

High Peak Retail, Leisure and Town Centres Study 2022

High Peak Borough Council

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NEXUS
PLANNING



Contents

Executive Summary	3
1 Introduction	14
Instruction and Purpose	14
Structure of Report.....	15
2 Current and Emerging Trends	16
The Current State of the UK Economy.....	16
Available Expenditure and the Impact of the Internet	18
Convenience Goods	20
Comparison Goods.....	21
Leisure and Food & Drink.....	23
Planning Reform on the High Street	24
Implications for High Peak Centres	25
3 Planning Policy Context	28
Revised National Planning Policy Framework	28
Use Classes Order	32
Local Planning Policy Context.....	33
4 Market Research	36
Introduction.....	36
Convenience Shopping Patterns.....	36
Comparison Shopping Patterns	40
5 Healthcheck Assessments	48
Introduction.....	48
Buxton Town Centre	49
Glossop Town Centre	50
Other Town Centres.....	52
Chapel-en-le-Frith Town Centre	52
New Mills Town Centre.....	53
Whaley Bridge	53

Comparator Centres.....	54
6 Population and Expenditure	57
Study Area and Survey.....	57
Study Area Population	58
Retail Expenditure.....	58
7 Assessment of Retail Capacity	63
General Approach to Estimating Quantitative Capacity.....	63
Capacity for Future Convenience Goods Floorspace.....	64
Capacity for Future Comparison Goods Floorspace	68
Qualitative Requirements	71
8 Assessment of Leisure Capacity	73
Commercial Leisure: Bingo, Cinemas, Ten Pin Bowling and Casinos	73
Food and Drink	78
9 Summary and Recommendations	81
Key Findings: Retail Need and Retail Strategy	81
Key Findings: Leisure	87
Key Findings: Principal Centres.....	87
Key Policy Recommendations.....	90
Monitoring Recommendations.....	98
Appendix 1 – Study Area Plan	
Appendix 2 – Household Survey Results	
Appendix 3 – Healthcheck Assessments	
Appendix 4 – Quantitative Capacity Assessment	
Appendix 5 – Suggested Town Centre Boundaries	

Executive Summary

Instruction and Scope

1. Nexus Planning has been instructed by High Peak Borough Council (hereafter referred to as 'the Council') to undertake a new Authority-wide Retail, Leisure and Town Centres Study ('the Study'). The primary focus of the Study is to establish the current position in respect of the need for additional retail and leisure facilities in High Peak, and to consider the vitality and viability of the Borough's principal defined centres.
2. The Council is looking to inform the preparation of a new development plan (subject to member approval). It is therefore envisaged that this Study will not only form part of the evidence base to inform the future Local Plan, it will also assist with the Council's consideration of planning applications for retail and leisure uses and to help the Council consider future strategies to support vital and viable town centres.
3. This Study is underpinned by new empirical evidence in the form of a new household shopping and leisure survey, and our site visits to survey and assess the health of the principal centres. The household survey was undertaken by NEMS Market Research in November 2021 and covers six separate zones, which are collectively considered representative of the principal catchment area for retail facilities within High Peak.

Planning Policy Context

4. The most recent iteration of the National Planning Policy Framework ('NPPF') was published in July 2021. The NPPF reflects the fact that the traditional role of town centres has been somewhat undermined by structural changes in the retail sector, and that there may be a need to plan for a more diverse range of uses going forward. As such, the NPPF advocates a more flexible policy framework to support the future vitality and viability of town centres.
5. Paragraph 86 of the NPPF specifically relates to planning for town centres. It encourages local planning authorities to support centres' long-term vitality and viability by allowing them to grow in a way that can respond to rapid changes in the retail and leisure industries. The same paragraph also requires authorities to look at least ten years ahead when considering the scale and type of development that is likely to be needed in town centres.

6. The requirement to plan to meet needs across a minimum ten-year period represents a change from the previous iteration of the NPPF, which required town centre needs to be met in full across the entire plan period. The NPPF goes on to set out sequential and impact policy tests, which seek to promote a 'town centre first' approach to development.
7. The Adopted Development Plan is made up of the High Peak Local Plan and Policies Map, adopted in April 2016, alongside the Chapel-en-le-Frith Neighbourhood Plan adopted in 2015.
8. Policy CF1 of the High Peak Local Plan relates to retail and town centres. This Policy sets out that the Council will seek to maintain and enhance the vitality and viability of town centres and local centres in accordance with their function and scale and identified development needs. All major town centre use developments of 200 sq.m (of A1 net sales floorspace) or more outside of defined centres will be required to comply with the sequential approach to site selection and will be required to be supported by an impact assessment.

The Health of High Peak Town Centres

9. Nexus Planning carried out land use surveys of Buxton, Glossop, Chapel-en-le-Frith, New Mills and Whaley Bridge town centres in November 2021 in order to identify the current composition of units in the town centres. These assessments should be taken as a 'snapshot' of the performance of each centre at a moment in time, and further issues may subsequently become apparent in each centre as a consequence of the ongoing negative impacts arising from the Covid-19 pandemic.
10. The below Table 1 provides a summary of the land use composition of the town centres as identified by our November 2021 survey.

Table 1: Town Centre Unit Composition at November 2021

Centre	Comparison	Convenience	Financial & Business Services	Leisure Services	Retail Services	Vacant
Buxton	31.9%	6.8%	8.8%	25.4%	12.7%	14.3%
Glossop	28.9%	9.2%	9.2%	21.3%	19.7%	11.6%
Chapel-en-le-Frith	24.7%	7.5%	12.9%	23.7%	24.7%	6.5%
New Mills	28.2%	11.5%	11.5%	23.1%	16.7%	9.0%
Whaley Bridge	27.5%	10.0%	10.0%	37.5%	12.5%	2.5%
National average	27.1%	9.2%	9.1%	24.6%	15.6%	14.2%

Source: Composition of town centres (as defined by Experian Goad - with the exception of Whaley Bridge where Local Plan defined boundaries were used) derived from Nexus Planning Survey of November 2021; UK Average from Experian Goad Report October 2021

11. In respect of the five town centres, we note that each centre displays a vacancy rate lower than or very similar to the UK average of 14.2% (as identified by Experian Goad at October 2021). We summarise the key findings for each of the five town centre's below:

- **Buxton** is the principal commercial defined centre within the High Peak authority area. The centre is anchored by the Waitrose foodstore, located to the north, with the associated Spring Gardens Shopping Centre attached to the south and adjacent car parking to the north. Spring Gardens, where the national multiples are concentrated, consists of both a covered shopping mall and an external commercial pedestrianised street.

Buxton itself is split into two clearly defined commercial areas, with the 'new town' to the north, and the 'old town' to the south, beyond Buxton Town Hall. The southern part of the town centre is focused around the external market area, but extends further southwards along the A515.

- **Glossop** is the key retail destination in the northern part of High Peak, and as such accommodates a diverse range of convenience and comparison operators. There is a particularly strong range of convenience operators in the town centre, including Tesco, Iceland, Aldi, M&S Food and the Lidl store which opened in 2021 at Mill Street. Vacant units are located throughout the town centre, with particular concentrations observed around Wrens Nest Retail Park and Howard Town Retail Park.

The centre is generally well maintained, as are the retail units themselves, and the public realm is on the whole attractive and pleasant. However, a perennial issue in the town has been the volume of traffic on the A57 High Street but notwithstanding this, Glossop was well-used at the time of our visit and is considered to be a healthy, vibrant centre.

- **Chapel-en-le-Frith** is a relatively small centre, located just to the west of the boundary of the Peak District National Park. The centre provides a reasonable range of operators which are considered to be easily capable of providing for the day-to-day needs of the local community, particularly in respect of convenience goods which are anchored by Morrisons and Co-op Food. Chapel-en-le-Frith has a vacancy rate considerably lower than the current national average, and as such is considered to be a vital and viable centre.
- **New Mills** is one of the smaller town centres in High Peak, and as such primarily caters to serving day-to-day retail needs. The centre is anchored by a strong convenience goods offer,

alongside which is a diverse comparison offer which is comparable in terms of floorspace and units to the current national average. Furthermore, the centre benefits from a vacancy rate which is lower than the current national average. In terms of retailers, the majority of operators within the town centre are independents, although there are a limited number of national multiples such as Sainsbury's Local.

- **Whaley Bridge** is the smallest town centre in the High Peak authority area, and as such is focused on providing for the day-to-day needs of the local community, with a strong service and convenience goods offer, alongside a more limited comparison offer which provides for both day-to-day as well as more specialist goods. The small size of the town centre is such that the town has a 'village feel', with a strong community who organise and host a number of events, including an annual carnival in June, and provide for the upkeep of the town centre.

Methodology for Assessing Future Needs

12. In November 2021, a survey of 700 households was undertaken by NEMS within the defined Study Area in order to ascertain where residents go to undertake a range of shopping and leisure activities. The defined Study Area is consistent with that used in undertaking the 2013 Quantitative Retail Study Update. The Study Area reflects the area where residents look to facilities within High Peak to help meet their retail and leisure needs. A plan of the Study Area is provided as Appendix 1.
13. The defined Study Area for the household survey comprises six survey zones, which correspond to postcode sectors; the use of zones ensures an equitable distribution of surveys and assists in providing a detailed understanding of patterns of retail use at a localised level. The zones are representative of geographic areas that may accommodate broadly similar patterns of shopping behaviour.
14. The zones were used as the basis for the NEMS household survey and directly inform our needs assessment. The High Peak authority area is broadly consistent with Study Area Zones 1, 2 and 5.
15. Our service sector methodology is based around an estimation of the level of expenditure growth apparent across the period to 2041. We assume that some of this growth is available to support existing operators, and that the remainder is available to support new entrants into the market. The growth available to support new operators effectively provides a multiplier that can be applied to the base position at 2021 to identify future growth in the convenience and comparison sectors.
16. In summary, the key steps in our methodology comprise:

- use Experian data to estimate the likely population and expenditure available to support additional retail floorspace at 2021, and at future reporting years;
- calculate a multiplier which is commensurate with the expenditure growth in respect of convenience and comparison goods at relevant reporting years;
- make an allowance to account for the fact that some of this growth will be claimed by existing operators; and
- apply the net growth rate to the baseline position (i.e. the existing stock of convenience and comparison) to estimate the additional floorspace requirement.

Key Findings

Future Retail Needs

17. Our retail capacity assessment identifies the likely quantum of additional convenience and comparison goods floorspace that could be supported in High Peak across the period to 2041. Whilst any identified expenditure surplus is indicative of need that arises across the authority area and the towns as a whole, additional requirements should be directed towards the town centre in practice (subject to the availability of appropriate sites).
18. With regard to convenience goods, our assessment identifies an immediate need for between 6,500 and 7,800 sq.m at 2021, and an increased need of between 7,000 and 8,400 sq.m by 2041. The 2041 requirement is broadly commensurate to four moderately sized supermarkets.

Table 2: Quantitative Need for Convenience Goods Floorspace across High Peak's town centres

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
Buxton					
2021	21.8	4.1	17.7	1,300	1,600
2026	20.2	4.1	16.1	1,200	1,400
2031	21.2	4.1	17.1	1,200	1,500
2036	22.6	4.1	18.5	1,300	1,600
2041	24.1	4.1	19.9	1,400	1,700
Glossop					
2021	30.6	0.0	30.6	2,200	2,700
2026	28.6	0.0	28.6	2,100	2,500
2031	29.9	0.0	29.9	2,100	2,600
2036	31.7	0.0	31.7	2,300	2,800
2041	33.5	0.0	33.5	2,400	2,900
Chapel-en-le-Frith					

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2021	24.2	0.0	24.2	1,800	2,200
2026	23.4	0.0	23.4	1,700	2,000
2031	24.1	0.0	24.1	1,700	2,100
2036	25.0	0.0	25.0	1,800	2,200
2041	26.0	0.0	26.0	1,900	2,300
New Mills					
2021	17.0	0.0	17.0	1,200	1,500
2026	16.2	0.0	16.2	1,200	1,400
2031	16.8	0.0	16.8	1,200	1,500
2036	17.6	0.0	17.6	1,300	1,500
2041	18.4	0.0	18.4	1,300	1,600
Whaley Bridge					
2021	15.7	0.0	15.7	1,100	1,400
2026	15.0	0.0	15.0	1,100	1,300
2031	15.5	0.0	15.5	1,100	1,300
2036	16.2	0.0	16.2	1,200	1,400
2041	16.8	0.0	16.8	1,200	1,500

Source Table 6d of Appendix 4

19. With regard to comparison goods, our assessment identifies that between 1,700 sq.m and 2,700 sq.m of additional net sales floorspace could be supported at 2041. However, the first priority should be ensuring vacant floorspace is absorbed in the repurposing of existing units within the town centres, and filling the otherwise vacant floorspace.

Table 3: Quantitative Need for Comparison Goods Floorspace across High Peak's town centres

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
Buxton					
2021	0.0	1.8	-1.8	-300	-500
2026	5.1	2.1	3.0	500	800
2031	6.6	2.4	4.2	600	1,000
2036	6.2	2.8	3.4	500	800
2041	5.4	3.1	2.2	300	500
Glossop					
2021	0.0	0.0	0.0	0	0
2026	4.5	0.0	4.5	700	1,200
2031	5.8	0.0	5.8	900	1,300
2036	5.4	0.0	5.4	800	1,300
2041	4.7	0.0	4.7	700	1,100
Chapel-en-le-Frith					
2021	0.0	0.0	0.0	0	0
2026	1.3	0.0	1.3	200	300
2031	1.7	0.0	1.7	200	400

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2036	1.6	0.0	1.6	200	400
2041	1.4	0.0	1.4	200	300
New Mills					
2021	0.0	0.0	0.0	0	0
2026	1.2	0.0	1.2	200	300
2031	1.6	0.0	1.6	200	400
2036	1.5	0.0	1.5	200	300
2041	1.3	0.0	1.3	200	300
Whaley Bridge					
2021	0.0	0.0	0.0	0	0
2026	1.4	0.0	1.4	200	400
2031	1.9	0.0	1.9	300	400
2036	1.7	0.0	1.7	300	400
2041	1.5	0.0	1.5	200	300

Source Table 26d of Appendix 4

20. In the short to medium term, the first priority should be to support the reoccupation of this vacant stock. It should also be noted that any capacity for additional comparison goods floorspace arises in the medium term, and that it is relevant to note that the capacity assessment is based on the market share of the local authority area being maintained going forward. As set in the report, we are unaware of any significant proposed development which is likely to have a very significant impact on High Peak's future comparison goods market share.

Qualitative Considerations

21. From a qualitative perspective in terms of convenience provision firstly, if we look at the distribution of the stores across the authority area, these are principally focussed around the main settlements, which ensures that residents have good access to foodstores to meet their convenience needs. Furthermore, there is a good offer in terms of fascias across the authority area, with Aldi, Lidl, Tesco, Waitrose and Morrisons all occupying large format stores, and the likes of Tesco, Sainsbury's and the Co-op occupying smaller local convenience stores. There is one Lidl store located in Glossop and a live requirement to expand their portfolio, particularly within Buxton.
22. Providing for a new foodstore in a sustainable location (which would benefit and not directly compete with the defined centres), could assist in 'levelling out' some of the identified overtrading and provide for additional consumer choice within the authority area. However, given the historic nature of the centres within High Peak and the general complexities of finding suitable in or edge of centre sites, future allocations for retail developments of scale which could meet the above identified need may

prove difficult. We comment further below on the quantitative and qualitative requirements on a settlement basis.

23. In terms of comparison retailing, it is clear that the principal centres of Buxton and Glossop and to a lesser extent the other defined centres are meeting a general comparison need within the authority area. However, there are levels of leakage of comparison expenditure to destinations outside of the Study Area (Stockport, Manchester and so on) and an opportunity to claw back some of this expenditure back into High Peak.
24. We consider that the Council's current plans to enhance Buxton town centre will go some way to ensuring that comparison expenditure is drawn back into High Peak, by providing for space for modern format operators, both from the national and independent sectors. It follows that there does appear to be an opportunity to draw expenditure back into the Study Area through the diversification of the comparison offer within the key centres.

Future Leisure Needs

25. As identified at Section 8, we have identified a quantitative requirement for additional cinema screens and ten pin bowling alleys in particular. Whilst we consider that the existing cinema offer within and outside of the authority area is sufficient to meet the needs of residents, there may be an opportunity to explore the increase in screens in High Peak should an appropriate scheme be promoted. It is likely that any scheme would be focused on the niche, independent cinema sector, and which could be developed alongside a wider independent leisure offer.
26. In terms of the ten pin bowling alley requirement, we consider there to be an opportunity to explore requirements with boutique operators as part of a wider mixed use leisure-led scheme, particularly within Buxton, should an appropriate site come forward. Such a development could further enhance the diversity of uses within Buxton, increasing the draw of the centre and therefore benefiting the existing operators.

Policy Recommendations

27. Section 9 of the Study provides a series of recommendations relating to future town centre strategies, the sequential and impact policy tests and other policy matters such as defining town centre boundaries, defining a hierarchy of centres, local impact thresholds and future monitoring.
28. We summarise our recommendations below.

Town Centre Strategies

29. It is important that all of the centres continue to provide the day-to-day retail, leisure and service offer needed by their local catchments, alongside the visitors, and therefore retail and leisure will continue to play an important part in the future health of centres across High Peak. As such, whilst the diversification of uses must form part of future strategies for the centres, and the encouragement of spending from visitors will be integral to the future success, retail, leisure and service uses which residents rely on must continue to be supported. This will also help to retain both convenience and comparison expenditure which otherwise could be lost to competing centres outside of High Peak.
30. Town centre policies will therefore need to promote diverse centres, which encourage a mix of main town centre uses. Tracking the implications of Permitted Development Rights, and particularly the change of use from commercial to residential uses will be important, to ensure that the centres' focus' is still around the retail and leisure offer so residents can meet their daily needs. This will also help to avoid the loss of expenditure from the centres to other larger competing destinations and encourage sustainable shopping and leisure patterns within High Peak. As such, we recommend the following key priorities to be encouraged within planning policy:
- **Placemaking & Public Realm** – investment into the public realm of the centres and particularly Buxton and Glossop. High quality wayfinding, pedestrian and cycling linkages could also contribute to connecting the ends of Buxton and Glossop more effectively.
 - **Diversifying the leisure and cultural offer** – for centres to thrive they need several roles to attract the diversity and numbers of visitors. Uses such as gyms, entertainment centres, escape rooms, bars, restaurants and other complementary amenities within the principal centres would increase both the breadth of the type of visitor as well as the time expended and would therefore contribute to the local economy.
 - **Residential** – the emerging build to rent sectors could be an opportunity in appropriate locations to bring people into the centres and to drive footfall and patronage to the retail and leisure sector.
 - **Independent retailing** – as larger national multiples consolidate, new operators will come forwards.

- **Events** – successful centres are increasingly using public realm/centres to host events and thus attract visitors, examples include Christmas markets, fairs, festivals (food/literature), specialist markets, light nights, art and other displays.
- **Workspace** – provision of contemporary flexible workspace, particularly focusing on Glossop and the opportunities arising through the repurposing of the municipal buildings.

Town Centre Boundaries

31. The proposed boundaries are shown on the plans provided at Appendix 5. The only changes recommended from those defined within the 2016 Local Plan are for Chapel-en-le-Frith.
32. The proposed amendments in Chapel-en-le-Frith would alter the defined centre boundary to include the retail units on the southern side of Market Street between 5 High Street and Thornbrook Road. The proposed boundary would follow the rear of these properties and run parallel to Market Street in order to include the parade of units at 1-6 Thornbrook Road. This suggested boundary is recommended in order to include the units in this location, which are primarily focused on meeting town centre needs and will assist in the protection of the future vitality and viability of the centre, in accordance with local and national policy.

Retail Hierarchy

33. Town centres are defined at Annex 2 of the NPPF, however there is no longer any definition provided in the NPPG or Town Centre PG to differentiate between centres of different sizes. The now superseded Planning Policy Statement 4: Planning for Sustainable Growth provided definitions of what forms a town, district and local centre at Annex B.
34. The centres assessed across the Borough have been categorised by the different levels in the hierarchy by considering a range of factors to ensure that they are proportionate to the function in which they perform. Factors including the mix of uses provided, the social and community uses in the centres, the number of units and amount of floorspace present along with the overall role and function that the centres play within their locality, including the location of the centres within the administrative area.
35. We believe that Buxton and Glossop town centres are clearly the principal town centre in the Borough and have a catchment area which is more extensive than the other three town centres.

36. Although smaller centres, Chapel-en-le-Frith, New Mills and Whaley Bridge each continue to perform important market town centre roles and provide for the day-to-day needs of the residents. In this regard, each of the three centres provide a range of retail, leisure and service facilities for the relatively rural catchments of High Peak. The three centres therefore continue to perform a key town centre role within the authority area, albeit to a lesser extent than Buxton and Glossop, and we agree that they should continue to be designated within the Smaller Town Centre category within the hierarchy.

Thresholds

37. Paragraph 90 of the NPPF states that it is appropriate to identify thresholds for the scale of edge of centre and out of centre retail and leisure development that should be the subject of an impact assessment. Any such threshold policy applies only to the impact test (all planning applications for main town centre uses that are not in an existing centre and not in accordance with an up-to-date development plan will generally be the subject of the sequential test¹).
38. The current adopted policy adopts a threshold across the whole authority area for proposals over 200 sq.m.
39. We typically do not consider that applying a single threshold to apply to all types of centre in the authority area is appropriate, given the different scale and nature of each of the centres. However, having reviewed the current offer in the town centres, the size of units and their catchments, we consider the Council's current adopted policy approach to be relevant in this case and do not recommend any changes to the current adopted policy threshold.

¹ With the exception (in accordance with paragraph 89 of the NPPF) of small scale rural office proposals and other small scale rural development

1 Introduction

Instruction and Purpose

- 1.1 Nexus Planning has been instructed by High Peak Borough Council (hereafter referred to as 'the Council') to undertake a new Authority-wide Retail, Leisure and Town Centres Study ('the Study'). The primary focus of the Study is to establish the current position in respect of the need for additional retail and leisure facilities in High Peak, and to consider the vitality and viability of the Borough's principal defined centres.
- 1.2 This report has been produced to inform the formulation of future development plan policy and to assist in the determination of planning applications for retail and other main town centre uses. The Council considers it necessary to undertake a new Study due to the time that has now lapsed since the publication of the previous report, and as a consequence of ongoing developer interest in the retail sector within High Peak. The previous Quantitative Retail Study Update was undertaken by GVA in October 2013 on behalf of High Peak Borough Council and Staffordshire Moorlands District Council, and updated by an Addendum in 2014.
- 1.3 The Council is looking to inform the preparation of a new development plan (subject to member approval). It is therefore envisaged that this Study will not only form part of the evidence base to inform the future Local Plan, it will also assist with the Council's consideration of planning applications for retail and leisure uses and to help the Council consider future strategies to support vital and viable town centres.
- 1.4 This Study is underpinned by new empirical evidence in the form of a new household shopping and leisure survey, and our site visits to survey and assess the health of the principal centres. The household survey was undertaken by NEMS Market Research in November 2021 and covers six separate zones, which are collectively considered representative of the principal catchment area for retail facilities within High Peak. The zones are consistent with those utilised in the previous 2013 Study in order to allow comparison of shopping patterns over time². As part of the healthcheck analysis and recommendations made, we have also taken account of feedback from key stakeholders, including officers from Derbyshire County Council and the D2N2 Enterprise Partnership involved in the future plans for the principal centres within the authority area.

² Zone 6 is an amalgamation of the former Zones 6 and 7 from the 2013 and 2014 Studies

- 1.5 A plan of the Study Area is provided at Appendix 1, and the tabulated household survey results are provided at Appendix 2. Whilst the Study Area largely corresponds with the boundaries of the High Peak authority area, it does include small parts of neighbouring authority area of Staffordshire Moorlands, Cheshire East and Derbyshire Dales, where residents sometimes look to facilities in High Peak to meet at least some of their retail and leisure needs.
- 1.6 The Study Area is broken down into six Zones which broadly cover a key settlement each. The context of the zones are summarised below in Table 1.1.

Table 1.1: Study Area Zones by Settlement

Survey Zone	Key Settlements
1	Glossop
2	Chapel-en-le-Frith, New Mills, Whaley Bridge
3	Castleton (National Park), Hathersage (Derbyshire Dales)
4	Bakewell (Derbyshire Dales)
5	Buxton
6	Leek (Staffordshire Moorlands)

Structure of Report

- 1.7 Our report firstly provides an overview of prevailing retail and leisure trends, before then going on to consider the planning policy context for the Study. We then summarise the key findings of the new household shopper survey, before considering the vitality and viability of defined centres within the High Peak authority area. The remainder of the report is focussed around our assessment of retail and leisure needs.
- 1.8 Accordingly, our report is structured as follows:
- Section 2 identifies current retail and leisure trends of relevance;
 - Section 3 provides an overview of the planning policy context;
 - Section 4 summarises the findings of the household survey;
 - Section 5 summarises our assessment of the vitality and viability of the defined centres;
 - Section 6 provides an overview of forecast changes in Study Area population and expenditure;
 - Section 7 sets out an updated assessment of retail needs;
 - Section 8 sets out an updated assessment of leisure needs; and
 - Section 9 provides a summary of our key findings and conclusions.

2 Current and Emerging Trends

- 2.1 In order to provide a context for this Study and help identify the sectors that are more likely to be the subject of additional development proposals, we provide an overview of current retail and leisure trends below. In reading the below review, it should be noted that the retail and leisure sectors are dynamic and, whilst online shopping has impacted on the retail sector, new retailers and new formats continue to evolve to meet shoppers' needs.
- 2.2 The below commentary should therefore be taken as a 'snapshot' in respect of current market conditions; it will be necessary to judge future development proposals for main town centre uses with reference to the prevailing conditions at the time of a proposal's determination. This is particularly the case given the current commercial circumstances arising from the Covid-19 pandemic, and the impact of the lockdown measures on our high streets and operators (both local and nationally). We reflect on this in more detail below.

The Current State of the UK Economy

- 2.3 The UK economy has experienced a significant shock over the past 18 months as a result of the Covid-19 pandemic and subsequent restrictions on movement and behaviour which have sought to mitigate its impact. This uncertain background has caused business investment and expenditure to decline. Household spending fell by over 20% quarter-on-quarter in the second quarter of 2020 following the imposition of national lockdown measures. This is the largest quarterly contraction on record. Retail sales volumes also suffered double-digit falls in April 2020 as all but essential stores closed during the height of the lockdown.
- 2.4 However, as a result of the gradual reopening of businesses over summer 2020, the economy returned to growth, with this gathering momentum as a greater number of sectors reopened, including hospitality and leisure services followed by the full reopening of schools. A more pronounced resurgence in the number of cases of Covid-19 resulted in the Government reinstating a nationwide lockdown in early 2021.
- 2.5 In January 2022, Experian published its Retail Planner Briefing Note 19 ('ERPBN19'), which provides comprehensive and up-to-date information on retail developments and short, medium and long term forecasts for retail planning decisions.
- 2.6 ERPBN19 (January 2022) sets out Experian's best estimate of the retail sector and future changes in expenditure at the time of its publication. Experian anticipates that the post-Covid-19 recovery will

- be subdued over the coming months and that the economy will not recover to pre-Covid levels until at least 2023. In this regard, Experian consider that due to the unpredictable nature of the global pandemic, there is some degree of uncertainty over the scale and duration of the outbreak and the resulting economic consequences. Accordingly, Experian's forecasts are subject to a greater degree of uncertainty and volatility than previously would have been the case.
- 2.7 Although the medium term outlook for GDP will be shaped by the course of the pandemic, the long term outlook for GDP remains unchanged, with growth expected to remain below historic averages due to slower population rises and productivity.
- 2.8 The overall retail sales are projected to be volatile in the near term, but growth is less impacted over the medium and longer terms. The outlook for special forms of trading (i.e. internet sales, mail order) has been revised upwards in the short to medium term. The prospects for retail floorspace has been revised upwards in line with stronger projections for spending and slowing levels of growth projected for internet sales.
- 2.9 In terms of inflation, Office for National Statistics data³ indicates that the rate of inflation (as measured by the consumer price index) increased from 0.5% at June 2016 to a high of 3.1% at November 2017, before reducing to 0.6% at December 2020. The rate of inflation in 2021 has then increased back up to 2.4% in June 2021. Retail has been an industry under significant stress, as many retailers find themselves squeezed between rising costs and the increasing volume of sales over the internet. This has of course, been pressurised further with the impact of the Covid-19 pandemic.
- 2.10 There will still be the need and demand for physical stores, despite the increase in shopping online. This is particularly the case for convenience sales in light of the fact that the online shopping orders are still, in the majority, being picked from shelves in physical stores. In terms of comparison shopping, there will also still be the requirement for physical stores as shoppers enjoy the experience of viewing items in person, but this shopping experience will need to evolve and diversify, and seek to engage shoppers at a level which has not been explored before.
- 2.11 In terms of the grocery market, the ONS⁴ reports that the food and non-alcoholic beverage inflation rate as of May 2021 was 1.0% when compared to 12 months previous, with the inflation rate on alcoholic beverages and tobacco was 2.6% when compared to 12 months previous.

³ ONS 'Consumer price inflation tables' dataset, November 2021

⁴ ONS 'Detailed Figures by Division' dataset, November 2021

- 2.12 The long-term impacts of this period are yet to be determined, and as such it is almost impossible to predict with any meaningful certainty what effects short-term business closures and significantly reduced levels of activity will have.
- 2.13 However, as may be expected, ONS⁵ has reported that retailers which predominantly rely on customers visiting their stores recorded a big drop after they were ordered to close their doors. Dispensing chemists sold consistently more since the pandemic began than they did before, with their sales increasing strongly in March 2020, and continued to grow in June even after restrictions were eased and other non-essential stores were allowed to reopen. Non-specialised foodstores, which include supermarkets, also traded consistently above their pre-pandemic levels. However, for furniture retailers, customers returned in the summer with trade returning to pre-pandemic levels and growing further, boosted by people still spending more time at home than they used to.
- 2.14 In terms of online retailing, ONS has reported ‘...online sales reaching higher than usual levels over the course of the pandemic’. Although these levels dropped off after shops reopened in June, the proportion of online retailing began to increase in October and continued to do so into November following the reintroduction of lockdown measures. However, with the gradual reopening of the economy in Spring/Summer 2021, ONS has reported a decrease in the overall proportion of retail spending online.

Available Expenditure and the Impact of the Internet

- 2.15 Experian forecasts fairly turbulent growth in per capita convenience and comparison goods expenditure over the short term. In this regard, Experian forecasts that per capita expenditure growth in the convenience goods sector will decrease slightly at 2022 by 2.0% (from -3.7% at 2021, and 8.7% growth at 2020). The growth at 2020 was largely attributed to consumers spending more on such goods as a result of lockdown measures. However, this growth is forecast to unwind over the short to medium term, and Experian forecasts very limited growth beyond 2022.
- 2.16 As the below Table 2.1 indicates, forecast increases in comparison goods spending are more optimistic following reduced growth of 1.6% at 2020 and 1.9% at 2021, but it is evident that per capita comparison goods expenditure increases going forward will be below the level apparent at the turn of the millennium. Experian identifies that per capita comparison goods expenditure growth dropped from 3.9% at 2017 to 1.0% at 2018, and forecasts that it will remain between 2.8% to 2.9%

⁵ ONS analysis titled ‘The impact of the coronavirus so far: the industries that struggled or recovered’, published on www.ons.gov.uk on 9 December 2020

per annum in the medium to long term. The exception to this is the reduction in growth between 2020 and 2021, which is largely a result of lockdown measures closing all but essential stores, and an anticipated growth of 2.1% and 2.8% in per capita expenditure in 2022 and 2023 respectively under the expectation that lockdown measures will be gradually eased and expenditure will pick up.

Table 2.1: Experian’s Identified and Forecast Convenience and Comparison Goods Per Capita Expenditure Growth

Volume Growth Per Head (%)	2017	2018	2019	2020	2021	2022	2023	2024-28	2029-40
Convenience goods	0.2	0.0	-1.2	8.7	-3.7	-2.0	0.1	0.1	0.1
Comparison goods	3.9	1.0	2.2	1.6	1.9	2.1	2.8	2.8	2.9

Source: Figure 1a and Figure 1b of Experian Retail Planner Briefing Note 19

2.17 Whilst the above figures relate to a level of growth which is significantly below that which has historically been available to retailers, the situation for high street stores is exacerbated through the increasing amount of expenditure which is committed through special forms of trading⁶ and, in particular, online.

2.18 In this regard, Appendix 3 of ERPBN19 indicates that special forms of trading accounted for just over 30% of total retail sales at 2021 as a consequence of Covid-19 and subsequent to very strong growth in online retailing over the past decade. Although the growth in special forms of trading is anticipated to drop back slightly in 2022, Experian believes that special forms of trading will account for over 30% of retail sales by 2025, increasing to around 34% by 2031.

2.19 The below Table 2.2 sets out Experian’s identified and forecast level of special forms of trading as a proportion of overall convenience and comparison goods expenditure. Experian estimates that special forms of trading will account for over a third of comparison goods expenditure and over a fifth of convenience goods expenditure at 2031.

Table 2.2: Experian’s Identified and Forecast Market Share of Non-Retail Sales for Convenience and Comparison Goods Sectors

Volume Growth Per Head (%)	2017	2018	2019	2020	2021	2022	2026	2031
Convenience goods	11.2	12.4	13.7	18.0	20.9	19.1	22.2	23.9
Comparison goods	20.8	22.8	24.3	34.1	35.5	31.9	35.6	38.1

Source: Figure 5 of Experian Retail Planner Briefing Note 19

⁶ Including internet sales, mail order, stalls and markets, door-to-door and telephone sales

2.20 The ongoing popularity of internet shopping continues to have clear implications in respect of the viability of some 'bricks and mortar' retailers. However, it is important to note that changes in how people shop also bring about some opportunities for retailers trading from the high street. In particular, many stores sell online but fulfil orders from regular stores rather than warehouses⁷, with purchases therefore helping to sustain tangible retail floorspace. As a consequence, Experian also provides an 'adjusted' estimate of special forms of trading, which relates to expenditure which is not available to actual stores.

Convenience Goods

2.21 Recent socio-economic conditions have led to significant shifts in convenience goods retailing, which have resulted in the 'big four' supermarket operators' market share being cut. Mintel⁸ finds that the decline of the food superstore is well established and that this can be attributed to two issues.

2.22 Firstly, people are undertaking food shopping in different ways. More people are living in town and city centres and more people are having difficulties financing the purchase of their own home. Mintel indicates that such people are more likely to undertake food shopping on an 'as needs' basis and are more likely to eat out or use takeaways. As such, they are less likely to have need to undertake a 'main food shop'.

2.23 Secondly, the current uncertainty in the economy has made hard discounters (namely Aldi and Lidl) a more attractive proposition, and are particularly thriving given that shoppers are currently having to be 'money savvy'. Discounters have also made efforts to try to compete more directly with the 'big four' supermarket operators, with larger stores, greater ranges of goods, fresh foods and premium products becoming increasingly prevalent. It is clear that the likes of Aldi and Lidl are no longer 'discount retailers' as they once were, and have better met a wider range of customers' needs through the increase in a supply of more premium products.

2.24 The move towards the middle ground has allowed discounters to secure market share from both superstores and smaller convenience stores. In addition, we note that discount retailers are often happy to trade alongside more upmarket convenience goods retailers (such as Marks & Spencer Foodhall) as, collectively, the two stores can meet many food shopping needs.

⁷ This is particularly the case with food shopping and speciality comparison goods purchases, where retailers often try to tap into a wider market through an online presence

⁸ 'UK Retail Rankings', Mintel, April 2018

2.25 The shifts in the sector are illustrated with reference to changes in retailers’ market share in recent years, as shown in Table 2.3.

Table 2.3: Market Share of convenience goods operators

Operator	December 2016	December 2017	December 2018	December 2019	December 2020	December 2021
Tesco	28.4	28.1	27.8	27.4	27.3	27.9
Sainsbury's	16.5	16.5	16.1	16.0	15.9	15.7
Asda	15.3	15.3	15.2	14.8	14.3	14.2
Morrisons	10.8	10.8	10.6	10.3	10.4	10.1
Aldi	6.2	6.8	7.4	7.8	7.4	7.7
Co-op	6.3	5.8	5.9	6.1	6.0	5.8
Lidl	4.6	5.0	5.3	5.9	6.1	6.3
Waitrose	5.1	5.2	5.0	5.0	5.0	5.1
Iceland	2.2	2.2	2.2	2.3	2.5	2.4
Symbols & Independent	1.8	1.7	1.5	1.6	1.7	1.6
Other Outlets	1.7	1.6	1.7	1.6	1.8	1.8
Ocado	1.1	1.1	1.2	1.3	1.6	1.7

Source: KANTAR Grocery Market Share. Figures shown are for the final reporting period in each calendar year

2.26 Over the past couple of years, the market has witnessed the closure of unprofitable foodstores, particularly operated by Tesco and Morrisons but a substantial investment plan from the likes of Aldi and Lidl over the coming years, which will likely further shift the grocery market in the short and medium term.

Comparison Goods

2.27 The comparison goods sector is currently being squeezed by a number of factors, the most substantial being the effects of Covid-19 and the efforts to contain it. Other factors include reduced expenditure growth, the ability of internet shopping to plug gaps in retailer representation, increases in the minimum wage, and business rates changes.

2.28 This ‘perfect storm’ has resulted in changes in the structure of retailing on the UK high street and a generally lesser reliance on comparison goods retail. To underscore this, the Centre for Retail Research reported that 2020 was the worst year for the retail job losses in more than 25 years. Around 180,000 retail jobs were lost in total, with this figure representing a rise of almost a quarter on 2019⁹.

2.29 Whilst the sector is continually evolving and there are a number of ongoing success stories (including Primark, Zara, Jack Wills, Joules and Hotel Chocolat), recent headlines have focussed on failing retailers and store closures. High profile retailers that have struggled include Debenhams, which

⁹ Article headlined ‘Retail sales in 2020 ‘worst for 25 years’, BBC, 12 January 2021

announced the closure of all 124 stores in December 2020¹⁰ and the Arcadia Group, which owned Topshop Topman and Dorothy Perkins, which in February 2021 announced the closure of around 500 stores¹¹. Furthermore, Intu Properties, one of Britain's biggest shopping centre owners, fell into administration in June 2020 after failing to secure an agreement with its creditors¹².

- 2.30 Whilst the loss of some of the above names will have significant repercussions for certain towns (particularly those that lose Debenhams, Marks & Spencer or House of Fraser from their high street in very quick succession), some well-known retailers have failed to 'move with the times' and update their offer, accommodation and online presence. This is partly a consequence of retailers struggling to reinvest in their business when margins are tight (or non-existent).
- 2.31 It will be interesting to see whether any permanent change in working from home may act to counterbalance the polarisation trend, given the prospect of fewer commuters in larger centres and greater numbers of people spending the working day in and around their home. The impact on larger centres may be to reduce footfall, particularly within the week, and result in the shift in expenditure being directed to the smaller town, district and local centres. Whilst this will be a positive for the smaller centres, the city centre may suffer as a result.
- 2.32 Whilst structural changes have had a material impact on the vitality and viability of many UK high streets, there are some beneficiaries. In particular, household discount operators, such as B&M Bargains, Poundland and Wilko, have reoccupied a number of medium to large retail units. However, as evidenced by the failure of Poundworld, there is some evidence that this market may be approaching capacity.
- 2.33 It remains to be seen what additional long-term impacts will eventuate from retail closures resulting from Covid-19 containment measures. However, prior to the implementation of lockdown measures, trading conditions for retailers were challenging and many retailers were struggling to meet costs, including rents, resulting in a higher proportion of retailers restructuring or entering administration. As has been seen throughout 2020 and 2021, the conditions have only become more challenging.

¹⁰ Article headlined 'Debenhams set to close putting 12,000 jobs at risk', BBC, 1 December 2020

¹¹ Article headlined 'After Topshop owner Arcadia's demise, what now for UK clothes shopping?' The Guardian, 13 February 2021

¹² Article headlined 'Shopping centre owner Intu collapses into administration', The Guardian, 26 June 2020

Leisure and Food & Drink

- 2.34 The greater availability of high street units appears to have helped stoke an entrepreneurial spirit in recent years, with a number of centres beginning to benefit from a greater focus on independent retailers and also modern markets, which are frequently focussed around food and drink operators.
- 2.35 More generally, the food and drink sector has also been buoyed in recent years by the success of mid-market national multiples, which expanded quickly across the UK. However, there are signs that the market is becoming saturated in some locations and a number of high profile operators have been in financial difficulty. Given the problems suffered by such operators, the market has become more cautious and mid-market operators are picking new sites carefully as a result. Instead, we have seen a number of independent operators flourish, both before and throughout the pandemic, and a desire of shoppers to choose local operators over the bigger, regional and national brands. This is particularly the case for the smaller centres in the authority area.
- 2.36 A further significant recent high street success story has been the resurgence of the town centre leisure sector, which has resulted in new cinemas being developed close to the shopping core and 'competitive socialising' concepts, which include bowling, crazy golf, table tennis, darts, axe-throwing and other seemingly niche pursuits.
- 2.37 Cinema openings have been on the up in recent years and 'boutique' cinema operators – including Curzon, Everyman and The Light – are able to operate from smaller sites in town centres (partly as a consequence of digital technology). Town centre cinema development has successfully underpinned wider mixed-use developments, as food and drink operators are typically keen to locate in close proximity to benefit from spin-off custom. New, innovative leisure operators have been particularly beneficial both in re-using existing difficult to let premises, and in driving the evening economy.
- 2.38 More generally, the gym market continues to perform well, with the Leisure Database Company identifying that there are now more than 7,000 gyms across the UK, with the fitness market having an estimated value of more than £5bn. The Leisure Database Company suggests that this is a 'golden age of fitness', with around one in every seven Britons having a gym membership. Budget gyms are currently particularly popular, with operators such as Pure Gym, the Gym Group and easyGym utilising a format that is based on low costs and high volume.
- 2.39 There is a concern that the implications of the pandemic will be particularly felt on the leisure sector, with some facilities not being allowed to reopen until July 2021. The full impact on the leisure sector as a whole will really evolve into 2022, and it is clear that the industry is not 'in the clear' yet.

Planning Reform on the High Street

- 2.40 One of the most impactful planning reforms of the last year has been the consolidation of a number of separate Use Classes under a single 'Commercial, Business and Service' Class E. This update to the Town and Country Planning (Use Classes) Order 1987 (the 'UCO') in July 2020 came into effect in September 2020. It combines shops, restaurants, offices, gyms and nurseries (amongst others) that no longer require planning permission to switch uses.
- 2.41 Then, in March 2021, an update was made to the General Permitted Development) (England) Order 2015 (the 'GPDO'). This allows for the change of use from Class E properties to residential from August 2021 (extending a right that had previously been restricted to office uses). This permitted development right is subject to maximum size requirements, the property having been in use as Class E for 2 years and vacant for 3 months. Also, an application to the Council for 'Prior Approval' for limited consideration of impacts related to transport, contamination, flood risk, noise, the provision of natural light, and the potential effect of providing residential accommodation within an industrial area. Further limitations apply in Conservation Areas and for nurseries, as well as in areas covered by 'Article 4 directions' where the rights do not apply.
- 2.42 Article 4 directions are issued under article 4 of the GPDO, and allow for Councils to withdraw permitted development rights from defined areas. However, after notifying the Secretary of State of their intention to make an Article 4 directions, the Secretary of State can intervene and modify or cancel an Article 4. This would occur if they do not feel it is justified as they have done on a few notable occasions in the past. They can be immediate (taking effect within a year of being issued, but liable for compensation to landowners) or non-immediate (taking effect at least a year after issue, but not liable for compensation).
- 2.43 On 20th July 2021, the latest update to the National Planning Policy Framework ('NPPF') introduced new limitations on the use of Article 4 directions (Paragraph 53). The new text significantly narrows the areas in which it is justified to introduce Article 4 directions, limiting Councils abilities to control development within their boundaries. These updates to Paragraph 53 were first put forward in the January 2021 consultation for draft revisions to the NPPF. However, the final updates differ from the initial consultation in a couple of key areas. The text recognises that the loss of the "essential core of a primary shopping area" could result in wholly unacceptable adverse impacts on an areas vitality and viability. This is the Government's first acknowledgement of the potential for the permitted

development rights to undermine the health of centres in the NPPF. The updated text also introduces a requirement for 'robust evidence'.

- 2.44 On the one hand, this can be seen as good news for Councils looking to protect vulnerable centres. Protection of the vitality and viability of a high street or town centre against the adverse impacts of change of use is now listed as justification for issuing an Article 4 direction.

Implications for High Peak Centres

- 2.45 The above trends have a number of potential implications for retail and leisure provision within the High Peak authority area.
- 2.46 Buxton town centre is the principal retail and leisure centre serving the south of the High Peak authority area, with the highest level of national multiples present. As we demonstrate in more detail later in the report, for the most part, the centre still attracts the highest proportion of convenience and comparison shopping trips from residents in High Peak and has retained its importance as a commercial destination within the wider area. This is particularly the case given the relatively rural nature of some parts of High Peak and the importance of ensuring that there is a principal centre within the authority which provides for the range of operators residents require. Buxton is also undoubtedly an important town centre serving residents needs in the south and tourists' needs. The centre's offer is dominated by its wider leisure and service offer but is also an important destination to serve shoppers' convenience and comparison needs.
- 2.47 In this regard, High Peak Council successfully secured £6.6m of Future High Street funding from the Government in December 2021, following the preparation of detailed masterplan and business cases. The funding is only for physical works and focuses on the northern part of the town centre around Spring Gardens and the railway station. Buxton was also successful in securing Heritage Action Zone initiative which will complement the Future High Street funding, helping to reinstate traditional shopfronts and restore vacant heritage buildings.
- 2.48 Both of the above schemes will assist Buxton in responding to the changing commercial climate and requirement to ensure that the centre continues to draw in expenditure and footfall from both the surrounding catchment and the wider visitors. Key to this will be the inclusion of modern format units which meet the requirements of both national multiple and local independent traders, both of which are important elements of Buxton's commercial offer. The leisure function of the centre will also be key to its future success.

- 2.49 The other alternative (other than the other centres within the authority area such as Glossop which serves the north of High Peak) is for residents to look online to meet their shopping needs, which of course is partly to the detriment of defined centres (albeit there will be an element of 'click and collect' and other means which can encourage linked-trips to centres).
- 2.50 Buxton is also relatively well served by large format convenience destinations meeting both main and top-up food shopping functions and attracts residents from a relatively large catchment, particularly from those areas within which larger stores are not present. This in itself raises sustainability concerns in terms of the distances required by residents to travel to meet their needs but which is not unusual for areas similar to High Peak. Furthermore, and as is the case for comparison retailing, residents are becoming more familiar with shopping online, which again has been accelerated as a result of COVID-19. It will be important that post-COVID, operators and centres incentivise residents back into the centres to help support the revitalisation of the high streets.
- 2.51 Whilst the growth of online retailing is likely to have had a detrimental impact on the turnover of High Peak's retail destinations, going forward there may be opportunities for High Peak's retail facilities to benefit from multi-channel retailing in order to help drive footfall and sustain retailer representation. This is particularly important in light of the current commercial situation and the need to rejuvenate high streets once the pandemic is over. Working with bodies such as the Institute of Place Management to plan for a successful recovery will be vital following the current commercial climate, and will likely be a relatively lengthy process as we get used to being back to 'normal'.
- 2.52 Alongside this we can also point to an increase in community cohesion and partnerships amongst high street occupiers, as well as between high streets and local residents. In a number of cases, high street operators have adapted to the COVID-19 outbreak by pivoting to an online model (which will likely remain as an additional revenue stream for a number of businesses in the future) and increased communication of opening hours and operating procedures. This has led to new level of customer interaction for some high street occupiers, while others have understandably reduced communication whilst focussing on other priorities during the outbreak. Many businesses are also diversifying their offer and adding, often informal, home delivery services.
- 2.53 Such opportunities will likely be driven in the first instance by national multiple retailers – and are therefore of particular relevance to larger retail venues, such as Buxton and Glossop town centres and to a lesser extent the other centres – but there are also likely to be opportunities for smaller

- centres to provide click and collect facilities, which could help encourage residents to visit the centres and access other facilities whilst they do so.
- 2.54 There is a need for flexibility in centres, which needs to be adaptable to a number of uses to address a wide range of future needs. This is ever important following the COVID-19 pandemic and as we witness the 'recovery' within the centres and high streets in High Peak. Indeed, vital and viable centres need a varied mix of uses and there is also an identified need to concentrate multi-functional public services in town centre locations to realise agglomeration benefits.
- 2.55 The latest pressures on our high streets will likely affect demand for space and its use, the design of buildings and public realm, and transport access. Indeed, the changes in working habits will likely impact on the way we live longer-term, resulting in a need for residents to shop and work locally, and enjoy the local services and leisure activities. In this regard, the sub-regional centres have struggled more during the relaxing of the lockdown measures given that a higher proportion of workers are still working from home and making the most of facilities within the smaller local town centres. This may result in a decrease in retail space overall, a trend which has been witnessed in High Peak's centres pre-COVID in any event.
- 2.56 In this regard, we recommend that the authority ensure that policies are sufficiently flexible so as to allow for a wide range of town centre uses beyond retail, and that consideration is given to repurposing historic, often outdated retail stock to accommodate residential, leisure and community uses.

3 Planning Policy Context

3.1 In order to shape the direction of this Study, it is helpful to understand relevant retail and town centre planning policy at a national and local level. As such, we first summarise national planning policy of relevance before considering relevant development plan policy as set out in the High Peak Local Plan. We also consider changes to the Use Classes Order and the application of permitted development rights to town centre uses.

Revised National Planning Policy Framework

3.2 The most recent iteration of the National Planning Policy Framework ('NPPF') was published in July 2021. The NPPF reflects the fact that the traditional role of town centres has been somewhat undermined by structural changes in the retail sector, and that there may be a need to plan for a more diverse range of uses going forward. As such, the NPPF advocates a more flexible policy framework to support the future vitality and viability of town centres.

3.3 NPPF policies are considered on a thematic basis below.

Plan-Making

3.4 Paragraph 20 of the NPPF indicates that development plans should set out an overall strategy for the pattern, scale and design quality of places, including policies to deliver retail, leisure and other commercial development. Paragraph 31 states that the preparation and review of all policies should be underpinned by relevant and up-to-date evidence. This should be proportionate and take into account relevant market signals.

Building a Strong, Competitive Economy

3.5 Paragraph 81 of the NPPF indicates that planning policies and decisions should help create the conditions in which businesses can invest, expand and adapt. Significant weight should be placed on the need to support economic growth and productivity, taking into account both local business needs and wider opportunities for development.

Ensuring the Vitality of Town Centres

3.6 Paragraph 86 specifically relates to planning for town centres. It states that:

'Planning policies should:

- a. **define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail**

- and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;**
- b. define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;**
 - c. retain and enhance existing markets and, where appropriate, re-introduce or create new ones;**
 - d. allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;**
 - e. where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and**
 - f. recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.'**
- 3.7 The requirement to plan to meet needs across a minimum ten year period represents a change from the previous NPPF which required town centre needs to be met in full across the entire plan period.
- 3.8 In addition, it is notable that the NPPF Annex 2 Glossary fails to make any reference to the designation of primary and secondary frontages. Page 32 of the Government Response to the February 2019 Draft Revised National Planning Policy Framework Consultation¹³ indicates that, whilst the revised NPPF has removed the expectation in national planning policy that such frontages must be defined, this does not necessarily preclude authorities from doing so where their use can be justified. However, it is evident that the general intention is to provide for more flexibility through a less prescriptive approach to land use.
- 3.9 Paragraph 90 of the NPPF states that it is appropriate to identify thresholds for the scale of edge of centre and out of centre retail and leisure development that should be the subject of an impact assessment. Any such threshold policy applies only to the impact test. All planning applications for

¹³ Published July 2018.

main town centre uses that are not in an existing centre and not in accordance with an up-to-date development plan will generally be the subject of the sequential test¹⁴.

Promoting Healthy and Safe Communities

3.10 Paragraph 93 seeks to support the social, recreational and cultural facilities and services the community needs.

3.11 As such, planning policies and decisions should:

- plan positively for the provision and use of shared spaces, community facilities (such as local shops, meeting places, sports venues, open space, cultural buildings, public houses and places of worship), and other local services to enhance the sustainability of communities and residential environments;
- take into account and support the delivery of local strategies to improve health, social and cultural well-being for all sections of the community;
- guard against the unnecessary loss of valued facilities and services, particularly where this would reduce the community's ability to meet its day-to-day needs;
- ensure that established shops, facilities and services are able to develop and modernise, and are retained for the benefit of the community; and
- ensure an integrated approach to considering the location of housing, economic uses and community facilities and services.

3.12 Paragraph 96 states that to ensure faster delivery of public service infrastructure such as hospitals and criminal justice accommodation, Local Planning Authorities should work closely with promoters, delivery partners and statutory bodies to plan for the required facilities.

Town Centres and Retail Planning Practice Guidance

3.13 The Town Centres and Retail Planning Practice Guidance ('PPG') was published in September 2020, replacing the previous guidance 'Ensuring the vitality of town centres'. The document provides additional direction in respect of how retail and town centre planning policy should be applied in respect of plan-making and decision taking. The Town Centres PPG affirms the Government's

¹⁴ With the exception (in accordance with paragraph 88 of the NPPF) of small scale rural office proposals and other small scale rural development.

aspiration to support town centres in order to generate employment, promote beneficial competition and create attractive, diverse places where people want to live, work and visit.

3.14 Paragraph 004 of the Town Centres PPG indicates that a local planning authority's strategy for their town centres should include:

- The realistic role, function and hierarchy of town centres over the plan period. Given the uncertainty in forecasting long-term retail trends and consumer behaviour, this assessment may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed.
- The vision for the future of each town centre, including the most appropriate mix of uses to enhance overall vitality and viability.
- The ability of the town centre to accommodate the scale of assessed need for main town centre uses, and associated need for expansion, consolidation, restructuring or to enable new development or the redevelopment of under-utilised space. It can involve evaluating different policy options (for example expanding the market share of a particular centre) or the implications of wider policy such as infrastructure delivery and demographic or economic change.
- How existing land can be used more effectively – for example, the scope to group particular uses such as retail, restaurant and leisure activities into hubs or for converting airspace above shops.
- Opportunities for improvements to the accessibility and wider quality of town centre locations, including improvements to transport links in and around town centres and enhancement of the public realm (including spaces such as public squares, parks and gardens).
- What complementary strategies are necessary or appropriate to enhance the town centre and help deliver the vision for its future, and how these can be planned and delivered. For example, this may include consideration of how parking charges and enforcement can be made proportionate.
- The role that different stakeholders can play in delivering the vision. If appropriate, it can help establish the level of cross-boundary/strategic working or information sharing required between both public and private sector groups.

- Appropriate policies to address environmental issues facing town centres, including opportunities to conserve and enhance the historic environment.
- 3.15 This particular piece of work seeks to provide a general Borough-wide retail strategy to inform a future Local Plan and provide an overall context to the determination of planning applications for such uses and will help inform the Council's consideration of specific strategies and regeneration initiatives. As such, many of the above detailed requirements could be addressed by future centre-specific commissions.
- 3.16 Paragraph 006 of the Town Centres PPG identifies a series of key indicators of relevance in assessing the health of a centre over time. The indicators allow the role, performance and function of centres to be monitored and are considered in greater detail at Section 5 of this report (which specifically addresses the vitality and viability of High Peak's principal centres).

Use Classes Order

- 3.17 Significant changes to the Use Classes Order have been enacted through the Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020, which came into force on 1 September 2020.
- 3.18 The amendments include the revocation of Parts A and D, and the introduction of three new Use Classes, these being Classes E, F1 and F2. The Government's objective is that the changes will support the revival of the high street and allow for greater flexibility in changing uses within town centres without the need for planning permission.
- 3.19 In addition to the three new Use Classes, the changes also result in some changes in respect of uses classified as sui generis. In practical terms, the changes comprise:
- **Use Class E** – Commercial, business and service uses include: shops or retail; cafes or restaurants; financial services; professional services; any service appropriate to provide in a commercial, business or service locality; indoor sports, recreation or fitness; medical or health services; crèche, day nursery or day centre; and, offices.
 - **Use Class F1** – Learning and non-residential institutions include any non-residential use for the: provision of education; display of works of art; museum; public library or public reading room; public hall or exhibition hall; for or in connection with public worship or religious instruction; or, as a law court.

- **Use Class F2** – Local community uses include: a shop selling mostly essential goods, including food, no larger than 280 sq.m and where there is no other such facility within 1,000 metres radius of the shop’s location. A hall or meeting place for the local community, an area or place for outdoor sport or recreation and an indoor or outdoor swimming pool or skating rink.
- **Sui Generis** – Use within this Class now include Public house, wine bar or drinking establishment; a drinking establishment with expanded food provision; as a hot food takeaway for the sale of hot food where consumption of that food is mostly undertaken off the premises; live music venue; cinema; concert hall; bingo hall; or, dance hall.

3.20 The introduction of Class E is significant and places a wide range of uses including retail, food, financial services, gyms, healthcare, nurseries, offices and light industry into a single use class.

3.21 As ever, the Use Classes are not linked to any spatial considerations. As such, the expanded Use Class E applies equally to both town centres and out of centre locations, and there may be unintended consequences in providing additional flexibility across Class E outside of town centres. Accordingly, it may be necessary for the Council to apply restrictive conditions to certain forms of development in order to restrict the authorised use to that which has been justified in the application submission. This will help ensure that unacceptable impacts do not arise from future Class E development.

Local Planning Policy Context

Adopted Local Plan

3.22 The Adopted Development Plan is made up of the High Peak Local Plan and Policies Map, adopted in April 2016, alongside the Chapel-en-le-Frith Neighbourhood Plan adopted in 2015.

3.23 Policy S2 of the Local Plan on ‘Settlement Hierarchy’ and Policy S4 on ‘Maintaining and Enhancing an Economic Base’ outline that retail development will be directed towards town centres or local centres. Buxton, Glossop, Chapel-en-le-Frith, New Mills and Whaley Bridge are defined as ‘Market Towns’ in the settlement hierarchy. In the hierarchy of town and local centres, Buxton and Glossop are defined as Main Town Centres, and Chapel-en-le-Frith, New Mills and Whaley Bridge are defined as Small Town Centres. A Neighbourhood Plan is also currently being prepared for Whaley Bridge.

3.24 Policy CF1 relates to retail and town centres. This Policy sets out that the Council will seek to maintain and enhance the vitality and viability of town centres and local centres in accordance with their function and scale and identified development needs. This will be achieved by:

- Permitting appropriate retail, leisure, cultural and business development of a scale and type appropriate to the role and function of the centre;
 - Proposals that would create a concentration of evening economy uses (A3, A4 & A5) that would give rise to social and environmental issues will not be supported;
 - Requiring active ground floor frontages to be maintained and created within town centres with appropriate town centre uses; and,
 - Strengthening the vitality and viability and enhancing consumer choice to serve defined centres, including:
 - New Mills - proposals for additional A1 convenience floorspace will be supported
 - Proposals within the defined centres of Glossop, Whaley Bridge, New Mills and Chapel-en-le-Frith will be supported subject to their accordancy with other relevant policies.
 - Proposals within the Primary Shopping Area of Buxton will be supported subject to their accordancy with other relevant policies
- 3.25 All major town centre use developments of 200 sq.m (of A1 net sales floorspace) or more outside of defined centres will be required to comply with the sequential approach to site selection and will be required to be supported by an impact assessment.
- 3.26 The vitality and viability of the small town centres, larger villages, other settlements and other local centres within the towns will be protected by supporting proposals for town centres uses, including retail, leisure and office development of less than 200 sq.m. Proposals above this threshold should comply with the identified sequential test and impact assessment requirements.
- 3.27 Local Plan Policy CF2 on 'Primary Shopping Frontages' designates primary frontages in both Buxton and Glossop. Within such areas, proposals for changes of use to A1 retail will be supported. Changes of use proposals from A1 retail to other town centre uses will only be permitted where it will not create a concentration of non-shopping uses and result in an unacceptable change in the retail character of the immediate area or have an adverse effect on the vitality or viability of the town centre. Proposals from retail to other building uses will not be supported by the Council, unless the development is complementary to the surrounding shopping uses in terms of its operational characteristics and it maintains a display frontage appropriate to the surrounding shopping area.

- 3.28 Within the overall 'Spatial Vision' for High Peak in the Local Plan, it is stated that the historic and industrial legacy of the area will be harnessed to bring about growth in sustainable tourism in the area. The development of the Borough's tourism and cultural offer is also outlined as one of the strategic objectives in regards to the 'Economy'.
- 3.29 Policy E6 'Promoting Peak District Tourism and Culture' outlines that the Council will support and encourage the tourism offer in the area through supporting applications that relate to the industry. This includes enhancing the visitor offer through supporting existing and new serviced accommodation, the maintenance of existing visitor and cultural attractions and facilities and the creation of new facilities that expand the breadth and quality of the tourism offer.

Chapel-en-le-Frith Neighbourhood Plan

- 3.30 A Neighbourhood Plan for the Parish of Chapel-en-le-Frith was adopted in August 2015. This plan identifies site allocations and development management policies for the Parish.
- 3.31 In respect of Retail, Policy TC1 states that planning permission will be granted for retail development in Chapel-en-le-Frith town centre, subject to other policies of the Neighbourhood Plan. Policy TC2 also states that mixed use development in the town centre will be supported.

4 Market Research

Introduction

- 4.1 An assessment of spending patterns is undertaken to identify where residents across the study area are currently undertaking their convenience (food) and comparison (non-food) spending. This exercise is important to establish how much money is spent in centres within High Peak and how much 'leaks' to other destinations outside of the authority area. This is particularly of relevance to authority areas such as High Peak, where settlements are relatively rural in nature and ensuring residents have good access to retail, leisure and service provision is important.
- 4.2 In summarising and analysing the shopping patterns, it is useful to have regard to the settlements located within each of the zones. In this regard, the Study Area is broken down into six Zones. The context of the zones are summarised again below in Table 4.1. We also provide below the details of those centres in Zones 3, 4 and 6 which are located in neighbouring authorities but which are in proximity to the High Peak authority area boundary.

Table 4.1: Study Area Zones by Settlement

Survey Zone	Key Settlements
1	Glossop
2	Chapel-en-le-Frith, New Mills, Whaley Bridge
3	Castleton (National Park), Hathersage (Derbyshire Dales)
4	Bakewell (Derbyshire Dales)
5	Buxton
6	Leek (Staffordshire Moorlands)

Convenience Shopping Patterns

- 4.3 Table 4.2 below provides the top ten destinations in the authority area based on the level of convenience expenditure.
- 4.4 We can see from Table 4.2 that the principal destination for convenience goods shopping across the Study Area as a whole is the Tesco Superstore on Wren Nest Road in Glossop, which attracts a total of £35.4m of available convenience expenditure within the study area, or 8.4% of the available expenditure.
- 4.5 This is followed by the Tesco Superstore on Whaley Bridge, which attracts £32.1m, or 7.6% of the total available convenience expenditure and the Morrisons in Buxton, which attracts £31.7m or 7.5% of the available convenience expenditure.

Table 4.2: Total Convenience Expenditure Summary (Top Ten Destinations in High Peak)

Convenience Spending Patterns	2021 Study Area Residents' Expenditure	2021 Market Share (based on available expenditure) (%)
Tesco Superstore, Wren Nest Road, Glossop, SK13 8HB	35.4	8.4%
Tesco Superstore, Bridgemont (off A6), Whaley Bridge	32.1	7.6%
Morrisons, Bakewell Road, Buxton, SK17 9TB	31.7	7.5%
Aldi, Arundel Street, Glossop, SK13 7AB	28.9	6.9%
Aldi, Foresters Way, Chapel-en-le-Frith, SK23 0RB	27.4	6.5%
Aldi, Station Road, Buxton, SK17 6AQ	24.2	5.7%
Morrisons, Market Street, Chapel-en-le-Frith, SK23 0HY	22.5	5.3%
Lidl, Mill Street, Glossop, SK13 8PT	13.7	3.2%
Waitrose, The Springs Shopping Centre, Buxton	10.0	2.4%
Co-op, Church Road, New Mills, SK22 4NG	7.3	1.7%

Source: Table 4 of Appendix 4

- 4.6 Table 4.2 also indicates that the discount foodstores in particular are trading exceptionally well, particularly when compared against their benchmark averages. In this regard, the Aldi stores in Glossop, Chapel-en-le-Frith and Buxton are all trading substantially above their expected benchmark averages.
- 4.7 Other stores identified as trading well are the Tesco Superstore in Whaley Bridge, and the Morrisons store in Buxton. At 2013, the principal foodstores within High Peak were the Tesco at Wrens Nest, the Morrisons in Buxton, the Aldi in Glossop and the Aldi in Buxton.
- 4.8 We can see from the above however, that the Aldi in Chapel-en-le-Frith has made a considerable dent in the convenience market within High Peak, which will inevitably have had implications in terms of the draw of other operators within the town.
- 4.9 Table 4.3 below provides the main, top up and total retention of expenditure on a zonal basis. The retention level demonstrates the proportion of residents residing in that zone who also shop at destinations in the same zone.
- 4.10 We can see that in terms of main food expenditure, the highest level of retention for main food expenditure is in Zone 1, which covers Glossop, followed by Zones 6 (Leek) and 5 (Buxton). The proportion of main food convenience expenditure retained in Zone 3 is the lowest at 14%, indicating that a high proportion of residents' expenditure is being spent at destinations elsewhere. This is not unsurprising in light of the rural nature of Zone 3.

- 4.11 For Zone 1 residents, the principal convenience shopping destination is the Tesco on Wren Nest Road, followed by the Aldi on Arundel Street. For Zone 5 residents, the principal destinations are the Morrisons on Bakewell Road, followed by the Aldi on Station Road.
- 4.12 As of 2013, the Aldi in Glossop was attracting 24.5% of Zone 1 residents' main food expenditure, and the Tesco at Wren Nest was attracting 37.1% of the main food expenditure. Comparing this with 2021, the Aldi now attracts 30.9% of main food expenditure generated by Zone 1 residents, and the Tesco attracts 39.7%, both of which have therefore seen an increase in main food shopping trips since 2013.
- 4.13 Since the 2013 Study was published, the Lidl has subsequently come forward at Mill Street in Glossop which now also attracts 13.3% of Zone 1 residents' main food expenditure. Overall therefore, the level of main food expenditure retained in Zone 1 has increased from 72.3% at 2013, to 88.7% at 2021.
- 4.14 Looking at Zone 5 main food shopping patterns, we can see that the Aldi on Station Road attracted 25.6% of main food shopping trips at 2013 which has now increased to 32.1%. The Morrisons previously attracted 42.4%, which has decreased slightly to 40.5% at 2021. The Waitrose however, has seen a relatively considerable decline in main food shopping trips from 13.7% at 2013 to 6.9% at 2021. Overall, Zone 5 previously retained 86.6% of its main food expenditure, and now retains 81.4% of main food expenditure.
- 4.15 Whilst the Morrisons in Chapel-en-le-Frith continues to perform an important role in meeting residents' main food shopping needs, the proportion of trips from Zone 2 residents has decreased considerably from 33.9% in 2013 to 17.1% in 2021. The Tesco in Whaley Bridge has however broadly retained its level of main food market share from Zone 2 residents from 27.9% in 2013 to 27.8% in 2021. The biggest change in Zone 2 was the introduction of the Aldi in Chapel-en-le-Frith, which now attracts 23.8% of Zone 2 residents' main food shopping trips, which has considerably eroded the proportion attracted to the Morrisons on Market Street.

Table 4.3: Convenience Expenditure Retention by Zone at 2021

Zone	Main Food Expenditure Retention	Top-Up Food Expenditure Retention	Total Convenience Expenditure Retention Per Zone
1-Glossop	88.7%	92.2%	89.6%
2-Chapel-en-le-Frith, New Mills, Whaley Bridge	73.9%	86.4%	77.1%
3-Castleton, Hathersage	13.7%	81.4%	30.4%
4-Bakewell	63.0%	84.9%	68.5%
5-Buxton	81.4%	91.5%	83.9%
6-Leek	82.0%	91.1%	84.4%

Source: Table 4 of Appendix 4

- 4.16 In terms of top-up food shopping trips, the retention levels are higher within each of the zones, indicating that residents often choose to meet their day-to-day top-up convenience requirements at smaller, more local convenience destinations. For example, although just 13.7% of main food expenditure generated by Zone 3 residents is spent at destinations in the corresponding zone, 81.4% of top-up expenditure is spent at destinations in Zone 3. Again the highest proportions of top-up convenience expenditure retention is within Zones 1, 5 and 6 at 92.2%, 91.5% and 91.1% respectively.
- 4.17 Table 4.4 below provides the overall market share for destinations in High Peak and then for the Study Area as a whole. The Table also provides details of the proportion of expenditure being lost to destinations outside of the Study Area.
- 4.18 We can see from Table 4.4 that the total proportion of convenience expenditure retained within the authority area is 65.1%, or £274.5m of the available expenditure generated by residents. This increases considerably to 88.5% when including all of the destinations within the Study Area but outside of the High Peak authority area. Key convenience destinations located within the Study Area but outside of High Peak principally comprise of those within Leek (the Aldi, Morrisons and Sainsbury’s stores), all of which principally draw trade from Zone 6 residents.
- 4.19 As set out in table 4.3 above, the retention rates of convenience goods expenditure within Zones 1, 2 and 5 (being those which cover the principal urban areas of High Peak), are considered to be good overall. There may however be some opportunity to increase the retention rates for Zone 2 residents, to increase in particular the proportion of main food expenditure which is retained at destinations in Zone 2.
- 4.20 Table 4.4 also indicates that a total of 11.5%, or £48.4m of expenditure generated by residents in the Study Area is spent at destinations outside of the Study Area.

Table 4.4: Convenience Goods Expenditure Retention and Leakage

Destinations	2021 Study Area Residents' Expenditure £m	2021 Market Share %
All Destinations Inside High Peak	274.5	65.1%
All Other Destinations in Study Area	98.4	23.4%
All Destinations Inside Study Area	372.9	88.5%
All Destinations Outside Study Area	48.4	11.5%
Total	421.3	100.0%

Source: Table 4 of Appendix 4

Comparison Shopping Patterns

4.21 Table 4.5 below provides the principal comparison destinations within and outside of the Study Area. The Table demonstrates that the principal comparison shopping destination for residents in the Study Area is Buxton town centre, attracting a total of £46.3m of the total available Study Area expenditure or 9.3%, followed by Glossop town centre, which attracts £36.6m or 7.3%. Whaley Bridge, Chapel-en-le-Frith and New Mills each attract at or just above 2% of the available comparison expenditure. Looking outside of the authority area, Stockport town centre and Manchester city centre both attract relatively high levels of comparison expenditure.

Table 4.5: Total Comparison Expenditure Summary – Principal Destinations (Over 2.0% of Comparison Expenditure)

Convenience Spending Patterns	2021 Study Area Residents' Expenditure	2021 Market Share (%)
Destinations Inside High Peak		
Buxton town centre	46.3	9.3%
Glossop town centre	36.6	7.3%
Chapel-en-le-Frith Town Centre	11.6	2.3%
B&Q, Staden Business Park, Buxton	11.5	2.3%
New Mills Town Centre	11.1	2.2%
Tesco Superstore, Wren Nest Road, Glossop, SK13 8HB	10.7	2.1%
Whaley Bridge Town Centre	10.4	2.1%
Destinations Outside High Peak		
Stockport Town Centre	24.2	4.8%
Manchester City Centre	15.1	3.0%
Stockport Retail Park / The Peel Centre	14.9	3.0%
Lyme Green Retail Park, Macclesfield, SK11 0TB	13.3	2.7%
Bakewell Town Centre	12.8	2.6%
Macclesfield Town Centre	12.8	2.6%
Sheffield City Centre	12.0	2.4%
Sainsbury's Superstore, Churnet Way, Leek, ST13 8YG	10.9	2.2%

Source: Table 4 of Appendix 4

- 4.22 In terms of Zone 1 residents, Glossop town centre is the principal comparison destination, attracting £33.8m of the available £120.5m comparison expenditure, followed by the Tesco Superstore on Wren Nest Road (£9.9m) and the Wren Nest Retail Park (£8.4m).
- 4.23 A total of £6.7m of comparison expenditure generated by Zone 1 residents is spent at Snipe Retail Park and £6.6m in Stockport town centre.
- 4.24 Looking at Zone 2 residents, the principal two comparison destinations are New Mills town centre and Whaley Bridge town centre attracting £10.2m and £8.8m respectively, followed by Buxton town centre (£8.3m). However, £13.8m of Zone 2 residents' comparison expenditure is being spent at Stockport town centre.
- 4.25 Looking finally at Zone 5 residents, the principal comparison destination is Buxton town centre, which attracts £29.9m of comparison expenditure, followed by the B&Q in Buxton with attracts a total of £6.4m of the total available comparison expenditure from Zone 5 residents. A further £5.7m is spent at Lyme Green Retail Park in Macclesfield
- 4.26 Table 4.6 below then sets out the overall comparison goods retention and leakage within High Peak. Table 4.6 indicates that a total of 35.7% or £177.7m of available comparison goods expenditure generated by residents in the Study Area is retained within High Peak. However, a total of £231.1m is currently leaking to destinations outside of the Study Area.
- 4.27 The level of leakage of comparison goods expenditure outside of the Study Area is the highest for Zones 2, 3 and 4, with the lowest figures being recorded within Zones 5 and 6.

Table 4.6: Comparison Goods Expenditure Retention and Leakage

Destinations	2021 Study Area Residents' Expenditure £m	2021 Market Share %
All Destinations Inside High Peak	177.7	35.7%
All Other Destinations in Study Area	89.6	18.0%
All Destinations Inside Study Area	267.3	53.7%
All Destinations Outside Study Area	231.1	46.3%
Total	498.4	100.0%

Source: Table 25 of Appendix 4

Clothing and Footwear

- 4.28 In reviewing the comparison shopping patterns within the Study Area, the analysis focuses on the eight separate categories of goods which fall within the ‘non-bulky’ and ‘bulky’ comparison goods sectors.
- 4.29 However, given the dominance of the clothing and footwear market and the level of expenditure which is spent on such goods (approximately 26% of residents’ expenditure), we focus firstly on the clothing and footwear patterns, followed by a summary of the other seven categories below. Clothing and footwear retailing has traditionally been the bedrock of town centres’ retail offer and it can therefore be a useful barometer of the popularity of high streets. Comparison goods purchases are generally made less often than convenience purchases, and residents are often willing to travel greater distances to meet their comparison shopping needs. As such, levels of zonal retention are often lower than those which are established by convenience goods.
- 4.30 Table 4.7 demonstrates that Buxton is the principal destination for purchasing clothing and footwear goods for Zone 5 residents, and a lesser extent for Zone 2 residents. However, a relatively high proportion of clothing and footwear shopping trips from Zone 5 is leaking to destinations such as the Trafford Centre (13.1%) and Stockport town centre (11.0%). Stockport town centre is also a popular destination for purchasing clothing and footwear for Zone 1 residents (11.9%) and Zone 2 residents (15.9%). Manchester city centre also draws trips from Zones 1, 2, 3 and 5 residents at 17.9%, 8.9%, 6.9% and 6.5% respectively.

Table 4.7: Clothing and Footwear Shopping Market Share Analysis by Zone (%) at 2021

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6
Buxton town centre	0.7%	11.7%	8.4%	5.7%	22.5%	2.8%
Glossop town centre	8.2%	0.8%	0.0%	0.0%	0.0%	0.0%
Chapel-en-le-Frith town centre	1.0%	0.0%	2.0%	1.4%	0.0%	2.0%
New Mills town centre	0.2%	0.0%	0.8%	0.0%	0.0%	0.0%
Whaley Bridge town centre	0.7%	0.0%	2.8%	0.0%	0.0%	0.0%

Source: Table 9 of Appendix 4

- 4.31 Comparing the above with the shopping patterns established in the 2013 Study from Zones 1 to 5 in particular, we are able to see that Buxton town centre has remained a principal centre to meet clothing and footwear shopping needs for Zones 2 and 5 residents in particular, but in both cases, the proportion of trips has reduced since 2013.
- 4.32 The highest reduction can be seen from Zone 2 residents, which has decreased from 18.5% in 2013 to 11.7% in 2021. A similar trend can be seen from Zone 1 residents who choose Glossop town centre

to purchase clothing and footwear, which has dropped from 16.5% at 2013 to 8.2% at 2021. However, the proportion to the Tesco at Wrens Nest has increased considerably from 0.9% in 2013 to 7.6% at 2021, accounting for some of the loss of trips to the wider town centre.

Table 4.8: Clothing and Footwear Shopping Market Share Analysis by Zone (%) at 2013

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5
Buxton town centre	2.6%	18.5%	7.8%	6.2%	20.6%
Glossop town centre	16.5%	0.0%	0.0%	0.0%	0.0%
Chapel-en-le-Frith town centre	0.0%	0.0%	0.0%	0.0%	0.0%
New Mills town centre	0.0%	0.6%	0.0%	0.0%	0.0%
Whaley Bridge town centre	0.0%	0.0%	0.0%	0.0%	0.0%

Source: Appendix 3 of the 2013 Quantitative Retail Study Update

- 4.33 At 2013, a total of 32.5% of Zone 1 residents’ clothing and footwear expenditure was being attracted to Manchester city centre, and a further 11.1% to the Trafford Centre. As of 2021, the proportion of Zone 1 residents’ clothing and footwear trips attracted to Manchester city centre is considerably less at 17.9%, with 8.0% attracted to the Trafford Centre.
- 4.34 However, the overall proportion of trips attracted to High Peak destinations from Zone 1 residents has remained broadly consistent from 20.9% at 2013 to 19.9% at 2021, indicating that the trips have been redistributed around destinations outside of the authority area, instead of a shift in the proportion of leakage away from (or indeed towards) High Peak destinations.

Books, CDs and DVDs Goods

- 4.35 Across the Study Area as a whole, Buxton town centre attracts 9.6% of books, CDs and DVD goods shopping trips, followed by Glossop town centre (8.3%) and Tesco Superstore on Wren Nest Road in Glossop (7.3%). In total, High Peak destinations attract 39.8% of all books, CDs and DVD goods trips, and destinations within the Study Area attract a total of 54.4% of trips.
- 4.36 Looking in more detail at the shopping patterns within the zones located principally within the authority area, 28.9% of Zone 1 residents’ trips for books, CDs and DVDs are to Glossop town centre and 28.4% are to the Tesco Superstore, also in Glossop. In terms of Zone 2 residents, 27.0% of their trips are to Stockport town centre, with 12.3% to New Mills and 9.7% to Whaley Bridge. Finally, in terms of Zone 5 residents, 39.9% of their shopping trips are being attracted to Buxton town centre, and a further 10.4% to the Morrisons also in Buxton.

Small Household Goods

- 4.37 Turning to small household goods shopping patterns, we note that the most popular destination across the authority area is Glossop town centre, which attracts 7.2% of small household goods trips, followed by Buxton town centre which attracts 6.4% of trips.
- 4.38 In terms of Zone 1 residents, a total of 24.8% of residents' trips are attracted to Glossop town centre, with a further 6.4% at the Tesco in Glossop. Zone 2 residents are choosing the B&M in Whaley Bridge (8.3% of trips) and New Mills town centre (5.3%) but higher proportions of trips are travelling to The Peel Centre in Stockport (16.2%), IKEA in Manchester (11.8%) and the John Lewis on Wilmslow Road (11.3%).

Recreational Goods

- 4.39 Looking at shopping patterns for recreational goods, the most popular destination for purchasing such goods in the authority area is Buxton town centre (9.4% of all trips), followed by Glossop town centre (9.1% of all trips). Outside of the authority area, Leek town centre attracts 8.3% of the total trips, with Stockport town centre also attracting 6.2% of all trips.
- 4.40 Looking more specifically at habits of Zone 1 residents, the principal destination is Glossop town centre, which attracts 28.4% of Zone 1 residents' trips, followed by 10.1% to Wrens Nest Retail Park. Zone 2 residents are choosing the B&M in Whaley Bridge (15.7% of trips) but also look to destinations outside of the authority area such as Stockport town centre (10.1%) and the Peel Centre (6.4%).

Chemist Goods

- 4.41 Turning to the final non-bulky comparison category of chemist and beauty goods, the most popular destination within the authority area is Buxton town centre (18.3%), followed by Glossop town centre (12.0%). Other key destinations for purchasing chemist goods include Leek town centre (11.2%), Bakewell town centre (6.1%), the Tesco in Glossop (5.7%) and Whaley Bridge town centre (5.6%).
- 4.42 The level of retention of trips (and expenditure) is substantially higher for each zone for purchasing chemist goods. A total of 86.9% of Zone 1 residents' chemist shopping trips are retained at destinations also located in Zone 1, and the comparable figure for Zone 2 residents is 60.7%, with 88.0% of trips being retained in Zone 5. These higher retention rates demonstrate that shoppers will typically shop locally to purchase chemist goods, either at independent or national multiple pharmacies or at pharmacies within larger foodstores.

Electrical Goods

- 4.43 Looking at the first of the three bulky categories of comparison goods of electrical goods, the household survey results demonstrate that the most popular destination across the authority area is Glossop town centre (10.6% of all trips), followed by Buxton town centre (9.6% of all trips). A total of 11.7% of trips are to Lyme Green Retail Park located in Macclesfield (Zone 6).
- 4.44 For Zone 1 residents, a total of 36.0% of electrical goods shopping trips are to Glossop town centre, followed by 18.7% to Wren Nest Retail Park. For Zone 2 residents, the principal destination for purchasing electrical goods is Lyme Green Retail Park (15.6%) but 16.9% of trips from Zone 2 are travelling to John Lewis in Cheadle. In terms of Zone 5 residents, a total of 39.1% of their electrical goods shopping trips are travelling to Buxton town centre, with a further 35.6% to Lyme Green Retail Park.

DIY and Gardening Goods

- 4.45 Turning to DIY and gardening goods, the principal destination across the authority area is the B&Q at Staden Business Park in Buxton, which attracts 24.6% of all trips, followed by Glossop town centre (6.5%) and Wrens Nest Retail Park (5.4%).
- 4.46 The B&Q in Buxton attracts a total of 26.5% of Zone 2 residents' trips, 24.7% of Zone 4 residents' trips and 72.8% of Zone 5 residents' trips, with Glossop town centre being the principal destination to purchase DIY and gardening goods for Zone 1 residents.

Furniture Goods

- 4.47 Finally, turning to shopping patterns for furniture goods, the principal destination for residents across the authority area is Glossop town centre, which attracts 12.6% of all trips, followed by Chapel-en-le-Frith with attracts 9.3% of all trips.
- 4.48 A total of 43.2% of Zone 1 residents' shopping trips to purchase furniture goods are from Glossop town centre, with 24.7% of Zone 2 residents' trips travelling to Chapel-en-le-Frith town centre and a further 11.8% to New Mills town centre. In terms of Zone 5 residents, 32.7% of trips to purchase furniture goods are to Buxton town centre.

Summary

4.49 We set out the overall Borough market share by zone for each of the eight comparison goods sub-sectors in Table 4.9 below.

Table 4.9 High Peak Borough Comparison Retention Rates by Category and Zone

Category	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Total
Clothing and footwear	19.9%	18.0%	9.8%	5.7%	26.0%	2.8%	15.5%
Books etc.	60.0%	39.5%	20.0%	29.5%	69.0%	0.0%	39.8%
Household	40.5%	32.3%	18.2%	2.9%	37.3%	0.0%	26.5%
Toys etc.	49.3%	25.3%	24.1%	5.4%	48.4%	5.4%	34.1%
Chemist	88.1%	76.2%	20.4%	3.6%	89.0%	4.7%	61.9%
Electrical	56.5%	38.3%	7.7%	11.7%	44.6%	1.4%	32.0%
DIY	75.0%	67.4%	20.4%	32.7%	94.2%	6.4%	59.9%
Furniture	51.4%	52.5%	9.4%	1.8%	56.6%	3.3%	40.2%

Source: Tables 10, 12, 14, 16, 18, 20, 22 and 24 of Appendix 4

4.50 The household survey results are provided in full at Appendix 2. In respect of convenience goods, the findings that are of greatest relevance to the future retail strategy in High Peak are as follows:

- Overall, the High Peak convenience destinations meet both main and top up food shopping requirements for High Peak residents in a relatively satisfactory manner; and
- For Zones 1 and 5, more than eight of every ten main food shopping and top-up shopping trips are undertaken at stores within High Peak Borough and for Zone 2, more than seven of every ten main food trips are undertaken within High Peak; for top-up shopping, High Peak's market share is above 90% for Zones 1 (Glossop) and 5 (Buxton).

4.51 In terms of comparison goods, our assessment has identified that:

- The vast majority of residents in Zones 1, 2 and 5 are able to meet their comparison goods shopping needs within the High Peak authority area (principally at Buxton and Glossop town centres, but also other large format destinations such as Wrens Nest Retail Park and the B&Q in Buxton). However, there are high levels of leakage of expenditure to destinations outside of High Peak, which is due to larger centres being in a relative easy driving distance for residents within the Borough;
- The overall clothing and footwear market share claimed by facilities within High Peak represents 15.5% of the total market share in the Study Area. The highest proportion of

clothing and footwear trips to destinations within the authority area is from Zone 5 residents;
and

- Destinations including Lyme Retail Park in Macclesfield, The Peel Centre in Stockport and town centre destinations such as Stockport town centre are all key destinations outside of the authority area which are attracting shopping trips from residents in High Peak.

5 Healthcheck Assessments

Introduction

- 5.1 Paragraph 86 of the NPPF indicates that planning policies should promote the long term vitality and viability of town centres by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries. The same paragraph also states that town centres should accommodate a suitable mix of uses (including housing) and provide for development that reflects a centre's distinctive character.
- 5.2 Paragraph 006 of the Town Centres and Retail PPG identifies a range of indicators that should be assessed over time in order to establish the health of a town centre. The indicators include the following:
- diversity of uses;
 - proportion of vacant street level property;
 - retailer representation and intentions to change representation;
 - pedestrian flows;
 - accessibility;
 - perception of safety and occurrence of crime;
 - the state of town centre environmental quality;
 - the balance between independent and national multiple retailers; and
 - the extent to which there is an evening and night time economy.
- 5.3 Updated healthcheck assessments have been undertaken for Buxton, Glossop, Chapel-en-le-Frith, New Mills and Whaley Bridge town centres. The assessments are based on site visits which were undertaken in November 2021. These assessments should be taken as a 'snapshot' of the performance of each centre at a moment in time, and further issues may subsequently become apparent in each centre as a consequence of the ongoing negative impacts arising from the Covid-19 pandemic.

5.4 Detailed healthchecks for each of the centres are provided at Appendix 3. However, we summarise the key conclusions from our healthcheck assessments below.

Buxton Town Centre

5.5 Buxton town centre is the principal commercial defined centre within the High Peak authority area. The centre is anchored by the Waitrose foodstore, located to the north, with the associated Spring Gardens Shopping Centre attached to the south and adjacent car parking to the north. Spring Gardens consists of both a covered shopping mall and an external commercial pedestrianised street.

5.6 Buxton itself is split into two clearly defined commercial area, with the 'new town' to the north, and the 'old town' to the south, beyond Buxton Town Hall. The southern part of the town centre is focused around the external market area, but extends further southwards along the A515.

5.7 The northern part of the town centre around Spring Gardens comprises the highest concentration of national multiples. To the west of Spring Gardens is Cavendish Arcade Shopping Centre and Buxton Crescent, which includes a range of retail and leisure independent operators and the Buxton Crescent Visitor Experience, where visitors can explore the Victorian Pump Room. To the west of the Crescent and outside of the defined town centre boundary is The Pavilion Gardens and associated openspace, along with the Buxton Leisure Centre. A public car park is situated directly to the west of the Pavilion Gardens.

5.8 High Peak Council successfully secured £6.6m of Future High Street funding from the Government in December 2021, following the preparation of detailed masterplan and business cases. The funding is only for physical works and focuses on the northern part of the town centre around Spring Gardens and the railway station. Buxton was also successful in securing Heritage Action Zone initiative which will complement the Future High Street funding, helping to reinstate traditional shopfronts and restore vacant heritage buildings.

5.9 Table 5.1 shows the composition of retail units within Buxton Town Centre as at November 2021.

Table 5.1: Buxton Town Centre Unit Composition at November 2021

	Comparison	Convenience	Financial & Business Services	Leisure Services	Retail Services	Vacant
Buxton	31.9%	6.8%	8.8%	25.4%	12.7%	14.3%
National average	27.1%	9.2%	9.1%	24.6%	15.6%	14.2%

Source: Composition of Buxton town centre (as defined by Experian Goad) derived from Nexus Planning Survey of November 2021; UK Average from Experian Goad Report October 2021

- 5.10 Our survey identified a total of 44 units vacant, which consists of 8,750 sq.m of vacant commercial floorspace. In terms of proportions, this represents 14.7% of the total stock of units and 16.5% of the total level of floorspace. The proportion of vacant units is above the national average of 13.9%, and only slightly above the national average in terms of proportion of vacant floorspace.
- 5.11 Reviewing The Requirements List, and online commercial requirements search engine, there are 13 live requirements in Buxton, although some are dating back to 2020. Of the most recent requirements in Buxton are Hickory's Smokehouse, a BBQ restaurant, Travelodge, KFC, Lidl, Marks and Spencer Food and Amber Taverns.
- 5.12 Buxton is well served by public transport, with the Buxton railway station located to the north of the Waitrose on the opposite site of Station Road and the bus station located on Market Place to the south, with bus stops located throughout the centre.
- 5.13 The town centre environment is generally of a good quality, particularly on and surrounding Spring Gardens. Areas which are of very good environmental quality include the area around the recently refurbished Buxton Crescent, the adjacent open space and the pedestrianised area along Spring Gardens. The shopfronts are generally of a high standard, with some having been sympathetically upgraded in recent years to reflect the historical feel of the town centre.
- 5.14 The centre is considered to be vital and viable, with a good range of operators and a good offer for both residents and visitors. Furthermore, in light of the future committed plans for investment within the centre, there are positive signs for the centre's future.

Glossop Town Centre

- 5.15 Glossop is the largest settlement in the High Peak authority area and, by virtue of its good transport links to Manchester, is a popular area for commuters. The centre is focused along A57 High Street, which is a major route between Manchester and Sheffield. The majority of retail units are located along or in close proximity to this route, and as such the centre does feel relatively dominated by vehicle movements.
- 5.16 Glossop is the key retail destination in the northern part of High Peak, and as such accommodates a diverse range of convenience and comparison operators. There are 23 convenience operators in the town centre, with these being anchored by a particularly strong range of foodstores in Glossop. These include Tesco, Iceland, Aldi, M&S Food and the Lidl store which opened in 2021 at Mill Street.

Comparison operators are well represented in Glossop town centre, despite some recent high profile closures such as Peacocks and Edinburgh Woollen Mill.

5.17 Vacant units are located throughout the town centre, with particular concentrations observed around Wrens Nest Retail Park and in the west of the centre around Howard Town Retail Park. These vacant units are indicative of changes in town centres that have occurred in recent years, including closure of retail banks (the Barclays bank in Glossop closed in August 2021) and closures of national multiple retail operators, such as Edinburgh Woollen Mill and Peacocks. Notwithstanding this, the vacancy rate observed in Glossop at the time of our visit was broadly similar to the national average figures and as such is not considered to represent significant cause for concern at this time.

5.18 Table 5.2 shows the composition of retail units within Glossop Town Centre as at November 2021.

Table 5.2: Glossop Town Centre Unit Composition at November 2021

	Comparison	Convenience	Financial & Business Services	Leisure Services	Retail Services	Vacant
Glossop	28.9%	9.2%	9.2%	21.3%	19.7%	11.6%
National average	27.1%	9.2%	9.1%	24.6%	15.6%	14.2%

Source: Composition of Glossop town centre (as defined by Experian Goad) derived from Nexus Planning Survey of November 2021; UK Average from Experian Goad Report October 2021

5.19 A search of The Requirement List has confirmed that a number of operators, including Poundstretcher, Subway, KFC and Hickory's Smokehouse have an outstanding requirement for new premises in Glossop.

5.20 The centre is generally well maintained, as are the retail units themselves, and the public realm is on the whole attractive and pleasant. There are seasonal planters and areas of planting located throughout the centre, with a particularly pleasant environment at and around Norfolk Square. The public realm in the surroundings is again well planned and maintained, with clear signposting around the centre. These areas are of a simple design and provide opportunities for seating and café culture around Norfolk Square.

5.21 Evidence of investment, including the transformation of Glossop Hall, which will result in the use of the Market Hall as space for creative and start-up businesses and food and retail units on the ground floor, will build on these existing strengths. However, a perennial issue in the town has been the volume of traffic on the A57 High Street and this was observed during our visit. Notwithstanding this, Glossop was well-used at the time of our visit and is considered to be a healthy, vibrant centre.

Other Town Centres

5.22 The composition of the three ‘smaller’ town centres¹⁵, as measured by total number of units, is provided in Table 5.3 below. Each of these town centres display vacancy rates lower than or very similar to the UK average of 14.2% (as identified by Experian Goad at November 2021).

Table 5.3: Town Centre Unit Composition at November 2021

Town Centre	Comparison	Convenience	Financial & Business Services	Leisure Services	Retail Services	Vacant
Chapel-en-le-Frith	24.7%	7.5%	12.9%	23.7%	24.7%	6.5%
New Mills	28.2%	11.5%	11.5%	23.1%	16.7%	9.0%
Whaley Bridge	27.5%	10.0%	10.0%	37.5%	12.5%	2.5%
National average	27.1%	9.2%	9.1%	24.6%	15.6%	14.2%

Source: Composition of town centres (as defined by Experian Goad - with the exception of Whaley Bridge where Local Plan defined boundaries were used) derived from Nexus Planning Survey of November 2021; UK Average from Experian Goad Report October 2021

Chapel-en-le-Frith Town Centre

5.23 Chapel-en-le-Frith is a relatively small centre, located just to the west of the boundary of the Peak District National Park. The retail centre is linear in nature and largely runs along Market Street and High Street, which are two busy, well-used routes. However, within the defined boundaries of the village centre are a number of residential properties and other non-retail operators. As a result of this, Chapel-en-le-Frith largely lacks a clear retail ‘core’, with the exception of the Market Place. The impact of this relationship is that the town centre is dominated by vehicle movements, which somewhat impact on the appearance of the town centre and the overall ease of pedestrian movement.

5.24 The centre provides a reasonable range of operators which are considered to be easily capable of providing for the day-to-day needs of the local community, particularly in respect of convenience goods which are anchored by Morrisons and Co-op Food. The wider settlement is also served by the out of centre Aldi.

5.25 Chapel-en-le-Frith has a vacancy rate considerably lower than the current national average, and as such is considered to be a vital and viable centre.

¹⁵ These centres are Chapel-en-le-Frith, New Mills and Whaley Bridge.

New Mills Town Centre

- 5.26 New Mills is one of the smaller town centres in High Peak, and as such primarily caters to serving day-to-day retail needs. The centre is anchored by a strong convenience goods offer, alongside which is a diverse comparison offer which is comparable in terms of floorspace and units to the current national average. Furthermore, the centre benefits from a vacancy rate which is lower than the current national average. In terms of retailers, the majority of operators within the town centre are independents, although there are a limited number of national multiples such as Sainsbury's Local. The wider settlement is also served by the out of centre Co-op foodstore on Church Road.
- 5.27 The town centre is focused along Market Street and Union Road, and includes peripheral areas such as Torr Top Street and High Street. These roads are generally quiet, the effect of this being that New Mills provides a generally pleasant retail environment.
- 5.28 The centre's close proximity to the edge of the Peak District National Park result in it benefiting from passing tourist activity which, alongside New Mills' focus on providing for the local community, result in a town centre which is considered to be both vital and viable.

Whaley Bridge

- 5.29 Whaley Bridge is the smallest town centre in the High Peak authority area, and as such is focused on providing for the day-to-day needs of the local community, with a strong service and convenience goods offer, alongside a more limited comparison offer which provides for both day-to-day as well as more specialist goods. The small size of the town centre is such that the town has a 'village feel', with a strong community who organise and host a number of events, including an annual carnival in June, and provide for the upkeep of the town centre.
- 5.30 The town centre is mostly focused along Buxton Road, which is a key arterial route through Whaley Bridge and as such is subject to a high number of vehicular movements. The centre's location, although ensuring a high standard of accessibility, does detract somewhat from the overall environmental quality. In common with other towns in High Peak, Whaley Bridge developed during the Industrial Revolution. The legacy of this pattern of development can be seen in charming period and historic buildings, many of which are listed. The wider settlement is also served by the Tesco and B&M located on Buxton Road to the north of the centre.

5.31 The vacancy rate is just 2.5% of units in the centre, with a single prominent vacancy (the former Jodrell Arms public house), recorded at the time of our visit. As a result of this, it is considered that Whaley Bridge is a vital and viable centre.

Comparator Centres

5.32 In order to understand whether the composition of units identified in the five town centres of High Peak is broadly typical for similar centres, we have undertaken an analysis of the composition of three comparator centres. These centres have been identified by virtue of their proximity to High Peak (e.g. Macclesfield and Matlock), them occupying similar roles (e.g. Cirencester and Evesham) or are located on the edge of a key tourist area (e.g. Kendal).

5.33 Table 5.4 below provides a breakdown of the composition of the five town centres in High Peak and the identified comparator centres.

5.34 By reviewing the composition of these centres, it is possible to identify common features exhibited in each of the town centres and these five towns, as well as identifying general gaps in the composition of them.

5.35 Table 5.4 demonstrates that, with the exception of Glossop, all of the High Peak town centres have a higher proportion of leisure service operators relative to the other three centres. Likewise, with the exception of Cirencester and Matlock, all of the town centres and identified comparators have a broadly similar proportion of comparison operators. In respect of vacancy, with the exception of Buxton town centre, all of High Peak's town centres exhibit a lower proportion of vacant units than the five identified comparator centres.

Table 5.4: Breakdown of Composition by Units at High Peak Centres and Identified Comparator Centres

	Buxton	Glossop	C-e-I-F	New Mills	Whaley Bridge	Cirences ter	Evesham	Kendal	Macclesfie ld	Matlock
Comparison	31.9%	28.9%	24.7%	28.2%	27.5%	41.9%	23.8%	32.6%	29.7%	38.7%
Convenience	6.8%	9.2%	7.5%	11.5%	10.0%	5.6%	7.8%	6.3%	6.3%	7.4%
Financial	8.8%	9.2%	12.9%	11.5%	10.0%	9.4%	9.9%	10.4%	9.2%	6.1%
Leisure	25.4%	21.3%	23.7%	23.1%	37.5%	15.3%	21.4%	20.8%	20.8%	20.2%
Retail	12.7%	19.7%	24.7%	16.7%	12.5%	15.9%	18.4%	14.3%	17.5%	15.3%
Vacant	14.3%	11.6%	6.5%	9.0%	2.5%	11.8%	18.7%	15.6%	16.5%	12.3%

Source: Figures for High Peak town centres taken from Nexus Planning land use surveys of November 2021, and Experian Goad composition figures for Cirencester, Evesham, Kendal, Macclesfield and Matlock

5.36 Overall, the composition of Chapel-en-le-Frith, New Mills and Whaley Bridge town centres is considered to be more reflective of smaller centres which are generally focused on meeting day-to-

day needs arising in the immediate area. In contrast, both Buxton and Glossop town centres have historically been focused around a more traditional 'retail' offer, which this reflected in the towns having the fourth and sixth highest proportion of comparison goods operators. Moreover, although Buxton and Glossop both exhibit the greatest vacancy rates of the five High Peak town centres, as noted above the level of vacancy observed at the time of our survey was, with the exception of Buxton town centre, lower than the five identified comparator centres as well as the national average in respect of units.

5.37 Turning to the composition of the centres, we have undertaken a finer grain analysis of the principal centres within High Peak (these being Buxton and Glossop) and the five identified comparator centres. The two larger High Peak centres have been explored in greater detail by virtue of their more comprehensive retail and service offer. This analysis will enable Buxton and Glossop to be benchmarked against that in Cirencester, Evesham, Kendal, Macclesfield and Matlock in order to determine any quantitative deficiencies or differences in the composition of the centre.

Table 5.5: Breakdown of Comparison Goods Operators by Units at principal High Peak Centres and Identified Comparator Centres

Operator	Buxton	Glossop	Cirencester	Kendal	Evesham	M'field	Matlock
Antique Shops	2%	0%	1%	4%	8%	0%	5%
Charity Shops	10%	10%	11%	7%	14%	9%	16%
Chemist & Drugstores	3%	6%	1%	3%	4%	4%	3%
Clothing – Various ⁺	14%	10%	23%	17%	5%	13%	11%
Crafts, Gifts, China & Glass	12%	11%	9%	10%	5%	4%	8%
Department & Variety Stores	0%	0%	0%	1%	0%	1%	2%
DIY & Home Improvement	6%	4%	4%	1%	0%	2%	5%
Electrical & Other Durable Goods	4%	6%	4%	4%	5%	5%	0%
Footwear	5%	3%	4%	2%	3%	2%	0%
Furniture General	4%	3%	1%	4%	3%	3%	5%
Hardware & Household Goods	2%	7%	2%	4%	3%	3%	5%
Jewellery, Watches & Silver	3%	4%	7%	6%	5%	5%	5%
Other Comparison Operators [†]	26%	32%	25%	26%	25%	40%	30%
Sports, Camping & Leisure Goods	3%	0%	1%	4%	4%	1%	2%
Telephones & Accessories	4%	3%	4%	4%	13%	4%	3%
Toiletries, Cosmetics & Beauty Products	1%	3%	2%	3%	5%	4%	2%

Source: Figures for Buxton and Glossop town centres taken from Nexus Planning land use surveys of November 2021, and Experian Goad composition figures for Cirencester, Evesham, Kendal, Macclesfield and Matlock

* Clothing – Various category represents the various Experian Goad sub-categories, which relate to clothing uses

+Other Comparison Operators represents a totalised figure for other sub-categories, which represent less than 5% of total operators across all towns.

5.38 Table 5.5 above provides a breakdown of comparison goods operators by units in the five centres. This shows that the proportion of Charity Shop operators in both Buxton and Glossop is broadly

comparable with that of the five other centres at 10%, which with the exception of Kendal represents the lowest proportion in the five centres. Conversely, the proportion of Clothing operators in Glossop is, with exception of Evesham, lower than the other centres.

5.39 Both Buxton and Glossop have a higher proportion of DIY & Home Improvement operators, and Glossop in particular has high proportions of Chemist & Drugstores and Hardware & Household Goods operators.

5.40 In respect of leisure service operators, Table 5.6 provides a detailed breakdown of such operators in the seven town centres, namely the two principal High Peak centres and the five identified comparator centres.

Table 5.6: Breakdown of Leisure Service Operators by Units at principal High Peak Centres and Identified Comparator Centres

Operator	Buxton	Glossop	Cirencester	Kendal	Evesham	M'field	Matlock
Bars & Wine Bars	13%	13%	6%	12%	8%	15%	12%
Cafes	24%	15%	29%	26%	24%	19%	24%
Casinos & Betting Offices	3%	4%	4%	2%	6%	2%	3%
Fast Food & Take Away	18%	32%	13%	22%	25%	25%	27%
Hotels & Guest Houses	4%	4%	6%	4%	0%	2%	0%
Other – Leisure~	5%	4%	6%	7%	8%	8%	6%
Public Houses	14%	19%	15%	12%	13%	13%	3%
Restaurants	19%	9%	21%	15%	15%	17%	24%

Source: Figures for Buxton and Glossop town centres taken from Nexus Planning land use surveys of November 2021, and Experian Goad composition figures for Cirencester, Evesham, Kendal, Macclesfield and Matlock

~Other Leisure category represents a totalised figure for other sub-categories, including Bingo & Amusements, Cinemas, Theatres & Concert Halls, Clubs, Disco, Dance & Nightclubs and Sports & Leisure Facilities

5.41 As Table 5.6 demonstrates, the proportion of Bars & Wine Bars and Public Houses is broadly similar in each of the seven town centres, although, with the exception of Macclesfield, both Buxton and Glossop have the highest proportion of such operators. Again, with the exception of Glossop, the proportion of Cafés across all centres is broadly similar, with Glossop having a much lower proportion at 15%.

5.42 In respect of restaurants, Buxton has the third highest proportion of restaurant operators of the seven centres at 19% of all leisure service operators, with only Matlock and Cirencester having a greater proportion. Conversely, Glossop has the lowest proportion of restaurant operators at 9%, but the highest proportion of hot-food & takeaway operators at 32%. This figure represents the greatest proportion of hot-food & takeaway operators in the seven centres by some margin. The significant proportion of hot-food & takeaway operators in Glossop results in the centre having comparably lower proportions of other key operators, including Cafés and Restaurants.

6 Population and Expenditure

Study Area and Survey

- 6.1 In November 2021, a survey of 700 households was undertaken by NEMS within the defined Study Area in order to ascertain where residents go to undertake a range of shopping and leisure activities. The defined Study Area is consistent with that used in undertaking the 2013 Quantitative Retail Study Update. The Study Area reflects the area where residents look to facilities within High Peak to help meet their retail and leisure needs. A plan of the Study Area is provided as Appendix 1.
- 6.2 The defined Study Area has been broken down into six separate zones (in a manner which is also broadly consistent with the 2013 Study¹⁶) based on postcode sectors. The six zones are considered representative of geographic areas that may accommodate broadly similar patterns of shopping behaviour. The below Table 6.1 identifies the postcode sectors which define each of the zones.

Table 6.1: Study Area Zones by Postcode Sector

Survey Zone	Postcode Sectors
1 - Glossop	SK13 0, SK13 1, SK13 2, SK13 5, SK13 6, SK13 7, SK13 8, SK14 6, SK14 8
2 - Chapel-en-le-Frith, New Mills, Whaley Bridge	SK6 5, SK12 2, SK22 1, SK22 2, SK22 3, SK22 4, SK23 0, SK23 6, SK23 7, SK23 9
3 - Castleton (National Park), Hathersage (Derbyshire Dales)	S32 1, S32 2, S32 3, S32 4, S32 5, S33 0, S33 6, S33 7, S33 8, S33 9
4 - Bakewell (Derbyshire Dales)	DE45 1
5 - Buxton	SK17 6, SK17 7, SK17 8, SK17 9
6 - Leek (Staffordshire Moorlands)	SK11 0, SK17 0, ST13 5, ST13 6, ST13 8

- 6.3 The zones were used as the basis for the NEMS household survey, which is used to inform our assessment of shopping patterns as set out at Section 4 of this report. The survey results also underpin the quantitative retail capacity assessment, which follows at Section 7.
- 6.4 However, in order to consider the flow of expenditure to retail destinations, it is first necessary to estimate the population and future convenience and comparison goods expenditure apparent in the Study Area.
- 6.5 The High Peak authority area is broadly consistent with Study Area Zones 1, 2 and 5.

¹⁶ Zones 1 to 5 are consistent with Zones 1 to 5 of the 2013 and 2014 Studies and Zone 6 is an amalgamation of Zones 6 and 7 of the 2013 and 2014 Studies.

Study Area Population

- 6.6 The population within each postcode sector and each zone at 2021 has been calculated using Experian Micromarketer G3 data (2020 estimate, which was issued in February 2022). In estimating the future population of the Study Area, consideration has been given to the authority's population projections across the period to 2041.
- 6.7 Table 6.2 below sets out Experian's population projections for each zone in the Study Area for reporting years 2021, 2026, 2031, 2036 and 2041.

Table 6.2: Estimated Study Area Population by Survey Zone

Zone	2021	2026	2031	2036	2041
1 - Glossop	41,809	42,695	43,430	44,165	45,045
2 - Chapel-en-le-Frith, New Mills, Whaley Bridge	42,279	42,961	43,596	44,103	44,529
3 - Castleton (National Park), Hathersage (Derbyshire Dales)	10,760	10,844	10,964	10,991	10,962
4 - Bakewell (Derbyshire Dales)	8,780	8,769	8,803	8,764	8,724
5 - Buxton	30,088	30,608	31,115	31,608	32,048
6 - Leek (Staffordshire Moorlands)	28,782	29,112	29,357	29,637	29,932
Total	162,498	164,989	167,265	169,268	171,241

Source: Table 1 of Appendix 4

- 6.8 The Study Area population will increase from 162,498 persons at 2021 to 171,241 at 2041. This equates to an increase of 8,743 over the 20-year period. In this context, planning policy seeks to manage population increase and to support and encourage future growth.

Retail Expenditure

- 6.9 In order to calculate per capita convenience and comparison goods expenditure, we have utilised Experian Micromarketer G3 data, which provides detailed information on local consumer expenditure that takes into consideration the socio-economic characteristics of the local population. The base year for the Experian expenditure data is 2020. Our methodology takes account of the fact that some special forms of trading expenditure¹⁷ is not available to support retail floorspace, and then allows for increases in per capita expenditure growth on an annual basis.
- 6.10 Figure 5 of Appendix 3 of ERPBN19 (January 2022) provides forecasts in respect of the proportion of convenience and comparison goods expenditure that will be committed through special forms of

¹⁷ Identified as comprising sales via the internet, mail order, stalls and markets, door-to-door and telephone sales (i.e. all expenditure not available to traditional retail floorspace)

- trading both now and in the future. We have 'stripped out' any survey responses which relate to expenditure committed via special forms of trading and have instead made an allowance derived from Experian's recommendations (which we consider to be the most appropriate means by which to account for such expenditure).
- 6.11 In considering special forms of trading, it should be noted that many products which are ordered online are actually sourced from a store's shelves or stockroom (particularly in the case of convenience goods). As such, expenditure committed in this manner acts to sustain shops and can be considered 'available' to support floorspace within the Study Area.
- 6.12 Accordingly, in order not to overstate the influence of special forms of trading on retailers, our methodology utilises Experian's 'adjusted' allowance for special forms of trading (which is provided at Figure 5 of ERPBN19). This allowance indicates that 5.4% of convenience goods expenditure and 25.6% of comparison goods expenditure is 'lost' from shops at base year 2020 through special forms of trading purchases.
- 6.13 Having made an allowance for special forms of trading, we then take account of projected changes in expenditure in accordance with the recommendations provided by Figure 6 of Appendix 3 of ERPBN19. Experian provides overall growth rates and 'adjusted' rates, which account for any additional increases in expenditure lost to special forms of trading.
- 6.14 The latest growth rates suggest that growth in comparison goods expenditure should pick up in the short term as confidence in the economy returns, with this increase following a significant impact to comparison goods expenditure arising from the situation around Covid-19 in 2020.
- 6.15 For convenience goods, Experian forecasts very limited per capita expenditure growth across the entire period to 2036. The position is even more pessimistic when account is taken of future growth in special forms of trading, with Experian's forecasts suggesting that the growth in convenience goods expenditure available to actual stores will not exceed 0.1% per annum across the entire period 2022 to 2036. Overall, it is evident that per capita convenience goods expenditure is not forecast to increase in the period to 2036.
- 6.16 The position in respect of comparison goods expenditure is more positive. Experian forecasts that per capita comparison goods expenditure growth will take place over the period to 2036, but, with the exception of growth of 5.9% in 2022, will not exceed 2.7% per annum in the period from 2022 to

2036. Experian’s forecast suggests that there will be relatively healthy growth in comparison goods even after accounting for expenditure lost to special forms of trading.
- 6.17 Growth in expenditure forecasts in the longer term (beyond the next ten years) should be treated with caution given the inherent uncertainties associated with predicting the performance of the economy over time (particularly in the current economic, health and political climates). As such, assessments of this nature should be reviewed on a regular basis in order to ensure that forecasts over the medium and longer term reflect changing circumstances.
- 6.18 In this regard, we also note that paragraph 85 of the revised NPPF requires local planning authorities to allocate sites to meet likely needs ‘...**looking at least ten years ahead**’, which differs from the previous requirement to meet needs across the entire plan period. We believe that this change directly reflects current economic conditions and changes in the retail sector in recent years. By applying Experian’s recommendations in respect of special forms of trading and expenditure growth, we are able to produce expenditure estimates for each survey zone and the Study Area as a whole at 2021, 2026, 2031, 2036 and 2041.

Convenience Goods Expenditure

- 6.19 Taking into account the Study Area resident population and the available per capita convenience goods expenditure, we estimate that £421.4m¹⁸ of convenience goods expenditure originates within the Study Area at 2021. The below Table 6.3 indicates that available Study Area convenience goods expenditure is forecast to increase to £439.5m at 2041.

Table 6.3: Total Available Study Area Convenience Goods Expenditure

2021 (£m)	2026 (£m)	2031 (£m)	2036 (£m)	2041 (£m)
421.4	419.3	425.1	432.3	439.5

In 2020 Prices

- 6.20 Table 6.4 indicates that this represents a modest increase of £18.0m (or 4.3%) across the Study Area between 2021 and 2041. Given the static growth in per capita expenditure, this increase can be attributed to growth in the Study Area’s population.

Table 6.4: Growth in Available Study Area Convenience Goods Expenditure

Growth 2021-26 (£m)	Growth 2021-31 (£m)	Growth 2021-36 (£m)	Growth 2021-41 (£m)
-2.1	3.7	10.8	18.0

In 2020 Prices

¹⁸ In 2019 prices, as is every subsequent monetary reference

6.21 We have assumed that around 75% of available convenience goods expenditure would take the form of main food shopping and that around 25% would take the form of top-up shopping (which relates to smaller purchases, often including staple items such as milk and bread)¹⁹. By applying this ratio, we estimate that main food shopping trips account for £316.1m of Study Area convenience goods expenditure at 2021, and top-up shopping trips account for £105.4m.

Comparison Goods Expenditure

6.22 For comparison goods, Table 6.5 sets out our estimate that the resident population of the Study Area will generate £498.4m of comparison goods expenditure at 2021. Available comparison goods expenditure is then forecast to grow to £828.3m at 2041. The large majority of this growth is forecast to occur in the medium to longer term (i.e. after 2026).

Table 6.5: Total Available Study Area Comparison Goods Expenditure

2021 (£m)	2026 (£m)	2031 (£m)	2036 (£m)	2041 (£m)
498.4	577.1	656.7	738.0	828.3

In 2020 Prices

6.23 The identified increase in comparison goods expenditure growth is substantial, but it represents a level of annual growth that is more circumspect than that which has been achieved in the past. This is due to both a reduction in the overall level of growth when compared to that achieved in the early part of this millennium and as a consequence of further forecast increases in expenditure committed via special forms of trading (most obviously, internet shopping).

Table 6.6: Growth in Available Study Area Comparison Goods Expenditure

Growth 2021-26 (£m)	Growth 2021-31 (£m)	Growth 2021-36 (£m)	Growth 2021-41 (£m)
78.7	158.3	239.6	329.8

In 2020 Prices

6.24 We sub-divide comparison goods expenditure into eight categories, these being: 'DIY', 'Electrical' and 'Furniture' (collectively referred to as bulky goods); and, 'Clothing and Footwear', 'CDs, DVDs and Books', 'Health, Beauty and Chemist Goods', 'Small Household Goods', and 'Toys, Games, Bicycles and Recreational Goods' (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zonal basis. Experian's estimates are reflected in the detailed expenditure tables set out at Table 7b of the 2022 Nexus Planning Quantitative Needs Assessment.

¹⁹ This is a fairly standard split applied in undertaking this exercise

6.25 In considering expenditure growth, it should be noted that not all growth arising within the Study Area will be to support additional floorspace. Instead, account needs to be taken of: the market share of expenditure secured by retailers within the town centres; the claim made by existing retailers on expenditure growth (the future efficiency of retail floorspace); and, the expenditure that will be claimed by committed retail developments.

7 Assessment of Retail Capacity

- 7.1 Our retail capacity tables set out our step-by-step approach to estimating the expenditure surplus which is available to support additional retail floorspace and are provided at Appendix 4. A summary of our methodological approach, together with our findings, is provided below.

General Approach to Estimating Quantitative Capacity

- 7.2 Retail capacity modelling follows the basic principle that: Available Expenditure minus Expected Turnover of Existing and Committed Floorspace equals Expenditure Surplus or Deficit. An identified quantitative expenditure surplus indicates that there may be capacity to support additional retail floorspace (subject to there being no unacceptable impacts arising as a consequence of the increased provision). We summarise the key considerations relating to each component of the equation below.

Available Expenditure

- 7.3 As we set out in Section 6 of this report, available expenditure within a zone is calculated by multiplying the population at a given reporting year by the estimated per capita expenditure. The available expenditure takes into consideration: estimated population growth; forecast increases in per capita expenditure; and forecast increases in special forms of trading.

Anticipated Turnover of High Peak's Retail Floorspace

- 7.4 The turnover relates to the expenditure required by existing retailers (and by retail commitments benefitting from an extant planning permission) to ensure that they trade viably. For convenience goods retailers, the expected 'benchmark' turnover of existing convenience goods facilities is calculated with reference to GlobalData Convenience and Comparison Goods Sales Densities of Major Grocers and Mintel Retail Rankings data²⁰.

Surplus/Deficit

- 7.5 The expenditure surplus (or deficit) is calculated by subtracting the turnover of existing and committed floorspace from the available expenditure in the High Peak authority area. A surplus figure effectively represents an under-provision of retail facilities within the Borough (which may indicate that additional floorspace could be supported), whereas a deficit would suggest a quantitative over-provision of retail floorspace.

²⁰ These datasets provide independent analysis of key grocery retailers' declared turnover and the overall floorspace in their portfolio in order to calculate national average sales densities.

- 7.6 Although a surplus is presented as a monetary figure, it can be converted to a floorspace requirement through the application of an appropriate sales density. In this regard, the floorspace requirement will vary according to operator and the likely sales density they could achieve. For example, in the case of comparison goods, non-bulky goods retailers tend to achieve higher sales densities than bulky goods retailers.
- 7.7 However, within the bulky goods sector itself there is significant variation, with electrical retailers typically having higher sales densities than DIY or furniture retailers. The turnover of destinations is generally considered with reference to retailers' net sales areas and all of the following floorspace figures relate to net sales areas. Our assessment considers convenience and comparison goods needs on an Authority-wide basis and then on a settlement by settlement basis based on existing market share.

Capacity for Future Convenience Goods Floorspace

- 7.8 In order to identify the likely need for additional convenience goods floorspace in High Peak, it is first necessary to consider the performance of the current provision. In this respect the built up area of High Peak already accommodates a relatively good variety of foodstore operators. As such, we believe that many of the food shopping trips which originate within the Study Area, but are directed to facilities outside of High Peak, occur principally because the trip is convenient (i.e. close to home or work), rather than due to any significant deficiencies in High Peak's offer. However, there are some instances where there may be an opportunity to 'claw back' convenience expenditure back into the main towns within the authority area.
- 7.9 Consideration of convenience goods shopping patterns on a zone-by-zone basis for those zones which principally cover the High Peak authority area, does not suggest that there is a particular problem with shoppers driving outside the authority area to access convenience goods shopping facilities. Given this, we believe that the High Peak's existing convenience goods market share of 65.1% of the total Study Area's convenience goods expenditure²¹ is broadly appropriate and is likely to be sustained in the future. This is due to the fact that those living on or just outside of the authority area boundary (but within the Study Area) are unlikely to be travelling unsustainable distances to meet their convenience shopping needs, in light of these being large format convenience stores in neighbouring authorities of Tameside and Derbyshire Dales.

²¹ Comprising Zones 1 to 6 of the Study Area, which includes residents located outside of the High Peak Authority Area

- 7.10 Based on the existing market share, we estimate that £302.9m of convenience goods expenditure which originates within the Study Area will be claimed by retailers in High Peak at 2021. For each convenience goods retail destination, consideration has been given as to whether any of its turnover is likely to be derived as 'inflow' from outside the Study Area.
- 7.11 Visitor spending has been estimated using data from the High Peak Steam Final Trend Report data prepared by Global Tourism Solutions (UK) Ltd on tourist expenditure in High Peak. Discussions with officers have confirmed that appropriate split between convenience and comparison spending is 55% to convenience and 45% to comparison. We then apportion both levels of tourism inflow on a pro-rata basis, based on the current turnovers of stores and the likelihood of attracting tourism inflow (i.e. the larger convenience and comparison destinations will also attract the higher proportions of tourism inflow). In this regard, the Steam Report indicates that in 2019 in High Peak, there was a total of £63.2m of direct expenditure directed towards shopping from tourists. When taking the 55:45 split between convenience and comparison spend, this equates to a total of £28.4m of convenience inflow and £34.8m of comparison inflow from tourists.
- 7.12 The Steam report also provides a standalone inflow figure for Buxton, which equates to a total of £20.3m. We have then applied an estimated split in terms of the remaining expenditure inflow between Glossop, Chapel-en-le-Frith, New Mills and Whaley Bridge.
- 7.13 For each convenience goods retail destination, the identified survey derived turnover is compared to its expected benchmark performance (which is estimated with reference to company average sales densities and the estimated net sales areas of individual shops). Our assessment assumes a 'goods based' approach, which disaggregates expenditure by sector, as it is important to recognise that major foodstore operators generally also sell some comparison goods, such as clothing, household goods, books and CDs. To account for this, the typical split between convenience and comparison goods provision for each operator has been identified²² and this multiplier has been applied to the estimated net floorspace of each foodstore. This provides an indication of the likely floorspace dedicated to the sale of convenience goods at each store and provides for an accurate estimation of convenience goods benchmark turnover.
- 7.14 The calculation of the estimated benchmark turnover of individual stores allows an assessment to be made in respect of individual retailers' trading performance and whether (on an aggregated basis)

²² Generally sourced from GlobalData Convenience and Comparison Goods Sales Densities of Major Grocers 2020, except where the data is not likely representative of how a store trades in practice. Detailed notes in respect of our approach in calculating net convenience goods sales areas are provided at Table 5 of Appendix 4 65

surplus expenditure exists to support additional floorspace. For smaller shops (where it is more difficult to collate accurate floorspace and sales density data), we assume that stores are trading 'in equilibrium' (i.e. the survey-derived turnover equates to the anticipated benchmark turnover).

7.15 Our assessment is summarised below at Table 7.1 and identifies that convenience goods floorspace in High Peak has an expected benchmark turnover of £210.4m at 2021, which is below the estimated survey derived turnover of £274.5m. As such, taken collectively, convenience goods floorspace is 'overtrading' by £63.3m even before tourism inflow is accounted for.

7.16 In order to appraise the future need for additional convenience goods floorspace, it is necessary to consider how the performance of stores will be affected by forecast expenditure growth. Accordingly, Table 7.1 also sets out the anticipated increases in expenditure that will be available to the authority area's convenience goods retailers, assuming its current market share is maintained. We have assumed that the benchmark turnover of floorspace will change going forward in accordance with improvements in floorspace efficiency set out in ERPBN19.

7.17 Table 7.1 sets out our estimate that the convenience goods expenditure available to facilities in High Peak will be £302.9m at 2021, decreasing to £301.4m at 2026, and then increasing to £305.5m at 2031 and to £315.9m at 2041. When the forecasted increase in available convenience goods expenditure is compared to growth in the benchmark turnover of such floorspace, the identified estimated convenience goods surplus equates to £101.0m at 2041.

Table 7.1 Quantitative Need for Convenience Goods Floorspace in High Peak

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Surplus Expenditure (£m)
2021	210.4	302.9	92.5
2026	214.4	301.4	87.0
2031	214.8	305.5	90.7
2036	214.8	310.7	95.9
2041	214.8	315.9	101.0

Source Table 6a of Appendix 4
In 2020 Prices

7.18 When considering the above assessment, it should be noted that the survey only takes account of retail venues that were trading as of the date of the undertaking of the household survey (December 2021). As such, convenience goods floorspace implemented subsequent to the undertaking of the survey needs to be accounted for in a similar manner to retail commitments (i.e. the floorspace will have a claim on future convenience goods expenditure and, as such, will partly extinguish any identified capacity).

- 7.19 It is noted that the application for the proposed new 'local centre' at Foxlow Farm in Buxton (reference HPK/2021/0145) has a resolution to approve, but a decision notice has not yet been issued. As such, we have included the commitment for the purposes of the capacity assessments for completeness.
- 7.20 The commitment is for a new local centre, which includes a new Aldi foodstore and smaller retail units. The new Aldi will be a relocation of the existing store from the edge of Buxton town centre and therefore an uplift in the turnover only has been included. The closure of the existing Aldi store has been agreed as part of the legal agreement associated with the application, and therefore assessing the uplift in turnover only is appropriate in this case.
- 7.21 As Table 7.2 identifies, there is an identified convenience goods floorspace requirement of between 6,500 and 7,800 sq.m²³ at 2021, which remains broadly consistent across the plan period, increasing slightly to between 7,000 and 8,400 sq.m by 2041.

Table 7.2 Quantitative Need for Convenience Goods Floorspace in High Peak after Commitments

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2021	92.5	4.1	88.4	6,500	7,800
2026	87.0	4.1	82.8	6,000	7,200
2031	90.7	4.1	86.6	6,200	7,500
2036	95.9	4.1	91.7	6,600	8,000
2041	101.0	4.1	96.9	7,000	8,400

Source Table 6d of Appendix 4

Assumes constant market share of Study Area expenditure claimed by facilities in High Peak; allows for changes in benchmark turnover sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 19; minimum floorspace requirement based on an assumed sales density of £13,621 per sq.m at 2020 (which equates to the average sales density of the 'big four' foodstore operators); maximum floorspace requirement based on an assumed sales density of £11,264 per sq.m at 2020 (which is typical figure for discount operators)

In 2020 prices

Assessment of Convenience Need on a Settlement Boundary Basis

- 7.22 Table 7.3 below sets out the residual convenience expenditure capacity in Buxton and each of the other town centres in High Peak.
- 7.23 As can be seen from Table 7.3, we identify a quantitative need for additional convenience floorspace within each of the five settlements, with the highest level being identified in Glossop town centre of between 2,400 and 2,900 sq.m across the plan period. The identified capacity is less in the other centres, with the lowest being identified in Whaley Bridge.

²³ The min and max capacity figures are calculated using average sales densities for discount operators (max) and the 'main four' foodstore operators (min)

Table 7.3: Quantitative Need for Convenience Goods Floorspace in High Peak's Town Centres

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
Buxton					
2021	21.8	4.1	17.7	1,300	1,600
2026	20.2	4.1	16.1	1,200	1,400
2031	21.2	4.1	17.1	1,200	1,500
2036	22.6	4.1	18.5	1,300	1,600
2041	24.1	4.1	19.9	1,400	1,700
Glossop					
2021	30.6	0.0	30.6	2,200	2,700
2026	28.6	0.0	28.6	2,100	2,500
2031	29.9	0.0	29.9	2,100	2,600
2036	31.7	0.0	31.7	2,300	2,800
2041	33.5	0.0	33.5	2,400	2,900
Chapel-en-le-Frith					
2021	24.2	0.0	24.2	1,800	2,200
2026	23.4	0.0	23.4	1,700	2,000
2031	24.1	0.0	24.1	1,700	2,100
2036	25.0	0.0	25.0	1,800	2,200
2041	26.0	0.0	26.0	1,900	2,300
New Mills					
2021	17.0	0.0	17.0	1,200	1,500
2026	16.2	0.0	16.2	1,200	1,400
2031	16.8	0.0	16.8	1,200	1,500
2036	17.6	0.0	17.6	1,300	1,500
2041	18.4	0.0	18.4	1,300	1,600
Whaley Bridge					
2021	15.7	0.0	15.7	1,100	1,400
2026	15.0	0.0	15.0	1,100	1,300
2031	15.5	0.0	15.5	1,100	1,300
2036	16.2	0.0	16.2	1,200	1,400
2041	16.8	0.0	16.8	1,200	1,500

Notes: Assumes constant market share of Study Area expenditure claimed by facilities in each respective settlement; allows for changes in benchmark turnover sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 19; minimum floorspace requirement based on an assumed sales density of £13,621 per sq.m at 2020 (which equates to the average sales density of the 'big four' foodstore operators); maximum floorspace requirement based on an assumed sales density of £11,264 per sq.m at 2020 (which is typical figure for discount operators)
In 2020 prices

Capacity for Future Comparison Goods Floorspace

- 7.24 Our methodology in calculating comparison goods capacity deviates from that employed in respect of convenience goods. This is because it is difficult to accurately estimate a benchmark turnover for comparison goods floorspace, both because of the number of units involved (which are occupied by

a wide variety of retailers), and due to the variation in the trading performance of floorspace depending on its location, the character of the area and the nature of the catchment.

7.25 As a consequence, we adopt the position for comparison goods floorspace that it is trading 'at equilibrium' at base year 2021 (i.e. our survey derived turnover estimate effectively acts as benchmark). We assume that there is therefore a nil quantitative need for any additional comparison goods floorspace across the authority area at 2021.

7.26 The £212.5m of comparison goods expenditure claimed by facilities within High Peak that originates from inside the Study Area equates to a market share of 35.7% of all such comparison goods expenditure. By making provision for inflow and 'rolling forward' this market share, our assessment finds that facilities in the authority area will attract £246.0m at 2026, increasing to £280.0m at 2031, to £314.6m at 2036, and then to £353.1m at 2041.

7.27 Given forecast increases in comparison goods expenditure and allowing for annual forecast changes in the productivity of existing floorspace, we estimate that, at 2026, there will be an expenditure surplus of £14.0m of comparison goods floorspace within High Peak. As set out by Table 7.5, this surplus is forecast to increase to £18.2m at 2031, before decreasing slightly to £17.0m at 2036 and to £14.7m at 2041.

Table 7.5 Quantitative Need for Comparison Goods Floorspace in High Peak

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Surplus Expenditure (£m)
2021	212.5	212.5	0.0
2026	232.0	246.0	14.0
2031	261.8	280.0	18.2
2036	297.6	314.6	17.0
2041	338.4	353.1	14.7

Source: Table 26a of Appendix 4

Notes: Assumes constant market share (35.7%) of Study Area expenditure claimed by facilities in High Peak; allows for changes in benchmark turnover sales efficiency in accordance with Table 4b of Experian Retail Planner Briefing Note 18 In 2020 Prices

7.28 Once more, the above assessment does not take into consideration existing commitments and the claim they will have on capacity.

7.29 As Table 7.6 illustrates, once the single identified commitment at Foxlow Farm is taken into account there is a moderate requirement for additional comparison goods floorspace across the period to 2041.

Table 7.6 Quantitative Need for Comparison Goods Floorspace in High Peak after Commitments

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2021	0.0	1.8	-1.8	-300	-500
2026	14.0	2.1	11.9	2,000	3,100
2031	18.2	2.4	15.8	2,300	3,700
2036	17.0	2.8	14.3	2,100	3,300
2041	14.7	3.1	11.6	1,700	2,700

Source Table 26d of Appendix 4

Notes: Assumes constant market share of Study Area expenditure claimed by facilities in each respective settlement; allows for changes in benchmark turnover sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 19; minimum floorspace requirement based on an assumed sales density of £5,500 per sq.m at 2020; maximum floorspace requirement based on an assumed sales density of £3,500 per sq.m at 2020. The lower sales density figure used is comparable to national average sales density often secured by bulky goods retailers, and the higher figure is an average typically secured by operators selling clothing and footwear goods and other high-end retailers.

In 2020 Prices

- 7.30 In considering comparison goods commitments, it is again relevant to note that the capacity assessment is based on the market share of the local authority area being maintained going forward. As set out above, we are unaware of any significant proposed development which is likely to have a very significant impact on High Peak's future comparison goods market share.

Assessment of Comparison Need on a Settlement Boundary

- 7.31 Consideration has also been given to the residual comparison expenditure capacity in each of the Town Centres in High Peak. This is provided at Table 7.7 below which shows that there is a limited identified quantitative capacity for additional comparison floorspace within the six town centres of High Peak across the period to 2041.

Table 7.7: Quantitative Need for Comparison Goods Floorspace in High Peak's Town Centres

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
Buxton					
2021	0.0	1.8	-1.8	-300	-500
2026	5.1	2.1	3.0	500	800
2031	6.6	2.4	4.2	600	1,000
2036	6.2	2.8	3.4	500	800
2041	5.4	3.1	2.2	300	500
Glossop					
2021	0.0	0.0	0.0	0	0
2026	4.5	0.0	4.5	700	1,200
2031	5.8	0.0	5.8	900	1,300
2036	5.4	0.0	5.4	800	1,300
2041	4.7	0.0	4.7	700	1,100
Chapel-en-le-Frith					
2021	0.0	0.0	0.0	0	0

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2026	1.3	0.0	1.3	200	300
2031	1.7	0.0	1.7	200	400
2036	1.6	0.0	1.6	200	400
2041	1.4	0.0	1.4	200	300
New Mills					
2021	0.0	0.0	0.0	0	0
2026	1.2	0.0	1.2	200	300
2031	1.6	0.0	1.6	200	400
2036	1.5	0.0	1.5	200	300
2041	1.3	0.0	1.3	200	300
Whaley Bridge					
2021	0.0	0.0	0.0	0	0
2026	1.4	0.0	1.4	200	400
2031	1.9	0.0	1.9	300	400
2036	1.7	0.0	1.7	300	400
2041	1.5	0.0	1.5	200	300

Notes: Assumes constant market share of Study Area expenditure claimed by facilities in each respective settlement; allows for changes in benchmark turnover sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 19; minimum floorspace requirement based on an assumed sales density of £5,500 per sq.m at 2020; maximum floorspace requirement based on an assumed sales density of £3,500 per sq.m at 2020
In 2020 prices

Qualitative Requirements

- 7.32 As set out above, we have identified that when considered cumulatively across the Study Area, the convenience stores are calculated to be significantly over-trading when compared to their benchmark averages. As set out as part of the market share analysis above, there are some key stores which are identified as overtrading considerably more than others, principally focussed around the discount operators. Indeed, the Aldi stores in Buxton, Chapel-en-le-Frith and Glossop are all identified as significantly overtrading, with other large stores including the Morrisons in Buxton, the Tesco in Whaley Bridge and to a lesser extent, the Morrisons in Chapel-en-le-Frith also overtrading to some extent.
- 7.33 The overtrading of stores indicates that from both a quantitative and qualitative perspective, there is a requirement to increase the provision of convenience facilities within High Peak.
- 7.34 If we look at the distribution of the stores across the authority area, these are principally focussed around the main settlements, which ensures that residents have good access to foodstores to meet their convenience needs. Furthermore, there is a good offer in terms of fascias across the authority area, with Aldi, Lidl, Tesco, Waitrose and Morrisons all occupying large format stores, and the likes of

- Tesco, Sainsbury's and the Co-op occupying smaller local convenience stores. There is one Lidl store located in Glossop and a live requirement to expand their portfolio, particularly within Buxton.
- 7.35 Providing for a new foodstore in a sustainable location (which would benefit and not directly compete with the defined centres), could assist in 'levelling out' some of the identified overtrading and provide for additional consumer choice within the authority area. A new foodstore could be accommodated in or on the edge of each of the five centres, although the stores in Glossop and Chapel-en-le-Frith appear to be overtrading to greater extent. We provide further recommendations in respect of the quantitative and qualitative requirements for additional floorspace at Section 9 of this Study.
- 7.36 In terms of comparison retailing, it is clear that the principal centres of Buxton and Glossop and to a lesser extent the other defined centres are meeting a general comparison need within the authority area. However, there are levels of leakage of comparison expenditure to destinations outside of the Study Area (Stockport, Manchester and so on) and an opportunity to claw back some of this expenditure back into High Peak.
- 7.37 We consider that the Council's current plans to enhance Buxton town centre will go some way to ensuring that comparison expenditure is drawn back into High Peak, by providing for space for modern format operators, both from the national and independent sectors. The redevelopment and regeneration of key buildings within Glossop will also assist in drawing trade back into this centre, and will provide space for additional primarily independent operators in a key centre within High Peak.
- 7.38 It follows that there does appear to be an opportunity to draw expenditure back into the Study Area through the diversification of the comparison offer within the key centres.

8 Assessment of Leisure Capacity

Commercial Leisure: Bingo, Cinemas, Ten Pin Bowling and Casinos

- 8.1 Our approach to the assessment of commercial leisure needs necessarily deviates from our retail methodology, in part because it is difficult to source some of the required information to undertake a similar exercise for the leisure sector²⁴. In addition, the commercial leisure sector is different to the retail sector; large-scale leisure uses are relatively limited in number and customers often expect to travel at least some distance in order to access them. As such, we believe it is sensible to consider the general appropriateness of provision on a Study Area basis, with reference to the typical number of persons required to support particular uses.
- 8.2 Our assessment considers the typical population required to support bingo halls, casinos, cinema screens and ten pin bowling alleys, and is based around three key stages.
- 8.3 We firstly calculate the expected Study Area and local authority population²⁵ for the relevant reporting years (2021, 2026, 2031, 2036 and 2041).
- 8.4 We then calculate the number of persons required to support a bingo hall, cinema screen and bowling alleys nationally, across the UK. We have identified the current level of provision across the UK with reference to the following sources:
- Mintel's Casinos and Bingo UK report (March 2019), which identifies that there are 350 bingo halls across the UK;
 - the UK Cinema Association website²⁶ which identifies that there are 4,596 cinema screens across the UK; and
 - Mintel's Ten Pin Bowling UK report (May 2017), which identifies that there are 5,242 bowling lanes across the UK.
- 8.5 We then apply the respective ratio to the Study Area population and to High Peak authority area's population in order to gauge the 'benchmark' level of provision.

²⁴ Experian does not forecast improvements in sales efficiency for leisure operators, which is a critical element in translating a monetary surplus into a floorspace requirement 73

²⁵ Derived from Experian MMG3 data

²⁶ www.cinemauk.org.uk, consulted on 11 May 2021

8.6 We supplement our assessment with an overview of current patterns of commercial leisure trips throughout the Study Area (as identified by the NEMS household survey of November 2021) in order to identify any qualitative deficiencies in provision.

Bingo

8.7 Mintel’s March 2019 Casinos and Bingo UK report identifies that there are 350 bingo halls across the UK, which equates to a bingo hall for every 193,447 persons or thereabouts²⁷. Accordingly, we estimate that the Study Area could theoretically support around 0.8 bingo halls at 2021, increasing to around 0.9 bingo halls at 2041.

8.8 We estimate that the population of High Peak is around 58.5% of that of the Study Area as a whole at 2021. Therefore, on a pro rata basis, we calculate a need for around 0.5 bingo halls in High Peak at 2021, remaining at 0.5 halls to 2041.

8.9 At present, there are no bingo halls within either High Peak or the wider Study Area, although we do note a limited number of trips to destinations across the Study Area for bingo. Notwithstanding this, the closest bingo halls to the Study Area include Buzz Bingo in Stockport, Club 3000 on Hyde Road in Manchester and Cosmo Bingo in Stalybridge.

8.10 As such, we do not believe that there is any requirement to plan specifically for additional bingo hall provision across the plan period to 2041. Table 8.1 below shows the bingo hall requirement in the Study Area and within High Peak across the plan period.

Table 8.1: Bingo Hall Requirement in Study Area and High Peak

Year	Study Area Population	Typical Population Required to Support Hall	Potential Number of Halls Supported by Study Area	Proportion of Study Area Population in High Peak (%)	Potential Number of Halls Supported in High Peak	Outstanding Potential Requirement in High Peak
2021	162,498	193,447	0.8	58.5%	0.5	0.5
2026	164,989	193,447	0.9	58.7%	0.5	0.5
2031	167,265	193,447	0.9	58.8%	0.5	0.5
2036	169,268	193,447	0.9	59.0%	0.5	0.5
2041	171,241	193,447	0.9	59.2%	0.5	0.5

Note: Typical population to support bingo hall calculated with reference to the Mintel Casinos and Bingo UK 2019 report and to the ONS 2019 mid-year population estimates for the UK, England and Wales, Scotland and Northern Ireland

²⁷ Based on the Experian 2019 Populations estimates for the UK, England and Wales, Scotland and Northern Ireland, which identifies a UK population of 67,706,302 persons at 2019

8.11 Furthermore, in considering the potential need for additional bingo facilities, it should also be noted that the sector has been significantly affected by the ban on smoking in enclosed workplaces that came into force in 2007 as a consequence of the Health Act 2006. Subsequent to the Act being enforced, new bingo hall openings are rare and we consider it highly unlikely that there will be any need for additional provision in the Study Area in the foreseeable future.

Cinemas

8.12 The UK Cinema Association website estimates that there are 4,596 cinema screens in the UK, which equates to one screen for every 14,732 persons or thereabouts. On this basis, we estimate that the Study Area population could support around 11.0 cinema screens at 2021, increasing to around 11.6 screens at 2041.

8.13 Once more, we estimate that the population of High Peak is around 58.5% of that of the Study Area at 2021. On a pro rata basis, this equates to a need for around 6.4 screens in High Peak at 2021, increasing to around 6.9 screens at 2041.

8.14 There is a single cinema within High Peak; Buxton Cinema at the Pavilion Arts Centre in Buxton. This provides a single screen. Accordingly, we estimate that there is a potential requirement for around five additional screens in High Peak with reference to national average levels of provision.

8.15 Although this would suggest that there is an existing under-supply of cinema screens in High Peak, it should be noted that just beyond the boundary of the High Peak authority area are a number of cinemas, including Cineworld in Ashton-under-Lyne, Light Cinema at Redrock in Stockport and Regent Cinema in Marple. These cinemas alone provide a further 27 screens.

8.16 As such, it is considered that the current level of provision is more than sufficient to serve the needs of residents within High Peak, and that the composition of cinema operators within and in close proximity to residents of High Peak is considered to provide a variety of operators to appeal to a wide population.

Table 8.2: Cinema Screen Requirement in Study Area and High Peak

Year	Study Area Population	Typical Population Required to Support Cinema Screen	Potential Number of Cinema Screens Supported by Study Area	Proportion of Study Area Population in High Peak (%)	Potential Number of Cinema Screens Supported in High Peak	Outstanding Potential Requirement in High Peak
2021	162,498	14,732	11.0	58.5%	6.4	5.4
2026	164,989	14,732	11.2	58.7%	6.6	5.6
2031	167,265	14,732	11.4	58.8%	6.7	5.7
2036	169,268	14,732	11.5	59.0%	6.8	5.8
2041	171,241	14,732	11.6	59.2%	6.9	5.9

Note: Typical population to support a cinema screen calculated with reference to data provided by the UK Cinema Association website and to the ONS 2019 mid-year population estimates for the UK, England and Wales, Scotland and Northern Ireland

Ten Pin Bowling

- 8.17 Mintel’s Ten Pin Bowling UK 2017 report identifies that there are 5,242 ten pin bowling lanes across the UK, which equates to a bowling lane for every 12,916 persons or thereabouts.
- 8.18 Accordingly, we estimate that the Study Area could support around 12.6 bowling lanes at 2021, increasing to around 13.3 lanes at 2041. Given that the estimated population of High Peak is around 58.5% of that of the Study Area at 2021, we calculate a need for around 7.4 bowling lanes in High Peak at 2021, increasing to 7.8 lanes at 2041.
- 8.19 However, it should be noted that whilst there are currently no ten-pin bowling operators within High Peak, it should be noted that there are a total of 40 bowling lanes provided at Hollywood Bowl in Ashton-under-Lyne and Superbowl UK in Macclesfield.
- 8.20 As such, there is a surplus of 7.4 lanes at 2021, increasing to 7.8 at 2041 within the High Peak authority area. This estimated surplus of bowling lanes should be viewed in the context of the two facilities outlined above which are likely to serve the needs of High Peak residents.
- 8.21 Whilst very few new ten-pin bowling alleys were built in the early part of this century, the market has picked up in recent years. This upturn in the sector has been partly assisted by a more modern type of offer, which is typically ‘in centre’ and aimed at those going out in the evening as much as families. As such, modern bowling alleys often incorporate other forms of leisure activity (most notably through a strong food and drink offer). There may be an opportunity to explore whether boutique ten pin bowling operators have a requirement within High Peak, which could further assist in diversifying the commercial offer, particularly within the larger centres of Buxton or Glossop.

Table 8.3: Ten Pin Bowling Lane Requirement in Study Area

Year	Study Area Population	Typical Population Required to Support Bowling Lane	Potential Number of Bowling Lanes Supported by Study Area	Proportion of Study Area Population in High Peak (%)	Potential Number of Bowling Lanes Supported in High Peak	Outstanding Potential Requirement in High Peak
2021	162,498	12,916	12.6	58.5%	7.4	7.4
2026	164,989	12,916	12.8	58.7%	7.5	7.5
2031	167,265	12,916	13.0	58.8%	7.6	7.6
2036	169,268	12,916	13.1	59.0%	7.7	7.7
2041	171,241	12,916	13.3	59.2%	7.8	7.8

Note: Typical population to support ten pin bowling alley calculated with reference to the Mintel Ten Pin Bowling UK 2017 report and to the ONS 2019 mid-year population estimates for the UK, England and Wales, Scotland and Northern Ireland

Casinos

- 8.22 Mintel’s Casinos and Bingo UK 2018 report identifies that there are 145 bingo halls across the UK, which equates to a bingo hall for every 466,940 persons or thereabouts²⁸. Accordingly, we estimate that the Study Area could support around 0.3 casinos at 2021, a figure which would barely change throughout the study period. Given that the estimated population of High Peak is around 58.5% of that of the Study Area at 2021, we calculate a need for around 0.2 casinos at 2021, a figure which again barely changes across the study period.
- 8.23 Given this indicative potential casino provision in the authority area, it is unsurprising that there are no casinos within High Peak. However, there is considerable provision in proximity to High Peak, with Genting Casino at Stoke-on-Trent, Grosvenor Casinos in Salford, Stoke-on-Trent and Manchester and Manchester235 in Manchester. Accordingly, the current level of provision is considered to be sufficient to serve the needs of both residents within High Peak and the wider Study Area.

²⁸ Based on the ONS 2019 mid-year population estimates for the UK, England and Wales, Scotland and Northern Ireland, which identifies a UK population of 67,706,302 persons at 2017

Table 8.4: Casino Requirement in Study Area

Year	Study Area Population	Typical Population Required to Support a Casino	Potential Number of Casinos Supported by Study Area	Proportion of Study Area Population in High Peak (%)	Potential Number of Casinos Supported in High Peak	Outstanding Potential Requirement in High Peak
2021	162,498	466,940	0.3	58.5%	0.2	0.2
2026	164,989	466,940	0.4	58.7%	0.2	0.2
2031	167,265	466,940	0.4	58.8%	0.2	0.2
2036	169,268	466,940	0.4	59.0%	0.2	0.2
2041	171,241	466,940	0.4	59.2%	0.2	0.2

Note: Typical population to support casino calculated with reference to the Mintel Casinos and Bingo UK 2018 report and to the ONS 2019 mid-year population estimates for the UK, England and Wales, Scotland and Northern Ireland

Food and Drink

- 8.24 Food and drink uses are not typically the subject of a quantitative assessment due to the difficulties in forecasting future growth in the sector over time (and an absence of data relating to how existing operators may need to increase their trading efficiency in the future in order to remain profitable).
- 8.25 In addition, most new food and drink uses are relatively small-scale and can be readily accommodated within a centre (through the reoccupation or refurbishment of existing premises) without the need for any planning policy-led intervention.
- 8.26 As such, our consideration of the current food and drink offer within the city is a qualitative assessment, based on the strength of the current offer and the opportunities that may exist to attract further operators in High Peak.
- 8.27 Table 8.5 indicates that Glossop Town Centre attracts the largest proportion of trips to eat out, equating to 16.7% of all such trips in the Study Area. However, Glossop's market share is highly concentrated within Zone 1 (within which the town is located), with 53.7% of trips in this zone. Across the other five zones, Glossop Town Centre does not attract a market share above 2.3%. This suggests that the town's appeal as a restaurant destination is relatively focused geographically. In comparison Buxton Town Centre, which attracts a total of 13.1% of all trips in the Study Area, attracts at least 2.6% of the market share of restaurant trips across all six zones, but a substantial 61.7% of trips within Zone 5.
- 8.28 It should also be noted that, within Zones that broadly correspond with the boundaries of the High Peak authority area (Zones 1, 2 and 5), a majority of market share is retained within the authority area itself. This is considered reflective of the scale and scope of the offer not just within these centres, but also in the smaller centres throughout the authority area. It is also reflective of the more rural

nature of the authority area, and the preference of users to visit destinations which are close to where they live.

Table 8.5: Market Share of Restaurant Trips

Zone	Venue	Total	1	2	3	4	5	6
1	Glossop Town Centre	16.7%	53.7%	1.2%	0.0%	0.0%	2.3%	0.0%
2	Chapel-en-le-Frith Town Centre	2.4%	0.8%	8.5%	1.2%	0.0%	0.0%	0.0%
	Disley Village Centre	3.4%	1.2%	10.4%	0.0%	0.0%	2.6%	0.0%
	New Mills Town Centre	2.3%	0.0%	9.2%	0.0%	0.0%	0.0%	0.0%
	Whaley Bridge Town Centre	1.7%	0.0%	6.9%	0.0%	0.0%	0.0%	0.0%
3	Hathersage Village Centre	1.8%	0.0%	0.7%	23.3%	0.0%	1.3%	0.0%
4	Bakewell Town Centre	3.2%	0.0%	0.0%	6.0%	37.9%	3.1%	1.9%
5	Buxton Town Centre	13.1%	2.7%	3.3%	4.1%	2.6%	61.7%	2.8%
6	Leek Town Centre	8.8%	0.0%	1.7%	0.0%	0.0%	1.3%	49.6%
Other Outside Study Area	Hazel Grove Town Centre	1.5%	0.0%	6.1%	0.0%	0.0%	0.0%	0.0%
	Manchester City Centre	8.5%	11.3%	14.2%	1.2%	0.0%	7.0%	2.0%
Total		100						

Note: Market share derived from 2021 NEMS household survey 'weighted and filtered' results; table includes all inside and outside the Study Area that secure a market share located within the Study Area and those outside that secure a total market share of at least 1.5%

8.29 Analysis of the survey results in respect of trips to visits pubs, bars and nightclubs, indicates that respondents generally visit a wider range of venues in order to drink and socialise than they do to dine. As such, venues typically secure a lower market share of trips to pubs, bars and nightclubs compared to their market share of restaurant trips. However, it is interesting to note that both Glossop and Buxton Town Centres attract a higher proportion of market share for trips to pubs, bars and nightclubs suggesting that the restaurant offer in these destinations is more limited, or less frequented.

Table 8.6: Market Share of Trips to Pubs, Bars and Nightclubs

Zone	Venue	Total	1	2	3	4	5	6
1	Glossop Town Centre	17.6%	61.3%	0.0%	0.0%	0.0%	2.6%	0.0%
	Hadfield Town Centre	2.3%	8.1%	0.0%	0.0%	0.0%	0.0%	0.0%
2	Chinley Village Centre	1.8%	0.0%	7.3%	0.0%	0.0%	0.0%	0.0%
	Disley Village Centre	2.2%	0.0%	6.8%	0.0%	0.0%	2.9%	0.0%
	Hayfield Village Centre	1.8%	0.0%	7.3%	0.0%	0.0%	0.0%	0.0%
	New Mills Town Centre	4.3%	0.0%	16.9%	0.0%	2.9%	0.0%	0.0%
	Whaley Bridge Town Centre	3.0%	0.0%	12.5%	0.0%	0.0%	0.0%	0.0%
4	Bakewell Town Centre	2.8%	0.0%	0.0%	1.2%	45.0%	2.1%	0.0%
5	Buxton Town Centre	15.8%	1.5%	5.9%	2.1%	0.0%	68.6%	6.9%
6	Leek Town Centre	10.5%	0.0%	0.0%	0.0%	0.0%	0.0%	61.9%
Other Outside Study Area	Manchester City Centre	2.7%	7.0%	3.0%	0.0%	0.0%	0.0%	0.0%
	Marple Town Centre	1.7%	1.5%	5.3%	0.0%	0.0%	0.0%	0.0%
	Sheffield City Centre	1.6%	0.0%	2.7%	6.0%	0.0%	2.6%	0.0%
Total		100						

Note: Market share derived from 2021 NEMS household survey 'weighted and filtered' results; table includes all inside and outside the Study Area that secure a market share located within the Study Area and those outside that secure a total market share of at least 1.5%

- 8.30 Glossop is the most popular destination for trips to pubs, bars and nightclubs that originate within the Study Area, and as noted above its market share of 17.6% of such trips is less than its market share of restaurant trips.
- 8.31 Buxton is the second most popular destination for such trips in the Study Area, and again attracts a market share in excess of its market share of restaurant trips, at 15.8%. This is reflective of many of Glossop and Buxton's most popular evening venues being focused around eating, as much as drinking.
- 8.32 We believe that these higher figures are indicative of the considerable development in recent years to both Glossop and Buxton's leisure offer, which we believe is likely to continue to development and as such there are no obvious deficiencies in its offer. Opportunities to further enhance the offer and help support the future viability of such operators should continue to be explored, and we consider the investment schemes within both Buxton and Glossop in particular will assist with ensuring this part of the market is supported.

9 Summary and Recommendations

- 9.1 In making recommendations, this part of the Study draws together the previous sections of this report, drawing the key findings from the extensive market research undertaken and the overarching messages which have been taken account of in formulating strategies for the future of the centres in High Peak.
- 9.2 These recommendations focus on the distribution of identified need within the authority area, and the findings from the health assessments of the defined centres.

Key Findings: Retail Need and Retail Strategy

Quantitative Considerations

- 9.3 As identified at Section 7, we have identified a quantitative requirement for additional convenience goods floorspace on an authority-wide basis and on a settlement by settlement basis across the reporting period to 2041. This is because, when considered cumulatively, the existing convenience provision within the whole authority area is identified as over-trading when compared against the total benchmark average, indicating that in some circumstances, there is a lack of consumer choice for residents.
- 9.4 We have also calculated the quantitative capacity for additional convenience and comparison floorspace on a settlement basis, having regard to the performances of specific stores within each settlement. For example, the Aldi stores in Glossop, Chapel-en-le-Frith and Buxton are all identified as significantly overtrading when compared with their benchmark averages.
- 9.5 As such, on a settlement by settlement basis and having regard to the retention of market share within the individual settlements, we have identified a quantitative capacity for additional convenience floorspace within each of the five centres, as summarised below.

Table 9.1: Quantitative Need for Convenience Goods Floorspace in High Peak's Town Centres

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
Buxton					
2021	21.8	4.1	17.7	1,300	1,600
2026	20.2	4.1	16.1	1,200	1,400
2031	21.2	4.1	17.1	1,200	1,500
2036	22.6	4.1	18.5	1,300	1,600
2041	24.1	4.1	19.9	1,400	1,700
Glossop					
2021	30.6	0.0	30.6	2,200	2,700
2026	28.6	0.0	28.6	2,100	2,500
2031	29.9	0.0	29.9	2,100	2,600
2036	31.7	0.0	31.7	2,300	2,800
2041	33.5	0.0	33.5	2,400	2,900
Chapel-en-le-Frith					
2021	24.2	0.0	24.2	1,800	2,200
2026	23.4	0.0	23.4	1,700	2,000
2031	24.1	0.0	24.1	1,700	2,100
2036	25.0	0.0	25.0	1,800	2,200
2041	26.0	0.0	26.0	1,900	2,300
New Mills					
2021	17.0	0.0	17.0	1,200	1,500
2026	16.2	0.0	16.2	1,200	1,400
2031	16.8	0.0	16.8	1,200	1,500
2036	17.6	0.0	17.6	1,300	1,500
2041	18.4	0.0	18.4	1,300	1,600
Whaley Bridge					
2021	15.7	0.0	15.7	1,100	1,400
2026	15.0	0.0	15.0	1,100	1,300
2031	15.5	0.0	15.5	1,100	1,300
2036	16.2	0.0	16.2	1,200	1,400
2041	16.8	0.0	16.8	1,200	1,500

Notes: Assumes constant market share of Study Area expenditure claimed by facilities in each respective settlement; allows for changes in benchmark turnover sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 19; minimum floorspace requirement based on an assumed sales density of £13,621 per sq.m at 2020 (which equates to the average sales density of the 'big four' foodstore operators); maximum floorspace requirement based on an assumed sales density of £11,264 per sq.m at 2020 (which is typical figure for discount operators)

In 2020 prices

9.6 In terms of comparison retailing, we have identified a lower quantitative capacity for additional floorspace within the authority area of between 2,200 and 3,400 sq.m at 2026, rising to 2,500 and 4,000 sq.m at 2031.

9.7 Table 9.2 below provides the breakdown of capacity on a settlement basis.

Table 9.2: Quantitative Need for Comparison Goods Floorspace in High Peak's Town Centres

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
Buxton					
2021	0.0	1.8	-1.8	-300	-500
2026	5.1	2.1	3.0	500	800
2031	6.6	2.4	4.2	600	1,000
2036	6.2	2.8	3.4	500	800
2041	5.4	3.1	2.2	300	500
Glossop					
2021	0.0	0.0	0.0	0	0
2026	4.5	0.0	4.5	700	1,200
2031	5.8	0.0	5.8	900	1,300
2036	5.4	0.0	5.4	800	1,300
2041	4.7	0.0	4.7	700	1,100
Chapel-en-le-Frith					
2021	0.0	0.0	0.0	0	0
2026	1.3	0.0	1.3	200	300
2031	1.7	0.0	1.7	200	400
2036	1.6	0.0	1.6	200	400
2041	1.4	0.0	1.4	200	300
New Mills					
2021	0.0	0.0	0.0	0	0
2026	1.2	0.0	1.2	200	300
2031	1.6	0.0	1.6	200	400
2036	1.5	0.0	1.5	200	300
2041	1.3	0.0	1.3	200	300
Whaley Bridge					
2021	0.0	0.0	0.0	0	0
2026	1.4	0.0	1.4	200	400
2031	1.9	0.0	1.9	300	400
2036	1.7	0.0	1.7	300	400
2041	1.5	0.0	1.5	200	300

Notes: Assumes constant market share of Study Area expenditure claimed by facilities in each respective settlement; allows for changes in benchmark turnover sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 19; minimum floorspace requirement based on an assumed sales density of £5,500 per sq.m at 2020; maximum floorspace requirement based on an assumed sales density of £3,500 per sq.m at 2020
In 2020 prices

Qualitative Considerations

- 9.8 From a qualitative perspective in terms of convenience provision firstly, if we look at the distribution of the stores across the authority area, these are principally focussed around the main settlements, which ensures that residents have good access to foodstores to meet their convenience needs. Furthermore, there is a good offer in terms of fascias across the authority area, with Aldi, Lidl, Tesco, Waitrose and Morrisons all occupying large format stores, and the likes of Tesco, Sainsbury's and the

Co-op occupying smaller local convenience stores. There is one Lidl store located in Glossop and a live requirement to expand their portfolio, particularly within Buxton.

- 9.9 Providing for a new foodstore in a sustainable location (which would benefit and not directly compete with the defined centres), could assist in 'levelling out' some of the identified overtrading and provide for additional consumer choice within the authority area. However, given the historic nature of the centres within High Peak and the general complexities of finding suitable in or edge of centre sites, future allocations for retail developments of scale which could meet the above identified need may prove difficult. We comment further below on the quantitative and qualitative requirements on a settlement basis.
- 9.10 In terms of comparison retailing, it is clear that the principal centres of Buxton and Glossop and to a lesser extent the other defined centres are meeting a general comparison need within the authority area. However, there are levels of leakage of comparison expenditure to destinations outside of the Study Area (Stockport, Manchester and so on) and an opportunity to claw back some of this expenditure back into High Peak.
- 9.11 We consider that the Council's current plans to enhance Buxton town centre will go some way to ensuring that comparison expenditure is drawn back into High Peak, by providing for space for modern format operators, both from the national and independent sectors. It follows that there does appear to be an opportunity to draw expenditure back into the Study Area through the diversification of the comparison offer within the key centres.

Overarching Capacity Considerations

- 9.12 In light of the above, we recommend the following in respect of the quantitative and qualitative capacity for each centre.

Buxton Town Centre

- 9.13 Based on the current market share attracted by convenience operators within Buxton and the level of identified overtrading, we have identified there to be some quantitative capacity for additional convenience floorspace within the settlement. From a qualitative perspective, whilst the centre is served by an Aldi, Morrisons and Waitrose, there would appear to be an opportunity to further consumer choice through the introduction of another mid-format operator to meet residents and visitor's needs.

- 9.14 We note however, that the new Aldi foodstore at Foxlow Farm (which has a resolution to approve but no decision notice has been issued at the time of writing) will provide for a larger footprint than that which is currently provided for by the existing Aldi, which may reduce the level of overtrading currently identified within the Study.
- 9.15 Furthermore, there is a risk that the relocation of the Aldi away from the town centre has the potential to reduce the proportion of linked-trips to the wider town centre, which could further impact on the identified level of undertrading of the Waitrose foodstore at The Springs Shopping Centre in particular.
- 9.16 As noted as part of the healthcheck analysis of Buxton town centre, there are substantial investments being made into the centre, which will help to improve the centre by enhancing the public realm, the accessibility and safety but also providing space within the centre to accommodate a wide range of town centre retail and leisure operators. All efforts should be made to help protect this investment and support the future plans for the centre in the first instance. There are of course also opportunities as part of the regeneration schemes to accommodate new operators which may absorb some of the identified capacity.
- 9.17 As such, although the Study has identified a quantitative capacity, we do not consider that the Council should actively promote the allocation of a site within the centre to accommodate the total level of convenience floorspace capacity. In any event, we are not aware of any site which could be actively promoted as part of the local plan which would have the benefit of enhancing Buxton town centre and could further exacerbate the level of undertrading of town centre stores.
- 9.18 In terms of the identified comparison capacity, the floorspace requirements over the plan period are limited and should be absorbed in the repurposing of existing units within the town centre, and filling the otherwise vacant floorspace. Diversifying the comparison offer through encouraging a range of independent operators in particular will help to attract footfall back into the centre and continue to help support Buxton and promote its qualitative benefits which attract both residents and visitors alike.

Glossop Town Centre

- 9.19 We have also identified a quantitative capacity for additional convenience floorspace within Glossop, principally due to the overtrading of the Aldi and Lidl stores, along with the Tesco at Wren Nest.

These three stores alone are identified as overtrading by approximately £30m even before inflow from tourist spend is considered.

- 9.20 However, when considered on a qualitative basis, it is considered that the town and its residents are well catered for by the Aldi, Lidl and Tesco, along with the M&S, and discount operators such as Heron, Home Bargains and Iceland convenience stores. There is considered to be a good level of consumer choice in the town overall, and it is considered that part of the identified overtrading will be due to the relatively small Aldi foodstore (with no obvious opportunity to expand on its current site) and providing further opportunity for the new Lidl to 'bed in' in terms of its position in the market in the centre.
- 9.21 As such, and as there does not appear to be many site options which have the potential for redevelopment to enhance the offer of the town centre, we do not recommend that the Council specifically allocates a site to meet the identified retail capacity, and that instead any capacity is absorbed, at least in part, in new developments and regeneration schemes within the town centre itself. The regenerated and expanded market hall will go some way to meeting needs, and other opportunities to repurpose historic and cultural buildings for a mix of uses may also assist in meeting that quantitative need and provide space for the independent sector in particular.
- 9.22 Turning to the comparison capacity within Glossop, we again identify a quantitative capacity for additional comparison floorspace within the centre. In the first instance, all efforts should be concentrated on filling otherwise vacant floorspace within the centre, and ensuring any new schemes coming forward are occupied from the outset. As such, we do not recommend any additional sites are specifically allocated for additional retail floorspace within or on the edge of Glossop town centre, and that future policy instead supports the reuse and repurposing of existing buildings for a mix of main town centre uses within the centre.

Chapel-en-le-Frith, New Mills and Whaley Bridge Town Centres

- 9.23 Looking at the three smaller centres in High Peak, again we have identified a quantitative capacity for additional convenience floorspace in each of the settlements and given the convenience offer, we also consider there to be an opportunity to enhance the qualitative offer within the centres.
- 9.24 In this regard, the settlements' convenience offer are more limited than Buxton and Glossop and there is certainly less choice for residents within the towns, with the main food offer focusing on the Aldi and Morrisons in Chapel-en-le-Frith and the Tesco in Whaley Bridge. In this regard, it is likely

that the Aldi and Tesco in particular are serving a wider catchment in light of their good locations in proximity to the A6 and them benefiting from trade passing by.

- 9.25 As such, there does appear to be both a qualitative and quantitative need for additional floorspace within the three centres. However, unless a suitable site is identified within one of the centres, we would not recommend that the Council specifically promotes alternatives which could have the potential to significantly impact on the performance of town centre operators, and particularly the Co-op stores in Chapel and Whaley Bridge, and the Sainsbury's Local in New Mills.
- 9.26 Again from a comparison perspective, the Study has identified a limited capacity in each of the three centres, which should be absorbed in the first instance through the occupying of otherwise vacant floorspace in each of the centres. We therefore do not recommend that the Council allocates any specific sites to accommodate the comparison capacity specifically.

Key Findings: Leisure

- 9.27 As identified at Section 8, we have identified a quantitative requirement for additional cinema screens and ten pin bowling alleys in particular. Whilst we consider that the existing cinema offer within and outside of the authority area is sufficient to meet the needs of residents, there may be an opportunity to explore the increase in screens in High Peak should an appropriate scheme be promoted. It is likely that any scheme would be focused on the niche, independent cinema sector, and which could be developed alongside a wider independent leisure offer.
- 9.28 In terms of the ten pin bowling alley requirement, we consider there to be an opportunity to explore requirements with boutique operators as part of a wider mixed use leisure-led scheme, particularly within Buxton, should an appropriate site come forward. Such a development could further enhance the diversity of uses within Buxton, increasing the draw of the centre and therefore benefiting the existing operators.

Key Findings: Principal Centres

Buxton Town Centre

- 9.29 Buxton town centre is the principal commercial defined centre within the southern part of the High Peak authority area. The centre is anchored by the Waitrose foodstore, located to the north, with the associated Spring Gardens Shopping Centre attached to the south and adjacent car parking to the north. Spring Gardens consists of both a covered shopping mall and an external commercial pedestrianised street.

- 9.30 Buxton itself is split into two clearly defined commercial areas, with the 'new town' to the north, and the 'old town' to the south, beyond Buxton Town Hall. The southern part of the town centre is focused around the external market area, but extends further southwards along the A515.
- 9.31 The northern part of the town centre around Spring Gardens comprises the highest concentration of national multiples. To the west of Spring Gardens is Cavendish Arcade Shopping Centre and Buxton Crescent, which includes a range of retail and leisure independent operators and the Buxton Crescent Visitor Experience, where visitors can explore the Victorian Pump Room. To the west of the Crescent and outside of the defined town centre boundary is The Pavilion Gardens and associated open space, along with the Buxton Leisure Centre. A public car park is situated directly to the west of the Pavilion Gardens.
- 9.32 High Peak Council successfully secured £6.6m of Future High Street funding from the Government in December 2021, following the preparation of detailed masterplan and business cases. The funding is only for physical works and focuses on the northern part of the town centre around Spring Gardens and the railway station. Buxton was also successful in securing Heritage Action Zone initiative which will complement the Future High Street funding, helping to reinstate traditional shopfronts and restore vacant heritage buildings.

Glossop Town Centre

- 9.33 Glossop is the key retail destination in the northern part of High Peak, and as such accommodates a diverse range of convenience and comparison operators. There are 23 convenience operators in the town centre, with these being anchored by a particularly strong range of foodstores within Glossop. These include Tesco, Iceland, Aldi, M&S Food and the Lidl store which opened in 2021 at Mill Street. Comparison operators are well represented in Glossop town centre, despite some recent high profile closures such as Peacocks and Edinburgh Woollen Mill.
- 9.34 Vacant units are located throughout the town centre, with particular concentrations observed around Wrens Nest Retail Park and in the west of the centre around Howard Town Retail Park. These vacant units are indicative of changes in town centres that have occurred in recent years, including closure of retail banks (the Barclays bank in Glossop closed in August 2021) and closures of national multiple retail operators, such as Edinburgh Woollen Mill and Peacocks. Notwithstanding this, the vacancy rate observed in Glossop at the time of our visit was broadly similar to the national average figures and as such is not considered to represent significant cause for concern at this time.

- 9.35 Evidence of investment, including the transformation of Glossop Hall, which will result in the use of the Market Hall as space for creative and start-up businesses and food and retail units on the ground floor, will build on these existing strengths. A search of The Requirement List has confirmed that a number of operators, including Poundstretcher, Subway, KFC and Hickory's Smokehouse have an outstanding requirement for new premises in Glossop.
- 9.36 The centre is generally well maintained, as are the retail units themselves, and the public realm is on the whole attractive and pleasant. However, a perennial issue in the town has been the volume of traffic on the A57 High Street and this was observed during our visit. Notwithstanding this, Glossop was well-used at the time of our visit and is considered to be a healthy, vibrant centre.

Other Town Centres

- 9.37 The three smaller town centres in High Peak typically serve a more localised role and provide catchments with their day-to-day retail and service needs. Each of these town centres display vacancies rates lower than or very similar to the UK average of 14.2% (as identified by Experian Goad at November 2021). We summarise the key findings for each of the three town centre's below:
- **Chapel-en-le-Frith** is a relatively small centre, located just to the west of the boundary of the Peak District National Park. The centre provides a reasonable range of operators which are considered to be easily capable of providing for the day-to-day needs of the local community, particularly in respect of convenience goods which are anchored by Morrisons and Co-op Food. Chapel-en-le-Frith has a vacancy rate considerable lower than the current national average, and as such is considered to be a vital and viable centre.
 - **New Mills** is one of the smaller town centres in High Peak, and as such primarily caters to serving day-to-day retail needs. The centre is anchored by a strong convenience goods offer, alongside which is a diverse comparison offer which is comparable in terms of floorspace and units than the current national average. Furthermore, the centre benefits from a vacancy rate which is lower than the current national average. In terms of retailers, the majority of operators within the town centre are independents, although there are a limited number of national multiples such as Sainsbury's Local.
 - **Whaley Bridge** is the smallest town centre in the High Peak authority area, and as such is focused on providing for the day-to-day needs of the local community, with a strong service and convenience goods offer, alongside a more limited comparison offer which provides for both day-to-day as well as more specialist goods. The small size of the town centre is such that

the town has a 'village feel', with a strong community who organise and host a number of events, including an annual carnival in June, and provide for the upkeep of the town centre.

Key Policy Recommendations

General Policy Approach and Town Centre Strategies

- 9.38 We note that High Peak promotes a 'town centre first' approach in its adopted development plan, which we welcome. This is consistent with paragraph 86 of the NPPF (which indicates that planning policy should support the role of town centres at the heart of local communities), paragraphs 87 and 88 (which set out the sequential approach to development), and paragraph 90 (relating to the impact test).
- 9.39 We note that paragraph 017 of the Town Centres PPG indicates that proposals for edge and out of centre retail and leisure developments should be considered with reference to the health of centres that would be impacted upon. In this regard, paragraph 017 states that:
- 'A judgement as to whether the likely adverse impacts are significant can only be reached in light of local circumstances. For example, in areas where there are high levels of vacancy and limited retailer demand, even very modest trade diversion from a new development may lead to a significant adverse impact.'**
- 9.40 We recommend that the authority continues to ensure that the forthcoming plan sets out sequential and impact tests that can be applied in a robust manner to provide for future centres that are fit for purpose.
- 9.41 Whilst non-retail uses will be an increasingly important component of the mix of land uses in principal centres moving forward, there is still a requirement to accommodate new retailers and additional retail floorspace within defined centres wherever possible.
- 9.42 Covid-19 hasn't entirely diluted the human instinct to mix, socialise and observe others going about their business. It has, however, reduced the desire *to travel* in order to shop, eat and socialise. As such, local and district centres are assuming greater importance in serving local needs, and High Peak's centres also appear to have fared relatively well due to their local and independent offer in particular. Allowing a range of main town centre uses, including residential uses, will be key to helping secure their future and ensuring residents and tourists alike continue to visit the centres.
- 9.43 The centres within High Peak are performing relatively well against the UK averages, and the offer of retail, leisure and service floorspace is generally meeting residents needs well. Overall, we consider

- the level of commercial floorspace to be at a level which appropriately meets the needs of residents and we do not recommend a policy approach which seeks to retract the level within the centres.
- 9.44 There has been a shift in some comparison shopping trips but Buxton and Glossop in particular continue to perform important roles in meeting some of the comparison shopping needs of residents. However, due to the centres' locations in proximity to key larger centres such as Stockport, Manchester, Sheffield and a lesser extent Macclesfield, providing a more comprehensive comparison shopping function alongside this competition is likely to be difficult. As such, the centres' focus on the independent market is likely to help differentiate their offer from the larger destinations in proximity to High Peak.
- 9.45 It is clear that Buxton and Glossop in particular will need to diversify in order to provide for a balanced and relevant offer which meets the needs of both residents and visitors throughout the year. As part of our work, we also organised meetings with Economic Development Officers of Derbyshire County Council and the D2N2 Local Enterprise Partnership.
- 9.46 One of the key concerns raised by stakeholders²⁹ in discussions as part of this Study was that centres needed to diversify to retain visits for longer periods of time, encouraging wider spending throughout the centre and longer dwell times. As such, the current priority, which is already being explored by the Council and stakeholders, is the reuse of existing stock, the repurposing of important town centre assets to provide active uses such as leisure, community and residential uses, and wider aesthetic improvements to encourage safe pedestrian movement and promote pleasant town centre environments. Stakeholders were also keen to see the creation of additional leisure opportunities which would encourage longer dwell times, and increasing the level of expenditure available to support local businesses. Community events, small festivals and other opportunities to use outdoor space were also discussed, building on the wider cultural and heritage strengths of the centres.
- 9.47 One of the key priorities for Buxton, along with the current investment, will be to ensure that footfall is encouraged between the two ends of the centre, to help support spending throughout the centre and throughout both the day and the evening. In this regard, whilst the Spring Gardens Masterplan will significantly enhance the northern part of Buxton town centre, it will be important that the southern end, focused around the Market Place, is also enhanced. Encouraging a wider leisure offer and introducing additional uses will help to attract the footfall to the southern part of the centre, particularly working alongside the wider cultural offer and important market provision. Further

²⁹ Specifically officers from Derbyshire County Council and the LEP

opportunities for community uses of both the internal and external spaces could help to bring footfall and create a buzz.

- 9.48 In terms of Glossop, the centre benefits from a range of operators, both independent and national multiple and its linear form is anchored by the Tesco and Wrens Nest to the west and Howard Mills to the east. Encouraging trips throughout the centre is key to securing expenditure and footfall, and it is envisaged that the regeneration of the Glossop Market Hall will assist in creating a destination within the heart of the centre which will encourage that movement of footfall. It is also expected that on the back of the regeneration of these key municipal buildings within Glossop, that new businesses will emerge and the offer will diversify further within the centre, providing opportunities for further independent operators in particular. Again, encouraging footfall throughout the centre through enhancements to the public realm and providing safe pedestrian-friendly areas will assist, particularly on the back of the success of outdoor dining which has risen in particular during the pandemic.
- 9.49 It is important that all of the centres continue to provide that day-to-day retail, leisure and service offer needed by their local catchments, alongside the visitors, and therefore retail and leisure will continue to play an important part in the future health of centres across High Peak. As such, whilst the diversification of uses must form part of future strategies for the centres, and the encouragement of spending from visitors will be integral to the future success, retail, leisure and service uses which residents rely on must continue to be supported. This will also help to retain both convenience and comparison expenditure which otherwise could be lost to competing centres outside of High Peak.
- 9.50 Town centre policies will therefore need to promote diverse centres, which encourage a mix of main town centre uses. Tracking the implications of Permitted Development Rights, and particularly the change of use from commercial to residential uses will be important, to ensure that the centres' focus' is still around the retail and leisure offer so residents can meet their daily needs. This will also help to avoid the loss of expenditure from the centres to other larger competing destinations and encourage sustainable shopping and leisure patterns within High Peak. As such, we recommend the following key priorities to be encouraged within planning policy:
- **Placemaking & Public Realm** – investment into the public realm of the centres and particularly Buxton and Glossop. High quality wayfinding, pedestrian and cycling linkages could also contribute to connecting the ends of Buxton and Glossop more effectively.
 - **Diversifying the leisure and cultural offer** – for centres to thrive they need several roles to attract the diversity and numbers of visitors. Uses such as gyms, entertainment centres, escape rooms,

bars, restaurants and other complementary amenities within the principal centres would increase both the breadth of the type of visitor as well as the time expended and would therefore contribute to the local economy.

- **Residential** – the emerging build to rent sectors could be an opportunity in appropriate locations to bring people into the centres and to drive footfall and patronage to the retail and leisure sector.
- **Independent retailing** – as larger national multiples consolidate, new operators will come forwards.
- **Events** – successful centres are increasingly using public realm/centres to host events and thus attract visitors, examples include Christmas markets, fairs, festivals (food/literature), specialist markets, light nights, art and other displays.
- **Workspace** – provision of contemporary flexible workspace, particularly focusing on Glossop and the opportunities arising through the repurposing of the municipal buildings.

Boundaries

- 9.51 Paragraph 86 of the newly published revised NPPF requires local planning authorities to ‘**define the extent of town centres and primary shopping areas**’, with there now being no specific requirement to identify primary and secondary frontages.
- 9.52 The Ministry for Housing, Communities and Local Government has confirmed that the deletion of this requirement is to encourage a more positive and flexible approach to planning for the future of town centres due to the rapid changes taking place in the retail and leisure industries. However, the removal does not preclude local planning authorities from identifying primary and secondary shopping frontages where their use can be justified.
- 9.53 We consider there to be no benefit in defining primary and secondary frontages in the defined centres in the authority area and that future flexibility should be applied to enable the take-up of vacant units by wider mix of uses. We therefore consider the removal of defined frontages to be a sensible approach within High Peak.
- 9.54 Annex 2 of the revised NPPF indicates that a primary shopping area is the ‘**Defined area where retail development is concentrated**’.

- 9.55 Annex 2 also identifies that a town centre is the **'Area defined on the local authority's policies map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area'**.
- 9.56 Notwithstanding the above, we believe that the offer in most of the centres is generally varied and that the retail uses are not typically located in a manner which lends itself to the identification of a primary shopping area ('PSA'). The exception to this is Buxton, which we recommend to retain the currently defined PSA, as defined by the 2016 Local Plan.
- 9.57 As such, for Glossop, Chapel-en-le-Frith, New Mills and Whaley Bridge, we do not believe that there is any requirement to differentiate between a PSA and a wider town centre boundary.
- 9.58 We also consider that the currently defined town centre boundaries for Buxton, Glossop, New Mills and Whaley Bridge as defined by the 2016 High Peak Local Plan to be appropriate and do not recommend any changes. The only amendments to the currently defined boundaries are for Chapel-en-le-Frith.
- 9.59 For Chapel-en-le-Frith, we have provided our recommendations for the town centre boundary at Appendix 5. The proposed amendments in Chapel-en-le-Frith would alter the defined centre boundary to include the retail units on the southern side of Market Street between 5 High Street and Thornbrook Road. The proposed boundary would follow the rear of these properties and run parallel to Market Street in order to include the parade of units at 1-6 Thornbrook Road. This suggested boundary is recommended in order to include the units in this location, which are primarily focused on meeting town centre needs and will assist in the protection of the future vitality and viability of the centre, in accordance with local and national policy.
- 9.60 The existing and proposed boundaries for each centre, as described above, are depicted on plans at Appendix 5.

Centres Hierarchy

- 9.61 Town centres are defined at Annex 2 of the NPPF, however there is no longer any definition provided in the NPPG or Town Centre PG to differentiate between centres of different sizes.
- 9.62 The now superseded Planning Policy Statement 4: Planning for Sustainable Growth provided definitions of what forms a town, district and local centre at Annex B. These definitions are considered

to be useful in setting the context of the centre hierarchy for High Peak. The definitions are provided below:

- **Town centre** - Town Centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability.
- **District centre** - District centres will usually comprise of groups of shops often containing at least one 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.
- **Local centre** - Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.

9.63 The centres assessed across the Borough have been categorised by the different levels in the hierarchy by considering a range of factors to ensure that they are proportionate to the function in which they perform. Factors including the mix of uses provided, the social and community uses in the centres, the number of units and amount of floorspace present along with the overall role and function that the centres play within their locality, including the location of the centres within the administrative area.

9.64 We believe that Buxton and Glossop town centres are clearly the principal town centres in the Borough and have a catchment area which is more extensive than the other three town centres. By virtue of their retail and leisure offer, they are also able to attract custom from across the Borough. As such, both Buxton and Glossop are still performing a principal town centre role and therefore we agree that they continue to fall within the Main Town Centre category within Policy S 2.

9.65 Notwithstanding this, although smaller centres, Chapel-en-le-Frith, New Mills and Whaley Bridge each continue to perform important market town centre roles and provide for the day-to-day needs of the residents. In this regard, each of the three centres provide a range of retail, leisure and service

facilities for the relatively rural catchments of High Peak. The three centres therefore continue to perform a key town centre role within the authority area, albeit to a lesser extent than Buxton and Glossop, and we agree that they should continue to be designated within the Smaller Town Centre category within the hierarchy.

9.66 Policy S 2 also designates 'Larger Villages' and Harpur Hill Local Centre in the third tier of the hierarchy. The full list of Larger Villages are set out at the start of the Policy, and include Charlesworth, Chinley, Furness Vale and so on. Although detailed healthchecks of these centres did not form part of the commission for this Study, we do consider it appropriate to include these centres in the hierarchy as local centres, in light of them serving a very localised catchment, often focused around a small convenience store or newsagent, providing facilities for residents to purchase 'top up' convenience goods such as bread and milk. Harpur Hill local centre is yet to be built, but will provide for a localised function providing space for small retail and leisure operators, alongside a nursery, and the proposed relocated Aldi which will draw trade from a wider catchment.

9.67 In this regard, we consider that the hierarchy of centres relating to the Larger and Smaller Town Centres and Local Centres as set out at the currently adopted Policy S 2 of the 2016 High Peak Local Plan to be appropriate.

9.68 We do consider there is a requirement to clarify as to what is meant by 'Other Settlements' and whether for the purposes of applying the sequential and impact policy tests, these are also defined as local centres, or are more of a neighbourhood parade or centre format.

Thresholds

9.69 Paragraph 90 of the NPPF states that it is appropriate to identify thresholds for the scale of edge of centre and out of centre retail and leisure development that should be the subject of an impact assessment. Any such threshold policy applies only to the impact test (all planning applications for main town centre uses that are not in an existing centre and not in accordance with an up-to-date development plan will generally be the subject of the sequential test³⁰).

9.70 The purpose of applying an impact threshold within the development plan which deviates from the national threshold of 2,500 sq.m, is to allow the Council to retain appropriate control in respect of the potential for development to impact on the future health of defined centres within the authority

³⁰ With the exception (in accordance with paragraph 89 of the NPPF) of small scale rural office proposals and other small scale rural development

area. By applying a lower threshold, applications for developments which could potentially have a harmful effect on the overall vitality and viability of a defined centre, will need to be supported by a proportionate impact assessment which sets out the potential trade diversion impact assumptions.

9.71 Paragraph 16 of the Town Centres PPG provides specific guidance in relation to floorspace thresholds and states:

‘The impact test only applies to proposals exceeding 2,500 square metres gross of floorspace unless a different locally appropriate threshold is set by the local planning authority. In setting a locally appropriate threshold it will be important to consider the:

- **scale of proposals relative to town centres**
- **the existing viability and vitality of town centres**
- **cumulative effects of recent developments**
- **whether local town centres are vulnerable**
- **likely effects of development on any town centre strategy**
- **impact on any other planned investment.’**

9.72 Using the above guidance, we set out the justification to support our view that a lower threshold should be applied across the hierarchy of centres within the authority area. To note, the current adopted policy adopts a threshold across the whole authority area for proposals over 200 sq.m.

9.73 We typically do not consider that applying a single threshold to apply to all types of centre in the authority area is appropriate, given the different scale and nature of each of the centres. However, having reviewed the current offer in the town centres, the size of units and their catchments, we consider the Council’s current adopted policy approach to be relevant in this case and do not recommend any changes to the current adopted policy threshold.

9.74 It is important to emphasise that, whilst the locally set threshold would require the submission of an impact assessment for all edge-of-centre and out-of-centre developments exceeding the thresholds, national guidance states that the impact test should be undertaken in a proportionate and locally appropriate way, commensurate to the scale of development proposed. The level of detail would typically be agreed with planning officers during the pre-application process in order to avoid overly onerous requirements that may otherwise restrict and delay development opportunities from coming forward.

Monitoring Recommendations

9.75 This study provides the Council with its floorspace needs requirements. To establish whether the requirements for new floorspace (by type) are being met and more generally to monitor the performance, the Council should monitor:

- planning permissions for retail floorspace - by type, amount (sq.m gross and net), location and retailer;
- completions of retail floorspace - by type (convenience and comparison), amount, location and retailer;
- mix of uses in the centres as per the healthchecks set out above, including vacancies; and
- healthchecks of designated centres. This is particularly important given the current commercial and economic situation.

9.76 The monitoring recommended above is relatively straightforward and should be conducted on a rolling basis for the first two items and annually or every two years for the latter two items.

9.77 The recommendations set out in this report may need to be adjusted, in the future, due to changing market conditions, demographic changes and the impact of developments elsewhere. They may also need to be adjusted if standard assumptions, in particular those relating to expenditure growth and e-tailing, change. The role of monitoring is crucial in highlighting changes in the assumptions that underpin this study and we recommend regular monitoring to the Council.

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