Stockport Borough Wide Retail & Leisure Study, 2019

December 2019

Volume 1 of 2 – Main Report

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1.0 Introduction

1.1 Instruction

1.1.1 WYG Planning ('WYG') has been commissioned by Stockport Metropolitan Borough Council to undertake a borough wide Retail and Leisure Study. The key purpose of this study is to act as the evidence base to assist in the formulation of future development plan policy and land use allocations, as well as providing baseline information to assist in the determination of planning applications for retail and leisure development. The study supersedes the previous retail and leisure studies completed on behalf of the Council namely the 2014 Retail Study Update undertaken by hollissvincent.

1.1.2 This Study will be used to inform policy in the emerging Stockport Local Plan which will identify how land is used and help determine what will be built where, via the application of appropriate allocations and policies.

1.1.3 The main objective of this study is to provide a National Planning Policy Framework (NPPF) and National Planning Policy Guidance (NPPG) compliant Retail & Town Centre Study, which provides the Council with an up-to-date objective assessment of retail and leisure development needs, together with a clear understanding of retail and leisure provision and potential strategic responses/recommendations.

1.1.4 The study explores retail and commercial leisure need over a fifteen year period to 2034 and provides an up-to-date review of the performance of Stockport Town Centre and the eight district centres within the borough. The objectives of the study are to:

- review relevant national and local retail and leisure planning policy as a context for the study;
- review relevant retail and leisure trends and forecasts identifying current and future challenges to the borough's town centre district centres;
- carry out health check assessments of Stockport Town Centre and the borough's 8 district centres;
- assess the current pattern of convenience and comparison goods shopping, food and beverage, cultural and leisure offer in Stockport and identify deficiencies in provision;
- identify the future retail and leisure capacity/quantitative needs for the town and district centres;
- undertake an assessment of operator demand for new retail and leisure facilities in the town and district centres;
- provide recommendations on the appropriate extent of town and district centres including primary shopping areas and primary and secondary shopping frontages;
- advise on a locally set floorspace threshold for the purpose of requesting impact assessments for retail and leisure floor space outside of town centres;

- provide recommendations on any amendments required to the current retail and leisure hierarchy in Stockport;
- provide strategic advice on the overall future retail and leisure need and the implications for policies and strategies to be included in the Local Plan; and
- provide initial views on broad locations/opportunities within or adjacent to the main town centres for future retail and commercial leisure development if a need is identified.

1.1.5 Key contributions to the above objectives have been a number of items of new empirical research. First, we have commissioned NEMS Market Research to undertake a new a shopping survey of 1,900 households. The Study Area for the survey comprises 19 zones which are based on postcode areas.

1.1.6 The second are of empirical research, has involved the commissioning of in-centre surveys with visitors in the town and district centres. The surveys, again undertaken by NEMS Market Research, involved interviewing 1,000 of visitors across the town and district centres in the borough. 200 of the surveys were undertaken in Stockport Town Centre, whilst 100 were undertaken in each of the 8 district centres.

1.1.7 The third area of research has been in relation to the assessment of the health of Stockport Town Centre and the 8 district centres in the borough. This exercise has incorporated land use surveys of these defined centres, along with a review of health check indicators and an appraisal of the qualitative results of the household survey data.

1.1.8 In addition, as part of the assessment of key town centre health issues engagement has taken place with key Stakeholders in Stockport to obtain views on, inter alia, existing town/district centre strengths, weaknesses, opportunities and threats; potential suggested town/district centre improvements; and retailer/leisure provider requirements/needs.

1.1.9 Finally, the Study is also informed by industry research having regard to published recognised retail and leisure data including demand/requirements from retail and leisure operators for presence in the defined town centres.

1.2 Structure of Study

1.2.1 Our study is structured as follows:

Section 2 - summarises the current national and local planning policy context for retail and leisure development issues in Stockport;

Section 3 - provides a context for the Study by summarising the current and emerging key retail and leisure trends in the UK;

Section 4 - sets out the key market research which informs the Study;

Section 5 - analyses retail market shares and patterns in the Study Area;

Section 6 - sets out our qualitative assessment/overview of the vitality and viability of Stockport Town Centre and the district centres in the borough;

Section 7 - provides our assessment of the need for further convenience and comparison goods retail floorspace over the assessment period;

Section 8 - sets out our assessment of the need for further commercial leisure floorspace over the assessment period; and

Section 9 - summarises our key findings and sets out our recommendations.

2.0 Planning Policy Context

2.1 Introduction

2.1.1 Given that this Study seeks to provide evidence to assist in the production of the Council's new emerging Local Plan, it is important to review existing national planning policy of pertinence to retail and commercial leisure matters to explore the context for the Study and how it may impact upon the production of future development plan policy.

2.1.2 This section also provides an overview of the Council's policies, insofar they are relevant to retail and commercial leisure matters. A more detailed review of relevant national and local planning policy is also contained at Appendix A.

2.2 National Planning Policy

2.2.1 National Planning Policy for England is contained within the National Planning Policy Framework (NPPF) (February 2019). The main theme of the NPPF is that there should be 'a presumption in favour of sustainable development'.

2.2.2 The NPPF recognises the need to ensure the vitality and viability of towns and cities and support the role that they play at the heart of local communities by taking a positive approach to their growth, management and adaption.

2.2.3 Paragraphs 86 and 89 respectively, requires local planning authorities to adopt a sequential approach and require an impact assessment (if the development is over a proportionate, locally set threshold) for retail and commercial leisure development outside of town centres which are not in accordance with an up-to date Local Plan.

2.3 Development Plan Policy

2.3.1 The relevant development plan for Stockport comprises of the Stockport Core Strategy DPD (adopted March 2011) and the saved policies of the Stockport Unitary Development Plan Review (adopted May 2006).

Stockport Core Strategy (2011)

2.3.2 The retail and commercial leisure policies of relevance within the Core Strategy are as follows:

- Policy CS5: Access to Services – seeks to safeguard and enhance the vitality and viability of the town, district and local centres. Also seeks enhancement of Stockport as the borough's primary settlement by controlling the scale, level and mixture of uses within the defined centres.

- Policy CS6: Safeguarding and Strengthening the Service Centre Hierarchy – establishes the centre hierarchy in the borough with Stockport Town Centre identified as the highest order centre, followed by 8 'district centres', 9 'local centres' and 15 'other' local centres.

- Policy AS-1: The Vitality and Viability of Stockport's Service Centres – seeks to safeguard and enhance the defined centre's retail function, their viability, viability and accessibility.
- Policy AS-3: Main Town Centre Uses & Hot Food Takeaways Outside Existing Centres - requires planning applications for A1 uses over 200sq m in edge and out-of-centre locations to be accompanied by an impact assessment.
- Policy AS-4: Visitor Accommodation and Other Tourism Development - establishes a specific sequential approach to hotel development in the borough, directing it in the first instance to Stockport Town Centre. It also encourages the development of small sale visitor accommodation in Marple, Romiley and Marple Bridge.

Stockport Unitary Development Plan (2006) (UDP)

2.3.3 The relevant saved retail and commercial leisure policies of the UDP are summarised as follows:

- Policy PSD 2.1: Retail Development in District and Local Centres - permits the development of convenience and comparison retail uses within District and Local Centres, providing they are of an appropriate scale and character.
- Policy PSD 2.2: Service Uses in the Town Centre, District and Large Local Centres – seeks to ensure the units within the Primary Shopping Frontages remain in retail use by restricting the development of non-retail uses in these areas.
- Policy PSD 2.4 Service Uses in Other Local Centres - seeks to restrict the loss of A1 retail uses to other uses in the Other Local Centres through controlling the change of uses.
- Policy PSD 2.5: Other Developments in the District Centres - allows for the development of leisure, community and commercial development within the District Centres, providing they are of an appropriate scale. Policy also allows residential providing it does not negatively impact the centres vitality and viability or its role as a location for offices.
- Policy PSD 2.6: Local Shops - recognises the important role local convenience shops which are located outside of defined centres can play for communities.
- Policy PSD 2.7: Residential Development in Local Centres - permits residential development in local centres, providing they do not negatively impact on the vitality or viability of the centre.
- Policy TCG2.1: Central Shopping Area (CSA) - seeks to ensure that the Central Shopping Area remains the primary area for retail development and to ensure this it gives priority and permits retail development proposals.
- Policy TCG2.2: Great Portwood Street Area - identifies Great Portwood Street as being sequentially preferable in meeting Stockport's deficiencies after the CSA.

- Policy TCG3.1: Riverside - allows the extension and development of new leisure facilities providing they respect the area's historic character.
- Policy TCG3.2: Cultural, Leisure and Heritage Quarter - seeks to focus and concentrate a range of cultural, leisure and heritage facilities in the area extending from Grand Central and Daw Bank down to St Peters Square and Lower Hillgate.

2.4 Other Relevant Documents

Future Stockport – Supplementary Planning Document for the Town Centre Masterplan

2.4.1 The Supplementary Planning Document (SPD) establishes the need for the regeneration of Stockport Town Centre and identifies the priority development projects for the delivery of the Future Stockport Masterplan together with overarching development principles for the town centre.

2.4.2 The strategy set out in the document is supported by six key objectives which includes to: reinforce Stockport's position as a sub-regional shopping destination; raise the quality and range of attractions within the town centre; and upgrade the public realm. The SPD identifies six key development projects which include: a new public square (Mersey Square); a revitalised and expanded Merseyway Shopping Centre; provision of a new public transport interchange; a revitalised St Peter's Square; and the development of a new high quality eastern gateway providing retailing and complimentary uses to the town centre.

Emerging Greater Manchester Spatial Framework [GMSF] (Revised Draft, January 2019)

2.4.3 The only emerging policy of relevance is GM-E 3 (New Retail and Leisure Uses in town Centres). The policy recognises Stockport as a second-tier centre in the context of the City Region. It recognises that it is appropriate to direct retail development towards designated centres in order to maintain their vitality, viability and to meet the needs of residents.

2.5 Summary

2.5.1 National planning policy highlights the need to promote the vitality and viability of town centres through a town centre first approach and a defined hierarchy of centres. Applicants for main town centre uses are required to pass the sequential approach to site selection and provide a full assessment of the impact on the vitality and viability of protected centres. The Stockport Core Strategy and saved policies are in accordance with the general trend of the most recent national policy guidance, identifying a hierarchy of centres and the town centre first approach.

2.5.2 As required by this commission, policy recommendations on the basis of updates to the evidence base and national guidance are provided in Section 9.

3.0 Current/Future Retail & Commercial Leisure Trends

3.1 Introduction

3.1.1 In order to set out the wider context for the Study and inform our advice on the need for additional retail and leisure floorspace in Stockport borough, we summarise prevailing retail and leisure trends and the Government's response to 'transform town centres' below and provide a more detailed overview of each at Appendix B. Our overview draws on recognised retail and leisure data sources, including research by Experian, Global Data and Mintel.

3.2 Prevailing Retail/leisure trends

The Changing Retail Climate

3.2.1 The last two years have been particularly challenging for retailers. Deloitte report that 2018 was the year that saw the most store closures and job losses since the 2008 global recession. Retail is an industry which is under pressure with many retailers finding themselves in an uncomfortable position as margins are squeezed between weakening demand and rising costs. In 2019, retailers have continued to experience challenges, these challenges are expected to continue into the near future. The key issues impacting many retailers and town centres in the UK are:

- The continued rise in internet shopping;
- Increased town centre vacancy levels & store closures; and
- The decline in investment due to the uncertainty surrounding Brexit.

The continued rise in internet shopping

3.2.2 The strong increase in online shopping in the past decade has lifted the share of non-store retail sales to a level where at 2018 it accounted for close to 20% of total retail sales, against a little below 5% in 2008. It is estimated that the value of internet sales in 2018 totalled some £68.1bn.

3.2.3 Non-store retailing is expected to continue to grow rapidly, outpacing traditional forms of spending. It is anticipated to continue to increase at a faster pace than total retail sales until at least 2028.

Increased town centre vacancy levels & store closures

3.2.4 In the first half of 2019 a net 1,234 stores disappeared from Britain's top 500 town centres compared with a 222 store loss over the equivalent period in 2017. Many retailers have found themselves struggling to pay their rents and other overheads, such as a rising minimum wage and business rates. This, together with consumers doing more of their shopping online, has resulted in a large number of national retailers restructuring or going into administration.

3.2.5 Current trading conditions for a number of retailers are tough. Store closures/changes can result in particularly significant impacts at medium/smaller sized town centres, which tend to be the subject of higher vacancy rates, and which have also often suffered related reductions in rental levels and footfall in recent years.

3.2.6 Stockport Town Centre itself has experienced a number of store closures, the most notable one being the closure of the town centre Marks & Spencer in April 2018. Whilst the town centre Debenhams store is not currently on any store closure list, the future of the store is uncertain given the recent announcements by its owners.

Uncertainty surrounding Brexit

3.2.7 At the time of writing the final outcome of the Brexit negotiations remain uncertain. A withdrawal agreement is now agreed between the UK and the EU, and EU leaders have agreed another Brexit delay until 31 January 2020. A Withdrawal Agreement Bill required to ratify the agreed deal has finally been approved by Members of Parliament. Passing of the bill will set in motion the passage of the Brexit to ratification by the House of Lords and the European Parliament.

3.2.8 The UK continues to face uncertainty which will have an impact on investment decisions and 2020 will continue to be an uncertain period for the UK consumer. It is difficult to predict what will happen given that so much depends on the details of the UK's exit from the EU.

The Continued Rise of the Grocery Discounter

3.2.9 Shoppers have turned away from food superstores in recent years with discount grocers (principally Aldi and Lidl) benefitting from increases in their market share. The discount grocers continue to have ambitious store opening targets in the coming years whilst the 'Big Four Grocers' look to continue to develop their smaller 'top-up shopping' store formats and reconfigure/refurbish their existing stores to include concessions.

The Food & Drink Sector

3.2.10 In recent years, town centres have also increasingly relied upon an expanding food and drink sector to bring some vacant units back into active use. Food and drink operators now require units which are in the retail heart of a centre. However, over the last year or so there is evidence that the national multiple food and drink market is becoming saturated with numerous operators restructuring, closing outlets, or going into administration.

3.2.11 Saturation in the market may a contributing factor in the slow take up of the new food and drink units at Redrock in Stockport Town Centre, which are well suited to national multiple operators. However, food and drink uses are underrepresented in Stockport Town Centre leaving substantial room for further growth in the town centre food and drink sector.

Other Commercial Leisure Uses

3.2.12 There are a number of emerging leisure concepts which are also helping to anchor retail environments, including bowling alleys, virtual reality zones, trampolining and crazy golf. These concepts can assist centres in providing a point of difference with the competition, ensure that visitors' dwell times are increased, and assist a town's evening economy. A number of the concepts do however require reasonably large footprint units/space which primarily due to physical constraints, town centres are not always able to provide/offer.

3.2.13 However, as the principal landlord in Stockport Town Centre, the Council is able to balance property rents against the wider benefit of generating footfall in the town centre and has identified units suitable for these types of commercial leisure uses in the centre.

3.3 Governments Response to 'Transform Town Centres'

Changes in Permitted Development Rights and Use Classes

3.3.1 In October 2018 MHCLG issued a consultation document titled 'Planning Reform: Supporting the high street and increasing the delivery of new homes. The changes which the Government has now adopted (25th May 2019) to support greater diversity and footfall on the high street following the 'Planning Reform' consultation include the following amendments to the GPDO:

- A new class JA of the General Permitted Development Order (GPDO) which permits a change of use of a building from a use falling within Class A1 (shops), Class A2 (financial and professional services), or Class A5 (hot food takeaways) or from use as a betting office, pay day loan shop or launderette, to a use falling within Class B1 (a) (offices).
- In Class M (residential conversion from A1 shops, A2 offices, betting or pay day load shop), A5 take-aways have been added to the pre-existing uses that can be changed to residential, together with a clarification of the retail impact assessment that is required.
- Part 4, Class D (temporary use of various business premises) has been amended by enlarging the uses to which the use of the specified business premises can be changed to include Class D1(a) (the provision of any medical or health services except the use of premises attached to the residence of the consultant or practitioner), Class D1(d) (the display of works of art (otherwise than for sale or hire)), Class D1(e) (museum), Class D1(f) (public library or public reading room), or Class D1(g) (public hall or exhibition hall). The single period of the temporary use has been extended from 2 to 3 years.

3.3.2 The regulations do not include the proposed permitted development right allowing upward extensions to create new housing, though the Government's consultation response said it still intends to proceed with this later this year.

Business Rate Relief

3.3.3 In the 2018 Budget the Chancellor confirmed the Government will cut business rates by a third for small town centre retailers/businesses with a rateable value of less than £50,000 for two years.

3.3.4 At the same time the Government also announced the introduction of a digital services tax from April 2020. The Government is proposing a 2% tax rate against the sales that large digital companies make in the UK.

Funding to Support Town Centres

3.3.5 The Government's 'Towns Fund' (which comprises the 'Stronger Towns Fund' and 'Future High Street Fund') involves a total fund of £3.6bn to support struggling town centres. Overall, the Government has invited 100 places to develop proposals for funding from the fund, with Cheadle District Centre one of the towns set to benefit from the fund. The towns eligible for support from the fund include places with industrial and economic heritage but have not benefitted from economic growth in the same way as more prosperous areas.

3.3.6 Plans are to be drawn up by communities, business and local leaders with the purpose of transforming their town's economic growth prospects with a focus on improved transport, broadband connectivity, skills and culture. The Government is intending to publish a prospectus to guide towns through the process and set eligibility criteria for funding.

3.3.7 A total of £241m is available to support towns in 2020-2021, and the 100 towns can bid for up to £25m each. The Government is intending to publish a prospectus to guide towns through the process and set eligibility criteria for funding.

3.4 Potential Impact of Trends on Centres within Stockport borough

3.4.1 Stockport Town Centre and the borough's district centres continue to face a number of challenges, particularly from increasing competition from the internet, business rates, multichannel retailing, polarisation of retailing, and out-of-centre retail/leisure developments. These challenges will impact on the performance, vitality and viability and the future strategy the centres.

3.4.2 It is important that Stockport Town Centre and the borough's district centres are able to respond to continued changes in the retail and leisure sector, and that they provide (or continue to provide) an offer/destination which distinguishes them from competing centres and out-of-centre retail and leisure destinations.

3.4.3 Centre Strategies need to be able to support the continued development/changes in the 'high street' if they are to successfully compete. Such strategies may seek to:

(1) provide a good mix/variety of retail and leisure uses;

(2) attract a mix of additional land uses beyond retail/leisure, including residential, educational, community and office uses;

(3) build on existing cultural/heritage/tourist attractions;

(4) enhance existing town centre markets and speciality retailing;

(5) provide a high quality shopping/leisure experience;

(6) provide convenient, affordable and accessible town centre parking;

(7) promote and encourage events in the town centre;

(8) embrace, and not compete against, multi-channel retailing; and

(9) be responsive to changes in technology (the 'digital high street').

3.4.4 The key purpose of Town Centre Strategies should be to seek to build on the existing individuality of centres, ensuring centres are be a focus/hub for their communities, and extend the 'dwell time' and spend of visitors/residents visiting the town centre which in turn will support the vitality and viability of the centres.

4.0 Original Market Research

4.1 Introduction

4.1.1 This study is informed by three key areas of original market research. The two key areas being:

- a telephone household survey;
- in-centre visitor surveys; and
- key stakeholder engagement.

4.1.2 Each of the 3 key areas of market research are summarised in turn below.

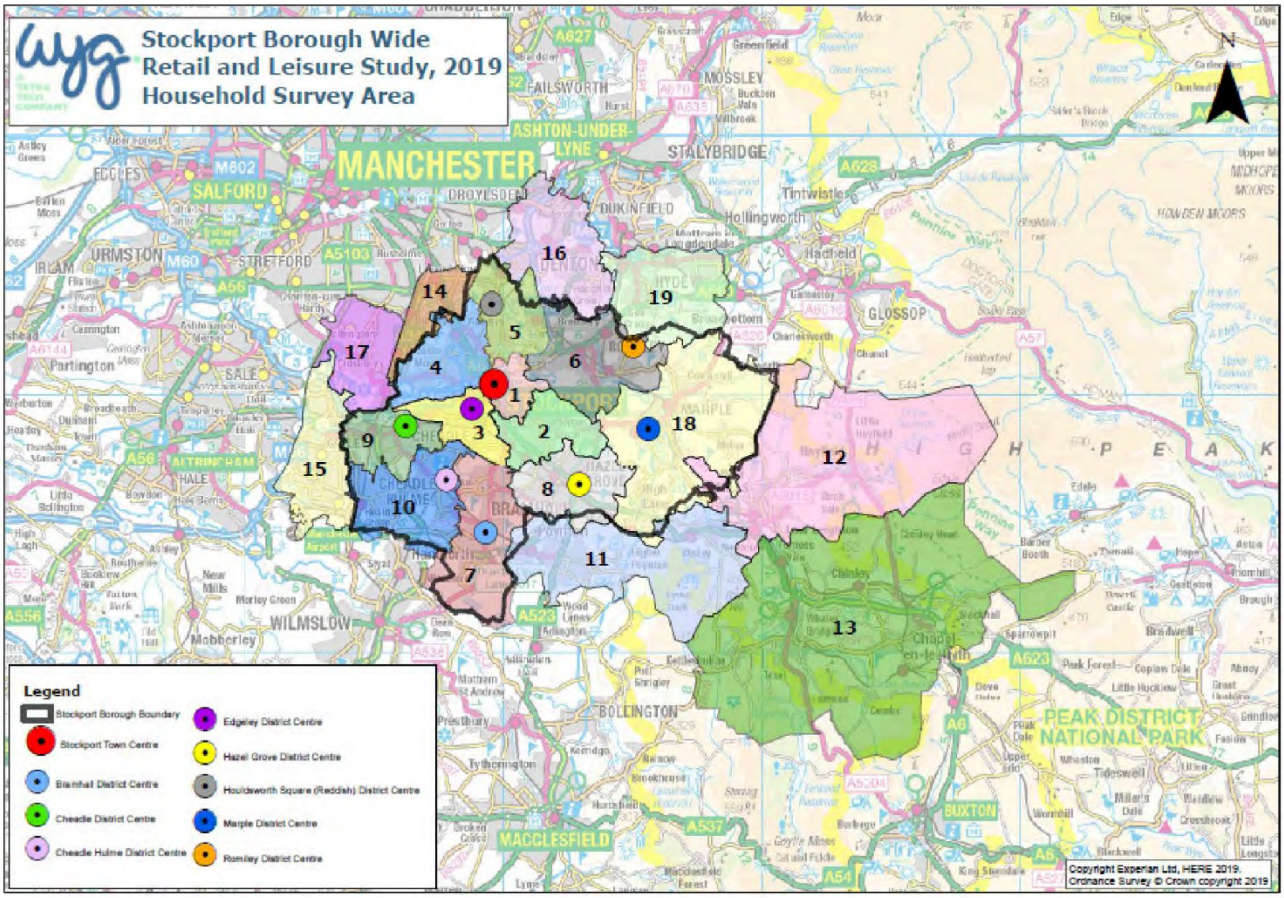
4.2 Telephone Household Survey

4.2.1 A key requirement of this Study is the detailed understanding of shopping and leisure patterns in terms of the use of centres and the identification of the centres' catchment areas. WYG commissioned specialist market researchers NEMS to undertake a comprehensive household telephone survey to identify consumers' habits and preferences in the Study Area.

4.2.2 The undertaking of original market research enables in-depth analysis at a local level and allows the evaluation of the trade draw of particular town centres. The use of specifically commissioned and tailored survey research is fundamental to identifying the likely capacity for future retail and leisure needs across the Study Area. Notwithstanding this, WYG acknowledges that there can be limitations to survey research, particularly with regard to the sample size which can be achieved, and the results should therefore be taken to be a broad indication of consumer preferences.

4.2.3 The household survey was undertaken in July 2019. The survey involved 1,900 households across a defined Study Area which comprises 19 separate zones. The Study Area, as shown in Figure 4.1 below, is identical to that adopted in the 2014 Retail Study Update. It extends beyond Stockport borough to the east, west and north where, to some extent, residents of these visit retail and leisure facilities in Stockport borough.

Figure 4.1 - Study Area



4.2.4 Figure 4.2 below details the postcode sectors which make up the survey zones.

Figure 4.2 - Postcodes by Survey Area

Survey Zone	Postcode Sector
1	SK 1 1, SK 1 2, SK 1 3, SK 1 4
2	SK 2 5, SK 2 6, SK 2 7
3	SK 3 0, SK 3 8, SK 3 9
4	SK 4 1, SK 4 2, SK 4 3, SK 4 4, SK 4 5
5	SK 5 6, SK 5 7, SK 5 8
6	SK 6 1, SK 6 2, SK 6 3, SK 6 4
7	SK 7 1, SK 7 2, SK 7 3
8	SK 7 4, SK 7 5, SK 7 6
9	SK 8 1, SK 8 2, SK 8 4
10	SK 8 3, SK 8 5, SK 8 6, SK 8 7
11	SK 12 1, SK 12 2
12	SK 22 1, SK 22 2, SK 22 3, SK 22 4
13	SK 23 0, SK 23 6, SK 23 7, SK 23 9
14	M 19 1, M 19 2, M19 3

Survey Zone	Postcode Sector
15	M 22 0, M 22 1, M 22 4, M 22 5, M 22 8, M 22 9
16	M 34 2, M 34 3, M 34 5, M 34 6, M 34 7
17	M 20 1, M 20 2, M 20 3, M 20 4, M 20 5, M 20 6
18	SK 6 5, SK 6 6, SK 6 7, SK 6 8
19	SK 14 1, SK 14 2, SK 14 3, SK 14 5

4.2.5 The results of the household survey, inter alia, are utilised to calculate the expenditure claimed by each existing retail facility within the Study Area, a process which is considered in Section 7.

4.2.6 The findings of the household survey are further used to assess customers' experience and behaviour, one of the key indicators that inform our qualitative health check assessments of Stockport Town Centre and the eight district centres, which can be found at Appendices F and G, respectively.

4.3 In-Centre Visitor Surveys

4.3.1 WYG commissioned NEMS Market Research to undertake in-centre surveys in Stockport Town Centre and each of the eight district centres of Bramhall, Cheadle, Cheadle Hulme, Edgeley, Hazel Grove, Marple, Reddish (Houldsworth Square) and Romiley. The purpose of the surveys is to provide an insight into the views and behaviours of customers, residents and visitors in relation to their visits to the town and district centres in Stockport borough.

4.3.2 The in-centre surveys were undertaken in September 2019. For each centre, the surveys were undertaken at various locations across each centre and over several days, to ensure that a range of respondents were questioned. In total, 1,001 surveys were completed across the borough, with 200 surveys completed in Stockport Town Centre and 100 surveys completed in each of the district centres (excepting Marple, where 101 surveys were completed).

4.3.3 The results of the in-centre visitor survey are used to assess customers' experience and behaviour, one of the key indicators that inform our qualitative health check assessments of Stockport Town Centre and the eight district centres. The findings of the in-centre survey are detailed as part of the health check assessments of the town and district centres, which can be found at Appendices F and G, respectively.

4.4 Key Stakeholder Engagement

4.4.1 In order to inform the qualitative analysis in this study we have engaged with key stakeholders in Stockport borough. The objective of the key stakeholder engagement was to gather views on any strengths, weaknesses, opportunities, threats in centres/retail and leisure provision, along with suggested improvements to the defined centres.

4.4.2 Key stakeholders were invited to complete a feedback form to provide information their town or district centre of interest. This was emailed to eight key stakeholders in September 2019, comprising seven Stockport Town Centre and one in Bramhall District Centre. Copies of the returned forms are provided at Appendix C.

4.4.3 The findings of the key stakeholder engagement are used to inform our qualitative health check assessments of Stockport Town Centre and the eight district centres, which can be found at Appendices F and G, respectively.

5.0 Retail Market Share Analysis and Retail Provision

5.1 Introduction

5.1.1 Drawing on the findings of the household telephone survey this section summarise the convenience and comparison goods retail market share patterns within the Study Area. In order to provide some context for these market share patterns this section firstly:

- provides an overview of the socio demographic context of Stockport borough;
- sets out the sub-regional centre hierarchy;
- summarises the existing retail provision in Stockport borough; and
- summarises existing retail facilities within the main competing centres.

5.1.2 A detailed analysis of the convenience and comparison goods retail market share patterns within the Study Area is provided at Appendix D. An analysis of existing leisure provision and leisure market share patterns is provided as part of the commercial leisure need assessment set out in Appendix E.

5.2 Socio Demographic Context of Stockport borough

5.2.1 A population profiling exercise has been undertaken utilising the Experian Mosaic database to establish the socio demographic profile of the borough. A national UK average is also provided so as to enable a comparative assessment to be undertaken. The breakdown and definition of each Experian Mosaic group is provided at Appendix F.

Figure 5.1 - Experian Mosaic Profiling (%)

Mosaic Group	Stockport	UK Average
Population (Adults 18+)		-
A: City Prosperity	0	4
B: Prestige Positions	16	7
C: Country Living	0	7
D: Rural Reality	0	7
E: Senior Security	15	8
F: Suburban Stability	9	6
G: Domestic Success	13	8
H: Aspiring Homemakers	12	9
I: Family Basics	6	7
J: Transient Renters	8	6
K: Municipal Challenge	3	6
L: Vintage Value	6	6

Mosaic Group	Stockport	UK Average
M: Modest Traditions	6	5
N: Urban Cohesion	1	5
O: Rental Hubs	3	8
U: Unclassified	0	1
Total	100	100

Source: Experian Mosaic Report

Notes: Population derived from Mosaic report – 2017 estimate Adults 18+ / Figures may not add due to rounding

5.2.2 The Experian Mosaic results highlight that when compared to the UK average Stockport borough contains:

- a lower proportion of the population in the 'City Prosperity' (high status and wealthy elite households living in expensive urban properties) category;
- a much higher proportion of the population in the 'Prestige Positions' (families with substantial income/retired in sizeable homes/upmarket suburban homes/high achieving) and 'Senior Security' (prosperous older households/retired people in comfortable suburban homes) categories;
- a much lower proportion of population in the 'Country Living' (prosperous families and older households/retired people living in country houses/small countryside villages) and 'Rural Reality' (people living in expanding developments/affordable village homes/inexpensive housing/removed communities within rural locations) categories;
- a higher proportion in the 'Suburban Stability' (mature couples/families, some with older or adult children in family homes with mid-range incomes);
- a higher proportion of 'Domestic Success' (affluent families in upmarket housing/well qualified singles/families in modern detached homes/traditional mid-range suburbs) and 'Aspiring Homemakers' (younger and settled families in affordable/modest homes/fashion conscious young singles/partners setting up home/young singles renting in family suburbs);
- a broadly similar proportion of those falling within the 'Family Basics' (stable families renting from social landlords/families where expenditure can exceed income/ younger families with budget home/families living in areas of high deprivation) and 'Transient Renters' (younger singles and couples/maturing singles renting low cost properties) categories;
- a lower proportion of residents within the 'Municipal Challenge' category (long term renters/older social renters/hard-pressed singles/multi-cultural household of social/low cost flats) than the national average;
- A similar proportion fall within the 'Vintage Value' (dependent elderly renters/those in specialist accommodation/single elderly low value homeowners/longstanding elderly social renters) and 'Modest Traditions' (mature singles/couples/with adult children in inexpensive/budget homes) categories;

- a lower proportion of residents within the 'Urban Cohesion' (families/older households in multicultural urban communities) and 'Rental Hubs' (younger singles and couples/student renting close to/within commuting distance of jobs and universities) categories.

5.2.3 The Mosaic results generally highlight that Stockport borough has a higher proportion of affluent families and older suburban households than the national average and a lower proportion of younger and less well-off residents, as well as few residents in the rural/country categories.

5.2.4 The socio demographics of a catchment area of a town will, in part, have an impact on the quantum and type of retail and leisure demand in a town centre.

5.3 Sub-Regional Centre Rankings

5.3.1 Figure 5.2 illustrates the position of the principal centres within the hierarchy of centres based on the Venuescore's UK Shopping Venue Rankings. The index ranks over 3,000 retail venues within the UK (including town centres, stand-alone malls, retail warehouse parks and factory outlet centres) based on the current retail provision. Towns and major shopping centres are rated using a scoring system which takes account of the presence in each location of multiple retailers – including anchor stores, fashion operators and non-fashion multiples. The rankings in the table represent the position of the centres at the time of the most recent Rankings as well as competing surrounding centres. A historic tabulation of retail rankings data is also provided which shows the performance of the centres in the preceding 2010-11 Rankings.

Figure 5.2 - Sub-Regional Centre Rankings

Centre	Classification	2010-11 Rank	2016-17 Rank	Change in Rank 2010/112016/17
Manchester	Major City	18	1	17
The Trafford Centre	Major Regional	27	30	-3
Bury	Regional	96	94	2
Wigan	Regional	96	113	-17
Bolton	Regional	96	115	-19
Stockport	Regional	96	115	-19
Oldham	Regional	231	177	54
Ashton Under Lyne	Sub-Regional	231	211	20
Altrincham	Sub-Regional	231	217	14
Macclesfield	Sub-Regional	231	229	2
Wilmslow	Sub-Regional	231	289	-58
Sale	Sub-Regional	231	312	-81
Buxton	Sub-Regional	231	329	-98
Hyde	Major District	405	382	23
Manchester Fort/Ravenside RP	Major District	405	438	-33
Peel Centre/Portwood Court RP	Major District	1,298	537	761

Centre	Classification	2010-11 Rank	2016-17 Rank	Change in Rank 2010/112016/17
Wythenshawe	Major District	405	551	-146
Crown Point North S P	District	744	710	34
Heald Green	District	744	754	-10
Cheadle	District	1,410	819	591
Hazel Grove	District	1,410	879	531
Glossop	District	1,414	912	502
Handforth Dean RP	District	1,090	968	122
Didsbury	District	1,410	968	442
Denton	Minor District	1,410	1,140	270
Fallowfield	Minor District	3,511	1,276	2,235
Gorton	Minor District	3,511	1,418	2,093
Cheadle Hulme	Minor District	3,511	1,481	2,030
Marple	Minor District	1,886	1,481	405
Lyme Green R P	Minor District	1,886	1,559	327
Longsight	Local	1,886	1,625	261
Poynton	Local	1,886	1,696	190
Broadstone Rd	Local	1,886	1,696	190
Cheadle Heath	Local	1,659	1,696	-37
Bramhall	Local	1,659	1,775	-116
Reddish	Local	1,659	1,775	-116
Fallowfield S C	Local	1,659	1,888	-229
Withington	Local	1,560	2,021	-461
Bredbury	Local	1,886	2,021	-135
Stockport Rd	Local	1,886	2,021	-135
Stanley Green R P	Local	1,886	2,171	-285
Levenshulme	Local	2,039	2,377	-338

Source: VenueScore 2010 and 2016 Rankings

5.3.2 Venuescore classifies Stockport as a Regional centre and since 2010-11, the centre's ranking has decreased, falling 19 places. Within Greater Manchester, Bury, Wigan, Bolton and Oldham are also classified as a Regional centres. Wigan and Bolton are ranked broadly the same as Stockport and have also fallen in the retail rankings by a similar number of places to Stockport. Bury is ranked above

Stockport and has maintained its position in the rankings since 2010-11. Oldham is located approximately 15km north of Stockport, its town centre ranks below Stockport but it has seen an increase in rankings, rising 54 places since 2010-11.

5.3.3 Both the centres of Cheadle and Hazel Grove are classified as Minor District centres in Venuescore and both have seen an increase in their rankings. Cheadle has risen 591 places between 2010-11 and 2016-17, while Hazel Grove has risen 531 places. Cheadle Hulme and Marple are classified as District centres and both have risen in the rankings between 2010-11 and 2016-17. Cheadle Hulme has seen the biggest increase in rankings of the centre in Stockport borough, rising 2,030 places, and Marple has risen 405 places. In contrast, Bramhall and Reddish, which are both categorised as Local centres in Venuescore, have both seen a fall in their rankings of 116 places. Romiley and Edgeley are not ranked in Venuescore.

5.3.4 As noted earlier, the Rankings are reflective of the presence of national multiple retailers in a particular centre and are therefore a more accurate barometer of the performance of larger centres. Accordingly, towards the lower end of the Rankings, the importance of a centre can be overlooked or amplified based on whether a handful of national multiples are present or not.

5.4 Summary of Existing Retail Provision in Stockport borough

5.4.1 Provided below is a summary of existing retail provision in Stockport borough.

Stockport

5.4.2 Stockport Town Centre is the principal shopping and leisure destination in the borough and is a sub regional centre that serves residents across the whole of the borough and beyond. The town centre is located in the west of Stockport borough approximately 10km south east of Manchester City Centre.

5.4.3 The Central Shopping Area of the town centre is focused on Merseyway Shopping Centre and extends to include the Redrock leisure development, the Old Town and surrounding areas. Merseyway Shopping Centre accommodates a largely traditional high street offer and the majority of the national multiple retailers in Central Shopping Area. Two large anchor foodstores are present in the centre, Asda and Sainsbury's, along with large Primark and Debenhams stores. Most of the top comparison goods retailers are represented in the centre, along with a reasonable selection of the mainstream high street retailers, including clothing and footwear retailers.

5.4.4 The centre further provides a varied leisure offer that includes several tourist attractions, performance venues, and a new cinema, gym and branded restaurants at Redrock, alongside a small independent food and drink offer around Market Place.

5.4.5 Adjacent to the Central Shopping Area is the Great Portwood Street Area, which primarily accommodates the Peel Centre, a retail park comprising comprises large format retail warehouse units, along with several cafés and restaurants as set out in Figure 5.3.

5.4.6 Overall, the town centre including the Central Shopping Area and adjacent Great Portwood Street Area encompasses circa 82,700sq m gross retail floorspace, 5,200sq m retail service floorspace, 25,300sq m leisure service floorspace and 8,700sq m financial and business services floorspace (source: Experian Goad Survey).

Figure 5.3 - Retail Provision at the Peel Centre, Stockport

	Distance from Stockport Town Centre (Central Shopping Area)	No. of Units	Vacant Units	Key Occupiers
Peel Centre, Great Portwood Street, Stockport	100m	20	0	Argos, Boots, Currys PC World, DFS, Dunelm, Gap Outlet, Harveys, Hobbycraft, Home Bargains, H&M, Matalan, New Look, Next. SCS, The Range, TK Maxx, Wilko

District Centres

5.4.7 There are eight designated district centres in Stockport borough which provide important day-to-day shopping facilities and services to those in surrounding areas.

5.4.8 Bramhall District Centre located in the west of Stockport borough approximately 6km south of Stockport Town Centre. The centre extends out along the A5102 Woodford Road/Bramhall Lane South and A5149 Ack Lane East from the junction of these roads. Bramhall District Centre contains a total of 111 retail and service units and 13,413sq m of floorspace and is one of the smaller district centres in Stockport borough. National retailers present in the centre include Tesco Express, Sainsbury's Local, Boots and Superdrug. In addition, the centre also accommodates a good independent retail and service offer with a focus on evening food and drink.

5.4.9 Cheadle District Centre is located in the west of Stockport borough, approximately 4km west of Stockport Town Centre. The centre is focused along the A560 High Street and the A5149 Wilmslow Road and contains a total of 160 retail and service units and 22,930sq m of floorspace, making it the second largest of the district centres. The centre contains a varied convenience provision with Tesco Express, Sainsbury's Local and Iceland all present in the centre, which are complemented by a good range of other national multiples and a varied independent offer. The centre also serves as a local financial and business services hub and an evening food and drink destination.

5.4.10 Cheadle Hulme District Centre is located in the west of Stockport borough along the A5149 Station Road in the vicinity of Cheadle Hulme Railway Station, approximately 4km south west of Stockport Town Centre. The district centre contains a total of 82 retail and service units and some 16,700sq m of floorspace, making it the fourth largest of the district centres in terms of floorspace, but seventh in terms of the number of units. The centre provides a varied convenience offer including two anchor foodstores, Waitrose and Asda, and a range of independents, along with a large and diverse food and drink offer.

5.4.11 Edgeley District Centre is located adjacent to the south western boundary of Stockport Town Centre, approximately 500m from the Central Shopping Area. The centre accommodates 121 commercial units and

13,200sq m of floorspace. It encompasses a reasonably strong retail and retail service offer that includes a Co-op Food and Home Bargains, several specialist operators that complement the comparison retail and retail service offer available in nearby Stockport Town Centre, and an evening leisure offer that supports a mix of activity in the centre.

5.4.12 Hazel Grove District Centre is located along the A6 London Road in the south of Stockport borough approximately 4km south east of Stockport Town Centre. Hazel Grove District Centre is the largest of the district centres with 183 retail and service units providing 35,900sq m of floorspace. The centre encompasses several large foodstores along with a variety of other retail, service and leisure uses with a focus on evening food and drink.

5.4.13 Marple District Centre is situated in the town of Marple in the rural east part of Stockport borough approximately 7km south east of Stockport Town Centre. Marple District Centre contains a total of 155 retail and service units and 17,470 sq.m of floorspace and is therefore the third largest of the district centres in Stockport borough. The centre contains a strong convenience goods offering that includes a large Asda foodstore, a good independent retail and services offer, and a varied leisure and evening offer.

5.4.14 Reddish (Houldsworth Square) District Centre is located at the northern periphery of the Stockport Borough around 3 km north of Stockport Town Centre. The centre is focused on the junction of Reddish Road, Gorton Road and Broadstone Road. Reddish is a relatively compact district centre containing 73 retail and service units and some 12,900sq m of floorspace, making it the smallest of the eight district centres in terms of the number of units, but seventh in terms of floorspace. A large Morrisons store provides a key anchor, and the centre also contains good retail service and leisure offer.

5.4.15 Romiley District Centre is located in the north east of the Stockport borough around 5km east of Stockport Town Centre and at the periphery of the urban area of Greater Manchester. Romiley is one of the smaller district centres in the borough, containing 90 retail and service units and 9,507sq m of floorspace. Romiley contains a Sainsbury’s Local alongside a strong independent and retail services offer and a good mix of retail and leisure uses.

Local Centres

5.4.16 In addition to the town and district centres listed above, there are 25 designated local centres across Stockport borough which provide local shopping facilities to residential areas, comprising 9 large local centre and 16 other local centres as follows:

- Large local centres: Gatley, Heald Green, Moor Top (Heaton Moor), Shaw Road / Heaton Moor Road, Heaton Chapel, Davenport, Great Moor, North Reddish and Marple Bridge.
- Other local centres: Adswood, Brinnington, Cheadle Heath, Heaton Mersey, Berrycroft Lane (Higher Bredbury), Hall Street (Offerton), High Lane, Fiveways Parade (Macclesfield Road), Offerton, Offerton Green, Woodley, Councillor Lane (Cheadle), Fir Road (Bramhall), Smithy Green (Cheadle Hulme), Turves Road (Cheadle Hulme) and North Park Road (Bramhall).

Main Out of Centre Retail Destinations

5.4.17 Stockport borough contains several out-of-centre retail and leisure destinations. Figure 5.4 below provides details of the main out of centre retail locations and sets out the current key occupiers.

Figure 5.4 - Principal Out-of-Centre Retail Provision in Stockport borough as of December 2019

	Distance from Stockport Town Centre	No. of Units	Vacant Units	Key Occupiers
Cheadle Royal, Wilmslow Road, Cheadle	5km	2	0	John Lewis, Sainsbury's
George's Road, Stockport	500m	2	0	B&Q and Decathlon
Stanley Green Retail Park, Earl Road, Cheadle	7km	6	0	B&Q, Furniture Village, Halfords, Homesense, TK Maxx
Edgeley Road Retail Area, Edgeley Road/Stockport Road, Cheadle Heath	2km	4	0	Aldi, B&M, Go Outdoors, Morrisons

5.4.18 Edgeley Road Retail Centre, whilst located 2km from Stockport Town Centre, is located immediately next to Cheadle Heath Local Centre.

5.4.19 There is also a good provision of standalone out-of-centre foodstores in Stockport borough, including the following large foodstores:

- Tesco Extra, Tiviot Way, Stockport;

- Aldi, Newbridge Lane, Stockport;
- Morrisons, Stockport Road West, Bredbury;
- Asda, Manchester Road, Stockport;
- Aldi, Lisburne Lane, Stockport;
- Aldi, Weybrook Road, Stockport; and
- Aldi, Green Lane, Romiley.

5.5 Main Surrounding Large Centres and Out-of-Centre Retail Destinations

5.5.1 Stockport Town Centre and the district centres in the borough do not operate in isolation. It is important to understand the nature of the existing (and emerging) retail offer in the surrounding 'competing' centres and out-of-centre destinations given that planned improvements could potentially materially impact upon shopping patterns, future performance and overall vitality and viability of the centres.

5.5.2 The surrounding centres and main retail destinations which the household survey shows have an influence on shopping patterns in Stockport borough are Handforth Dean, the Trafford Centre and Manchester City Centre.

Handforth Dean

5.5.3 Handforth Dean Retail Park is located in Handforth off the A34 bypass, around 500m south of the Stockport borough boundary. Handforth Dean is a major sub-regional shopping destination, accommodates a one of the biggest M&S stores in the UK along with a Tesco Extra and 'flagship' Next Home and Garden store. Handforth Dean is ranked in 968th place in Venuescore's UK Shopping Venue Rankings and it is therefore a major retail and leisure destination.

Figure 5.5 - Retail Provision at Handforth Dean, Handforth (including adjacent Next store)

	Distance from Stockport Town Centre	No. of Units	Vacant Units	Key Occupiers
Handforth Dean	7.5km	5	0	Tesco Extra, Marks & Spencer, Outfit, Boots, Next

5.5.4 Two planning application for sites at land off Earl Road and Epsom Avenue, Handforth were granted planning permission at to appeal in June 2019. Both sites are located adjacent to the existing retail provision at Handforth Dean and are as follows:

- Application ref. 15/0400M – Orbit Investments (Properties) Ltd – development of five units of non-food Class A1 and two units of Class A1/A3 or A5, providing up to 6,035sq m of Class A1 retail floorspace; and
- Application ref. 16/3284M – CPG Development Projects Limited – Erection of 2,320sq m of retail floorspace (Phase 1B).

The Trafford Centre

5.5.5 The Trafford Centre is located in Handforth off the M60, around 10km north east of the Stockport borough boundary and 14km from Stockport Town Centre. The Trafford Centre is the third largest shopping centre in the UK and a major regional shopping and leisure destination, ranking in 30th place in Venuescore's UK Shopping Venue Rankings. It accommodates some 150 stores, primarily national multiple and traditionally 'high street' comparison retailers, including John Lewis, Selfridges, Debenhams and Marks & Spencer stores, along with a large food and drink offer and a cinema.

5.5.6 In 2011, planning permission was granted to add an additional level of retail to the Trafford Centre's Barton Square, which is currently under construction. The first floor extension will create some 10,200sq m of new retail floorspace and will make the Trafford Centre the largest shopping centre in the UK once completion. Primark will open a new anchor store in Barton Square in March 2020.

Manchester

5.5.7 Manchester City Centre is a major retail and leisure destination the social, cultural, financial and commercial centre of Greater Manchester and the wider North West region. Located to the north of Stockport borough, the city centre lies approximately 6 km north west of Stockport borough's boundary and 10km from Stockport Town Centre. Manchester is ranked number 1 in Venuescore's UK Shopping Venue Rankings (London is disaggregated into several areas in the rankings).

5.5.8 The Arndale Centre, the main shopping centre in the city centre provides the focus for comparison retailing. The Arndale Centre is the largest city centre shopping centre in the UK and accommodates over 200 retail and leisure units. Major retailers include Selfridges, House of Fraser, Marks & Spencer, Debenhams and Next.

5.6 Shopping Patterns

5.6.1 This section contains a summary of the convenience and comparison-goods shopping patterns for Stockport Town Centre and the district centres in the borough. Both main and top-up convenience food shopping patterns have been analysed, as well as combined comparison-goods shopping patterns. As noted previously a detailed assessment of shopping patterns is set out at Appendix D.

Stockport Town Centre

5.6.2 Stockport retains around a third of main shopping trips (in centre and out of centre stores combined) and our analysis shows it has an influence over the zones adjacent to its own (Zone 1). We also found that it has a limited influence on areas falling outside of the borough. Looking specifically at out of centre stores, these attract a more limited share of trips than store located within Stockport Town Centre.

5.6.3 For top-up food shopping, Stockport Town Centre retains a reasonable amount (14%) of the market share from within its own survey zone (Zone 1) and it is also shown to attract a limited proportion of trips from the adjacent zones (Zones 2-6). Asda on Warren Street is the most popular destination for both main food shopping and top-up food shopping activities. Out of centre top up shopping attracts a smaller proportion of trips within Stockport and a limited number of trips from surrounding zones.

5.6.4 For comparison shopping, Stockport Town Centre retains 47% of trips from within its own zone and attracts trips from every other survey zone, with a higher proportion of trips made from the zones adjacent to Stockport (Zones 2-6 at rates ranging between 27%-47%) and generally lower proportions from zones further afield (ranging between 10%-28%).

Bramhall District Centre

5.6.5 Bramhall District Centre does not contain a large food store, hence it has a low retention rate for main food shopping (2%) from its zone (Zone 7). Bramhall does however have a relatively high retention of top-up shopping trips. It also attracts a very limited proportion of trips from other zones.

5.6.6 Bramhall attracts a very limited number of trips (1%) for comparison shopping from across the study area.

Cheadle District Centre

5.6.7 Overall, foodstores in Cheadle District Centre retain 8% of main food shopping trips from its zone (Zone 9) and attract a smaller proportion from elsewhere, including 5% from Zone 10 (Cheadle Hulme) and 2% from Zone 3 (Cheadle Heath). Large foodstores outside of the district centre have an influence on shopping patterns in Cheadle, with more trips being made to out of centre stores (14%) than those within the District Centre (8%). The proportion of top-up shopping trips retained within Cheadle is notably higher than main food shopping trips (28%).

5.6.8 Looking at trips from across the borough, Cheadle District Centre attracts 2% of the comparison goods market share, more than most other District Centres. Cheadle attracts at least a small proportion of trips from most of the survey zones.

Cheadle Hulme District Centre

5.6.9 The three foodstores in Cheadle Hulme District Centre capture slightly less than a quarter of the main food shopping trips (24%) in its survey zone (Zone 10). These foodstores also attract some trips from Zone 7 (Bramhall) and a limited number of trips from Zones 2 (Davenport) and 3 (Cheadle Heath). A larger proportion of trips (29%) are made to out of centre stores from Zone 10, than to the District Centre, and a fifth of trips are made to stores which are located outside of Stockport borough. 33% of top-up food shopping trips are retained within the District Centre from Zone 10.

5.6.10 Cheadle Hulme attracts a very limited proportion of comparison shopping trips (1%) from survey zones within the borough.

Edgeley District Centre

5.6.11 Due to its proximity to Stockport and the absence of a large food store, main food shop trips to Edgeley District Centre are limited. 50% of trips are made to out of centre stores, including 33% to Morrisons on Edgeley Road. Whilst the proportion of top-up shopping trips is higher than that of main food shopping trips (17% vs 5%), it is still somewhat low compared to other District Centres.

5.6.12 With regards to comparison shopping patterns, Edgeley District Centre attracts a very limited proportion of trips.

Hazel Grove District Centre

5.6.13 Hazel Grove has the highest retention rate for main food shopping trips out of any of the survey zones (65% from Zone 8), with the Aldi on Commercial Road being the most popular destination. Hazel Grove is also shown to attract main food shopping trips from zones located outside of the borough. For top-up food shopping, Hazel Grove retains the highest proportion of any of the District Centres (60%) and captures the highest overall share of all trips in the borough (9%), including trips from adjacent zones.

5.6.14 Hazel Grove attracts 3% of all comparison shopping trips within the borough and whilst this is a limited proportion, it is the highest of any of the District Centres.

Marple District Centre

5.6.15 Foodstores in Marple retain 38% of trips from within its survey zone (Zone 18) and have a very limited influence on trip patterns from other survey zones. More than half (56%) of top-up food shopping trips are retained within Marple, with the majority of these made to Asda at the Ringdale Centre. Marple only attracts a limited amount of top-up trips from adjoining survey zones.

5.6.16 For comparison shopping trips, Marple attracts a limited proportion (1%) of trips from the borough.

Reddish District Centre

5.6.17 The Morrisons in Reddish District Centre retains 26% of the main food shopping trips from its survey zone (Zone 5) and it is also shown to attract residents from other surveys zones in the borough and outside. A higher proportion of trips are retained for top-up food shopping (42%).

5.6.18 Reddish attracts a very limited share of comparison shopping trips from across the borough and study area (1%).

Romiley District Centre

5.6.19 Due to its limited convenience offering, Romiley attracts a very limited share of main food shopping trips across the borough and has a very low retention rate when compared to other District Centres. Those in Zone 6 are shown to favour out of centre shopping locations. In terms of top-up shopping patterns, notably more trips are made to destinations outside of Romiley's survey zone (Zone 6) than retained within (79% vs 21%).

5.6.20 A limited proportion of comparison goods shopping trips are directed towards Romiley (1%).

Local Centres

5.6.21 Stockport's Local Centres together attract 5% of the borough's main food shopping trips and 3% of the total number of trips from across the study area. Local Centres attract a greater proportion of top up shopping trips than main food-shopping, attracting 18% of trips from within the borough and 10% of all trips across the study area.

5.6.22 Given their small size and limited convenience goods offer, the local centres capture only a limited market share of trips from across the borough and the wider study area (4% and 2% respectively).

Out of Centre facilities

5.6.23 Out of centre facilities in the borough attract 18% of all comparison shopping trips across the borough. The most popular destinations are Cheadle Royal Shopping Centre (6% of all trips from Stockport borough), B&Q on Georges Road (4% of trips), and Stanley Green Retail Park (2% of trips).

Internet Shopping

5.6.24 The results of the Household Survey found that books, CDs and DVDs are the most popular items bought online followed by small and large electrical goods, and toys, games, bicycles and other sporting or recreational goods. The least popular goods to purchase online are chemist goods and DIY items.

5.6.25 For convenience shopping, the level of online main food shopping varied between 1-11% across the survey zones.

5.6.26 In terms of how items purchased online are received, survey results indicate that all convenience goods were received by home delivery. For comparison goods, most are shown to be home delivered, but between 8% and 10% of clothing & footwear, and DIY goods are collected from stores using click & collect services.

Changes in shopping patterns between 2014 & 2019

5.6.27 A broad comparison between expenditure patterns from the 2014 Retail Study Update and those identified in this study (See Appendix I) shows that for convenience goods, a declining trend is evident in Stockport Town Centre and for stores in Cheadle, Cheadle Hulme and Hazel Grove. Conversely, increases in expenditure are indicated within Edgeley and Marple district centres, and collectively across the defined local centres.

5.6.28 In terms of comparison goods expenditure, a mixed picture is also evident. Again, a declining trend is evident within Stockport Town Centre, and the market share captured by Cheadle Hulme is also shown to decrease slightly. For the other district centres, and for the local centres as a whole however, expenditure figures are shown to have remained static or have increased.

5.7 Summary

5.7.1 The above sections set out the existing retail provision within Stockport borough, surrounding competing centres and an assessment of the shopping patterns of residents within the study area. The subsequent sections provide health checks and our qualitative assessment of any retail related deficiencies within each of the centres.

6.0 Qualitative Health Check Assessments of Centres

6.1 Introduction

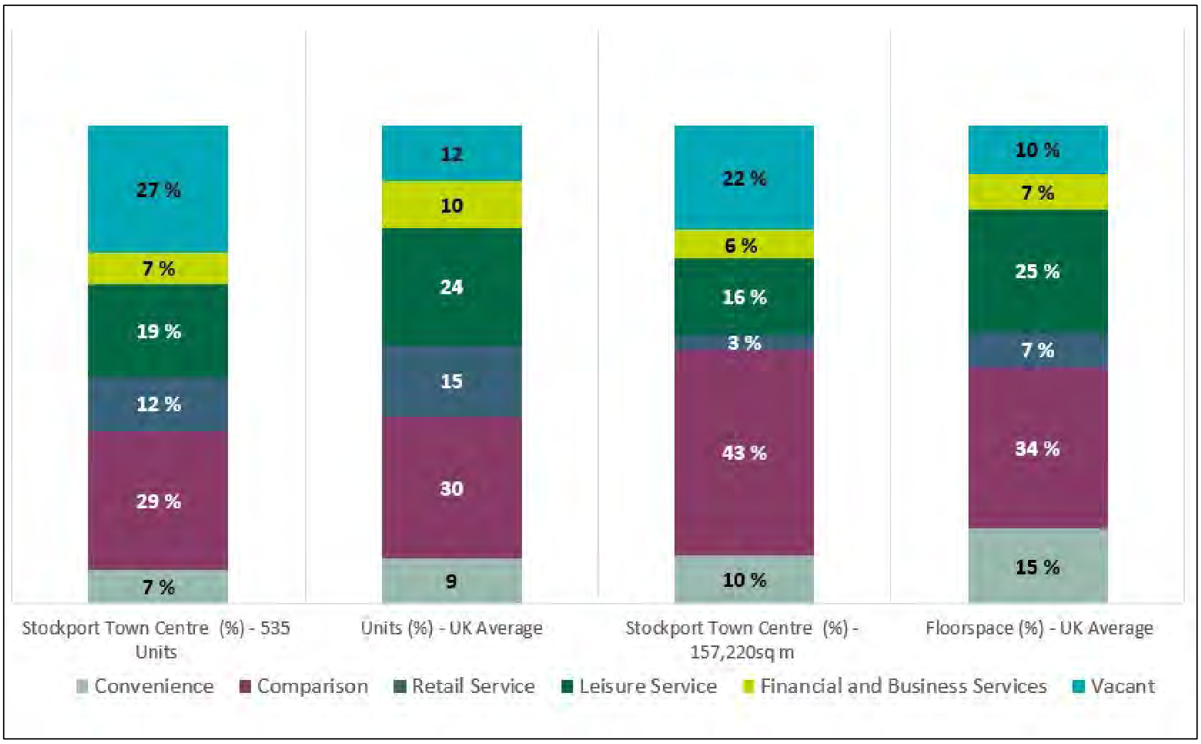
6.1.1 This section provides a summary of the detailed qualitative health check assessments undertaken for Stockport Town Centre, and each of the 8 district centres which can be found at Appendices G and H.

6.1.2 The health check assessments are based on indicators published in the NPPG and are used to assess the vitality and viability of each centre. Details of the criteria within the NPPG and the methodology utilised for the health checks is contained at Appendix I.

6.2 Stockport Town Centre

6.2.1 Figure 6.1 provides a summary of the composition of Stockport Town Centre. It breaks down the proportion of units and floorspace occupied by each of the Experian Goad town centre use categories and compares them to the UK average.

Figure 6.1 - Composition of Stockport Town Centre by percentage of commercial units



Source:ExperianGoadSurveys
Notes:Figuresmaynotto100%duetorounding

6.2.2 The proportion of units in Stockport Town Centre occupied by each use category is shown to be below the national average. This is due to the high number of vacancies in the town (27%), more than double the national average of 12%.

6.2.3 In terms of floorspace, comparison goods retailers occupy a higher proportion in Stockport than the national average (43% vs 34%), however a smaller than average proportion of floorspace is occupied by each of the other use categories. Again, the high vacancy rate in the town centre influences the figures significantly with 22% of floorspace across Stockport Town Centre currently lying vacant, significantly more than the UK average of 10%.

6.2.4 Our health check assessment of Stockport Town Centre finds that it displays reasonable overall levels of vitality and viability, although this is in part due to the significant recent and ongoing programme of public sector investment. We consider that the principal strengths, weaknesses, opportunities and threats to the centre are as follows:

Strengths and Opportunities

- The scope and scale of investment projects in the town centre have been delivering, and will continue to deliver substantial positive changes to the physical and economic environment within the centre.
- There is a strong overall clothing and footwear offer across the town centre and most of the top comparison goods retailers are represented.
- Stockport provides a varied leisure offer that includes several tourist attractions, performance venues and a new cinema, gym and restaurants at the new Redrock leisure development.
- Recent take-up of vacant units around Market Place for leisure units point to a growing sector serving the evening economy.
- Opportunities to deliver improved access around the town centre and enhance the public realm and physical environment around Stockport are presented through the Town Centre Access Plan.

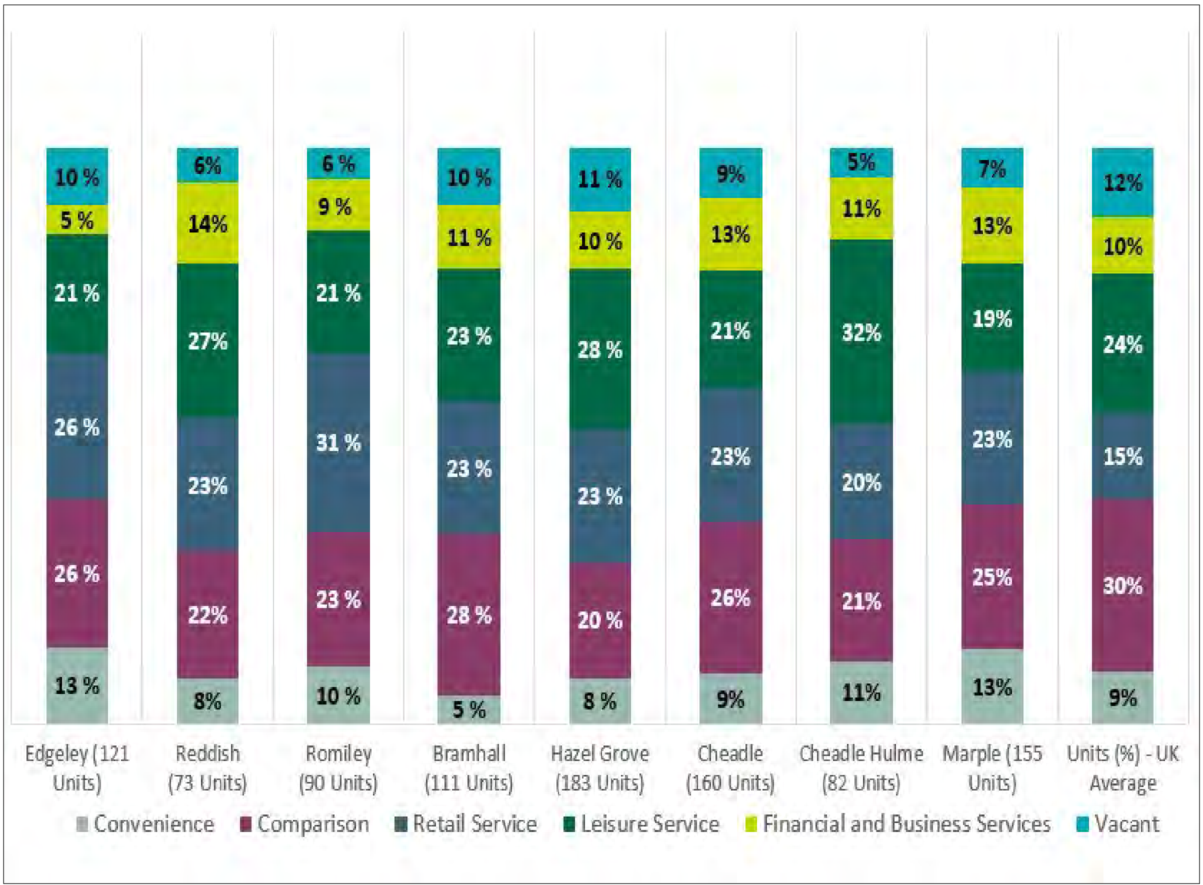
Weaknesses and Threats

- Contraction of the comparison retail sector and loss of high-profile retailers from the central shopping area (e.g. BHS and Marks & Spencer). Static rents and high yields evidences weak investor confidence and retailer demand.
- Potential for further impacts of structural changes in the retail sector, including further contraction of store portfolios into fewer larger destinations and increasing competition from the growth in online retailing as well as from the Manchester City Centre and major out-of-centre destination, such as the Trafford Centre, Cheadle Royal and Handforth Dean.
- Despite recent growth, the evening and night time offer in the town centre remains modest for a town of Stockport's size.
- High and increasing levels of vacant units with concentrations in several areas of the Central Shopping Area.
- Poor environmental quality of various areas within the town centre and several prominent buildings including Merseyway and the Debenhams building.

6.3 District Centres

6.3.1 Figure 6.2 below provides a summary of the composition of each District Centre in Stockport Borough, breaking down the proportion of units by each Experian Goad town centre use category.

Figure 6.2 - Composition of each District Centre by percentage of commercial floorspace



Source: Experian Goad Surveys
Notes: Figures may not to 100% due to rounding

6.3.2 It is shown that the proportion of comparison goods units across each of the District Centres is below the national average. Given the size and role of these centres, this is not unexpected, and we do not consider necessarily to be indicative of any deficiency of provision. Conversely, the proportion of retail service units is higher than average for each centre, and this is to be expected.

6.3.3 Encouragingly, vacancy levels in each of the centres is below the national average, and generally the provision of financial and business services across the centres is also strong, with only the provision in Edgeley and Bramhall falling below the national average.

Bramhall

6.3.4 Bramhall is considered to be a healthy District Centre. Our assessment identifies the following strengths, opportunities, weaknesses and threats:

Strengths and Opportunities

- Good independent fashion offer and specialist comparison retail offer.
- The centre provides an important role as an evening food and drink destination with a strong restaurant offer and facilities to service the evening economy.
- Good environmental quality with a pedestrianised shopping precinct and small public space that acts as a focus for activity.
- Active and popular programme of events throughout the year generating footfall and trade across the centre.

Weaknesses and Threats

- Limited range of basic comparison goods retailers.
- Ongoing impact of wider structural changes in the retail sector on vacancy levels in the centre.
- Limited number of national multiple comparison retailers and small scale of vacant properties limiting the potential to attract such operators.

Cheadle

6.3.5 Overall, Cheadle District Centre is considered to be an attractive and healthy District Centre. Having regard to our vitality and viability health check assessment, we consider that the principal strengths, weaknesses, opportunities and threats to the centre are as follows:

Strengths and Opportunities

- Varied convenience provision with representation from several of the top foodstore operators complemented by a good independent offer.
- The centre acts as a local financial and business services hub.
- The centre generally has a high environmental quality with distinctive period buildings and green character.
- Acts as an evening food and drink destination and serves the evening economy well.
- Attractive tourist destination with shops/services providing a dual function for local residents/tourists.

Weaknesses and Threats

- Lack of a large ‘main food’ shopping store in the centre.
- Large vacant former telephone exchange unit detracts from the environmental quality of its surroundings.

- Negative impact of traffic and congestion on the High Street affecting the shopping environment and pedestrian connectivity.

Cheadle Hulme

6.3.6 Cheadle Hulme fulfils and important role as a convenience shopping and evening food & drink destination. We consider the centre to display reasonably good levels of vitality and viability.

Strengths and opportunities

- Varied convenience goods offer including two anchor foodstores and a range of independent retailers.
- Active and varied evening economy comprising a large and diverse food and drink offer, late opening of main foodstores and local amateur theatre facilities.
- Low and declining vacancy levels.
- Highly accessible by public and private means of transportation.
- A reasonably good environmental quality with a number of attractive buildings, both traditional and new, and the presence of greenery throughout.

Weaknesses and Threats

- Limited availability and small size of vacant commercial units.
- Clustering of reported crimes in and around Cheadle Hulme Shopping Centre indicates that measures are required to minimise further opportunities for crime.
- Wi-Fi provision and digital services in the centre are poor.

Edgeley

6.3.7 Our health check findings identify the vitality and viability of Edgeley District Centre is mixed. It identifies the strengths, opportunities, weaknesses and threats to the town centre as follows:

Strengths and Opportunities

- Reasonably strong retail and retail service offer that includes several specialist operators and an evening leisure offer that supports a mix of activity in the centre.
- Proximity to Stockport County's football ground and location in between the ground and Stockport railway and bus stations generating footfall in the centre on match days.
- A largely pedestrian friendly environment with pedestrianised areas and low vehicle numbers and speeds.
- Good parking provision with several small car parks located throughout the centre combined with on-street car parking provision.

Weaknesses and Threats

- Comparison goods offer is mainly budget focussed.
- Limited diversity of the evening leisure offer with a focus on takeaways, pubs and betting shops.
- Poor environmental quality of certain areas with dated public realm, litter and units in a poor state of repair.

Hazel Grove

6.3.8 Our detailed vitality and viability health check finds that Hazel Grove District Centre displays mixed levels of vitality and viability, and that there is potential for improvement. The following strengths, opportunities, threats and weaknesses have been identified:

Strengths and Opportunities

- Strong convenience goods offer including several anchor foodstores that attract shoppers from a wide area.
- The centre has below average vacancy levels and there is an ongoing programme of redevelopment or refurbishment of vacant properties.
- High visibility of the centre and accessibility by road due to its location on a key strategic highway route, providing potential for businesses to capture passing trade.
- Potential to substantially improve the environmental quality by upgrading the existing green/public spaces and introducing street trees and planters along the length of the centre.

Weaknesses and Threats

- Dominance of busy roads and adverse impact of heavy traffic on the pedestrian environment, movement and safety.
- Adverse impact of long-term vacant units and vacant sites in the centre on perceptions and environmental quality.
- Elongated and linear nature of the centre and severance effect of the A6 deters linked pedestrian trips between the major foodstores in the centre and other smaller operators as well as across its length.
- Provision of general public, and on-street car parking is limited. Majority of car parking available on a 'customer only' basis.

Marple

6.3.9 We consider that Marple District Centre is generally an attractive and healthy centre. Based on our surveys and analysis above we consider the key strengths, opportunities, threats and weaknesses of the centre are:

Strengths and Opportunities

- Strong convenience offering with national operator Asda acting as a key anchor in the centre.

- Low vacancy rates and relatively strong market interest.
- Good environmental quality with potential to deliver a modern and green public space outside The Hollins Parade on Stockport Road.

Weaknesses and Threats

- Limited number of national convenience retail operators.
- Prominent and long-term vacancy at the former NatWest Bank unit detracts from the environmental quality of the centre.
- Traffic and congestion on Stockport Road affect pedestrian connectivity and may be a barrier to cyclists.

Reddish (Houldsworth Square)

6.3.10 Overall, we consider that the health and performance of Reddish District Centre is adequate, but that there is significant potential for improvement. We consider that the principal strengths, weaknesses, opportunities and threats to the centre are as follows:

Strengths and Opportunities

- Large Morrisons store provides a strong convenience anchor and car parking provision for the centre.
- Strong leisure and retail service offer.
- Low levels of vacancies and strong local investor confidence.
- There is an opportunity to redesign Houldsworth Square as a focal point for the centre which could be utilised as a multi-functional space.

Weaknesses and Threats

- Under-provision of community facilities such as a doctors surgery or a library that could help maintain footfall in the centre.
- Small size of available building stock and lack of available vacant premises.
- Long term vacancies of prominent former NatWest and Lloyds Bank buildings.
- Traffic on Reddish Road and Gorton Road impact on environmental quality and pedestrian accessibility.

Romiley

6.3.11 Our detailed vitality and viability assessment of Romiley District Centre finds that it displays healthy levels of vitality and viability:

Strengths and Opportunities

- Strong independent and retail services offer, and a good mix of retail and leisure uses.
- Low vacancy rate.

- Easily accessible by car, on foot and via public transport (including by train).
- The centre generally provides a pleasant and attractive environment.

Weaknesses and Threats

- Lack of a large anchor main food shopping destination in the centre.
- Evening food and drink offer limited to takeaway units.
- Busy road running through the centre affects pedestrian connectivity and lowers environmental quality.
- Some buildings would benefit from cosmetic improvements.

7.0 Quantitative Retail Needs Assessment

7.1 Introduction

7.1.1 This section of the Study provides a summary of our detailed assessment of the retail needs for the borough. Detailed assessments of the convenience goods and comparison goods capacity can be found at Appendix J.

7.1.2 In considering the capacity figures, it should be noted that the NPPF no longer requires local plans to meet the needs 'in full' in the plan period. Given the uncertainty in forecasting long term retail trends, policies only need to look ahead at least ten years (in this case to 2029), and not necessarily over the full plan period when allocating a range of suitable sites in town centres to meet the 'likely' needs for town centre uses.

7.2 Potential Capacity for Future Convenience Goods Floorspace

7.2.1 Figure 7.1 below sets out the convenience goods expenditure capacity estimates for Stockport borough as a whole. It shows that, by 2029 (the minimum timeframe identified by the NPPF when allocating sites), after commitments, primarily due to convenience goods stores under trading, there is assessed to be no need/capacity for additional convenience floorspace in the borough.

7.2.2 The findings suggest that existing convenience goods facilities currently meet residents' needs in the borough and will continue to do so over the next 10 years.

Figure 7.1 - Quantitative Need for Convenience Goods Floorspace - Stockport borough

Year	Surplus Expenditure	Commitments	Residual	Floorspace Requirement
	£m	£m	£m	(sq m net)
2019	-2.3	7.0	-	-
2021	-15.5	7.0	-	-
2024	-9.9	7.0	-	-
2029	3.5	7.1	-3.6	-
2034	18.1	7.1	11.0	1,000

Source: Appendix Jii
Notes:
Floorspace Requirement - Average sales density assumed to be £11,134/sq m (@ 2019) based on the average sales density of all grocery operators - derived by GlobalData.com. Allows for increased turnover efficiency.
2017 Prices

7.3 Potential Capacity for Future Comparison Goods Floorspace

7.3.1 The assessment identifies that as the main comparison goods retail destination in the borough, Stockport Town Centre, after commitments/planning permissions, is assessed to have the greatest level of floorspace requirements by 2029 (5,700sq m net). This requirement is assessed to increase to some 10,200sq m net by the end of the plan period (2034).

7.3.2 In terms of the district centres in Stockport borough, with the exception of Hazel Grove only limited comparison goods capacity is identified in each over the next 10 years (less than 400sq m net). A modest level (700sq m net) of comparison goods floorspace capacity is identified in Hazel Grove District Centre over the next 10 years. In the longer term (end of plan period), Hazel Grove's comparison goods capacity is assessed to grow to circa 1,000sq m net with other centres assessed to increase to no more than 600sq m net.

Figure 7.2 - Quantitative Need for Comparison Goods Floorspace

Year	Surplus Expenditure	Commitments	Residual	Floorspace Requirement
	£m	£m	£m	(sq m net)
Stockport Town Centre				
2021	0.0	-	-	-
2024	9.7	20.3	-	-
2029	65.4	22.9	42.5	5,700
2034	110.4	25.7	84.8	10,200
Edgeley District Centre				
2021	0.0	NA	0.0	-
2024	0.1	NA	0.1	30
2029	0.8	NA	0.8	200
2034	1.4	NA	1.4	200
Reddish District Centre				
2021	0.0	NA	0.0	-
2024	0.1	NA	0.1	20
2029	0.7	NA	0.7	100
2034	1.1	NA	1.1	200
Romiley District Centre				
2021	0.0	NA	0.0	-
2024	0.1	NA	0.1	20
2029	0.5	NA	0.5	100
2034	0.9	NA	0.9	100
Bramhall District Centre				
2021	0.0	NA	0.0	-
2024	0.2	NA	0.2	30
2029	1.1	NA	1.1	200
2034	1.8	NA	1.8	300

Year	Surplus Expenditure	Commitments	Residual	Floorspace Requirement
	£m	£m	£m	(sq m net)
Hazel Grove District Centre				
2021	0.0	NA	0.0	-
2024	0.5	NA	0.5	120
2029	3.6	NA	3.6	700
2034	6.0	NA	6.0	1,000
Cheadle District Centre				
2021	0.0	NA	0.0	-
2024	0.3	NA	0.3	60
2029	1.9	NA	1.9	400
2034	3.3	NA	3.3	600
Cheadle Hulme District Centre				
2021	0.0	NA	0.0	-
2024	0.2	NA	0.2	40
2029	1.2	NA	1.2	200
2034	1.9	NA	1.9	300
Marple District Centre				
2021	0.0	NA	0.0	-
2024	0.3	NA	0.3	60
2029	1.7	NA	1.7	300
2034	2.9	NA	2.9	500

Source: Appendix Jiii Notes:
Allows for increased turnover efficiency.
2017 Prices

7.4 Summary

7.4.1 The assessment identifies that by 2029 (the minimum timeframe identified by the NPPF when allocating sites), after commitments, there is nil convenience goods capacity across the borough.

7.4.2 In terms of comparison goods capacity by 2029, Stockport Town Centre as the largest centre in the borough has the largest identified capacity at circa 5,700sq m net. Across the other district centres in Stockport borough, a more limited comparison goods capacity is identified, with between 100 and 700sq m identified in each over the next 10 years.

8.0 Commercial Leisure Needs Assessment

8.1 Introduction

8.1.1 This section of the study provides a summary of our detailed assessment of the commercial leisure needs undertaken for the centres across Stockport Borough. These assessments, found at Appendix E, use data obtained from the household survey to understand how leisure facilities in the borough meet the current needs of the population. The results from this, coupled with the use of national statistics for the typical level of provision for specific types of leisure facilities, and reference to estimated population increases in the Study Area, are then used to inform our judgement in respect of the likely future needs.

8.2 Leisure activities participation and provision

8.2.1 The findings of the assessment indicate that visiting restaurants is the most popular activity, with an average of 76% of respondents in each of the survey zones within the borough visiting these facilities. Other popular activities include visiting cafes and coffee shops, visits to pubs and bars, and visiting the cinema.

8.2.2 When asked what additional facilities they would like to see more of in the borough, non-commercial facilities was the most popular response. For commercial leisure activities, respondents indicated they would like to see an increase in the provision of restaurants and cafes, better shopping facilities and an increase in the provision of pubs and bars. The results show that 64% of respondents in the borough do not want any additional leisure facilities, an indication that they are satisfied with the current leisure provision.

8.3 Restaurant & Cafes / Coffee Shops

8.3.1 Our analysis indicates significant variances in the retention levels across the borough. Stockport Town Centre is the most popular destination for trips to restaurants and cafes, but the retention rates for its Survey Zone (Zone 1) are the lowest, with more than half of residents favouring visits to restaurants outside of the borough.

8.3.2 Due to its proximity, Manchester City Centre has an influence across each survey zone in the borough and it is the most popular destination for restaurant visits after Stockport Town Centre.

8.3.3 Overall, we consider the restaurant and café provision in the borough to generally be sufficient. However, the provision in Romiley (Zone 6) and Reddish (Zone 5) could be improved. The provision in Edgeley (Zone 3) is also lacking but, given its proximity and relationship to Stockport Town Centre, Edgeley may not be able to sustain additional facilities within its centre.

8.4 Health & Fitness Facilities

8.4.1 A total of 72% of all trips to indoor health & fitness facilities are retained within the borough. However, these trips are primarily made to destinations in out of centre locations. Stockport Town Centre attracts 11% of all trips and Pure Gym, which is located adjacent to the town centre boundary, attracts 6% of all trips from the borough.

8.4.2 Stockport Town Centre accommodates the highest number of indoor health & fitness facilities, including the Council owned Life Leisure Grand Central leisure centre and several private gym operators. There are numerous other public sports and leisure facilities operated by Life Leisure elsewhere in the borough.

8.4.3 Bramhall has the lowest retention rate (49%) for trips to indoor health & fitness facilities in the borough while Cheadle Hulme (Zone 10) also has a relatively low retention rate (6%) for facilities within its own zone.

8.4.4 Given the reasonably good range of facilities already present across the borough along with the Council's plans for a new leisure centre in Marple, we do not consider there to be a pressing need to allocate additional land for new commercial health and fitness uses. Nevertheless, we consider that the attraction of another commercial gym facility to Bramhall or indeed any of the borough's town or district centres would benefit their overall vitality and viability and should be supported.

8.4.5 On behalf of the Council, consultants SLC are currently assessing the level of latent demand in Stockport borough now and in the future. Initial findings show that there is an over-supply of fitness stations in the borough as whole (localised assessments will be undertaken when potential sites for investment are identified in the SLC Indoor Leisure Investment Strategy in early 2020). This is supported by overall health and fitness membership levels being static or declining at facilities owned by Stockport Council.

8.4.6 Overall, whilst there are adequate indoor health & fitness facilities in the borough as a whole, these tend to be located in out of centre locations. Our survey results point to a lack of provision in Bramhall and Cheadle Hulme, with these zones attracting fewer visits than would be expected.

8.4.7 We also consider that, based on the Requirements List, the provision of facilities in Stockport and Romiley could also be increased or offer improved provision. With specific reference to Stockport, we recommend the Council contact the potential operators and discuss accommodating them in either existing vacant premises or directing them to an appropriate potential development site.

8.5 Cinemas

8.5.1 The current cinema provision in Stockport borough comprises of four facilities including a large multiplex cinema (The Light, Stockport), a historic picturehouse (The Plaza, Stockport) and two smaller independent cinemas (The Savoy in Heaton Moor and the Regent in Marple). The Light Cinema, located in Stockport Town Centre, attracts around a third of the borough's cinema trips. The independent cinemas attract a reasonable share of trips from the borough (7-8%) which rises significantly when looking at the survey zone they are located in (46-48%).

8.5.2 The Plaza, despite its central location, attracts a very low share of the borough's trips (2%), however this is because the facility primarily operates as a theatre space. The Cineworld at Parrs Wood, just outside Stockport's administrative boundary, attracts 14% of all cinema trips from each survey zone apart from Zone 6 (Romiley).

8.5.3 We consider the existing provision in Stockport borough to be sufficient to accommodate the borough's current and projected requirements for the next ten years. Should any proposals come forward for new or the expansion of existing facilities, we recommend they are judged on their individual merits in accordance with the relevant town centre planning policies.

8.6 Tenpin Bowling

8.6.1 There are no tenpin bowling facilities in the borough and consequently all trips to this type of facility are made to destinations outside of the borough with the most popular destination Tenpin at Parrs Wood. The Hollywood Bowl in nearby Ashton-Under-Lyne also attracts residents in the northern and eastern survey zones in the borough (Zones 5, 6 and 18). An additional tenpin bowling facility currently under construction as part of a leisure development in nearby Ashton-Under Lyne, again outside of the borough boundary.

8.6.2 Given the lack of existing facilities, the development of a new tenpin bowling facility in the borough may be beneficial. However, there is no current registered interest from a tenpin bowling operator in locating in the borough. Taking into consideration the existing and committed provision outside of the borough, a large tenpin facility is therefore unlikely to be supported. However, a smaller or "boutique" bowling facility, either as a standalone premises or combined with another leisure use, may be more appropriate.

8.7 Bingo

8.7.1 There is a single bingo hall in the borough, Buzz Bingo in Stockport Town Centre. This facility attracts 79% of trips across the borough, with the remaining shares going to facilities outside of the borough such as Mecca Bingo and Club 3000, both in Manchester. A small proportion of the borough's residents (4%) indicated that they visited bingo halls.

8.7.2 Our analysis finds that Stockport borough could support 2-3 bingo halls by 2029. However, given the prevailing trends and growth of online bingo, the future demand for new physical venues is anticipated to be very limited. We therefore recommend that any proposals for new bingo halls are judged on their own merit in accordance with the relevant town centre planning policies at the time of an application's submission.

8.8 Arts and Cultural Facilities

8.8.1 Art and cultural activities play an important role in providing a distinct identity to settlements and places, alongside being important contributors to the local economy. For the purposes of our assessment, consideration has been given to the provision of theatres, museums and art facilities in Stockport borough.

8.8.2 The results from the household survey show that that 8% of trips to art and cultural facilities are retained within the borough. Trips to art and cultural facilities are dispersed with the most popular individual destination, which is Stockport Museum, attracting only a limited share (2%) of all trips. Over half of the trips are made to art and cultural facilities in Manchester City Centre – given the borough's proximity and connectivity to Manchester City Centre, and its status as a national and international cultural centre, this is not surprising. Manchester contains a variety and range of tourist facilities and attractions.

8.8.3 We do not consider there is any requirement for additional arts and cultural facilities in Stockport borough as the demand is likely to be limited due to the location of a wide range of existing facilities in Manchester City Centre. To maintain and increase existing visitor numbers, due regard should be given to enhancing the existing provision alongside further promoting the facilities through improved marketing strategies.

9.0 Key Findings & Recommendations

9.1 Summary of Identified Need

9.1.1 The quantitative need findings identified for Stockport borough are summarised in Figure 9.1 and 9.2 below.

Figure 9.1 - Stockport Borough Quantitative Capacity Summary (to 2029)

	Convenience Goods (sq m net)	Comparison Goods (sq m net)	Health & Fitness (no.)	Cinema Screens (no.)	Bingo (no.)	Tenpin Bowling (no.)
Stockport Borough	nil	7,900	6-8	nil	1	nil

Figure 9.2 - Town and District Centres Quantitative Capacity Summary (to 2029)

Centre	Comparison Goods (sq m net)
Stockport	5,700
Bramhall	200
Cheadle	400
Cheadle Hulme	200
Edgeley	200
Hazel Grove	700
Marple	300
Reddish (Houldsworth Square)	100
Romiley	100

Notes: Quantitative Capacity figures are post commitments/planning permissions.

Convenience Goods

9.1.2 Our study identifies that by 2029 (the minimum timeframe identified by the NPPF when allocating sites), after commitments, there is no demand for convenience goods capacity in Stockport borough.

Comparison Goods

9.1.3 In terms of comparison goods capacity by 2029, our assessment identifies that there is capacity for 7,900sq m net comparison goods floorspace across the borough. Following the 'town centre first' approach in line with national planning policy, the majority of this comparison goods floorspace capacity (circa 5,700sq m net) should be directed to Stockport Town Centre as the principal centre in the borough. The estimated comparison goods floorspace capacity is limited for the district centres. Hazel Grove has the greatest estimated floorspace capacity of circa 700sqm net with limited capacity of less than 400sq m net in all the other district centres.

9.1.4 Stockport Town Centre should therefore be the focus for new comparison retail floorspace in Stockport borough. It is not considered necessary for the Council to plan for the delivery of further comparison goods floorspace over the plan period in the district centres where we identified a relatively small requirement for new comparison goods floorspace. In meeting identified needs it will be important for the Council to consider the potential contribution of existing vacant floorspace and any emerging schemes.

Health and Fitness

9.1.5 Our assessment of the health and fitness sector indicates that Stockport borough is reasonably well served by health and fitness facilities, although these tend to be located in out of centre locations. There is good range of public sector leisure facilities distributed throughout the local authority area, excepting in Marple where the leisure centre is currently partially closed. The public sector facilities are supported by a number of private leisure facilities. A low proportion of respondents to the survey stated that they wanted to see a new gym facility in their local area, indicating that residents are satisfied with the existing gym provision.

9.1.6 However, the findings of the household survey highlighted the lack of provision in Marple, and also pointed to a localised deficiency in the health and fitness provision in Bramhall. The few facilities located within these centres and their respective zones (Zones 18 and 7) retained the lowest retention of local residents' trips to health and fitness facilities, with a high proportion of residents instead travelling to health and fitness facilities further afield. We are aware that the Council is currently exploring options to replace the existing public sector leisure centre in Marple District Centre, which is no longer fit for purpose, and expect that the delivery of a new leisure centre will address the current lack of provision in Marple.

9.1.7 Given the reasonably good range of facilities already present across the borough, along with the Council's plans for a new leisure centre in Marple, we do not consider there to be a pressing need to allocate additional land for new commercial health and fitness uses. Nevertheless, we consider that the attraction of another commercial gym facility to Bramhall, or indeed to any of the borough's town or district centres, would benefit their overall vitality and viability and should be supported.

9.1.8 On behalf of the Council, consultants SLC are currently assessing the level of latent demand in Stockport borough now and in the future. Initial findings show that there is an over-supply of fitness stations in the borough as whole (localised assessments will be undertaken when potential sites for investment are identified in the SLC Indoor Leisure Investment Strategy in early 2020. This is supported by overall health and fitness membership levels being static or declining at facilities owned by Stockport Council.

9.1.9 Overall, whilst there are adequate indoor health & fitness facilities in the borough as a whole, these tend to be located in out of centre locations. Our survey results point to a lack of provision in Bramhall and Cheadle Hulme, with these zones attracting fewer visits than would be expected.

9.1.10 We also consider that, based on the Requirements List, the provision of facilities in Stockport Town Centre and Romiley could also be increased or offer improved provision. With specific reference to Stockport, we recommend the Council contact the potential operators and discuss accommodating them in either existing vacant premises or directing them to an appropriate potential development site.

9.1.11 It is further recommended that any new proposals for gyms and health and fitness centres should be judged on their own merits in accordance with local and national policy, with a town centre first approach where suitable sites are available.

Cinema

9.1.12 Our assessment identifies that the existing cinema provision within Stockport borough provides a quality mix of modern multiplex facilities and small community / independent cinemas in heritage buildings.

9.1.13 The existing provision in the borough provides a total of 12 cinema screens. Whilst we indicatively calculated that 19 cinema screens can be supported in the borough, a large multiplex cinema is located adjacent to the Stockport borough's administrative boundary at Parrs Wood, which provides an additional 11 screens. Another multiplex cinema is also located in proximity to the borough in east Manchester (Showcase on Hyde Road, Belle Vue).

9.1.14 Overall, we consider the existing provision within and in proximity of the borough adequately meets the needs of the borough's current and future population and there is no need for the Council to plan to accommodate a new cinema in the borough. However, should such proposals come forward, we recommend that it be judged on its own merit in accordance with town centre policies at the time of submission.

Bingo

9.1.15 There is currently one commercial bingo hall in Stockport borough, Buzz Bingo in Stockport Town Centre. Responses to the household survey indicate that this facility is the most popular destination for the borough's residents, but that residents also travel to facilities in Manchester and other locations outside of the borough for bingo activities. Our indicative calculations suggest that there may be capacity for additional bingo facilities in Stockport borough. However, in light of low participation levels, the trend for bingo activities moving online and the existing provision in Manchester, we expect that future demand for new bingo venues will be very limited.

9.1.16 Accordingly, we do not consider it necessary to plan for a new facility in the borough, but should proposals for such a development come forward, we recommend that it be judged on its own merit in accordance with town centre policies at the time of submission.

Tenpin Bowling

9.1.17 The study identifies that there are no tenpin bowling facilities in Stockport borough with residents' existing demand currently met through facilities outside of the borough, primarily at Tenpin at Parrs Wood just outside of the borough, and at Hollywood Bowl in Ashton-Under Lyne. A new leisure centre is currently under construction in Denton, which will include a 10-lane tenpin bowling alley and increase the tenpin bowling provision in proximity to Stockport borough.

9.1.18 We consider that the provision of a tenpin facility in the borough would enhance and diversity the leisure offer in the borough and reduce the need for residents to travel to access such a facility. However, we consider that a large-scale tenpin bowling facility is unlikely to be capable of being supported by the market, given the existing and committed provision outside of, but in proximity to, the borough. Should proposals for such a development come forward, we recommend that it be judged on its own merit in accordance with town centre policies at the time of submission.

9.1.19 An alternative business model has recently developed for in-centre 'boutique' bowling facilities, smaller facilities with a greater focus on food and beverage as a fashionable alternative to the traditional family orientated bowling experience. Such a format is not currently present in Stockport Town Centre and would, subject to market demand, provide a potential option to help improve and diversify the leisure offer in the town centre.

Arts and Cultural

9.1.20 In terms of arts and cultural facilities, the study identifies that existing provision across each centre is of a scale appropriate to their role in the hierarchy. Consideration should be given to ways of further promoting and improving marketing of existing facilities, particularly those in Stockport Town Centre, and any future proposals for arts and/or cultural development be assessed on its own merit.

9.2 Review of Current Hierarchy of Centres

9.2.1 In drawing up Local Plans, Paragraph 85 of the NPPF requests the LPA to define a network and hierarchy of centres.

9.2.2 Policy CS6 (Safeguarding and Strengthening the Service Centre Hierarchy) of the Stockport Core Strategy identifies Stockport Town Centre as the principal centre in the borough. Underneath this, 8 District Centres (Bramhall, Cheadle, Cheadle Hulme, Edgeley, Hazel Grove, Houldsworth Square (Reddish), Marple and Romiley) are identified alongside 25 Local Centres, of which 9 are defined as Large Local Centres and the remaining 16 are defined as Other Local Centres.

9.2.3 In the absence of any definition to rely on in the NPPF and the NPPG, the definition of different tiers of the hierarchy provided by the now superseded Planning Policy Statement 4 (PPS4) remains of some relevance. In respect of the definition of town centres, district centres and local centres, PPS4 states the following:

> "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. In London the 'major' and many of the 'district' centres identified in the Mayor's Spatial Development Strategy typically perform the role of town centres.
>
> District centres will usually comprise 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 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.
>
> Small parades of shops of purely neighbourhood significance are not regarded as centres for the purposes of this policy statement."

9.2.4 Experian defines the multi-functional offer of a city or town as including residential, public service, leisure and entertainment, commercial and cultural facilities (amongst others).

9.2.5 In accordance with the findings of this Study, the role and functions of the centres, and in light of these definitions, we recommend that the defined Stockport Town Centre and eight district centres of Bramhall, Cheadle, Cheadle Hulme, Edgeley, Hazel Grove, Houldsworth Square (Reddish), Marple and Romiley are retained as respective Town and District Centres.

9.2.6 In terms of local centres, this study has not examined the health and composition of these centres. However, from our general observations and knowledge of these centres we consider it unlikely that any changes are required to the definition/hierarchy of these centres.

9.3 Recommended Local Impact Threshold

9.3.1 In accordance with national planning policy, it is appropriate to identify locally set retail thresholds for the scale of edge-of-centre and out-of-centre development which should be subject to the assessment of the impact criteria set out by paragraph 89 of the NPPF. The NPPF sets a default impact threshold of 2,500sq m gross. The NPPG explains that gross retail floorspace is defined as "the total built floor area measured externally which is occupied exclusively by a retailer or retailers, excluding open areas uses for the storage, display or sale of goods" (paragraph 16).

9.3.2 At present, Policy AS-3 (Main Town Centre Uses & Hot Food Takeaways Outside Existing Centre) of the Core Strategy sets a local impact assessment threshold. The policy requires that planning applications for over 200sq m (net) of floorspace for A1 use in edge and out-of-centre locations relative to the district and local centres to be accompanied by an impact assessment. There is no local floorspace threshold set in relation to Stockport Town Centre. Therefore the default threshold of 2,500sq m applies. It is noted that the thresholds set out in Policy AS-3 predate the publication of the original NPPF in March 2012, and were set in relation to the impact assessment criteria listed in former Policy EC16.1 of Planning Policy Statement 4.

9.3.3 When setting a locally appropriate threshold, the NPPG considers the following aspects important in setting a locally appropriate threshold:

- 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; and
- Impact on any other planned investment.

9.3.4 Following the assessment undertaken within this study and having regard to, inter alia, the current health, performance, unit and floorspace composition of Stockport Town Centre and each of district centres; increasing competition from the internet; and availability of units in capable of meeting potential national multiple occupiers in each of the centres, WYG considers that the impact thresholds set out at Policy AS-3 of the Core Strategy should be revised.

9.3.5 Our recommendation is that policy should advocate a tiered approach whereby the threshold applied to planning applications at edge-of-centre and out-of-centre locations varies in relation to the size, role and function of a particular centre. In our experience, it will only generally be development of a greater scale than these impact thresholds that could lead to a 'significant adverse' impact and merit the refusal of an application for town centre uses in accordance with the provisions of paragraph 90 of the NPPF. The thresholds should not only apply to new floorspace, but also to changes of use and variations of condition to remove or amend restrictions on how units operate in practice. In considering proposals for variations of condition, the threshold should apply to the whole of the unit in question, rather than just the quantity of floorspace subject to the condition.

9.3.6 Stockport Town Centre, as the principal retail destination in Stockport borough provides the biggest range of retail and leisure uses which help to draw shoppers from across the sub-region. Having regard to the anchor stores, number of retail units, overall retail floorspace and vitality and viability of the town centre, we recommend that the retail impact threshold should be 1,000sq m gross. This should provide the Council with sufficient flexibility to assess the merits and potential impact implications of edge and out-of-centre retail applications.

9.3.7 Although a district centre, Hazel Grove encompasses a substantial convenience offer with several large foodstores that draw shoppers in from a wide surrounding area. We therefore consider that a foodstore development of less than 1,000sq m gross is unlikely to lead to a 'significant adverse' impact on this district centre given the quantity and strength of its convenience retail provision. However, comparison retail and leisure uses in Hazel Grove District Centre are generally small in scale. We therefore consider that a lower threshold of 500sq m gross is required to ensure that the centre's vitality and viability is not impacted upon.

9.3.8 The district centres of Cheadle Hulme, Edgeley, Marple and Reddish all encompass large foodstores and function as important anchor stores. We recommend that the retail impact threshold of 500sq m gross is required for these district centres to ensure that their vitality and viability would not be significantly impacted upon. Whilst the retail provision in Bramhall, Cheadle and Romiley District Centres is generally smaller in scale, all of these centres are healthy centres meaning that these centres are unlikely to be vulnerable to out-of-centre retail proposals of less than 500 sq.m. We therefore consider that a threshold of 500sq m gross is also appropriate for these district centres and will ensure that their vitality and viability are not significantly impacted upon.

9.3.9 As noted above, this study has not examined the health and composition of the local centres in Stockport borough. However, from our general observations and experience in relation to local centres elsewhere, we consider that a threshold of 300sq m gross is appropriate, which is broadly equivalent to the 200sq m net threshold set out in the Core Strategy.

9.3.10 We further consider it appropriate to qualify the catchment area to which each local impact threshold will apply. We consider that the higher threshold of 1,000sq m for Stockport Town Centre should apply borough-wide. We recommend that the threshold of 500sq m apply where the catchment area of the proposal, as agreed by the Council, encompasses one or more of the district centres of Bramhall, Cheadle, Cheadle Hulme, Edgeley, Hazel Grove, Marple, Reddish and Romiley.

9.3.11 We recommend that the local centre threshold of 300sq m gross should be applicable within 800 metres of the boundary of the relevant centre. The distance of 800 metres is broadly commensurate with the potential walk-in catchments of smaller centres and is identified by Guidelines for Providing for Journeys on Foot (The Institution of Highways & Transportation, 2000) as being the 'preferred maximum' acceptable walking distance to a centre.

9.3.12 Based on the above, we recommend that an impact assessment will be necessary for proposals (including the formation of mezzanine floors) for/or that include retail and leisure developments that are not located within a defined centre where:

- The proposal provides 1,000sq m gross of retail and/or leisure floorspace;
- The agreed catchment area of the proposal encompasses one or more of the district centres of Bramhall, Cheadle, Cheadle Hulme, Edgeley, Hazel Grove, Marple, Reddish and Romiley and the proposal provides 500sq m and above gross of retail and/or leisure floorspace; or
- The proposal is located within 800 metres of the boundary of a local centre and provides 300sq m and above gross retail and/or leisure floorspace.

9.3.13 It is important to stress 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.

9.4 Review of Town Centre Boundaries and Primary Shopping Areas & Relevant Policy

9.4.1 The NPPF identifies that LPA’s planning policies should define the extent of town centres and primary shopping areas and set out the range of uses permitted in such locations as part of a positive strategy for the future of each centre.

9.4.2 The previous 2012 version of the NPPF recommended that local authorities additionally define primary and secondary frontages and set policies that make clear which uses will be permitted in such locations. However, this policy requirement is deleted from the revised 2019 version of the NPPF. 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 as confirmed by the NPPG (paragraph 002), which identifies that authorities may, where appropriate, also wish to define primary and secondary retail frontages where their use can be justified in supporting the vitality and viability of particular centres.

9.4.3 As part of this study, and in line with the brief, WYG has reviewed the existing boundaries and frontages. Our review has had regard to our vitality and viability health check and detailed analysis of the town and district centres, as well as the definitions set out in Annex 2 glossary of the NPPF as follows:

- Town centre – the defined area including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area (p72). References to town centres or centres apply to city centres, town centres, district centres and local centres.
- Primary shopping area – the defined area ‘where retail development is concentrated’ (p70).

- Main town centre uses - ‘Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities)’ (p68).

9.4.4 We set out our recommended town centre boundaries, primary shopping areas and primary shopping frontages for Stockport Town Centre and each of the eight district centres at Appendix K.

Stockport Town Centre

9.4.5 The Stockport Town Centre boundaries remain as identified in the Stockport UDP Review, which was adopted in 2006. The extent of the town centre boundary is currently defined by nine sub-areas as identified in the UDP Proposals Map. A primary shopping areas is not identified in the UDP, but the defined Central Shopping Area of Stockport Town Centre identified under Policy TCG2.1 of the UDP is assumed to represent the primary shopping area of town centre. Primary and secondary shopping frontages are identified in Appendix 7 of the UDP.

9.4.6 We recommended significant changes to the Stockport Town Centre boundaries. The existing town centre boundaries for Stockport Town Centre were adopted 15 years ago, predating the publication of the originally NPPF in March 2012 by several years. Therefore, they are not consistent with the definitions set out the current national planning policy or the current policy approach that encourages a more positive and flexible approach to planning for the future of town centres.

9.4.7 We recommend that the extent of the town centre is defined by a single boundary. We consider that the town centre boundary should be contracted to exclude those areas currently within the boundary that are predominantly occupied by residential and industrial uses, and which are not main town centre uses.

9.4.8 We recommend the definition of a primary shopping areas in Stockport Town Centre, and that this area includes mixed retail and service use areas of the centre in order to ensure that this important town centre provision is protected under the NPPF impact test. Taking the defined Central Shopping Area as a starting point, we recommend minor changes to the boundary to exclude peripheral vacant units on Churchgate, which are set to be converted into residential use.

9.4.9 With regards to the primary and secondary shopping frontages, we see no benefit in this instance in defining primary or secondary shopping frontages in the town centre. Our health check identified there is a concentration of retail frontages within the Merseyway Shopping Centre, on Merseyway and on Warren Street. However, several vacant units are present on these streets. Outside of this area, the centre encompasses a diverse mix of retail and service uses, which make a significant contribution to the vitality and viability of the town centre. Whilst the take up of vacant properties in these areas by service uses has helped to reduce vacancy in these areas, vacancy in the centre and particularly in the Old Town remains exceptionally high. We therefore consider that the take up of vacant units by a diverse mix of retail and service uses should be encouraged across the town centre to help improve the vitality and viability of the town centre as a whole.

District Centres

9.4.10 The district centre boundaries remain as identified in the Stockport UDP Review. The extent of the district centres identified in the UDP Proposals Map, and primary and secondary shopping frontages are identified in Appendix 7 of the UDP. No primary shopping areas for the district centres are identified in the UDP.

9.4.11 Whilst the district centre boundaries were also adopted 15 years ago, we consider that these remain largely consistent with the definitions set out in the NPPF.

9.4.12 We recommended minor changes to all of the district centre boundaries in order to form a single boundary around the main town centre uses within that centre and exclude residential development as, under the NPPF definition, this does not constitute a main town centre use. We recommend the definition of primary shopping areas in the district centres. As for Stockport town centre, this area should include mixed retail and service use areas of the centres. This will ensure that this important provision is protected under the NPPF impact test.

9.4.13 In accordance with the NPPF, we consider that there is no benefit in defining primary and secondary frontages in the district centres. Our health checks identified that these centres encompass a diverse mix of uses. Whilst there are small concentrations of retail frontages in some of the district centres, such as in Cheadle Hulme Shopping Centre and on a section of Stockport Road/Market Street in Marple, the property offer and nature of the district centres mean that these areas are limited, with retail and service uses relatively mixed throughout. The independent offer and mix of uses in the district centres contribute significantly to their overall distinctiveness and vibrancy. We therefore consider that the take up of vacant units by a diverse mix of retail and service uses should be encouraged across these centres to help maintain their vitality and viability.

9.4.14 Our recommended primary shopping frontage, primary shopping areas and town/district centre boundaries have been drafted taking into account NPPF's requirement for policies and decisions to take a positive approach to town centre growth, management and adaptation.

9.4.15 Finally, it should be noted that, in accordance with the NPPF, the town centre boundaries should be kept under review, where necessary, so that future anticipated needs can be accommodated.

9.5 Recommendations in Respect of the Council's Future Retail & Commercial Leisure Strategy

9.5.1 The town and district centre strategies in Stockport Borough need to be able to support the continued development/changes in the 'high street' if they are to successfully compete. As noted earlier in this study the key purpose of the strategies should be to build on the existing individuality of centres, be a focus/hub for their communities, attract a mix of additional land uses beyond retail/leisure (including residential, educational, community and office uses), and extend the 'dwell time' and spend of visitors/residents visiting the town centre and in turn the vitality and viability of the centre.

9.5.2 The recommended key retail and commercial leisure elements of each town and district centre strategy, as informed by the findings of this study, are set out below.

Stockport Town Centre

9.5.3 Delivery of the major ongoing and planned investment projects in the town centre provides the greatest potential to support the vitality and viability of Stockport Town Centre. These schemes – namely, Stockport Town Centre West, the new Transport Interchange and the refurbishment of Adlington Walk within the Merseyway Shopping Centre – are aimed at tackling many of the key weaknesses and issues facing the centre, including improving the integration of different parts of the town centre, enhancing footfall, improving the day and night-time family entertainment and food and drink offers, and increasing the walk-in catchment of the centre. Totally Stockport – Stockport's Business Improvement District – further delivers an important programme of events that attract visitors and increase footfall. In addition to these key projects, we set out a number of new or supportive recommendations for the town centre below:

- The take up of existing vacant units in the centre should be the focus for the identified comparison goods expenditure capacity. The Council should support the re-occupation and/or redevelopment of existing units within the primary shopping area for modern floorspace, rather than the development of new floorspace in edge-of-centre or out-of-centre sites. Indeed, the vacant floorspace within Stockport Town Centre will sufficiently meet identified comparison goods expenditure capacity in the short to medium-term. However, this position should continue to be monitored on a frequent and regular basis.
- In consultation with the identified potential operators, investigate unit/site opportunities to meet the opportunities identified in this study to attract a new commercial gym and 'boutique' bowling alley in Stockport Town Centre.
- Support and promote the development of the town centre as an independent retail and leisure destination, providing a complementary offer to that available at competing destinations such as Cheadle Royal and Handforth Dean, and the offer available at the Peel Centre. This will further help to support the take up of vacant units around Market Place for independent town centre uses. Potential measures could include property/shop front grants, marketing of the town centre independent offer, promoting the emerging reputation of the area around Market Place as a quality evening food and drink destination, engaging with potential operators and further supporting local business start-ups through the Stockport Business Finance Scheme.
- In particular, we recommend that Council seek to attract an increase in the number and range of restaurants, which will help grow the evening economy in the town centre.

- Redesign and refurbishment of Mersey Square to create a modern, attractive and multi-functional public space. The new Transport Interchange works have already removed the need for through traffic to the bus station, freeing up space within the square for public realm. Mersey Square benefits from high visibility and the high profile redevelopment of the square will raise perceptions of the town centre. This should be a key priority for the Council.
- Cosmetic improvements to update the appearance of prominent buildings, most notably Merseyway and the Debenhams building, and tackle negative perceptions of the town centre.
- Selected redevelopment and environmental improvements within the Merseyway Shopping Centre / along Merseyway to address an inwards looking and drab street environment within the prime retail pitch.
- Consult with owners of vacant and poorly maintained properties which currently detract from the environmental quality of the centre to establish potential opportunities for their enhancements.
- Tap into the success of the Peel Centre and Redrock, as well as Stockport Exchange by improving integration between different parts of the town centre. This will help to attract further footfall and investment into Merseyway and the Old Town by encouraging existing visitors to other parts of the town centre into these areas as part of their trip, as well as linked trips across different parts of the primary shopping area. Delivery will require physical improvements to provide clear and attractive pedestrian routes between different parts of the town as well as measures to raise awareness of the full town centre offer. Potential measures include improved directional signage, the provision of on street town centre maps and increasing the availability of digital town centre maps/information through the Totally Stockport website.
- Raise the digital profile of the non-retail offer, the independent sector and the historic Old Town in Stockport Town Centre by improving the quality and availability of online town centre information and the ranking of Totally Stockport website. This will help raise awareness of the full town centre offer and best take advantage of the historic Old Town and town centre heritage assets to increase dwell times and attract more leisure/tourism visitors.

Bramhall District Centre

- Review opportunities to increase short-stay on street car parking in or close to the centre to support short stop-off visits to the shops and services near the junction of Bramhall Lane South/Ack Lane East/Woodford Road. Potential locations for additional short-stay car parking bays include Moss Lane and Sydall Road.
- Provide convenient cycle parking provision in prominent central locations, such as at the junction of Ack Lane East and Bramhall Lane South.

- In consultation with the potential operators, investigate unit/sites to meet the opportunity identified in this study to attract a new commercial gym to Bramhall District Centre, which would support the continued vitality and viability of the centre.
- Monitoring of the centre to identify any future vacant or redundant opportunity sites or properties as they come forward. Potential future opportunity sites could include the Barclays Bank or one of the petrol station sites, which the Council could then work to facilitate the re-use/redevelopment of for a larger convenience foodstore in the centre, a commercial gym and/or national multiple comparison operators.
- Protecting units and sites for town centre uses given the highly constrained nature of the centre and lack of larger scale units, which will support the maintenance of the retail and service role of the centre.

Cheadle District Centre

- Delivery of proposed highway and public realm improvements in the east of the centre (as part of the Cheadle and Cheadle Heath Corridor Improvements), which will improve the pedestrian environment in this part of the centre and ease of crossing the busy High Street.
- Work with property owners and potential occupiers to facilitate the re-occupation/ redevelopment of the former telephone exchange unit on High Street, as well as other vacant buildings in the centre. As the largest unit in the centre, the former telephone exchange offers potential to attract uses such as a gym, larger foodstore or national multiple comparison operators.
- Monitoring to identify any vacant or redundant opportunity sites or properties that come forward in the future, which offer potential to deliver a new larger foodstore in the centre.
- Provide an additional pedestrian crossing facility on Wilmslow Road in the south of the centre to facilitate pedestrian movements in this area.

Cheadle Hulme District Centre

- Provide an updated and consistent public realm and increased greenery on Station Road in the vicinity of Warren Road, working with property owners to encompass the private land/paving in front of the shops as part of the scheme.
- Provision of playground and adult exercise equipment in Oak Meadow Park to make the best use of this space and attract additional footfall in the centre through linked trips.

Edgeley District Centre

- Work with property owners and potential occupiers to facilitate the re-occupation/ redevelopment of the prominent vacant units at the junction of Castle Street and Mercian Way, as well as other vacant units in the centre.
- Encourage maintenance and upgrading of shop fronts to improve the appearance of units through measures such as shop front and building grants.

- Implement a programme of regular cleaning and maintenance of the public realm to address issues of litter and cleanliness.
- Update the public realm to provide quality modern materials and new landscaping/greenery.
- Creation of gateway features at either end of Castle Street to improve environmental quality and perceptions of Edgeley. Potential measures include works to provide quality public realm and landscaping, sculptures and working with property owners to provide street art/murals on blank building ends.

Hazel Grove District Centre

- Investigate and take up opportunities to improve environmental quality by upgrading the quality of the existing public realm/paving and introducing street trees and planters along London Road.
- Facilitate maintenance and upgrading of shop fronts to improve the appearance of units through measures such as shop front and building grants.
- Work with property owners and potential occupiers to facilitate the re-occupation/redevelopment of vacant units, focusing on the most prominent and long-term vacant units.
- Encourage maintenance and upgrading of shop fronts to improve the appearance of units through measures such as a shop front grants scheme. Measures support could include painting of roller shutters with street art to improve the appearance of units outside of opening hours.
- Investigate the potential to redesign the Commercial Road junction with London Road, to decrease the carriageway width and increase pedestrian space. This would enable expansion of the small existing public space to Lyme Street, and its redesign as a larger green public space and focal point for the centre.
- Implement a programme of regular cleaning and maintenance of the public realm to address issues of cleanliness.

Marple District Centre

- Public realm works on Market Street at the junction with Stockport Road and outside The Hollins parade to provide two quality and green public spaces at the focal point of the centre. These areas are located in a prominent position within the centre and offer the opportunity to provide a high-quality public space encompassing new trees, landscaping and paving outside The Hollins parade linked to the pedestrianised shopping street on Market Street.
- Work with property owners and potential occupiers to facilitate the re-occupation/redevelopment of the prominent former Natwest building on Market Street, as well as other vacant units in the centre.
- Investigate opportunities to provide pavements build outs and additional trees and planting/planters on Stockport Road to facilitate pedestrian crossing movements and help mitigate the impact of high levels of traffic and congestion on the pedestrian environment.

- Monitoring to identify any large vacant or redundant opportunity sites or properties that come forward in the future, which offer potential to deliver new large-scale retail units in the centre that are capable of attracting additional comparison goods retailers to the centre. Potential future sites include the current leisure centre should this be relocated elsewhere within Marple.
- Delivery of a new public sector leisure centre in Marple District Centre, which will qualitatively improve the health and fitness offer of Marple and support the vitality and viability of the centre.

Reddish (Houldsworth Square) District Centre

- Redesign and upgrade of Houldsworth Square to create a modern and attractive community space that provides a green focal point for the centre, which could then be used for a number of purposes including events and markets. Enhancing Houldsworth Square will further encourage the reuse of the vacant former Natwest building, potentially for a food/drink establishment given the opportunity for outdoor seating to Houldsworth Square.
- Facilitate maintenance and upgrading of shop fronts to improve the appearance of units through measures such as a shop front grants scheme.
- Implement a programme of regular cleaning and maintenance of the public realm to address issues of cleanliness and weeds.
- Review potential to relocate pedestrian crossing facilities to better follow pedestrian desire lines. Such improvements to the locations of crossings will help mitigate the adverse impact of heavy through traffic on Reddish Road and Gorton Road on pedestrian movements.

Romiley District Centre

- In consultation with the potential operators, investigate current unit/site opportunity to attract a new commercial gym to Romiley District Centre. Monitoring of the centre to identify any future opportunity sites or properties as they come forward, which the Council could support for reuse/redevelopment for a commercial gym.
- The attraction of more restaurants and bars to the centre would help to diversify the food and drink offer in the centre and should be supported, although there is no need for the Council to actively plan for the delivery of this.
- Work with the owners of The Precinct to support cosmetic improvements to modernise and enhance its appearance.
- Removal of the pedestrian guard rail outside the Forum Theatre/Precinct or replacement with bollards to facilitate pedestrian movements across Compstall Road.
- Investigate the potential to provide an improved public green space and/or additional car parking within the existing green space between Stockport Road and Kimberley Avenue.

9.5.4 In addition to the above, the Council, in partnership with its stakeholders, should continue to promote the town and district centres across Stockport borough (particularly through the internet (e.g. www.totallystockport.co.uk) as not just places to shop and eat/drink but also places to work, stay and live.

Glossary of Terms

Capacity	Retail capacity in terms of this report refers to surplus/deficit of expenditure (£m) which represents the difference between the expenditure and turnover of the identified facilities.
CTN	Shops selling Confectionary, Tobacco and newspapers
Comparison Goods	Comparison goods relate to items not obtained on a frequent basis, these include clothing, footwear, household and recreational goods.
Convenience Goods	Convenience goods relate to everyday essential items including confectionary, food, drinks, newspapers and magazines.
District Centre	District centres will usually comprise 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.
Expenditure Per Capita	The average spend of each person within the defined Study Area on a variety of retail goods.
Expenditure	Expenditure is calculated by taking the population within a defined area and then multiplying this figure by average annual expenditure levels for various forms of goods.
Expenditure Forecasts	This assessment has been undertaken using the 'goods based' approach as prescribed in the Planning for Town Centres Practice Guidance. Retail expenditure forecasts have been derived from Experian Retail Planner Briefing Note 14 (November 2016).
Experian (MMG3)	The database used to identify population, expenditure and socio-economic breakdown of the Study Area population.
Gross Floorspace	Represents the level of total floorspace or footprint of a specific development (i.e. sales area, storage, checkouts, café, display, and so on).
GOAD Plans	Provide accurate information on the composition of town centres, shopping areas, out-of-town retail parks and outlet villages in the UK. Identifies the fascia name, retail category, floorspace, and exact location of all retail outlets and vacant premises.

GOAD Reports	Provide a snap-shot of the retail status or demographic make-up of Goad surveyed town centres. Provides a comprehensive breakdown of floorspace and outlet count for all individual trade types in the Convenience, Comparison, Retail Service, Leisure, Financial/Business Services and Vacancy sectors.
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.
Net Floorspace	Represents the level of internal area devoted to the sale of goods.
Market Share	Market shares derived from the household survey results, which are based on either the proportion of shopping trips or the proportion of expenditure attracted to a particular centre/facility.
National Multiple	This is a retail or service operator which is or part of a network of nine or more outlets.
Price Base	The price base for the Study is 2017; all prices are or have been adjusted to 2017 in order to be consistent.
Rates of Productivity	This takes into account the potential for existing retail floorspace to improve their turnover productivity (e.g. smaller goods could be sold from a smaller area for more money, increased opening hours, etc.).
Sales Density	Retail capacity figures are expressed in term of floorspace, relying on the application of assumed sales density figures to the surplus expenditure identified. This is based on the typical turnover of a store by square metre/foot.
Special Forms of Trading	Defined by Experian as expenditure not directed to traditional floorspace such as the internet, mail order, party plan and vending machines and other non-store activity such as market and road-side stalls.
Study Area	This represents the household survey area, which is based on postal sectors.
Trade Draw	This refers to the level of trade attracted to a particular facility/centre.
Turnover	The turnover figure relates to the annual turnover generated by existing retail facilities.

Town Centre	A town centre will usually be the second level of centres after city centres and, in many cases, they will be the principal centre of 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.

Appendices

These appendices are technical in nature, please email planning.policy@stockport.gov.uk for copies.

Appendix A:	Planning Policy Overview
Appendix B:	Retail and Leisure Trends Overview & Government's Response to 'Transform Town Centres'
Appendix C:	Stakeholder Consultation Feedback Forms
Appendix D:	Analysis of Retail Market Share Patterns
Appendix E:	Commercial Leisure Needs Assessment
Appendix F:	Experian Mosaic Summary
Appendix G:	Stockport Town Centre Vitality and Viability Health Check Assessment
Appendix H:	District Centres Vitality and Viability Health Check Assessments
Appendix I:	Vitality and Viability Methodology
Appendix J:	Quantitative Retail Need Assessment
Appendix K:	Recommended Town Centre Boundaries, Primary Shopping Areas and Primary Shopping Frontages