Carphone Warehouse, Dorothy Perkins, Marks & Spencer, New Look, Next, O2, Phones 4 U, Primark, Superdrug, TK Maxx, Topman, Topshop, Vodaphone, WH Smith and Wilkinsons. The town centre lacks a department store operated by a major national or independent retailer. However, the number of multiple retailers in the centre is regarded as good.

3.17 The variety of specialist/ independent shops in the centre is rated as fair with a number of specialist retailers, including designer clothing retailers (e.g. Gallery and Pollyanna on Market Hill, and Mode Boutique on Regent Street South), interior design specialists (e.g. Lewis & Co) and a range of other independents including butchers, bakers, clothes, shoes, jewellers and florists. The indoor market has a strong representation of independent retailers.

3.18 The town centre is well served by traditional outdoor and indoor markets. Barnsley's famous market has over 300 stalls located in both indoor and outdoor areas. The indoor market comprises a main market hall and meat and fish markets. Seasonal markets are also throughout the year including the annual Christmas Market and the Continental Market. In the On-Street survey 78% of respondents said they use the markets, mostly for food items. We rate the presence of markets in the town centre as very good.

3.19 Morrisons supermarket on Westway is located on the southern edge of the town centre. The centre also includes a Lidl discount foodstore, Iceland, Marks & Spencer's Food Hall and Fultons Foods as well as specialist food shops. As noted above, the indoor section of the markets accommodates numerous butchers, bakers and confectioners and they make an important contribution to the town centre's food retail offer. Therefore, we rate the availability of food shopping in the centre as good.

3.20 Evidence of recent investment by retailers is regarded as fair with evidence of recent investment in refurbishment of the Alhambra Centre, several retailers relocating within the centre from the Markets redevelopment area and the new Lidl foodstore and Quality Save discount store on Peel Street.

3.21 There is a lack of up-to-date information on retailer demand in Barnsley but the CoStar database suggests that the rate of recent lettings of shops has been low. We consider current retailer demand in the town centre to be poor.

3.22 Barnsley appears to have a relatively large number of charity shops and low quality discount shops. This is not necessarily a negative factor if they are meeting a local need but as an indicator of a healthy centre the presence of charity shops and low quality discount shops in the centre is rated as fair.

Pedestrian Flows

3.23 There is a relatively good volume of pedestrian movement in different parts of the town centre, and pedestrian flows are rated as good. The town centre was generally busy on the day of our visit in April 2014 and pedestrian footfall in the primary retail areas of Cheapside, Queen Street, The Markets, the Alhambra Centre, and in secondary areas of Market Street, Peel Street and Market Hill, was generally high. The indoor and outdoor markets were particularly busy.

Accessibility

3.24 The availability of car parking in Barnsley town centre is fair. The main car parking facilities in the centre include the Alhambra Centre, Markets multi-storey, Westgate and Courthouse Campus, with short stay parking on Peel Street, Pitt Street, Market Hill, Eldon Street, and Regent Street. In the On-Street survey most respondents visiting the town centre by car said they parked at the Alhambra Centre followed by the Markets multi-storey, Courthouse and Morrisons. The cost of car parking is also fair. The most popular car park in the Alhambra Centre charges £1.60 for up to 2 hours and £2.50 for up to 4 hours. Morrisons offers parking for 2 hours for £1 which is refundable and Lidl provides free car parking for 90 minutes.

3.25 In the north-eastern part of the town centre, Barnsley Transport Interchange provides a ‘state of the art’ facility for combined bus, rail, coach and taxi travel services and ‘park and ride’ facility with 100 parking spaces. The frequency and quality of public transport and the range of places served by public transport is good with regular bus services, including the numbers 7, 7A, 20, 21 and 21 stopping, every 15 minutes to an hour providing access to the town centre. The town centre is very accessible by bus from surrounding settlements such as Cudworth, Grimethorpe, Lundwood, Monk Bretton, Athersley and Brierley. Barnsley is a stopping point for National Express coach services to London and other destinations nationally. There is no direct train to and from London or Doncaster but frequent, direct trains to Leeds, Sheffield and Wakefield provide important links to connecting main line national rail services.

3.26 Ease of movement for pedestrians, cyclists and the disabled in the town is good. The primary shopping area in the centre is predominantly pedestrianised and there are good, paved links on foot to and from the Transport Interchange. Access in the north-western section of the town centre, e.g. Gateway Plaza and Westway, is slightly restricted by the undulating topography of this part of the centre and pedestrian access is restricted by main road routes along Westway on the southern edge of the centre. Ease of access to the main attractions in the centre is good, assisted by clear signage.

Safety and Security

3.27 Our observations are that the centre felt generally safe and secure during our visit. A CCTV system has been introduced into the town centre in recent years focused on the main shopping area on Cheapside which is also aided by a visible presence of security staff and Police officers. The feeling of safety and security in the centre is judged to be good overall. Crime and anti-social behaviour is relatively low in Barnsley compared with the average for South Yorkshire and is rated as fair.

Environmental Quality

3.28 Our general observations are that the physical appearance of retail and commercial properties in the town centre is fair. The centre does not appear to have any significant environmental problems such as graffiti, litter and air pollution and we rate the presence of environmental problems in the centre as fair. The centre benefits from good town centre management. The main pedestrianised retail core along Cheapside, Queen

Street and Peel Square benefits from bollards, creative paving, planters, trees and other decorative street furniture.

3.29 Barnsley Town Hall is an historic landmark building in the centre which is complemented by attractive landscaping and open spaces, with statues and interpretive plaques on nearby Church Street (e.g. honorary statue of Dickie Bird) and Market Hill (e.g. interpretive heritage plaques). There have recently been significant works to improve the public realm in Centenary Square. The quality of the public realm is rated as good.

3.30 In the On-Street survey 66% of respondents said they thought Barnsley town centre is 'family-friendly' in providing facilities that attract families to visit the centre. Those that said it is 'family-friendly' highlighted that there are good facilities/shops for families and friendly people/atmosphere. The minority that said it is not family-friendly mentioned that there are not enough facilities/activities for children. Overall we rate the town centre as good on family-friendly facilities.

3.31 The availability and condition of public toilets in the town centre is rated as fair with accessible WC facilities located in the Market Hall, Peel Square, Alhambra Centre and the Interchange.

Vitality and Viability of Barnsley Town Centre

3.32 The overall score obtained in our updated health check of Barnsley town centre in Appendix 2 is 3.4 which represents a better than average index of vitality and viability. Experience shows that the vitality and viability index will tend to range from about 2.5 for a centre that is performing badly with a low level of vitality and viability to 4.0 for a centre which is performing well with a high level of vitality and viability.

3.33 Barnsley's strengths are the number of shops and amount of shopping floorspace; its leisure and cultural facilities; linked trips from Morrisons; the number of multiples; Barnsley market; the availability of food shopping; good pedestrian flow; car parking; good accessibility by public transport; ease of movement within the centre; safety and security; and the quality of the shopping environment. The main weaknesses are the high vacancy rate and vacant floorspace (subject to our acknowledgement that some vacant units are awaiting redevelopment) and low retailer demand. All other factors in the town centre were rated as 'fair'.

3.34 Compared with the previous health check of the town centre in 2011, the overall vitality and viability index has increased slightly from 3.3 to 3.4. There has been a worsening in retailer demand and vacancies but an improvement in our rating of shopping provision, multiples, the market, food shopping, ease of movement and linked trips.

4. SHOPPING PATTERNS

Study Area

4.1 The study area for the Town Centre Retail Study is based on Barnsley Borough but in order to ensure that the study area includes the vast majority of shoppers who use Barnsley town centre the geographical coverage of the area has been extended to take in Hemsworth and South Kirkby in the east (in Wakefield District) and Brampton/Cortonwood in the south (in Rotherham District). The study area is slightly larger than that used in the previous Retail Study by DTZ in 2008, based on a household survey in 2007. The study area is shown on the map in Figure 1.

4.2 The study area has been divided into 5 zones for the purposes of the analysis of shopping patterns. The zones are defined by postcode sectors. They are essentially the same zones as those used in the 2008 study so it is possible to estimate how shopping patterns have changed since 2007. The five zones are also shown in Figure 1. They are:

1. Barnsley Central
2. Penistone / Rural West
3. Hoyland / Wombwell
4. Royston / Barnsley North
5. Cudworth / Goldthorpe

Telephone Household Survey Analysis

4.3 England & Lyle have commissioned NEMS Market Research to carry out a telephone household survey in the Barnsley study area. A total of 1004 interviews were carried out in March 2014, across the five zones. The number of interviews was proportional to the population in each zone and the survey data has been weighted according to the age structure of the population in each zone to obtain a representative sample. The number of interviews and weighted responses are as follows.

Zone	No. of Interviews	Weighted Responses
1 – Barnsley Central	275	273
2 – Penistone / Rural West	107	105
3 – Hoyland / Wombwell	144	135
4 – Royston / Barnsley North	175	179
5 – Cudworth / Goldthorpe	303	312
Total	1,004	1,004

4.4 The nature of the questions included the following topics:

- Stores used for main food shopping and top-up shopping
- Mode of travel for main food shopping and top-up shopping
- Spending on main food shopping and top-up shopping
- Linked trips when doing main food shopping
- Centres used for non-food shopping
- Home delivery/ internet shopping
- Use of retail warehouse parks
- Likes and dislikes about Barnsley town centre for shopping
- Changes or improvements needed in Barnsley town centre

4.5 The full household survey tabulations are included in Appendix 3.

Main and Top-Up Food Shopping

4.6 A detailed analysis of main and top-up food shopping and spending is given in Section 5. A summary of the stores most used for main and top-up food shopping is presented below. It should be noted that the percentages in the following table represent the actual survey responses. They are not a fully accurate representation of the market shares of these stores across the study area because they include Internet shopping and 'don't knows/it varies'. The data for top-up shopping include only those respondents who said they do top-up food shopping which is 72.4% of the total sample.

4.7 The stores shown in the table include those stores used by more than 1% of respondents for main food shopping and more than 2% of respondents for top-up food shopping. For top-up food shopping especially a much wider range of shops is used.

Food shopping **Stores mostly used (market shares)**	**Main food and grocery shopping (%)**	**Top-up food shopping (%)**
Asda, Old Mill Lane, Barnsley	21.4	4.7
Morrisons, Westway, Barnsley	12.6	2.5
Tesco Extra, Wombwell Lane	9.7	2.9
Morrisons, Cortonwood	8.3	1.3
Aldi, Barugh Green	4.8	4.2
Aldi, Doncaster Road, Barnsley	4.7	2.2
Tesco, Hemsworth	4.1	2.7
Tesco, Penistone	3.0	2.3
Tesco, Wath upon Dearne	2.2	0.6
Barnsley town centre	2.0	12.1
Asda, Royston	1.9	3.4
Asda, Goldthorpe	1.8	2.7
Asda, Chapeltown	1.6	0.2
Asda, Thurnscoe	1.4	1.9
Aldi, Wath upon Dearne	1.2	0.7
Asda, Worsborough	0.7	3.0
Asda, Grimethorpe	0.4	2.3
Co-op, Mapplewell	0.3	2.7
Wombwell	0.3	2.5
Other shops	17.6	45.1
Total	100.0	100.0

4.8 For main food shopping Asda at Old Mill Lane has the largest market share, significantly larger than that of Morrisons at Westway, Tesco at Wombwell Lane and Morrisons, Cortonwood. Asda also has a relatively high market share for top-up food shopping but for top-up shopping a much wider range of shops are used. Barnsley town centre is particularly well used for top-up shopping in Iceland, Lidl and Marks & Spencer. The town centre includes Barnsley market.

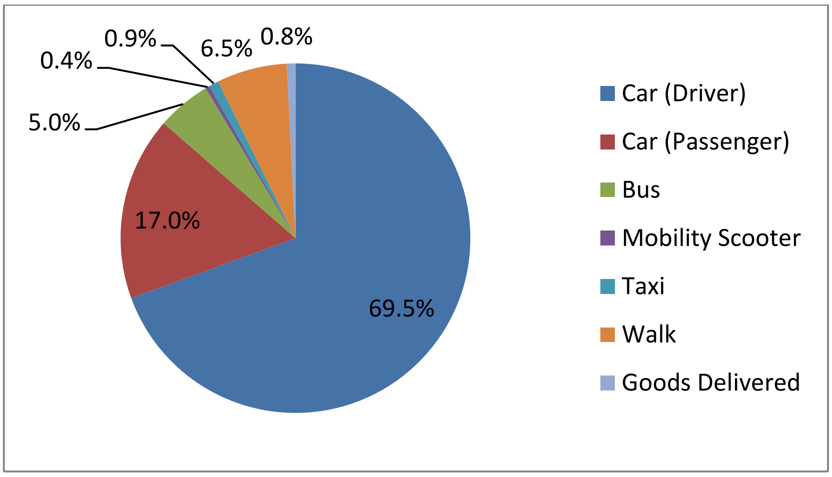
4.9 The main reasons why respondents choose to do their main food shopping at the store named are as follows.

Convenient to home	41.1%
Low prices / value for money	29.2%
Quality of food goods available	8.0%
Preference for retailer	7.6%
Range of food goods available	6.6%
Habit / always use it	4.7%
Convenient to work	4.5%

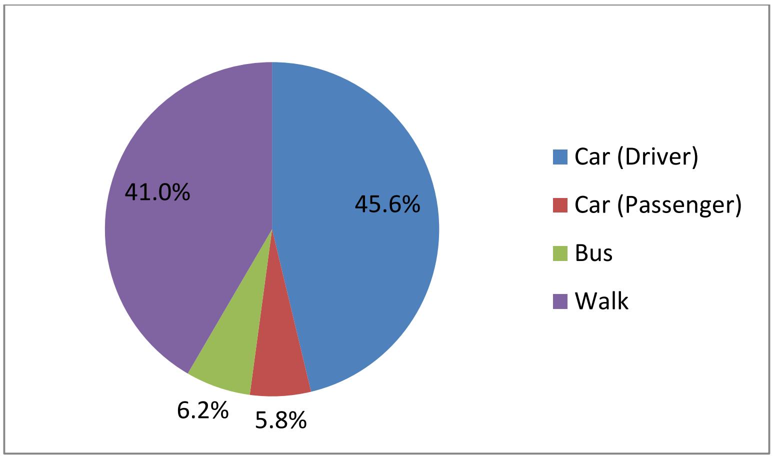
4.10 On average households in the survey spend £76.77 per week on main food shopping and £19.20 per week on top-up food shopping. Therefore, the proportion of food spending on main food shopping is 80%.

Mode of transport for food shopping

4.11 Respondents were asked how they normally travel when doing their main food and grocery shopping. As expected, the majority travel by car either as the driver (69.5%) or as the passenger (17%). Other responses included walking (6.5%) or bus (5%).



4.12 Respondents were also asked how they normally travel when doing their top-up food shopping. Again, the majority travel by car either as the driver (45.6%) or as the passenger (5.8%), although a considerable number walked (41.1%). A higher proportion of respondents used the bus (6.2%) for top up shopping rather than main food shopping.



Linked Trips

4.13 70.2% of respondents said that they do not tend to combine their main food shopping trip with a trip elsewhere. Of the 29.8% that do combine trips, the tables below show where they tend to go, and what activities they tend to carry out when visiting that place on the same trip.

Location of linked trips	Proportion of respondents
Barnsley town centre	44.8%
Don't Know / Varies	13.2%
Cortonwood Retail Park	6.9%
Wakefield city centre	3.4%
Stairfoot local centre	3.1%
Hoyland district centre	2.5%
Hemsworth town centre	2.4%

4.14 Most respondents visit Barnsley Town Centre (44.8%) on the same trip as their main grocery shop. Over half of respondents shop for other food items (51.4%), whilst an additional 39.2% shop for non-food items. Some respondents link their main food shop trip with travelling to or from work (7.6%) or visiting friends/family (6.4%).

Activities carried out when visiting this place on the same trip	Proportion of respondents
Go shopping for other food items	51.4%
Go shopping for non-food items	39.2%
Travel to/from work	7.6%
Visit family/friends	6.4%
Don't know	4.6%
Travel to/from School	4.3%
Use Sport/Leisure/entertainment facilities	3.9%
Financial Services (bank, building society)	3.9%
Visit café/restaurant/pub	3.6%
Visiting Market	3.2%
Health Services	2.5%
Get Fuel	1.8%

4.15 Further analysis of the household survey data was carried out to assess the differences between linked trips for the three main foodstore in the study area – Asda at Old Mill Lane, Morrisons at Westway and Tesco Extra, Wombwell Lane. The overall pattern of linked trips is shown below. Details are given in Appendix 4.

	Asda	Morrisons	Tesco	Overall
Respondents making linked trips	20.1%	41.0%	19.1%	29.8%
Linked trips to Barnsley town centre (excluding don't knows)	74.4%	90.0%	47.4%	51.4%

4.16 Clearly there is a much higher incidence of linked trips by those shopping at Morrisons than at Asda and Tesco, and the vast majority of these linked trips are to Barnsley town centre. Morrisons' shoppers are most likely to make linked trips on foot to Barnsley town centre from the store car park but Asda and Tesco shoppers are likely to make combined trips by car either to Barnsley town centre or other centres.

Internet shopping

4.17 When asked if they ever used home delivery services provided by supermarkets for food shopping, over three-quarters of the respondents said No (79.4%), 7.6% said yes-sometimes, 7.1% said they used it rarely and only 6% said they used the service frequently. The 6% frequent use of the Internet for food shopping in the Barnsley area compares with the Experian UK average of 8.3% of food spending on Internet shopping in 2013.

4.18 When asked if they ever used 'click and collect' services for food or non-food shopping, the majority of the respondents said No (87.4%), 7.1% said yes-sometimes, 4.1% said they used it rarely and only 1.4% said they used the service frequently.

Stores and centres mostly used for non-food shopping

4.19 Respondents were asked where they mostly buy the following products:

- Clothes, footwear and other fashion items
- Furniture, carpets and other floor coverings
- DIY and Hardware and Garden Products
- TVs, washing machines, fridges and small appliances
- Jewellery, toys and toiletries

4.20 The data in the table include responses of at least 1% for any type of goods.

	% of Responses				
Location	Clothes, footwear and other fashion items	Furniture, carpets and other floor coverings	DIY and Hardware and Garden Products	TVs, washing machines, fridges and small appliances	Jewellery, toys and toiletries
Asda, Old Mill Lane, Barnsley	0.8	-	0.1	1.2	6.0
Morrisons, Westway, Barnsley	-	-	0.1	0.2	2.6
Morrisons, Cortonwood	-	-	-	-	1.8
Tesco Extra, Wombwell Lane, Barnsley	0.3	-	-	2.7	3.7
Cortonwood Retail Park	8.9	6.2	31.8	9.7	6.0
Ings Road Retail Park, Wakefield	0.1	1.9	1.3	2.0	0.1
Meadowhall Shopping Mall, Sheffield	33.4	2.2	0.2	0.4	9.7
Meadowhall Retail Park, Sheffield	1.2	0.4	-	0.3	0.6
Parkgate Shopping Park, Rotherham	2.1	4.4	0.1	5.1	0.5
Peel Centre Retail Park, Barnsley	-	-	2.1	17.1	0.5
Wombwell Lane Retail Park	0.1	1.2	3.9	0.6	0.1
Barnsley Town Centre	28.3	15.8	17.8	21.1	27.8
Doncaster Town Centre	2.7	2.3	0.2	0.7	0.7
Hoyland District Centre	0.1	1.6	0.2	-	0.2
Leeds City Centre	0.7	0.6	-	-	1.0
Rotherham Town Centre	0.3	0.6	1.0	0.3	0.1
Sheffield City Centre	1.9	2.2	0.2	2.5	0.9
Stairfoot Local Centre	-	0.8	6.8	0.6	0.7
Wakefield City Centre	3.7	2.0	2.0	0.8	2.2
Wombwell District Centre	0.1	1.0	1.1	0.2	0.6
B&Q, Stairfoot Business Park	-	0.9	10.5	0.1	-
Internet / Catalogue / Mail Order / TV Shopping	6.2	8.1	1.3	15.6	8.7
(Don't Know / Varies / No Pattern)	3.6	16.6	3.0	6.3	4.7
(Don't Do / Don't Regularly Buy These Goods)	1.9	22.7	9.4	9.1	13.9

4.21 Meadowhall and Barnsley town centre are the dominant centres used for clothes and footwear shopping, followed by Cortonwood. For furniture and carpets Barnsley town centre is also well used, again followed by Cortonwood. DIY and hardware shopping is dominated by Cortonwood which has a B&Q Warehouse store but Barnsley town centre is also popular. The other B&Q store at Stairfoot is well used for DIY shopping, as is Stairfoot which we also interpret as being B&Q. For electrical goods most shoppers use Barnsley town centre and the Peel Centre Retail Park, and Internet shopping is significant. The proportion using Barnsley town centre for electrical goods appears high and it is possible that some respondents who stated 'town centre' actually shopped at the Peel Centre. Barnsley town centre is also predominant for other non-food goods.

Retail Warehouse Parks

4.22 The respondents were asked which retail warehouse park they mainly use for non-food shopping. Over a third of respondents said Cortonwood Retail Park, 19.7% said Meadowhall shopping mall and 7.4% said Parkgate Shopping Park. Conversely, 19.5% said they don't regularly buy these goods or that it varies, as shown in the table below.

Location	% of Respondents
Cortonwood Retail Park, Brampton	34.0
Meadowhall shopping mall, Sheffield	19.7
(Don't do / don't regularly buy these goods)	14.2
Parkgate Shopping Park, Rotherham	7.4
Peel Centre Retail Park, Barnsley	6.1
(Don't know / varies / no pattern)	5.3
Ings Road Retail Park, Wakefield	2.7
Meadowhall Retail Park, Sheffield	2.7
Wombwell Lane Retail Park	2.0
Junction 32 Outlet Shopping Village, Glasshoughton, Castleford	1.8
Barnsley Town Centre	0.9
Wakefield City Centre	0.8
Lakeside Village Outlet Shopping, Doncaster	0.7
Other	0.5

Likes and Dislikes about Barnsley town centre

4.23 Respondents were asked what they like best about Barnsley town centre for shopping, and what they disliked most. They were also asked what changes or improvements are needed in the centre.

Likes

4.24 The majority of respondents said they did not like anything about the town (33.9%). Others like the town centre because it is close to home (19.6%), whilst others like the fact that it has a good market, good range of non-food stores, compact, benefits from a good layout. The household survey was carried out over a wide survey area and 4.2% of the respondents had never used Barnsley town centre.

Likes about Barnsley Town Centre	Respondents
Nothing/Very Little	33.9%
Close To Home	19.6%
Good Market	11.3%
Good Range Of Non-Food Stores	4.9%
Compact Shopping Area	4.8%
Never Used Barnsley Town	4.2%
Good Layout	3.8%
Attractive Environment	3.2%
Close To Work	2.9%
Good Range Of Chain Stores	2.7%
Know Where Everything Is	2.1%
Don’t know	8.3%

Dislikes

4.25 The majority of respondents said they did not dislike anything about the centre (31%), whilst others commented on the lack of chain stores (19.7%), rundown appearance (12.3%), lack of range of non-food stores (11.0%) and independent stores (8.1%) and poor quality shops (7.2%).

Dislikes about Barnsley Town Centre	Respondents
Nothing/Very Little	31.0%
Lack Of Chain Stores	19.7%
Its Rundown	12.3%
Poor Range Of Non-Food Shops	11.0%
Lack Of Independent Stores	8.1%
Poor Quality Shops	7.2%
Too Many Charity Shops	5.8%
Not A Nice Environment	5.5%
Vacant Units	5.3%
Too Many Cheap Shops	4.2%
Parking Is Expensive	3.9%
Lack Of Parking	3.8%
Other	3.4%
Poor Quality Market	3.3%
Litter/Unclean	2.6%
Don't know	6.1%

Improvements

4.26 The survey shows that most people would like more chain stores, clothing shops and a refurbishment of the town centre. Over 30% of respondents did not know what improvements could be made or felt that no changes could be made. Other suggestions for improvements included a better range of non-food and quality shops, improvement of the market and more independent stores or national retailers.

Improvements to Barnsley Town Centre	% of Respondents
No Changes needed	19.2
more chain stores	15.2
more clothing shops	15.1
refurbish shopping area	12.9
better range of non-food shops	11.2
more quality shops	9.1
improve the market	7.5
more independent shops	7.3
more national high-street stores	6.4
free parking	4.3
less vacant units	4.0
more food shops	3.7
more parking spaces	3.4
make it more attractive	3.0
Other	2.7
new/better shopping mall	2.5
Needs Debenhams store	2.5
Needs BHS store	2.3
cheaper parking	2.2
better security	2.1
more shops for young people	2.1
Don't know	11.6

On-Street Survey Analysis

4.27 England & Lyle commissioned NEMS Market Research to carry out interview surveys in 8 locations within Barnsley town centre. A total of 300 interviews were carried out across these locations in March 2014. The surveys were conducted by face-to-face interviews by trained personnel with residents and visitors on six days of the week (Monday-Saturday) to ensure a representative sample of respondents

4.28 The nature of the questions included the following topics:

- Reasons for visiting the centre
- Frequency of visits to the centre
- Travel patterns and car parking
- Stores/centres used for main food shopping
- Use of Barnsley Market for shopping
- Likes and dislikes about Barnsley town centre for shopping
- Need for changes and improvements in Barnsley town centre

4.29 The full On-Street survey tabulations are included in Appendix 5.

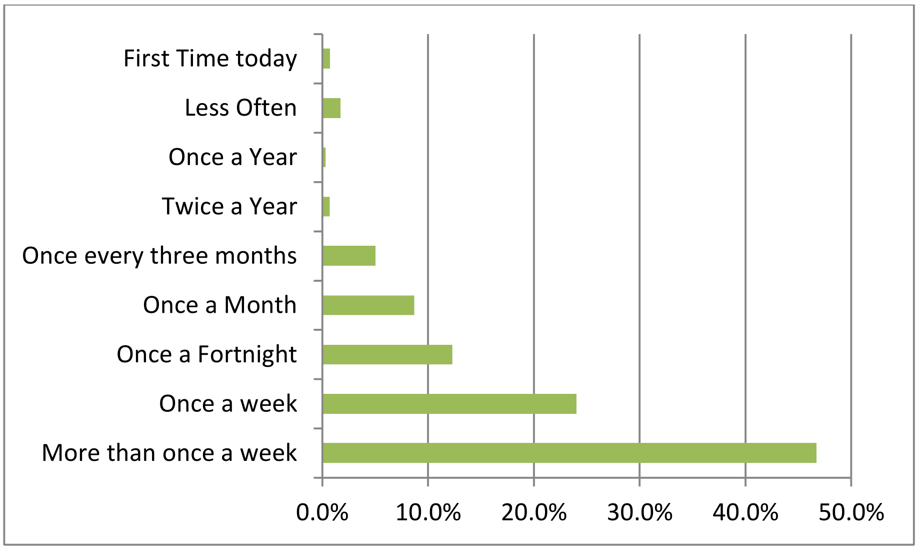
4.30 Respondents gave their main reason for visiting Barnsley Town centre that day, and other reasons for visiting Barnsley Town centre that day. The main results are shown in the following table.

Main Reason for visiting Barnsley town centre and other reasons for visiting town centre

	Main reason for visiting Barnsley town centre that day (single response)	**Other reasons for visiting Barnsley town centre that day (multiple responses)**
To buy non-food goods	45.0%	21.0%
To buy food items	11.7%	23.3%
Financial services	10.7%	7.3%
Browsing	6.3%	13.0%
Work / Business	5.3%	1.3%
Social	5.0%	2.7%
Other	8.3%	1.0%
Personal services	3.7%	1.3%
Don't Know/Varies	2.3%	-
Eating or drinking out	1.7%	3.0%
Nothing Else	-	34.0%

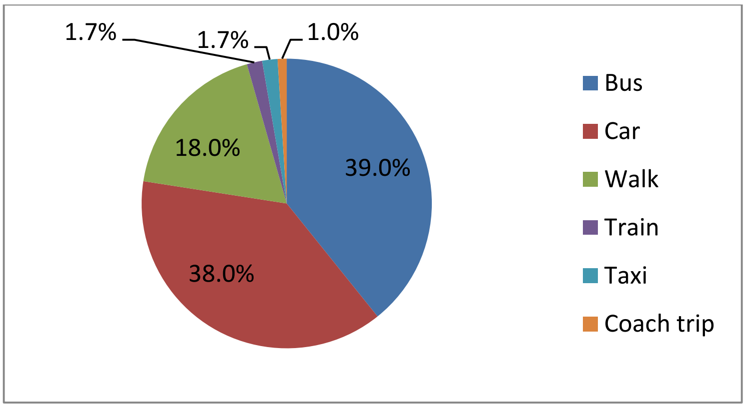
4.31 The main reason most people had come to the town centre was to buy non-food goods followed by food items and financial services (bank, building society, etc). A third of respondents were visiting the town centre just for the main purpose stated. Other reasons for visiting the centre also include buying food items and non-food goods, or just browsing.

Frequency of visits to Barnsley town centre for shopping or services



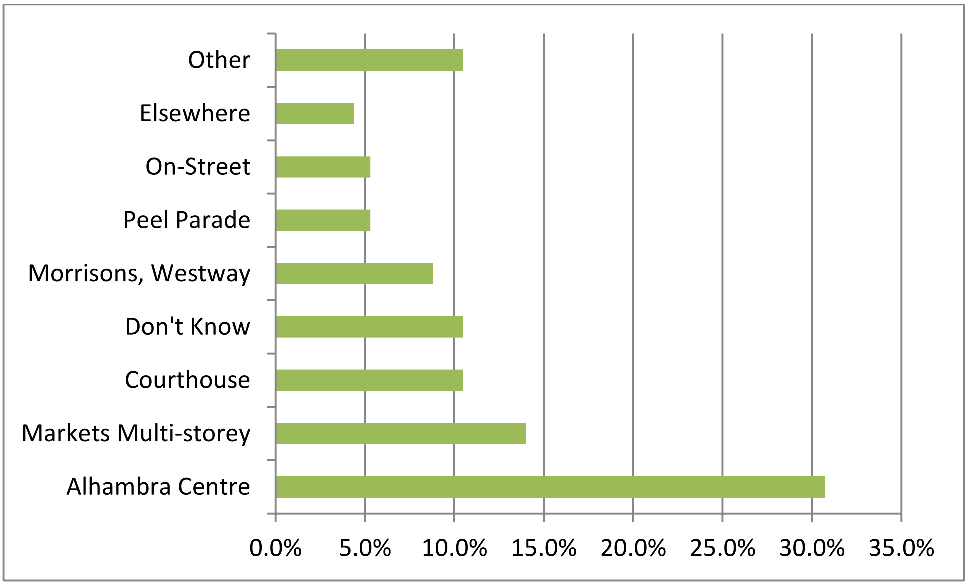
4.32 Most people visit Barnsley frequently, with over half the people asked visiting the town centre at least once a week (71%), compared to 16% visiting less than once a month.

Transportation used to get to Barnsley town centre and Parking



4.33 Most respondents travelled to the town centre by bus (39%), car (38%) or had walked (18%).

4.34 Those respondents who had travelled by car, were asked where they had parked.



4.35 Almost a third of respondents had parked in the Alhambra Centre car park (31%). 14% parked in the Markets Multi-storey and 11% in the Courthouse car park.

Linked trips with Morrisons in Barnsley while in the town centre

4.36 88% of respondents had not visited or did not intend to visit Morrisons while in Barnsley town centre. Of the 12% who did make linked visits to Morrisons, a relatively low proportion (7%) were aged under 35 and a relatively high proportion (15%) were aged 55 and over.

Stores mostly used for main food shopping and grocery shopping

Locations	Store used for main food and grocery shopping
Asda, Old Mill Lane, Barnsley	25.0%
Morrisons, Westway, Barnsley	16.7%
Tesco Extra, Wombwell Lane	8.7%
Morrisons, Cortonwood	7.3%
Iceland, Alhambra Centre	5.3%
Local Shops, Barnsley	3.7%
Don't Know/ Varies	3.3%
Iceland, Peel Street, Barnsley	3.3%
Other	26.7%

4.37 A high number of respondents use Asda at Old Mill Lane for their main food and grocery shopping followed by Morrisons at Westway, with a lower proportion using Tesco at Wombwell Lane and Morrisons at Cortonwood.

Stores and centres mostly used for non-food shopping

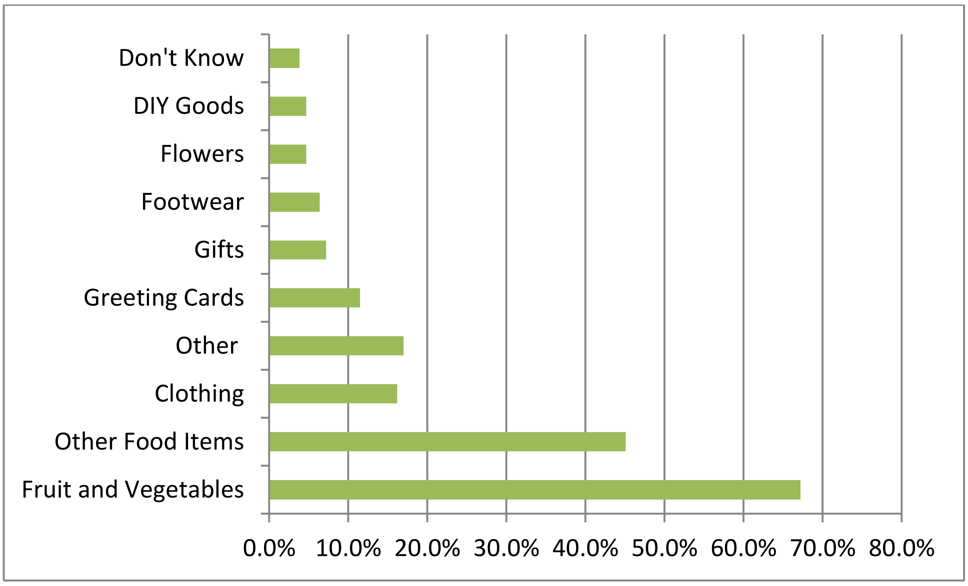
4.38 The following stores and centres are mostly used for non-food shopping.

Locations	Non-food shopping
Barnsley Town Centre	50.3%
Meadowhall Shopping Centre	18.7%
Cortonwood Retail Park	6.7%
Online/Internet	5.0%
Meadowhall Retail Park	3.3%
Wakefield City Centre	3.3%
Other	12.7%

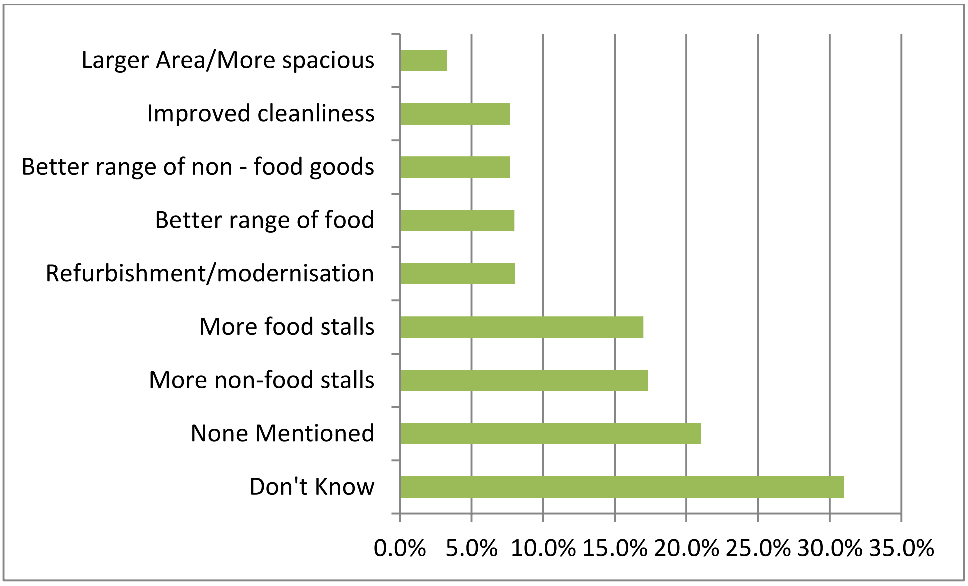
4.39 About half the respondents mostly use Barnsley town centre followed by Meadowhall.

Shopping in the Market

4.40 78% of respondents said they shop in Barnsley market. Of those that do use the market, the chart below shows the types of goods bought. The majority of respondents bought food items from the market, or clothing.

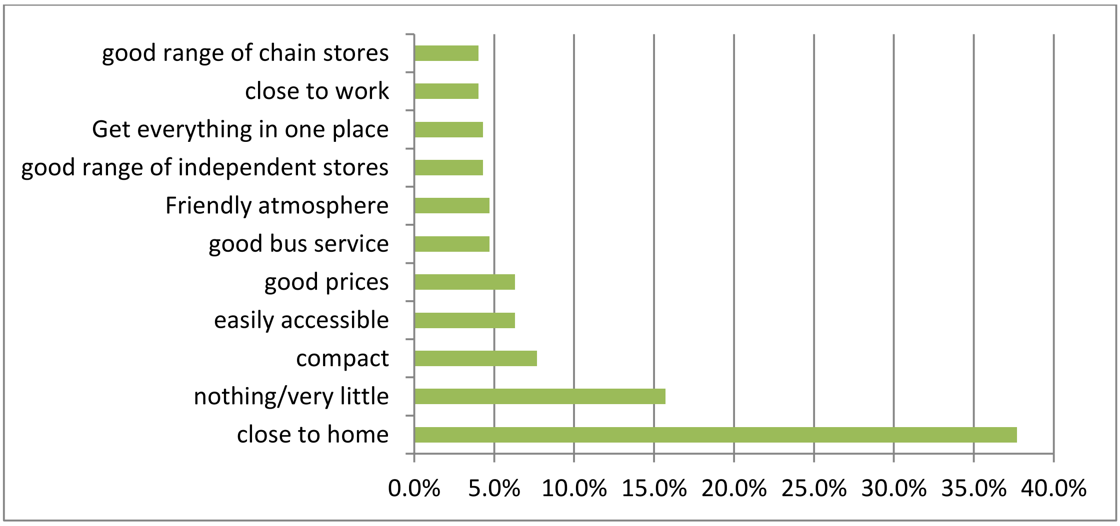


4.41 Respondents were asked in what ways the market could be improved. The majority of people did not know or did not comment. Of those who did comment, most people wanted either more non-food stalls (17%) or more food stalls (17%). Other suggestions for improvements included a better range of products and improved cleanliness/refurbishment.



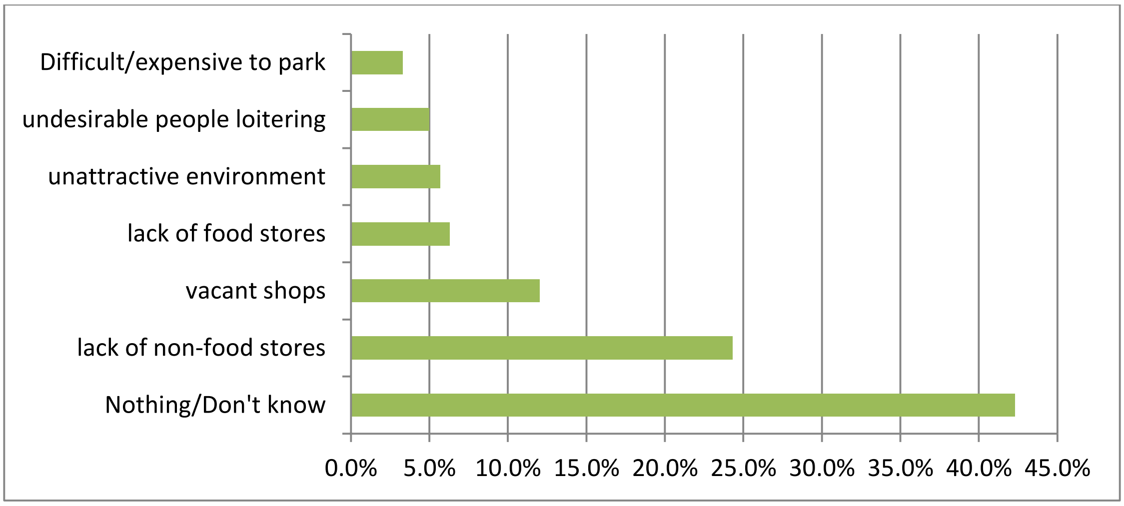
Likes and dislikes about Barnsley town centre

<u>Likes</u>



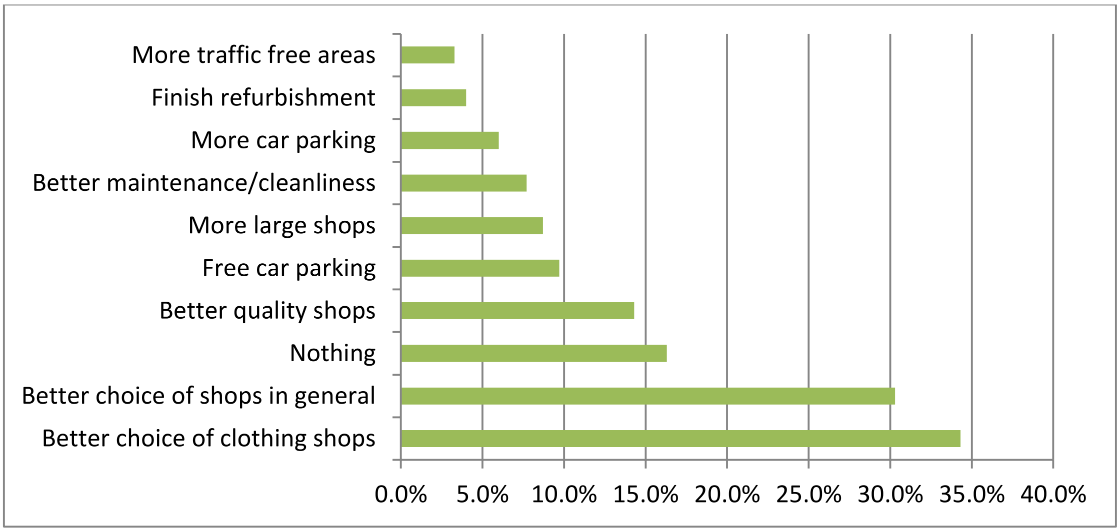
4.42 The majority of respondents like the town centre because it is close to home (38%). Some said there was very little they liked (16%) whilst others like the fact that it is compact, easily accessible by foot/cycle, has a good bus service and reasonable prices.

Dislikes



4.43 The majority of respondents said they did not dislike anything about the centre, whilst others commented on the lack of non-food stores (24%), number of vacant shops (12%), lack of food stores (6%), unattractive environment and people (11%) and difficult/expensive parking (3%).

Changes or Improvements in Barnsley town centre



4.44 Most respondents felt that a better choice of clothing shops (34%) and shops in general (30%) would benefit the town centre. Other suggestions for improvements include better quality and larger shops, free or more car parking and improved cleanliness/maintenance of the centre.

Town Centre redevelopment scheme

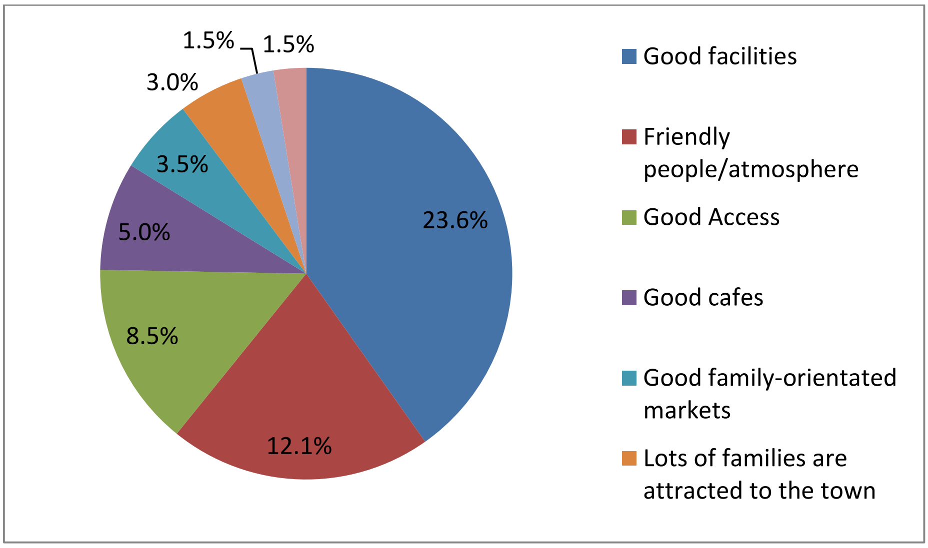
4.45 Respondents were asked if there was a major redevelopment scheme in Barnsley town centre, what they would like to see included in the scheme and the responses are shown in the table below.

Suggestion	% of Respondents
More non-food Shops	27.0%
More Restaurants	17.3%
Improved Market	15.0%
Other	10.4%
Cinema	9.7%
New Leisure Facilities	9.0%
Nothing	7.0%
More Car Parking	6.0%
More Cafes	5.7%
Another Department Store	4.7%
More Traffic Free Areas	4.3%
New Central Library	4.3%
More Food Supermarkets	4.0%
Better quality top brand shops	3.7%

4.46 The survey shows that most people would like more non-food shops, restaurants and an improved market as part of a major redevelopment scheme in the town centre. Social and leisure facilities were also suggested including a cinema and central Library.

Family Friendliness

4.47 Respondents were asked whether they consider Barnsley town centre to be 'family-friendly'. 66% of respondents considered that it is family-friendly. The proportions saying Yes are slightly higher for the 55+ age group (71%) compared to the under 35's (61%). The chart below sets out the views of those who gave a positive response about the centre being 'family-friendly.



4.48 Of those who considered that the centre is not family-friendly, 37% said it does not have enough facilities, and 4% said there were too many unpleasant people loitering for it to be considered 'family-friendly'. But 53% were don't knows'. The majority of respondents (90%) who were unsure as to whether it was 'family-friendly' or not did not justify their response. The remainder felt the centre has some facilities for families but needs more.

4.49 The On-Street survey asked respondents where they live and the postcode sectors were recorded. Grouped into the zones defined for the study area the number of respondents in the survey is as follows.

Zone	Area	Respondents
1	Barnsley Central	132
2	Penistone/Rural West	9
3	Hoyland/Wombwell	33
4	Royston/Barnsley North	39
5	Cudworth/Goldthorpe	57
External		30
Total		300

5. EXPENDITURE AND TURNOVER

Population Data and Forecasts

5.1 A Retail Planner demographic and expenditure report has been obtained from Experian for the Barnsley study area, divided into its five constituent zones. The report shows existing population estimates for 2012, based on the 2011 Census base. The 2012 resident populations by zone are shown in the table below. The total population in the study area in 2012 is 266,927. This total is larger than the 2011 Census usual resident population for Barnsley Borough because of the inclusion in the study area of areas that lie outside the Borough boundary.

5.2 The Retail Planner report also provides population projections for each zone. They are ONS 2012-based projections disaggregated to smaller areas by Experian. For the purposes of this Retail Study this data provides a reliable basis for population forecasts by zone and for the study area as a whole. The forecast years are 2018, 2023 and 2033. Experian's projections extend only as far as 2032, so the population figures for 2032 have been adopted as a best estimate for 2033.

Zone	2012	2018	2023	2033
1 Barnsley Central	72,404	75,636	78,264	82,069
2 Penistone/Rural West	28,618	29,869	30,890	32,361
3 Hoyland/Wombwell	37,839	39,456	40,777	42,613
4 Royston/North	46,887	48,889	50,519	52,757
5 Cudworth/Goldthorpe	81,179	84,692	87,552	91,516
Total	266,927	278,542	288,002	301,316

Retail Expenditure Estimates and Forecasts

5.3 Appendix 6 shows existing population and retail expenditure per person for the five zones that comprise the Barnsley study area. The table below shows expenditure per person in each zone in convenience and comparison goods. The expenditure figures are compared with the UK averages shown in the Experian report in the form of percentages of the UK base. All monetary figures are in 2012 prices.

Zone	Expenditure per person (2012 prices)		Percent of UK base	
	Convenience £	Comparison £	Convenience %	Comparison %
1 Barnsley Central	1,760	2,469	89	85
2 Penistone/Rural West	2,065	3,355	105	115
3 Hoyland/Wombwell	1,746	2,400	89	82
4 Royston/North	1,805	2,560	92	88
5 Cudworth/Goldthorpe	1,714	2,303	87	79

5.4 The table shows that in convenience goods only one zone, Penistone/Rural West, has a level of expenditure per person higher than the UK average. All the other zones have a relatively low level of convenience spending per person. In comparison goods the Penistone/Rural West zone again has a level of expenditure per head higher than the UK average, as high as 15% above the national average. All the other zones have a relatively low level of comparison spending per person. The Cudworth/Goldthorpe zone has the lowest level of expenditure in convenience and comparison goods.

5.5 In convenience goods expenditure per person has to be adjusted to exclude spending on non-store retail sales (or special forms of trading) such as Internet shopping. The proportion of non-store retailing in convenience goods nationally in 2012 shown in the Experian Retail Planner Briefing Note 11 (October 2013) is 2.1%, adjusted to exclude Internet/home delivery purchases that are sourced from foodstores. Multiplying population by spending per person in each zone (excluding non-retail sales) gives total convenience goods spending by zone. The total spending by residents on convenience goods in 2012 is £466.36 million. The calculations are shown in detail in Appendix 6.

5.6 In comparison goods expenditure per person also has to be adjusted to exclude spending on non-store retail sales such as Internet shopping. The proportion of non-store retailing in comparison goods nationally in 2012 shown in the Experian Retail Planner Briefing Note 11 is 10.5%. Multiplying population by spending per person in each zone (excluding non-store retail sales) gives total comparison goods spending by zone. The total spending by residents on comparison goods in 2012 is £601.96 million. The calculations are also shown in Appendix 6.

5.7 Expenditure has been projected forward to 2033 using forecasts in Experian Retail Planner Briefing Note 11 (October 2013). The forecasts of retail expenditure per head are from the Experian business strategies model of disaggregated consumer spending. They are not just trend-based but take account of economic cycles in the UK economy. The average annual forecast growth rates are as follows. The annual growth rates in Appendix 3 of Briefing Note 11 have been adjusted by Experian to allow for future changes in non-store retail sales taking account the extent of trading via traditional floorspace. In convenience goods the proportion of non-store retail sales is forecast to increase to more than 5% in the next 15 years. In comparison goods the proportion of non-store retail sales is forecast to increase to 16% in the next 15 years. No further adjustments are needed to the figures published by Experian.

Expenditure Growth per person per annum	**Convenience goods**	**Comparison goods**
2013	+1.0%	+2.9%
2014	-0.6%	+1.4%
2015	-0.1%	+2.0%
2016	+0.4%	+2.1%
2017	+0.6%	+2.1%
2018	+0.6%	+2.2%
2019-2023 (annual average)	+0.7% pa	+2.6% pa
2024-2033 (annual average)	+0.7% pa	+2.9% pa

5.8 The forecasts indicate a significantly higher growth in expenditure on comparison goods than on convenience goods. In convenience goods the rate of growth is forecast to increase after 2015 to a rate which is similar to that experienced nationally over the past 10-20 years. In comparison goods the rate of growth is forecast to be lower than that experienced nationally over the past 10-20 years but it is expected to increase in the longer term.

5.9 The population forecasts have been combined with retail expenditure per person by zone (adjusted to exclude non-store retailing) in future years to forecast total expenditure in the study area. Details are shown in Appendix 7 for convenience goods and comparison goods.

5.10 The expenditure forecasts for the study area excluding non-store retailing are summarised below.

Expenditure Forecasts (2012 prices)	**2012 £m**	**2018 £m**	**2023 £m**	**2033 £m**
Convenience Goods	466.36	495.94	530.98	595.68
Comparison Goods	601.96	712.24	837.28	1,165.94

5.11 The growth of total convenience and comparison expenditure comprises two elements – population growth and growth of expenditure per head. Total population in the study area is forecast to increase by about 21,000 between 2012 and 2023 and by a further 13,300 between 2023 and 2033. The overall growth in population to 2033 is 13%. As shown above, expenditure per head is forecast to increase relatively slowly in convenience goods but more significantly in comparison goods over the Plan period.

5.12 Based on the forecasts of population and expenditure per person, in convenience goods the forecast expenditure growth in the study area is 6% to 2018; 14% to 2023; and 28% to 2033. In comparison goods the forecast growth in expenditure is significantly greater with a growth of 18% to 2018; 39% to 2023; and 94% to 2033. These forecasts of expenditure growth take account of expenditure growth rates which are based on economic prospects as well as past trends and which fully take account of the growth in Internet shopping in the next 10-20 years.

Alternative Expenditure Forecasts

5.13 Experian indicate that the medium term outlook to 2019 is for economic growth nationally to improve compared with recent years but to be much less buoyant than before the recession of 2008/09. In the longer term further improvement in the national economy is forecast. Experian comment that comparison goods will feel a much greater impact from slower economic growth in the longer term than convenience goods. The reliability of forecasts reduces with the length of the forecasting period. Because of the uncertainty of longer term forecasts it is advisable to consider a range of possible growth rates. Retail Planner Briefing Note 11 (October 2013) states:

> *'Planning decisions for the next two decades should focus on the long term, ignoring the short-term effects of recent events. But it should also be recognised that the future will not necessarily be like the past – if circumstances change the outlook changes.'*

5.14 We have reservations about the probability that annual expenditure growth in comparison goods will increase to 2.6% per annum from 2019 and 2.9% per annum from 2024 onwards. These are growth rates that have not been experienced since 2008. Although an average annual growth rate of 2.2% p.a. looks reasonable up to 2018, we would advise that for planning longer term shopping needs the Council should take a more cautious approach and base its requirements for additional retail floorspace in Barnsley town centre on a continued growth of 2.2% per annum in comparison goods in the period 2018-2033. Using these lower growth rates, the forecast growth in comparison expenditure remains 18% to 2018; then reduces to a growth of 36% to 2023; and 77% to 2033. The lower forecasts for comparison goods are also shown in Appendix 7.

Survey-based Turnover in Barnsley Town Centre

5.15 The base year expenditure data has been combined with market shares of expenditure by zone derived from the household survey to estimate expenditure flows in 2012 to Barnsley town centre. The market shares of Barnsley town centre in convenience and comparison goods are shown in Appendix 8 and are summarised below.

Zone	1	2	3	4	5	Total
Convenience goods (%)	34	21	6	11	6	16
Comparison goods (%)	45	29	18	44	25	33

5.16 Expenditure in the town centre includes the Morrisons superstore at Westway which is located within the town centre boundary. The town centre has a relatively low market share in convenience goods, just 16% overall. This is a reflection of the low representation of convenience goods floorspace in the town centre compared to out-of-centre foodstores. The town centre has the highest draw for convenience goods from residents of Zone 1, Barnsley Central, which includes trade going to small shops and the market, and Zone 2, Penistone/Rural West, which is principally trade going to Marks & Spencer's Food Hall in Barnsley.

5.17 The town centre's overall market share for comparison goods is 33%. The town centre has a relatively high trade draw for comparison goods from residents of Zone 1, the Central zone and Zone 4, Royston/Barnsley North.

5.18 Based on the expenditure flows to Barnsley town centre in Appendix 8, the 2012 survey-based estimates of turnover in Barnsley town centre are shown below and are compared with the previous turnover estimates for the town centre in 2007 from the April 2008 Retail Study. The 2007 data has been adjusted from 2004 to 2012 prices to enable a direct comparison to be made of the changes between 2007 and 2012.

Barnsley town centre (including Morrisons)	2007	2012
Convenience goods turnover (£m)	91.83	75.37
Comparison goods turnover (£m)	190.68	200.58

5.19 There has been a decrease in convenience turnover in Barnsley town centre between 2007 and 2012. This is despite the opening of the Lidl discount store in 2012. The town centre's market share for convenience goods in the study area has fallen from 22% to 16%, though it should be noted that the study area defined for the present study is slightly larger than that used in the 2008 study. This is explained mostly by a reduction in the market share of Morrisons at Westway for main food shopping. However, all the main foodstores in Barnsley (Morrisons, Asda and Tesco) have seen a fall in their market share for main food shopping in recent years, while the market share taken by several Aldi stores has increased.

5.20 Barnsley town centre's total turnover in comparison goods increased slightly between 2007 and 2012 but the town centre's market share in the study area has fallen from 36% in 2007 to 33% in 2012 (again acknowledging a slightly larger study area in the current study). Its comparison market share has fallen during a period when comparison goods expenditure in the study area increased. Nationally comparison spending per head increased by about 5% between 2007 and 2012. The town centre has not been able to attract as much trade as would have been expected in recent years. During the same period the market share of Meadowhall from spending by study area residents increased from 11% to 13%. Barnsley appears to have lost market share to Meadowhall in the last few years.

6. RETAIL CAPACITY ANALYSIS

Market Share Approach

6.1 In this Study the quantitative capacity for retail development is assessed based on the expenditure forecasts and the extent of trade retention within the catchment area of Barnsley town centre. We have adopted a market-share approach to the capacity analysis, based on the market shares of the town centre in convenience and comparison goods. This is the conventional approach to assessing capacity and is the approach suggested in the section of the Planning Practice Guidance on Ensuring the Vitality of Town Centres.

6.2 Expenditure in the base year 2012 has been analysed in Section 5. The base year expenditure in the study area is compared with the survey-based turnover in the town centre estimated from the household survey data on shopping patterns and expenditure by zone. The amount of spending in the town centre from the study area represents its market share or retention level as a percentage of total spending. The scope for new retail floorspace in the town centre depends on expenditure growth and on the extent to which the retention level may increase in the future. Any potential for clawback of leakage will increase the retention level. The approach assumes that the town centre will maintain its existing market the centre and so increase its market share.

6.3 Capacity is assessed in periods to 2018, 2023 and 2033 for the Local Plan evidence base. The capacity analysis is carried out for convenience and comparison goods in line with the advice in the NPPF and Planning Practice Guidance. Expenditure forecasts are made in Experian Retail Planner Briefing Note 11 (October 2013) up to the year 2030 but we assume that the long term growth forecasts will continue to 2033. As noted earlier, the reliability of these long term forecasts is uncertain and in using this retail need assessment for the purposes of the Local Plan the Council should place emphasis on the short to medium forecasts to 2018 and 2023. Although necessary as a basis of site allocations in the Local Plan, the longer term forecasts over a period of 20 years are a general guide to shopping floorspace requirements which may change as economic prospects change. We have assessed the longer term forecasts using a range of annual growth rates for comparison goods expenditure depending on future economic growth.

6.4 An assessment is made of the potential for an increase in market shares or retention levels and the amount of expenditure retained, taking account of commitments and the extent to which Barnsley town centre could increase its attraction for shopping relative to other nearby centres. This is discussed below. In comparison goods the assumption is made that the town centre attracts an additional 5% of turnover from visitors (and inflow from beyond the study area), in line with the 2007 study.

6.5 It is then necessary to allow for an increase in turnover in existing shops to reflect the trend towards improvement in sales productivity over time in comparison goods as shops become more efficient. The latest advice from Experian is that in convenience goods no further increase in sales productivity is likely and no allowance needs to be made for it in the forecasts. In comparison goods sales productivity is projected to increase by an average of 2% per annum throughout the period to 2030 and we assume it continues to 2033. These rates of change are slightly below the forecast annual growth in both convenience and comparison expenditure, therefore some growth in spending potential is anticipated in convenience and comparison goods.

6.6 Subtracting the future turnover of existing shops from the amount of expenditure retained gives the surplus capacity in each forecast year. An allowance must then be made for any commitments for new retail development. After allowing for commitments the analysis shows the amount of residual capacity in the catchment area. The residual capacity in the form of expenditure capacity is expressed as floorspace capacity by applying appropriate sales densities. Details are given below.

Scenarios

6.7 The capacity analysis tables for Barnsley town centre are shown in Appendix 9 of this report for convenience and comparison goods. Three scenarios have been tested, as follows.

- **Scenario 1** – assuming constant market shares of Barnsley town centre within its catchment area assuming no new retail development. This scenario represents the 'no development' scenario outlined in the Practice Guidance as a benchmark for testing other scenarios. In effect, Scenario 1 reflects just the implications of the forecast expenditure growth in the catchment area in terms of floorspace demand.

- **Scenario 2** – taking account of the current proposals for retail development in the Markets project which include a net increase in retail floorspace compared with existing provision. This scenario assumes a small increase in the market share (retention level) of Barnsley town centre within its catchment area in comparison goods but no increase in convenience goods.

- **Scenario 3** – also takes account of the current proposals for retail development in the Markets project which include a net increase in retail floorspace, but with a smaller increase in the retention level for comparison goods. It is also based on a lower expenditure growth rate in comparison goods of 2.2% p.a. between 2018 and 2033. There is no Scenario 3 for convenience goods.

6.8 Scenarios 2 and 3 take account of the new floorspace that is currently proposed in the Markets project. The turnover of the Markets project is estimated to result in an increase of £1.15m in convenience goods and £10.35m in comparison goods. These figures are the net increase in turnover of the scheme compared to the turnover of the existing shops and market hall (details are given in Appendix 10).

6.9 It is assumed that the Markets project will be completed and trading by 2018 and that there are no other commitments for retail development in the town centre.

Retention Levels

6.10 In Scenario 1 it is assumed that the retention levels (market shares) for Barnsley town centre (including Morrisons) will remain constant at 16.2% for convenience goods and 33.3% for comparison goods.

6.11 In Scenario 2 it is forecast that the retention level for Barnsley town centre will increase to 33.8% for comparison goods from 2018 onwards. This assumption is based on the extent to which the Markets scheme could increase the town centre's market share by clawing back leakage representing one-third of its comparison goods turnover. The net increase in turnover in convenience goods is very small and there is not likely to be any increase in the existing retention level.

6.12 In Scenario 3 for comparison goods it is forecast that the retention level for Barnsley town centre will increase slightly to 33.5%, lower than in Scenario 2. It assumes that the Markets scheme would be less successful in clawing back leakage because of new developments in competing centres such as Meadowhall, Sheffield, Wakefield and Doncaster which may limit the potential to reduce leakage from Barnsley and increase the town centre's market share. Scenario 3 also assumes that in comparison goods the annual growth in expenditure per head will be 2.2% p.a. between 2018 and 2033, lower than in Scenarios 1 and 2.

Expenditure Capacity

6.13 The detailed capacity analysis table are included in Appendix 9. Expenditure capacity in each scenario is shown in the tables below. It represents the residual capacity after subtracting the additional turnover potential in the Markets scheme. The tables are presented by time periods. We advise that the Council should place the greatest emphasis on the short term (2018) and medium term (2023) forecasts. The long term (2033) forecasts are more uncertain and should be used with caution.

2018	**Convenience Capacity (£m)**	**Comparison Capacity (£m)**
Scenario 1	5.0	23.2
Scenario 2	3.8	16.5
Scenario 3	-	14.3

2023	Convenience Capacity (£m)	Comparison Capacity (£m)
Scenario 1	10.7	43.4
Scenario 2	9.5	37.4
Scenario 3	-	29.1

2033	Convenience Capacity (£m)	Comparison Capacity (£m)
Scenario 1	21.1	103.7
Scenario 2	20.0	99.4
Scenario 3	-	61.3

6.14 In convenience goods, assuming constant market shares, there is a small expenditure capacity in the town centre in 2018, increasing gradually up to 2033. There is little difference between the two scenarios. In comparison goods there is a modest capacity in comparison goods in the town centre in 2018, increasing to a greater capacity in 2023 and a fairly substantial capacity in 2033. In Scenario 2, because of the proposed Markets project, there would be a smaller residual capacity in comparison goods in the town centre throughout the Plan period. In Scenario 3 there would be a reduced expenditure, particularly in 2023 and 2033, mostly because of lower expenditure growth but also because of a lower retention level than in Scenario 2.

Floorspace Capacity

6.15 Based on the assessments of expenditure capacity, an assessment has been made of floorspace capacity in Barnsley town centre which is additional to the floorspace to be provided in the Markets project. The net increase in town centre turnover in the Markets project is taken as a commitment in the capacity analysis.

6.16 A consistent approach has been adopted to converting expenditure capacity to floorspace capacity, using generic sales densities in terms of turnover per sq.m. of net floorspace. This is the conventional approach used in this type of analysis, and is the same approach as that used in the 2007 study. It assumes that for convenience goods new floorspace will trade at an average sales density of £12,000 per sq.m. net and in comparison goods new floorspace will trade at an average sales density of £5,000 per sq.m. net.

6.17 The residual expenditure capacity figures shown above are presented in the form of floorspace capacity in the following tables. The figures are in terms of net and gross floorspace capacity in the town centre and they are rounded based on the figures in Appendix 9. To assess gross floorspace we have assumed an average net/gross floorspace ratio of 70%. This is a typical ratio for new retail floorspace in both convenience and comparison goods.

Local Plan Forecasts for Allocation of Additional Town Centre Retail Floorspace

Convenience Goods

2018	**Floorspace Capacity (sq.m. net)**	**Floorspace Capacity (sq.m. gross)**
Scenario 1	400	600
Scenario 2	300	500

2023	**Floorspace Capacity (sq.m. net)**	**Floorspace Capacity (sq.m. gross)**
Scenario 1	900	1,300
Scenario 2	800	1,100

Comparison Goods

2018	**Floorspace Capacity (sq.m. net)**	**Floorspace Capacity (sq.m. gross)**
Scenario 1	4,600	6,600
Scenario 2	3,300	4,700
Scenario 3	2,900	4,100

2023	Floorspace Capacity (sq.m. net)	Floorspace Capacity (sq.m. gross)
Scenario 1	8,700	12,400
Scenario 2	7,500	10,700
Scenario 3	5,800	8,300

6.18 There is forecast to be capacity for additional convenience goods floorspace equivalent to two small convenience stores or a discount food store in 2023. In comparison goods there is greater capacity in the period to 2023 arising from forecast expenditure growth. Taking Scenario 3 as the most realistic option, based on a more cautious forecast of comparison expenditure growth, the floorspace capacity for comparison goods represents in the order of 8,000 sq.m. gross floorspace in 2023 in addition to the new floorspace proposed in the Markets scheme.

Possible Longer Term Floorspace Provision

6.19 The Local Plan should allocate sites for future retail development in the town centre. The plan period extends to 2033 but we have cautioned against placing too much reliance on long term forecasts of expenditure growth, particularly in comparison goods. Although it is necessary to take account of floorspace requirements to the end of the plan period, we would advise that the allocation of sites in the town centre should be based on the medium term floorspace capacity in 2023, shown above. The priority for Barnsley is to ensure the successful delivery of the Markets redevelopment project as the key to the regeneration of Barnsley town centre. This scheme is crucial to the Borough and needs protection as an in-centre scheme. The allocation of other large sites for retail development based on long term forecasts of floorspace capacity which are uncertain could have negative consequences for the implementation of the Markets project. It is important that demand for new shopping floorspace in the town centre is concentrated on the Markets project until such time as its commercial viability is achieved.

Convenience Goods

2033	Floorspace Capacity (sq.m. net)	Floorspace Capacity (sq.m. gross)
Scenario 1	1,800	2,500
Scenario 2	1,700	2,400

Comparison Goods

2033	Floorspace Capacity (sq.m. net)	Floorspace Capacity (sq.m. gross)
Scenario 1	20,700	29,600
Scenario 2	19,900	28,400
Scenario 3	12,300	17,500

6.20 In the longer term to 2033 there is forecast to be capacity for additional convenience goods floorspace equivalent to one medium-sized supermarket or two smaller foodstores. In comparison goods there is significant capacity in 2033 in addition to the floorspace proposed in the Markets scheme. The longer term capacity is greater than the amount of floorspace likely to be developed in the Markets project. However, we do not propose that sites should be allocated to accommodate all of this additional retail floorspace at the present time. We would advise that the need for additional floorspace in the longer term should be considered again when the Local Plan is reviewed.

7. QUALITATIVE NEED

7.1 The qualitative need for future developments and improvements in Barnsley town centre has been assessed based on the updated health check appraisal and the results of the household and on-street interview surveys on consumer views about the town centre. The household survey is a good representation of shopping patterns and attitudes across the study area, including the views of people who don't use Barnsley town centre. The on-street survey within the town centre reflects the views of shoppers and visitors using the centre.

7.2 The town centre has slightly lower proportions of both convenience and comparison goods shops compared with the national averages. However, there is a good range of shops. The vacancy rate in the town centre is relatively high at 18%, compared with the national average of 13%. The proportion of vacant floorspace is 17%, again higher than the national average of 11%. However, it should be noted that the high vacancy rate is distorted by the presence of vacant properties that are awaiting redevelopment in the Markets project.

7.3 The town centre lacks a department store operated by a major national or independent retailer. However, the number of multiple retailers in the centre is good. The range of independent shops is more limited. One of the town centre's main strengths is its indoor and outdoor markets. The overall availability of food shopping is also good, including Morrisons, several smaller supermarkets and specialist food shops. Another aspect of the health check that is an indicator of qualitative need is low retailer demand.

7.4 Respondents in the household survey like the town centre mostly because it is close to home (20%) and has a good market (11%). However, respondents also commented that the town centre has a lack of chain stores (20%), a rundown appearance (12%), poor range of non-food shops (11%), lack of independent stores (8%) and poor quality shops (7%). The household survey shows that most people would like more chain stores, clothing shops and a refurbishment of the town centre. Other suggestions for improvements included a better range of non-food and quality shops, improvement of the market and more independent stores or national retailers.

7.5 In the on-street survey in Barnsley town centre 38% of respondents said they like the town centre because it is close to home. The main dislikes are the lack of non-food stores (24%), vacant shops (12%), lack of food stores (6%) and unattractive environment (6%). Most respondents felt that a better choice of clothing shops (34%) and shops in general (30%) would benefit the town centre. Other suggestions for improvements include better quality shops, more large shops, free or more car parking and improved cleanliness/maintenance of the centre.

7.6 78% of respondents said they use Barnsley market. Respondents were asked in what ways the market could be improved. Most people mentioned either more non-food stalls or more food stalls.

7.7 Respondents were asked whether they consider Barnsley town centre to be 'family-friendly'. 66% of respondents considered that it is family-friendly. Of those who considered that the centre is not family-friendly, most said it does not have enough facilities.

7.8 The on-street survey shows that most people would like more non-food shops, restaurants and an improved market as part of a major redevelopment scheme in the town centre. Social and leisure facilities were also suggested including a cinema and central library.

7.9 Barnsley town centre's market share for comparison goods in the study area has fallen in recent years, and at the same time Meadowhall's market share in the study area has increased. Barnsley appears to have lost trade to Meadowhall.

7.10 There is a limited quantitative need for additional convenience goods floorspace in the town centre in the Local Plan period which could be met by one or two new convenience stores, as well as some convenience shopping in the Markets project. In comparison goods there is significant capacity throughout the Local Plan period in addition to the floorspace proposed in the Markets project. Therefore there is potential for a quantitative and qualitative improvement in shopping facilities in the town centre.

7.11 The health check highlighted a deficiency in restaurants in the town centre. An improvement in restaurant provision would make the town centre more attractive, both during the day and in the evening. A cinema development in the town centre as part of the Better Barnsley Markets Project would help to attract new restaurants.

7.12 Although Barnsley town centre has a better than average level of vitality and viability, there is evidence of qualitative need for improvements in the centre. In particular the Local Plan should seek to cater for:

- A reduction in the vacancy rate
- An improvement in comparison goods shopping through the attraction of more national multiples.
- Better quality shops including more independent non-food shops.
- An improvement in the shopping environment to attract more shoppers into the town centre and make the centre more family-friendly.
- Redevelopment of the market to make it even more attractive as one of the strengths of the town centre's retail offer.
- New leisure facilities within the town centre to complement the retail offer, such as a cinema and restaurants.

7.13 Redevelopment in the Markets project should reduce the vacancy rate, together with a general improvement in the local economy and retail expenditure which is forecast to increase nationally. The Markets project should also bring about an improvement in comparison goods shopping and the quality of shops by providing the opportunity for the development of new retail units of the size that will attract national multiples.

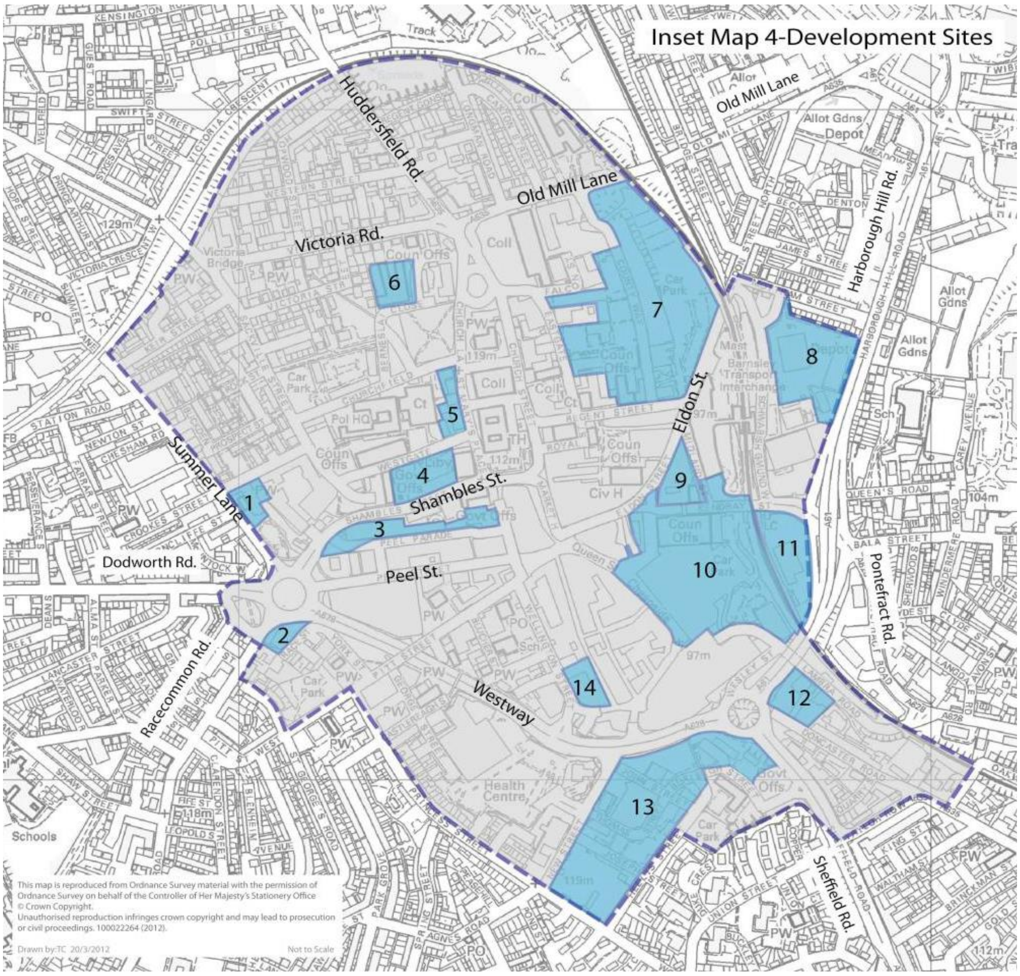
7.14 Although the physical environment in the town centre is generally of a good standard, there is a need to provide better public open space. The Markets project will include a large new town centre square which will create a focal point for shoppers and visitors to the town centre.

7.15 Car parking in the town centre is generally adequate but there will be a loss of parking spaces as a result of redevelopment. Although some new multi-storey parking provision is proposed, in the longer term the development of other town centre sites currently used for car parking will require new car parks to be provided, probably in more edge-of-centre locations.

7.16 In Section 8 we assess the potential for development of various town centre sites during the Local Plan period. Some of these sites have potential for residential development. Barnsley lacks the presence of housing in the town centre that contributes to the diversity of uses and vibrancy that can be found in some other town centres. There are opportunities for redevelopment for housing in the town centre which would help to support shopping in other town centre uses, including the evening economy.

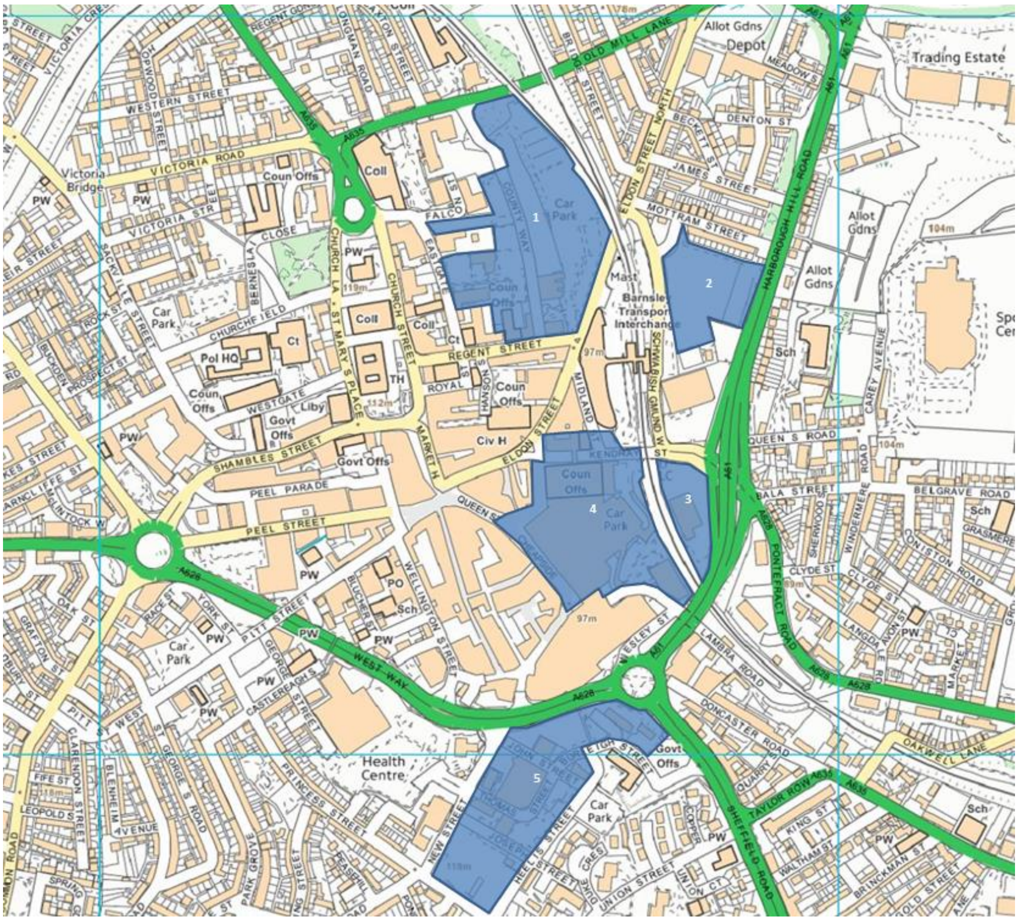
8. TOWN CENTRE SITE APPRAISALS

8.1 The Barnsley Town Centre Area Action Plan Consultation Draft 2012 (AAP) identified 14 development sites within the AAP boundary, which are shown on the plan contained below.



Extract from Barnsley Town Centre Area Action Plan Consultation Draft 2012 Identifying Potential Development Options

8.2 England & Lyle have sought to undertake a review of potential development sites within Barnsley Town Centre that are capable of accommodating the retail, leisure, commercial, office, tourism, cultural, community and residential development needed within the centre. This assessment focuses upon the sites identified within the draft AAP, as well as other potential sites identified during the course of discussions with Officers at Barnsley MBC and other town centre stakeholders. A number of the sites contained within the draft AAP are considered to be too small to bring forward as site allocations within the emerging Development Plan and are not therefore considered as part of this exercise. It is considered that any proposals that come forward for the redevelopment of these sites in the future should be considered in line with general town centre related policies. The Site Appraisal exercise now considers a total of five potential sites across the town centre, as shown on the plan contained below:



8.3 Appendix 11 of this study contains detailed site appraisals for each of the identified sites. The findings are briefly summarised in the table overleaf.

Site Ref.	Site	Summary	Potential Uses
BTC001	Courthouse	The site lies to the northern edge of the Primary Shopping Area and currently accommodates a number of existing main town centre uses. It is therefore considered that the site is entirely suitable in principle for redevelopment, although the site currently performs an important function for the wider town centre through the provision of significant areas of parking and, as such, it is considered that the loss of any surface level car parking through redevelopment will need to be offset.	▪ Retail ▪ Education & Community ▪ Residential ▪ Offices ▪ Multi-Storey Car Parking
BTC002	Transport Interchange / Yorkshire Electricity Site	The site lies approximately 200m to the north east of the Primary Shopping Area and, whilst the railway line acts as a strong physical barrier between the site and the wider town centre, a level crossing lies 190m to the south of the site to facilitate connectivity with the wider town centre. The site also lies in extremely close proximity to Barnsley Public Transport Interchange and therefore occupies a highly accessible location. There are no physical, heritage or amenity issues that are considered likely to prevent the site coming forward for redevelopment, although, in view of the previous use of the site, any future proposals would need to be accompanied by appropriate Contaminated Land Assessments. The site is therefore considered to be entirely suitable for redevelopment.	▪ Education & Community ▪ Residential ▪ Offices ▪ Transport related uses / car parking
BTC003	Former CEAG site, land south of Kendray Street	The site lies to the direct east of the Primary Shopping Area and, whilst the railway line acts as a strong physical barrier between the	▪ Retail ▪ Multi Storey Car Park

		site and the wider town centre, the existing level crossing facilitates connectivity with the wider town centre. The site also lies in extremely close proximity to Barnsley Public Transport Interchange and therefore occupies a highly accessible location. There are no physical, heritage or amenity issues that are considered likely to prevent the site coming forward for redevelopment, although, in view of the previous use of the site, any future proposals would need to be accompanied by appropriate Contaminated Land Assessments. The site is therefore considered to be entirely suitable for redevelopment.	▪ Leisure ▪ Offices ▪ Transport related uses
BTC004	Markets site	The site lies at the heart of the primary shopping area and constitutes the key regeneration opportunity within the town centre. The site enjoys extant planning permission for a mixed-use scheme and is therefore clearly suitable and available for redevelopment for main town centre uses. It is considered that the redevelopment of the site provides an opportunity to provide new links to and within the town centre and the creation of an improved public realm, including the provision of a new high quality public space.	▪ Retail (inc. replacement market) ▪ Leisure ▪ Offices ▪ Car Parking ▪ Cultural / Community Uses
BTC005	Heelis Street & New Street	The site lies to the southern edge of Barnsley Town Centre and is currently occupied by a range of office, retail warehouse and light industrial uses. There are also a number of vacant units and large areas of cleared land within the site, which contribute to the area having a relatively rundown appearance. Whilst Westway acts as a physical barrier between the site and the wider town centre,	▪ Retail ▪ Offices ▪ Leisure ▪ Residential

		there are pedestrian crossings available which ensures that the site enjoys relatively good connectivity with the centre. The site occupies a prominent position adjacent to Westway, however, due to the presence of a number of vacant units, cleared sites and premises in poor repair, the site does little to enhance the visual amenity of the wider area. The comprehensive redevelopment of the site therefore provides an opportunity to improve the visual appearance of the site, with particular reference to the prominent frontage adjoining Westway. There are no physical, heritage or amenity issues that are considered likely to prevent the site coming forward for redevelopment, although there is a substantial rise in levels across the site from Westway towards the south eastern corner of the site. There are a number of existing uses occupying the site and land ownership / tenancy issues will need to be resolved before the comprehensive redevelopment of the site can be brought forward.	

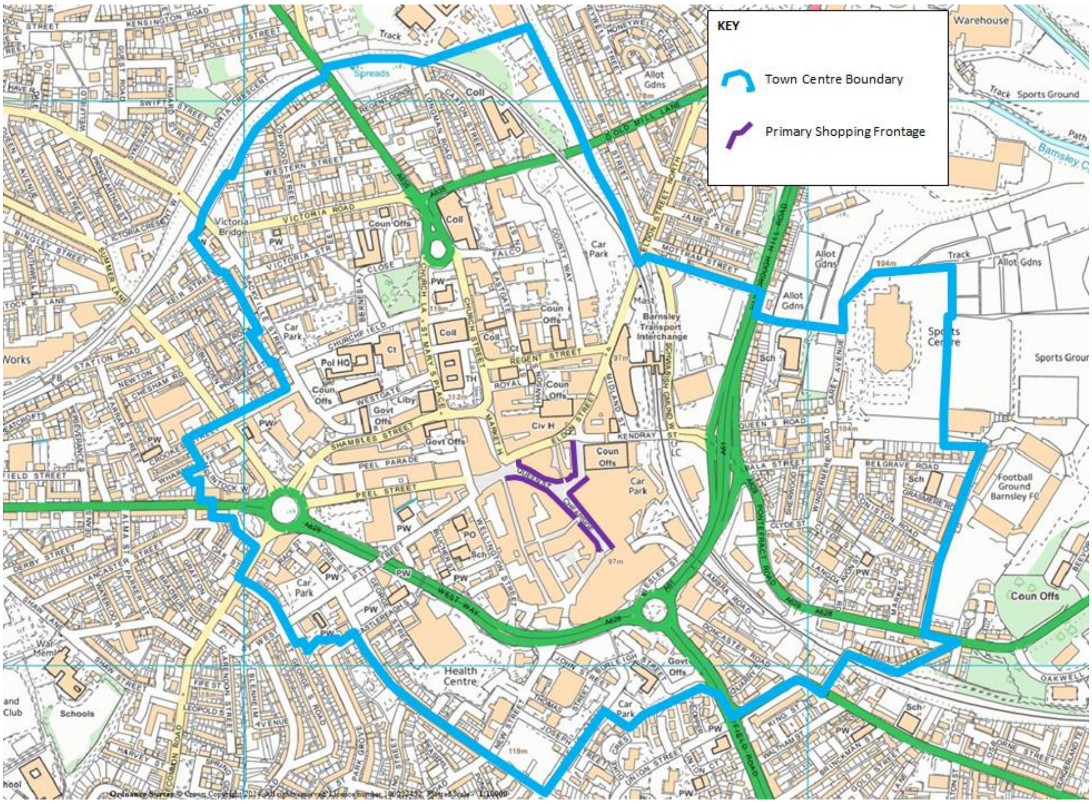
8.4 Following a review of potential redevelopment sites within Barnsley Town Centre, we are of the opinion that the Markets Project (BTC004) remains the key regeneration opportunity within the town centre and should accommodate a retail-led redevelopment scheme, including large, modern format retail units and a replacement market, as well as incorporating leisure, office and car parking uses and a new high quality public space. In addition, it is considered that Courthouse (BTC001), land south of Kendray Street (BTC003) and Heelis Street & New Street (BTC005) offer potential to accommodate major retail-led developments in the longer term. However, in respect of Courthouse, it is considered that any new retail floorspace should be concentrated to the southern part of the site to maximise linkages with the primary shopping area.

9. TOWN CENTRE BOUNDARIES

9.1 Paragraph 23 of the NPPF confirms that planning policies should be positive, promote policies for the management and growth of centres over the plan period. The NPPF advises that, in drawing up Local Plans, local planning authorities should, *inter alia*, define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres and set policies that make clear which uses will be permitted in such locations. Annex 2 of the NPPF sets out the following definitions of town centres; primary shopping areas; and primary and secondary frontages.

Town Centre	Area defined on the local planning authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising of or including main town centre uses, do not constitute town centres.
Primary Shopping Area	Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).
Primary & Secondary Frontages	Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and business.

9.2 The Barnsley UDP Proposals Map, which was adopted in December 2000, defines the town centre boundary and the principal shopping frontages but does not set out a primary shopping area or primary and secondary frontages. The extent of the adopted town centre boundary and defined principal shopping frontage is shown on the plan overleaf.



Town Centre Boundary & Principal Shopping Frontages (Barnsley UDP)

9.3 England & Lyle have therefore sought to review the existing town centre boundary, as well as provide advice on the extent of the primary shopping area and primary and secondary frontages in line with guidance contained within Paragraph 23 of the NPPF. The recently published Planning Practice Guidance (PPG) does not provide any substantive guidance on the definition of town centre boundaries or primary and secondary shopping frontages. It is therefore considered that the DCLG document *'Planning for Town Centres: Practice Guidance on Need, Impact & the Sequential Approach,'* whilst now replaced in its entirety by PPG, continues to provide useful guidance on the definition of these boundaries. Paragraphs 6.12 & 6.13 provide the following guidance on the definition of the primary shopping area and town centre boundaries:

'In defining the PSA, it may be appropriate to take into account the anticipated future role of the centre, and in particular the scope for growth and expansion. In centres where major expansion is planned, it may be appropriate to indicate where

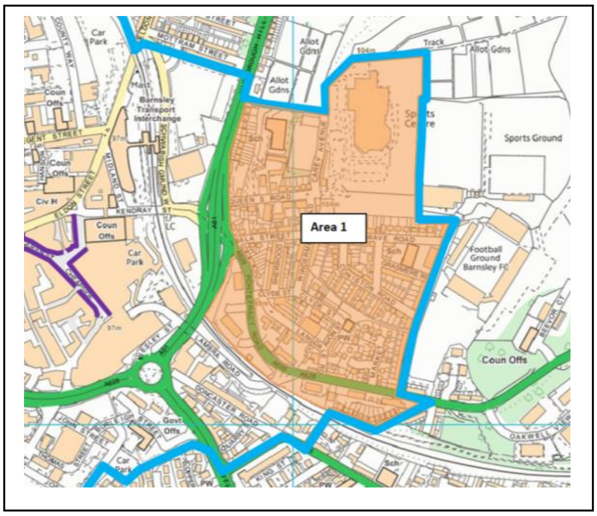
the PSA is likely to be extended to, having regard to the potential for achieving effectively integrated new development. Crawley's core strategy, which in response to a clearly defined need, identifies the extent of the expansion of the PSA as a 'strategic allocation.'
(Paragraph 6.12)

'LPAs should also identify an appropriate 'town centre boundary' within which it will seek to locate other main town centre uses. It may be appropriate to define other areas within the town centre but outside the PSA where specific uses are encouraged e.g. specialist retail, offices, bars / restaurants etc. To ensure that such uses are able to benefit from the centre's accessibility by alternative means of transport (and facilitate linked trips), it is important to ensure that the town centre boundary is not drawn too widely.
(Paragraph 6.13)

Town Centre Boundary

9.4 England & Lyle have sought to undertake a review of the town centre boundary defined by the adopted Barnsley UDP Proposals Map and we are concerned that the boundary is currently drawn too widely. These concerns centre primarily on an area to the eastern edge of the town centre, which includes the Metrodome Leisure Complex (Area 1) and an area to the north of the town centre, which is primarily residential in character (Area 2).

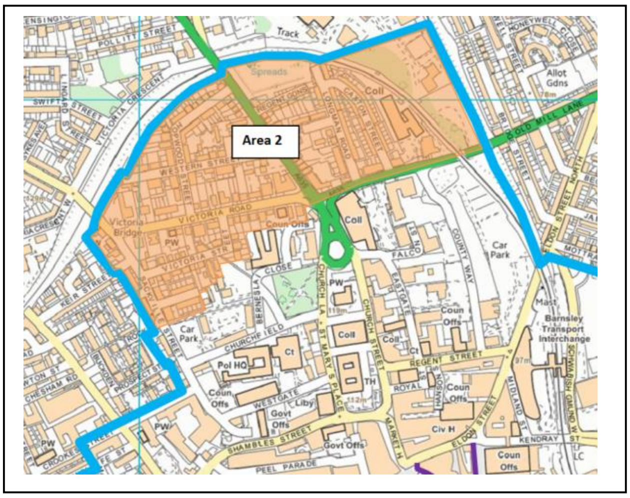
9.5 Area 1, as identified on the adjacent extract, is generally mixed in character with predominantly terraced and semi-detached residential properties, as well as a number of light industrial and commercial uses interspersed throughout the area, including a number of car showroom uses on Pontefract Road. Piper Cross Primary School also lies to the north of Queens



Road.

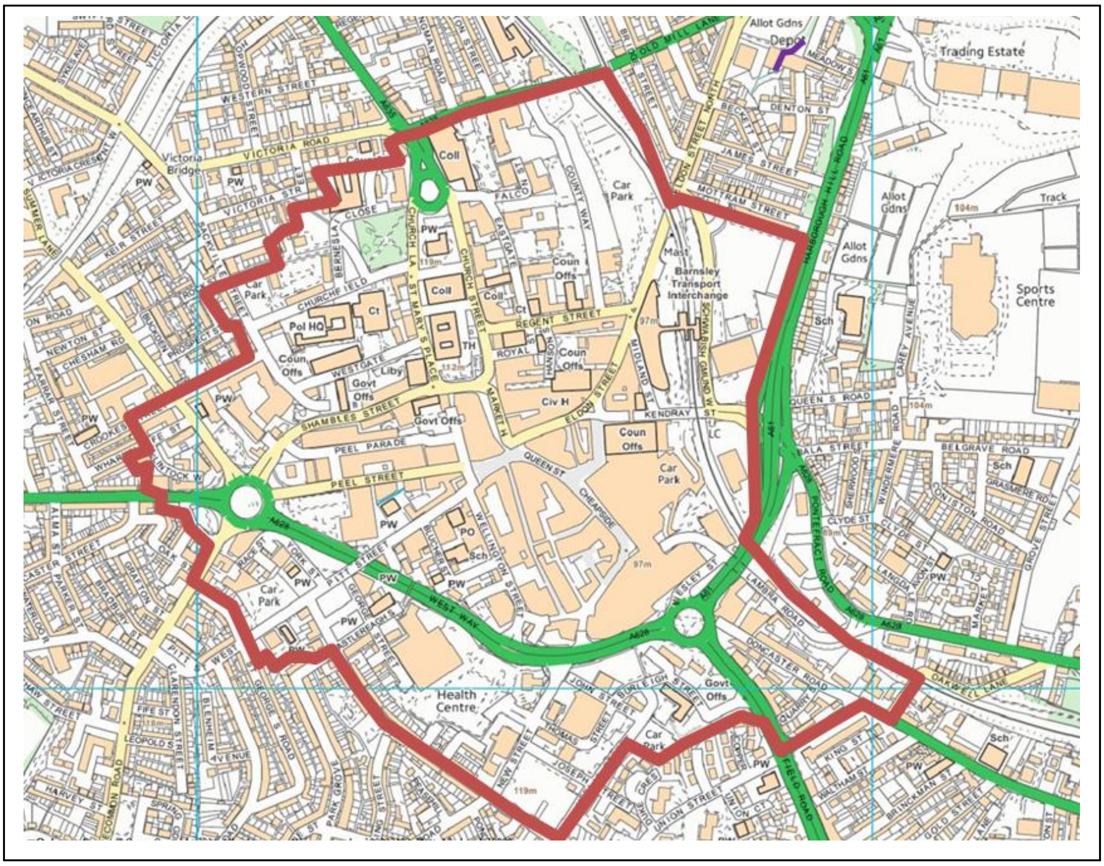
9.6 There are very few main town centre uses contained within Area 1 and the only such use of any real note is the Metrodome Leisure Complex. However, the Metrodome lies approximately 500m to the east of the suggested Primary Shopping Area and Harborough Hill Road acts as a significant physical barrier between the leisure complex and the wider town centre. Whilst a degree of directional signage is provided along the pedestrian routes between the town centre and the Metrodome, the routes are not particularly legible, particularly after crossing Harborough Hill Road and it is noted that are no pedestrian crossing facilities over the Harborough Hill Road slip road, with the exception of dropped kerbs. There is also a relatively steep climb towards the Metrodome along Queens Road and, accordingly, it is not considered that the topography, distances involved or the general pedestrian environment are particularly conducive to encouraging linked trips between the town centre and the Metrodome or enabling users of the leisure complex to benefit from the accessibility of the wider town centre to alternative modes of transport. On this basis, we are of the opinion that Area 1 should be removed from the defined town centre boundary.

9.7 Area 2, as identified on the adjacent extract, lies to the northern edge of the town centre and is predominantly residential in character, and community uses on Victoria Road and Longman Road. As outlined at Paragraph 9.1, the definition of 'town centre' contained at Annex 2 of the NPPF states, 'areas defined on the LPA's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area.' It is assumed that the town centre boundary was originally defined as a result of the strong physical boundary provided by the railway line to the north, however, it is considered that the current boundary plays little regard to the role played by Area 2 in terms of its contribution to the role and function of the wider town centre. Area 2 lies



approximately 240m to the north of the suggested primary shopping area boundary at its closest point and is primarily residential in nature with the exception of a limited number of office and community uses along Victoria Road and Longman Road. The area in question could not reasonably be classed as being predominantly occupied by main town centre uses and, accordingly, we are of the opinion that Area 2 should be removed from the town centre boundary.

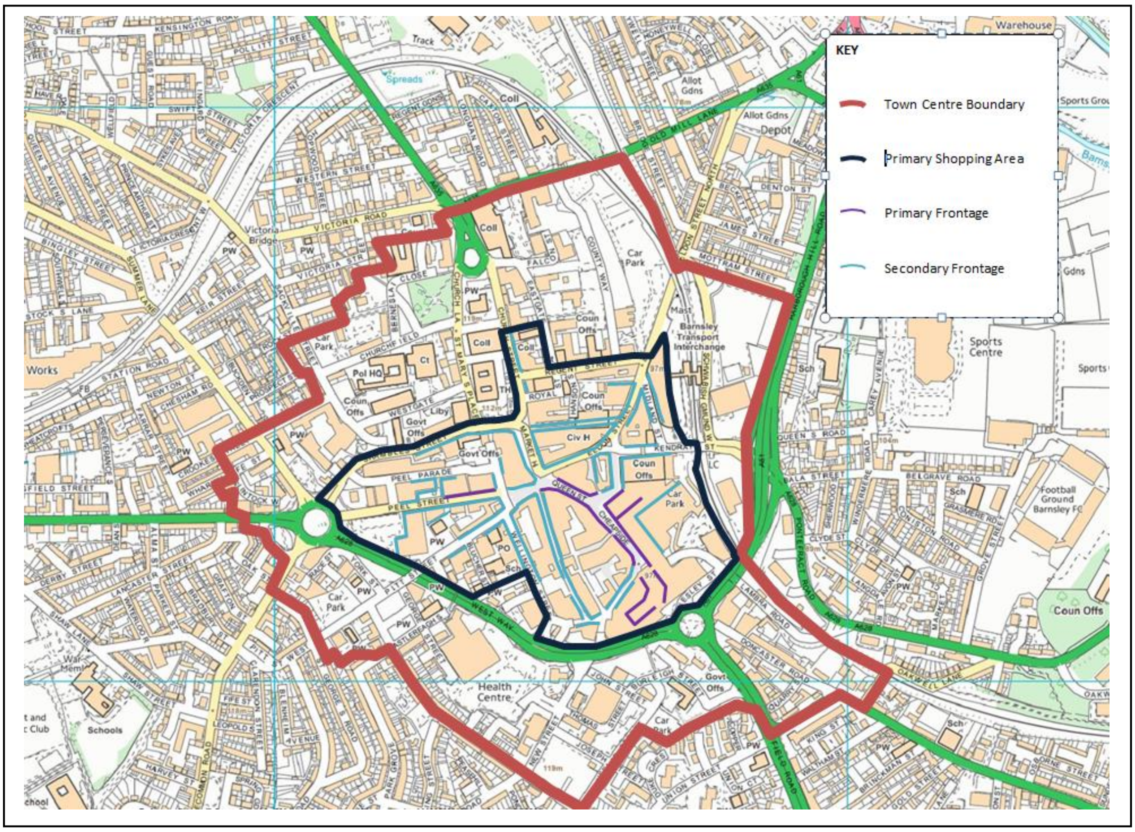
9.8 England & Lyle therefore advise that Areas 1 and 2 should be removed from the town centre boundary and a plan showing the suggested revisions to the boundary is contained in Figure 2 and shown in the extract contained below.



Primary Shopping Area and Primary & Secondary Frontages

9.9 The adopted Barnsley UDP Proposals Map does not define the extent of a primary shopping area or primary and secondary frontages, although it is noted that Principal Shopping

Frontages are defined on Cheapside, May Day Green and Queen Street. England & Lyle have therefore undertaken site visits to the Barnsley Town Centre to establish the extent of the primary shopping area and primary and secondary frontages and the suggested extent of these designations is shown in Figure 2 and on the extract contained below.



9.10 The table contained below provides a brief overview of the reasoning for including the relevant parts of the town centre within either the primary or secondary frontages:

STREET	COMMENT
PRIMARY FRONTAGE	
Cheapside	The units along Cheapside are predominantly in retail use with a number of national multiples represented. Cheapside is therefore classed as primary frontage.
Alhambra Centre	The units within the Alhambra Centre are predominantly in retail use with a number of national multiples represented. The Alhambra Centre is therefore classed as primary frontage.

Peel Street	A row of units to the north of Peel Street has been identified as Primary Frontage as the frontage is predominantly occupied by retail uses, including Argos and Iceland.
SECONDARY FRONTAGE	
Shambles Street	The frontage to the southern edge of Shambles Street is occupied predominantly by financial and professional services and bars / restaurants. There is a limited representation of retail units within the frontage, however, such uses should continue to be encouraged in this area and the frontage also plays a role in accommodating a diverse range of main town centre uses and, accordingly, is designated as secondary frontage.
Church Street	Church Street is predominantly occupied by a mix of retail, financial and professional services and bar / restaurant uses and, in view of the diversity of main town centre uses, Church Street is designated as secondary frontage.
Market Hill	Market Hill is predominantly occupied by A2 uses, including a number of high street banks and building societies and also accommodates a limited number of retail and bar / restaurant uses. Whilst there is a limited representation of retail uses on Market Hill, such uses should continue to be encouraged in this area and the frontage also provides a role in accommodating a diverse range of main town centre uses and, accordingly, is designated as secondary frontage.
Eldon Street	Eldon Street accommodates a diverse range of main town centre uses, including retail, building societies, retail services (e.g. hairdressers), Parkway Cinema and restaurants and, as such, is designated as secondary frontage.
The Arcade	The Arcade contains a wide range of independent businesses, including retail units and cafes / tearooms and, in view of the diverse range of main town centre uses present, is designated as secondary frontage.
Midland Street	Midland Street accommodates a range of main town centre uses, including commercial units incorporated into the western elevation of the Barnsley Transport Interchange. In view of the range of main town centre uses present, Midland Street is designated as secondary frontage.
New Street	New Street accommodates a range of main town centre uses, including retail units, retail services and cafés / restaurants and, in view of the current mix of uses, is classed as secondary frontage.
Market Street	Market Street accommodates a diverse mix of main town centre uses, including retail units, retail services, public houses and restaurants and is

	therefore designated as secondary frontage.
Wellington Street	Wellington Street is predominantly occupied by bars, public houses, nightclubs and hot food takeaways with a very limited representation of retail uses. However, this is an area where such uses should continue to be encouraged and the frontage also plays a key role in terms of the night time economy in view of the strong representation of bars and nightclubs and associated late night uses. Wellington Street is therefore designated as secondary frontage.
Pitt Street	Pitt Street accommodates a range of main town centre uses, including the Post Office, independent retail units and retail services, public houses and hot food takeaways. On this basis, Pitt Street is designated as secondary frontage.
Peel Street (south) and Peel Street Arcade	Peel Street (South) and Peel Street Arcade accommodate a range of main town centre uses, including retail uses, financial and professional services, bars and hot food takeaways. The recently constructed Lidl foodstore is also accessed from the western end of Peel Street. In view of the diverse range of main town centre uses present, Peel Street (South) and Peel Street Arcade are designated as secondary frontages.

9.11 Having established the extent of the primary and secondary frontages, we have sought to consider the extent of the Primary Shopping Area for Barnsley Town Centre. We are of the opinion that the identified secondary frontages all enjoy a relatively strong degree of connectivity with the primary frontages identified along Cheapside, Peel Street and within the Alhambra Centre and, as such, the Primary Shopping Area has been drawn to encompass all of the identified primary and secondary frontages, as shown on the Town Centre Boundaries Plan contained in Figure 2.

10. CONCLUSIONS

10.1 The updated health check of Barnsley town centre shows that the town centre has a better than average level of vitality and viability which has increased slightly since the previous health check in 2011. The town centre's main strengths are the number of shops and amount of shopping floorspace; its leisure and cultural facilities; linked trips from Morrisons; the number of multiples; Barnsley market; the availability of food shopping; good pedestrian flow; car parking; good accessibility by public transport; ease of movement within the centre; safety and security; and the quality of the shopping environment. The main weaknesses are a high vacancy rate and vacant floorspace, and low retailer demand.

10.2 The capacity for future retail development in the town centre has been assessed over the Local Plan period based on three scenarios: (1) a 'no development' scenario based on expenditure growth only; (2) development of the proposed Barnsley Markets project with a small increase in the town centre's market share in comparison goods; and (3) development of the Markets project with a smaller increase in the town centre's market share in comparison goods and lower expenditure growth in comparison goods after 2018.

10.3 There is a limited capacity for new convenience goods floorspace in the town centre in addition to the potential for some convenience floorspace in the Markets project. In comparison goods there is greater capacity throughout the Local Plan period in addition to the floorspace proposed in the Markets project, up to 8,300 sq.m. gross floorspace in 2023 and 17,500 sq.m. gross in 2033. Therefore, after the development of the Markets project, there will still be potential for further retail development in the town centre which needs to be accommodated through land allocations for future retail development in the town centre.

10.4 We would advise that the allocation of sites in the town centre should be based on the medium term floorspace capacity in 2023. The priority for Barnsley is to ensure the successful delivery of the Markets redevelopment project. This scheme is crucial to the Borough and needs protection as an in-centre scheme. The allocation of other large sites for retail development based on long term forecasts of floorspace capacity which are uncertain could have negative consequences for the implementation of the Markets project. It is important that demand for new shopping floorspace in the town centre is concentrated on the Markets project until such time as its commercial viability is achieved.

10.5 Although Barnsley town centre has a better than average level of vitality and viability, there is evidence of qualitative need for improvements in the centre, such as a reduction in the vacancy rate; an improvement in comparison goods shopping; better quality shops; improvement in the shopping environment; redevelopment of the market; and new leisure facilities.

10.6 The Barnsley Markets Project remains the key regeneration opportunity within the town centre and should accommodate a retail-led redevelopment scheme as well as leisure, office and car parking uses and a new high quality public space. In addition, it is considered that the southern part of the Courthouse site, land south of Kendray Street and the Heelis Street & New Street area offer potential to accommodate major retail-led developments in the longer term.

10.7 It is proposed that the town centre boundary should be revised to exclude areas to the north of the centre which are predominantly residential and areas to the east of Harborough Hill Road. The Morrisons store is outside the primary shopping area but within the town centre boundary. To be consistent with the NPPF and Planning Practice Guidance, for retail policy purposes Morrisons should be regarded as a town centre store.

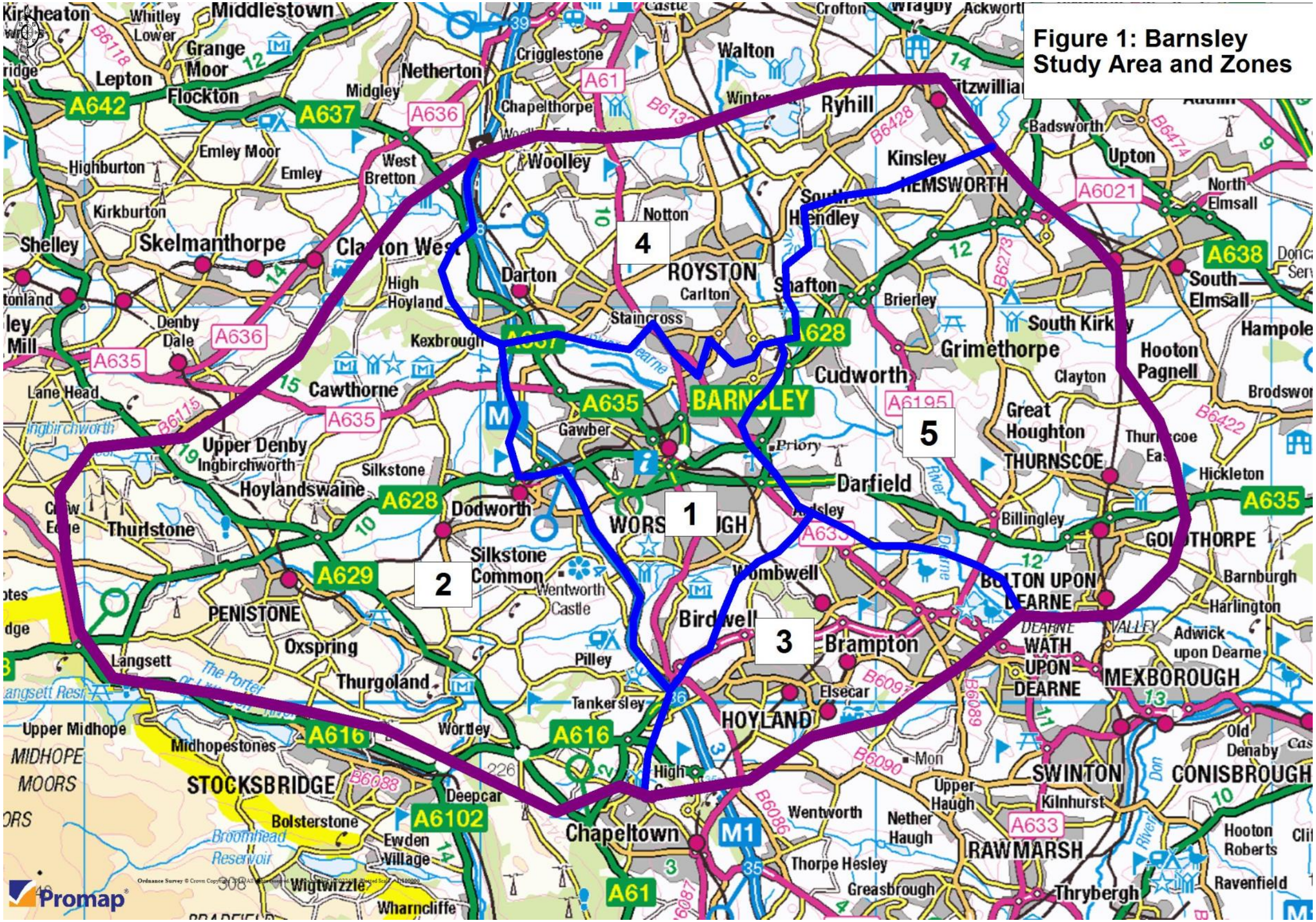


Figure 1: Barnsley Study Area and Zones

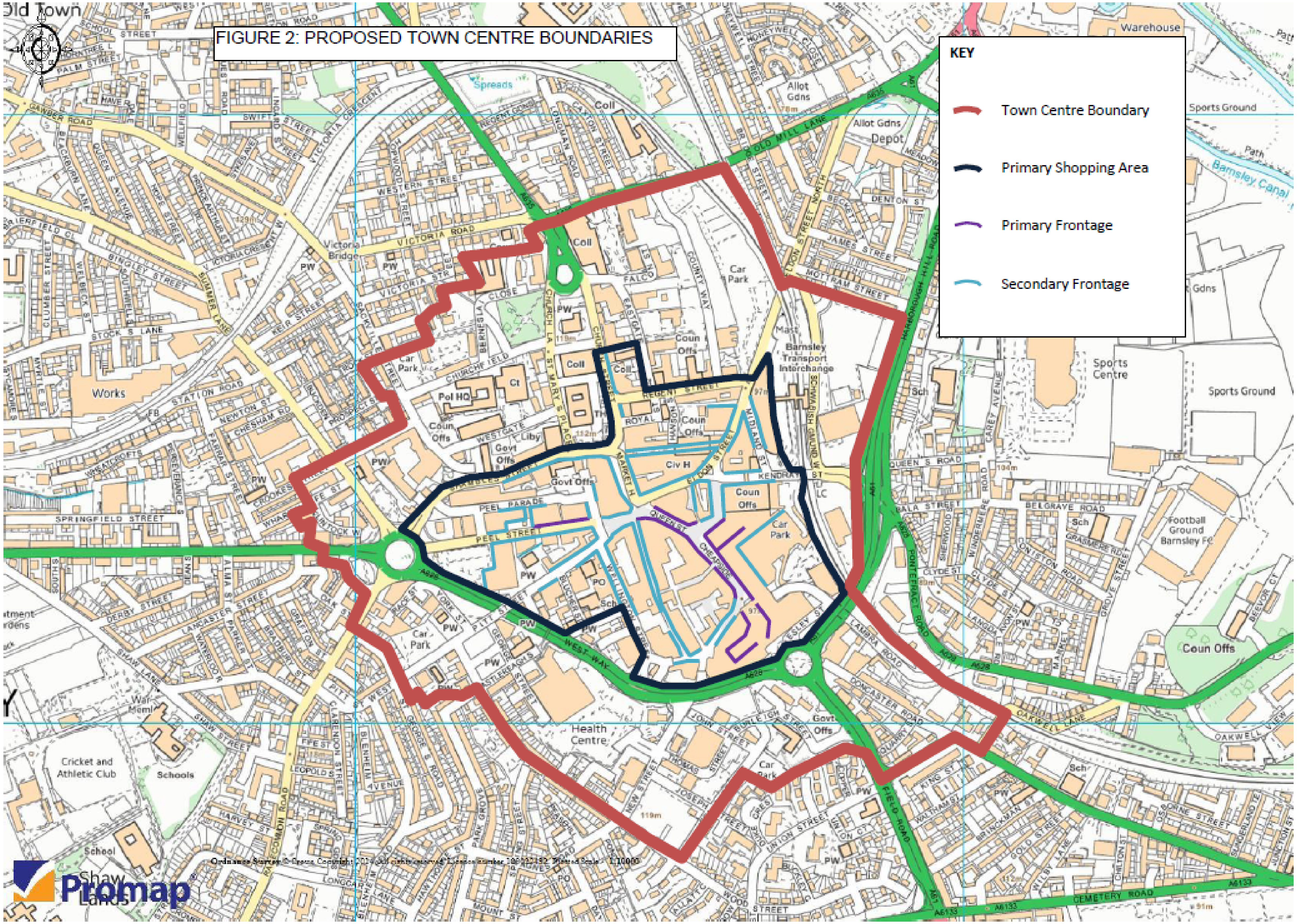


FIGURE 2: PROPOSED TOWN CENTRE BOUNDARIES
KEY
Town Centre Boundary
Primary Shopping Area
Primary Frontage
Secondary Frontage
Barnsley Transport Interchange
Promap

GLOSSARY OF TERMS

Definitions in italics are taken directly from the National Planning Policy Framework

Bulky Goods - non-food items usually sold from retail warehouses, including DIY and hardware goods, electrical goods, carpets and furniture, and other household goods.

Catchment Area - the geographical area from which trade to a store or centre is attracted; the primary catchment area defines the area from which the vast majority of shoppers (80-90%) tend to use a particular store or centre in preference to other stores or centres.

Clawback - the potential for a new retail development to recapture leakage of trade that is lost from a catchment area.

Commitments – developments which already have planning consent or are under construction.

Comparison Goods Shopping - non-food retail goods such as clothing and footwear, bulky household goods (see above) and other non-food goods normally sold in town centres, and usually not obtained on a frequent basis.

Convenience Goods Shopping – everyday essential items such as food and groceries, newspapers, magazines, confectionery, tobacco and alcoholic drink.

Convenience Store- a small foodstore, usually less than 500 sq.m. gross floorspace, selling a limited range of food items to meet day-to-day needs in a small catchment area (e.g. Tesco Express and Sainsbury's Local).

Design year – the forecast year selected for impact assessment, normally 5 years from the date of an application for a proposed retail development.

Discount foodstore – a supermarket which sells a limited range of (mostly food) items at discount prices (includes Aldi and Lidl).

District Centre - groups of shops, separate from the town centre, usually containing at least one food supermarket or superstore, and a range of non-retail services such as banks, building societies and restaurants, as well as local public facilities such as a library.

Economic development *- Development, including those within the B Use Classes, public and community uses and main town centre uses (but excluding housing development).*

Edge-of-Centre *- For retail purposes, a location that is well connected and up to 300 metres of the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre* *but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge of centre, account should be taken of local circumstances.*

Expenditure – annual spending on particular goods or services by residents living in defined area. Often expressed as expenditure per person or per capita.

Evening Economy – uses within a town centre that attract visitors in the evening for leisure and entertainment purposes, such as cinemas, theatres, public houses, bars, restaurants, bingo, night clubs and casinos.

Factory Outlet Centres - groups of shops specialising in selling seconds and end-of-line goods at discounted prices.

Health Checks - assessment of the health of a centre using key indicators of vitality and viability.

Hierarchy of Shopping Centres - a classification of shopping centres in which the importance of the centre is related to the size of its catchment area.

Independents – retail or service business run by local people or firms, as distinct from multiples.

Inflow of Trade – the amount of trade that is drawn to an existing or proposed centre or store from beyond its catchment area.

Isochrone - a line defining the off-peak drive time from a centre (in minutes).

Leakage - the loss of retail expenditure generated by residents in a catchment area to centres outside the area.

Leisure facilities – cinemas, restaurants, drive-through restaurants, bars and pubs, night clubs, casinos, health & fitness centres, indoor bowling centres, bingo halls, etc.

Leisure parks – developments which feature a mix of leisure facilities, such as a multiplex cinema, indoor bowling centres, night club, restaurants, bars and fast-food outlets, with car parking.

Linked Trips - trips which combine main food shopping with other activities such as non-food shopping and visits to other town centre facilities.

Local Centre - small grouping of shops and services usually comprising a small supermarket, newsagent, sub-post office and a pharmacy; other facilities could include a hot food takeaway, launderette and hairdresser.

***Main town centre uses** – Retail development (including warehouse clubs and factory outlet* *centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).*

Market share – the percentage of trade taken by a store or centre from within a defined area.

Multiples - national or regional non-food retailers with multiple branches in different towns and cities.

Need - the requirement for additional shopping floorspace arising from growth of retail expenditure (quantitative need) or to meet consumer choice (qualitative need).

No-Development Scenario – for the purposes of impact assessment, the estimated pre-impact turnover of centres and stores in the design year, that is before the impact of a proposed new development is assessed.

Out-of-Centre *- a location which is not in or the edge of a centre, but not necessarily outside the urban area.*

Out-of-Town *– a location out of centre that is outside the existing urban area.*

Over-trading and Under-trading - the extent to which a retail store is trading at a level above or below its company average.

Primary shopping area *- Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).*

Primary and secondary frontages *- Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.*

Qualitative Need – a need for greater choice and competition in retail or commercial provision, as shown by geographical deficiencies, over-trading, etc.

Quantitative Need – a measure of the capacity to support new floorspace based on the difference between future expenditure and turnover in an area.

Regional Shopping Centres - out-of-town centres generally over 50,000 square metres gross retail area, typically comprising a wide range of comparison goods stores.

Residual capacity – the amount of expenditure capacity that is available after subtracting commitments from surplus capacity.

Residual Turnover - the turnover remaining in a retail outlet or shopping centre after trade diversion has taken place to a new retail development.

Retail Impact - the economic impact of a new shopping development on existing centres and stores; also known as Trade Diversion and usually expressed as a percentage of the turnover of existing centres and stores.

Retail Warehouses - large stores specialising in the sale of household goods (such as carpets, furniture and electrical goods) and DIY items, catering mainly for car-borne customers.

Retail Parks - an agglomeration of at least 3 retail warehouses.

Retention Level - the percentage of expenditure by residents in a catchment area that is spent in centres within the catchment area (ie. expenditure retained).

Sales density (or sales productivity) – the amount of turnover per sq. metre of sales floorspace in a particular store or centre.

Service uses - commercial non-retail uses in a shopping centre such as banks, building societies, estate agents, travel agents, cafes, restaurants, hot food takeaways, hairdressers and public houses.

Supermarkets - self-service stores selling mainly food, with a trading floorspace less than 2,500 square metres, often with car parking.

Superstores - self-service stores selling mainly food, or food and non-food goods, usually with more than 2,500 square metres trading floorspace, with supporting car parking.

Surplus capacity – the difference between the amount of expenditure available to be spent in an area (expenditure retained) and turnover of existing shops in the area.

Town centre - *Area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.*

Trade Diversion - the loss of trade from an existing store or centre as a result of a new retail development taking place, usually measured as a percentage of its turnover before the opening of the new development (see Retail Impact).

Trade Draw - the percentage of the turnover of a new retail development which is drawn from existing centres or stores, zones within the catchment area.

Vitality and Viability – a concept which represents the 'health' of a town centre; it is related to the amount of retail activity which takes place (vitality) and the trading performance of the centre (viability).

Yield - the annual income from a property, expressed as a percentage of the property's freehold price or capital value; the smaller the percentage, the better the yield.