



City of York Council

Retail Study Update

Final Report

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1.0 Introduction

Instruction

1.01 WYG Planning ('WYG') was commissioned by City of York Council ('the Council') in November 2013 to undertake an update of the previous York Retail Study which was completed in 2008. The Study will therefore act as the evidence base to assist in the formulation of future development plan policy, as well as providing baseline information to assist in the determination of planning applications for retail development. The work also builds on "A City Centre Economic and Retail Growth and Visioning Study" undertaken in 2013 to support the City of York Local Plan Preferred Options. This update is also of particular importance given the downturn in the UK economy since the previous York Retail Study reported which has had a notable impact upon many town centres and the retail sector in general.

1.02 The aims and objectives for the Study included consideration of the following:

- An introduction to the Study setting out its general aims, how it relates to other parts of the retail evidence base already produced, including the Retail Study (2008), the Retail Topic Paper (2011) and the Economic and Retail Growth and Visioning Study (2013) alongside a section on current retail policy context, including a review of national trends in retailing and retail development and the implications this has on City of York Council;
- An updated Household Telephone survey to review local shopping patterns since 2008;
- An assessment of quantitative need for convenience and comparison goods retail floorspace over the Local plan period to 2030 across the City of York authority area, applying the latest population data and expenditure growth projections to an updated household survey. Our methodology is clearly set out and includes the identification of qualitative deficiencies in existing provision and advice on how to meet the need identified;
- A review of the local centre and neighbourhood parades identified in the Local Plan Preferred Options, including those identified as part of Strategic Sites, alongside a review of the Council's recent audit of neighbourhood parades as baseline data. We consider the appropriate level of local centre provision for strategic sites and existing local centres and neighbourhood parades, including definitions in respect of types of parades, how they fit with the retail hierarchy and boundary definitions;



- A review of the retail and town centre policies in the Local Plan Preferred Options alongside a review of consultation responses received in relation to retail policies and retail sites as part of the Local Plan Preferred Options consultation to inform recommendations for Submission Draft Local Plan retail policies;
- A review of existing and proposed retail sites across all centres and an assessment of the most appropriate locations for identified updated retail need within robust justification; and
- A section summarising the main findings and a retail strategy that can inform the Submission Draft Local Plan.

1.03 The Retail Study draws upon new empirical research, with NEMS Market Research Limited (NEMS) undertaking surveys of 1,800 households within a defined Study Area undertaken in November 2013. The Study Area for the household survey comprises eighteen zones which are based on postcode areas grouped covering a wider catchment area, and the adopted Study Area is consistent with the approach adopted in 2008. The Study also draws upon current Experian population and expenditure data (published in October 2013 and February 2014) in order to establish the up-to-date position with regard to both convenience and comparison goods capacity.

Structure of Report

1.04 The report is structured as follows:

- Section 2 provides a context for the Retail Study by providing an analysis of key retail trends;
- Section 3 considers the up-to-date position in respect of relevant retail and town centre planning policy;
- Section 4 sets out a review of the survey research and considers changes in shopping behaviour that have occurred since the undertaking of the previous Study;
- Section 5 reviews the distribution and composition of the city's district and local centres and local parades;
- Section 6 identifies current and future population and expenditure levels within the Study Area;
- Section 7 provides our assessment of the quantitative and qualitative need for further convenience and comparison goods floorspace over the assessment period;
- Section 8 considers the implications of the proposed local plan growth strategy on the quantitative capacity identified in Section 7; and
- Section 9 provides our recommendations in respect of the Council's future retail strategy.



2.0 Current and Emerging Retail Trends

Introduction

- 2.01 The retail property landscape across the UK has evolved significantly over the past 50 years, from post-war redevelopment in town centres, through to the emergence of retail warehouse parks and out-of-town regional shopping malls. For most of this period, the retail sector has experienced considerable expenditure growth, which has been attributed to a number of factors, including greater disposable income, availability of credit, new technology and a general overall increase in our standard of living. However, recent economic conditions have had a clear impact on expenditure and per capita convenience goods spending has actually reduced in recent years. The way in which goods are purchased has also altered due to the increased popularity of 'e-tailing' as well as emerging forms such 'm-retailing' and 'omni' channel retailing¹.
- 2.02 The retail market and the need for new development is continually evolving as a result of numerous factors including demographics, consumer demands, car ownership, planning policy and technological advancements, such as e-tailing. The share of retail spending has undergone a significant shift in the decade since 2002, with Verdict identifying that town centre spending declined from 47.7% of overall spend to 39.9% of overall spend at 2012. In contrast, spending in out of centre locations has increased over the same period by 2.1% and non-store locations by 6.6%². These changes have had a major impact on the format and location of retail and leisure floorspace, which has led to recent Governments reaffirming their commitment to the 'town centre first' policy approach which is now outlined in the National Planning Policy Framework (NPPF) (March 2012).

Current Retail Picture

- 2.03 Recent research undertaken by Colliers³ provides information on recent trends, together with forecasts for the future of retailing in the UK. The findings confirm that the retail sector has been significantly affected by the wider economic climate and there is considerable uncertainty about the strength and durability of future growth. It is noted that whilst sales volumes and footfall were high at the start of 2011, the UK economy was close to a double dip recession in the latter months of 2011 and the retail market has since continued to fluctuate over the last 12 months. With significant reduction in

¹ E-tailing is shopping under electronically, M-tailing is shopping undertaken through a mobile internet devices, and OMNI relates to multi-channel retailing, encompassing seamless approach to the consumer experience through all available channels (mobile internet devices, computers, brick and mortar, television, radio etc.

² 'UK Out of Town Retailing,' Verdict Datamonitor, April 2012

³ 'National Retail Barometer: Summer 2013,' Colliers, August 2013



Government spending impacting on economic growth, the UK unemployment rate was recorded at 7.6% in September 2013 and is now showing signs of improvement.

- 2.04 These factors have had a significant impact on the public's general confidence, thereby reducing their propensity to spend their earnings on retail goods. Since 2010 there have also been increases in taxation (for example in VAT, national insurance contributions and capital gains tax) which also impact upon households' spending. Furthermore, inflation has risen to a level beyond average earnings growth and, at the time of reporting, the national inflation rate is 1.6% (July 2014). The delay in reviewing business rates is also identified in both the Portas⁴ and Grimsey Reviews⁵ as a key factor affecting the success of many operators, with the Grimsey Review in particular recommending that the 2015 business rates revaluation to realign property values should be reintroduced immediately and business rates should be frozen from 2014.

- 2.05 The economic conditions have resulted in significant structural changes to the high street in recent years whereby the pressure on retailers to remain solvent has meant that many are showing increased signs of caution in investment decisions. In particular, retailers are rationalising their physical store portfolios by reducing their number of stores, abandoning their representation in weaker centres and concentrating on acquiring sites in city centres and major regional shopping centres. The Local Data Company notes in the Grimsey Report that the national vacancy rate equates to over 22,000 empty shops in the top 650 town centres. The Centre for Retail Research also predicts that overall store numbers are expected to fall by 61,930 (-22.0%) between 2012 and 2018, with the main impact to be upon non-food stores. The report also estimates that 316,000 people will become unemployed, permanently or temporarily, as a result of these store closures⁷.

- 2.06 To address this, many retailers are re-negotiating their lease terms with landlords in order to enable them to switch from quarterly rents to monthly agreements, with several high street firms (including Monsoon and New Look) trying to ease the cash flow burden of paying rent three months in advance. Furthermore, some retailers are finding it increasingly difficult to justify being represented in every town in the UK and in less profitable markets. As a consequence, demand has reduced considerably for 'poorer quality premises' in secondary locations and in many smaller towns with a commensurate drop in value (and often rent). Large cities and towns such as York are likely to suffer less compared

⁴ 'The Portas Review,' December 2011

⁵ 'The Grimsey Review – An Alternative Future for the High Street,' September 2013

⁷ 'Retail Futures 2018,' Centre for Retail Research, May 2013



to smaller centres, given that they provide an enhanced choice for customers and offer the greater and more diverse retail and leisure (and tourist) 'experience' that consumers and visitors increasingly desire. In terms of prime retail rental values, Colliers⁸ note that national rates fell by an average of -0.9% in 2011 and by a further -1.2% in 2012, with the average national prime retail rent now being £110 per sq.ft. Colliers also reports that there is a marked regional variation in the rental rates, with London the only region to achieve rental growth over the 12 months to June 2012. In contrast, several other regions experienced significant reductions in their average prime rental values during the 12 month period to June 2012, notably Wales (-8.4%), the East Midlands (-5.7%), West Midlands (-3.7%), North West (-2.1%) and Yorkshire and the Humber (-1.8%). However, such reductions are a positive response to market conditions and are natural response to current market conditions.

- 2.07 In summary, there has been a marked polarisation and divergence in retailer spending, characterised by diminishing demand for secondary premises in smaller peripheral centres and increasing interest for well located and appropriately configured floorspace in key centres. It is evident that whilst Central London, regional city centres and regional shopping malls are relatively stable as these are location that are still viable due to critical mass, a significant number of small and medium sized towns will need to implement innovative ideas in order to improve spending rates and reduce trade leakage.
- 2.08 Experian, which monitors and forecasts retail consumer expenditure in the UK, has reviewed its forecast growth rates for both convenience and comparison goods expenditure in recent years. Experian's⁹ forecast annual per capita convenience goods growth rate is now -0.6% at 2013, -0.3% at 2014 and +0.1% at 2015. Forecast annual per capita comparison goods growth rates are more positive than in previous years, with growth of +3.2% forecast at 2013, +2.3% at 2014 and +2.8% at 2015 and 2.9% thereafter. Whilst these increased forecasts are encouraging and show signs that confidence in spending is returning, it is evident that these forecast growth rates are still well below the annual growth (4% to 6%) which was recorded prior to the economic downturn but do show increased signs of stabilisation. WYG note that the GVA Retail Study in 2008, estimated convenience goods expenditure growth of 0.7% per annum and 3.8% per annum for comparison goods growth. In this regard, we note that, in 2009, Experian¹⁰ forecast that per capita convenience goods growth would equate to +1.1% per annum between 2013 and 2015.

⁸ Ibid

⁹ Experian Retail Planner Briefing Note 11, October 2013

¹⁰ Experian Retail Planner Briefing Note 6.1 (Table 3.2), October 2008



2.09 Despite the past difficulties outlined above and the general decline in the comparison goods sector, other specific types of goods continue to perform well. The market for recreational goods has, on the whole, performed well in recent years, with healthy growth attributed to supermarket sales together with the growing popularity of online shopping, which continues to see an increase in sales year-on-year. However, the manner in which such purchases are made has changed considerably, with the increasing popularity of the internet to purchase books and music having a notable impact on the composition of town centres, with such stores all but disappearing from the high street. Other businesses have experienced growth in the last two years, with a +12.4% increase (over 1,100 stores) in 'value-related retailing' outlets, including second-hand, discount and charity shops. The Grimsey Review¹¹ also makes reference to the expansion of pawnbrokers, pay-day lenders and betting shops which have collectively experienced a 17% growth in the number of outlets since 2011.

Trends in Comparison Goods Shopping

2.10 Whilst it is not anticipated that growth in retail spending over the next ten years will mirror that achieved after the turn of the millennium, there is expected to be some growth in comparison goods expenditure in coming years. Consequently, there is an increasing focus from retailers on achieving more efficient use of their floorspace, particularly given the recent poor performance of certain national multiples, many of which have been affected by the significant increase in e-tailing and increases in rental levels secured before 2008. As a result of the current economic climate, retailers are more reluctant to commit to new development than they have been in previous decades. Instead, they are more selective and are holding out for accommodation that is appropriate both in terms of location and the type of premises provided. Indeed, retailers are seeking to occupy larger units in order to achieve more efficient use of floorspace and attract shoppers from a wider area. These larger floor plates enable operators to provide a greater range of goods; for example, in 2011, Primark opened one million sq.ft of new retail space.

2.11 International market conditions and price deflation in some key sectors have also meant that many high street names are becoming increasingly vulnerable to takeover. This is being pursued through disposals, company voluntary administrations (CVAs), informal arrangements with landlords, lease expiries and break options. More generally, whilst there is likely to be continued demand for larger, modern retail units in the future, increased sensitivity over future viability will mean a cautious approach to new investment for many key national retailers. Marginal locations within centres will

¹¹ 'The Grimsey Review – An Alternative Future for the High Street,' September 2013



increasingly be rejected. Many national retailers, who would have previously considered smaller/lower order centres in order to increase their market share, are now assessing their future strategies given the ongoing downturn in the economy. Consequently, many investment decisions will be influenced by the scale of commitment from other retailers; developers will increasingly need to promote large town centre redevelopment schemes if they are to attract high quality retailers.

Trends in Food Retailing

- 2.12 In the aftermath of the growth in the number of edge and out of centre large format supermarkets during the 1990s, development of such facilities is now more limited due to stricter planning laws (following the publication of PPS4 and subsequently the NPPF) and a lack of suitable sites. As a result, the national multiples in the food retailing sector are finding a range of other measures to improve their market share. These include:
- Offering a wider product range, such as financial and insurance products, petrol and non-food goods;
 - Developing a wide range of retail models, for example small-format convenience stores in town centres (e.g. Sainsbury's Local, Tesco Express), smaller supermarkets mostly in town centres (e.g. Tesco Metro), superstores (e.g. Tesco) and hypermarkets (e.g. Tesco Extra, Asda Supercentres);
 - Extended opening hours;
 - Offering cheap products and no-frills service;
 - Providing an attractive and powerful brand image; and
 - Offering a home delivery service.
- 2.13 Mintel¹² identifies that the recession – allied with a period of higher inflation – has had an impact on consumer behaviour and the wider dynamics of grocery retailing. Price, or specifically value, is now identified as the key issue for consumers and more and more shoppers are assessing whether purchases represent value for money. Shoppers now realise that they are able to 'trade down' and switch to own-label ranges to save money without sacrificing on quality. Indeed, customers are mixing value and premium in the same basket. It is noted that as weekly food budgets fall and consumers alter their shopping habits, growth will be limited and the battle for market share will intensify further. Winning a share of consumer spend will require more than low prices, with shoppers increasingly seeking to source high-quality, good value food.

¹² 'Food & Drink Retailing,' Mintel, March 2013



- 2.14 Verdict also states that changing UK demographics are having a major impact on the food and grocery sector. For example, there has been a rise in single occupancy young professional households who are 'time poor' and relatively 'cash rich'. Though their baskets might be small, they tend to buy higher value items, therefore providing an opportunity to boost volume and value growth. Elsewhere, an ageing population profile is leading to a rise in time rich consumers who are likely to make more frequent small trips rather than do large weekly shops. The contrasting requirements of these markets means that retailers are seeking to open a variety of stores with a particular current focus on small convenience stores. Verdict indicates that, as the race for space intensifies, format flexibility will be essential.
- 2.15 Verdict¹³ estimates that the food and grocery sector was worth £136.0 billion in 2013, equating to an annual growth of 3.2%, representing 43.7% of total retail spend. The four key supermarket chains in the UK have respective market shares of 28.7% (Tesco), 15.9% (Asda), 15.6% (Sainsbury's) and 10.1% (Morrisons). National multiple retailers, including the Co-operative Food (5.1%), Waitrose (4.0%) and Aldi (3.6%), represent a total grocery market share of 90.8%.
- 2.16 More recently, there has been a slowdown in the growth plans of the majority of the principal supermarket operators. Tesco, for example, indicated in April 2013 that it would scrap plans for 100 major store developments and would instead focus on developing medium size units. It is also in the process of investing around £1 billion on improving its current stores and adding new elements, including bakeries and restaurants (notably the Giraffe chain which it purchased in March 2013) which, it hopes, will make the store environment more attractive and encourage shoppers to spend more time and money there. Asda is the second largest supermarket retailer in the UK, with more than 550 stores nationwide. In 2011, Asda opened 22 new stores and acquired 193 Netto stores which allowed the company to increase its smaller store portfolio. However, as a result of Competition Commission laws, it was later required to sell 47 of the stores to other retailers, including Morrisons. Asda has recently focused investment on its smallest store formats (known as Asda Supermarket), with the company having aspirations to deliver 250 such stores by 2015. Morrisons intend to deliver 2.5 million sq.ft of new retail floorspace by 2013/2014, both through the continued development of large foodstore schemes and the new small scale M-Local convenience format store. Due to the success of the initial trials, Morrisons now intend to open 50 additional M-Local stores by 2013/2014.

¹³ 'UK Food & Grocery – Verdict Sector Report', Verdict, October 2013



The discount supermarket chain Aldi made a pre-tax profit of £57.8m in 2011, when it opened 29 new UK stores. It is currently seeking to develop a further 40 stores by the end of 2013, thus bringing its total number of UK stores to over 500. Sainsbury's have also recently teamed up with Netto to look at introducing smaller formats to the UK market.

- 2.17 The role of supermarkets also continues to develop, with the large operators now offering a greater diversity of goods and services, via a larger number of formats and locations. Food and non-food sales are also increasingly being driven by large supermarket growth, with half of town centres now competing with five or more supermarkets within a two mile radius¹⁶. Whilst the exact impacts which will arise from the opening of a new supermarket are dependent on local circumstances, BCSC notes that there has been a significant decline in the number of independent food retailers over recent years, including a reduction of 45% between 1996 and 2007 in the number of greengrocers. Over the same time period the market share of total retail sales secured by supermarkets has increased from 38% to 42%.

Out of Centre

- 2.18 Despite the 'town centre first' planning policies which have been adopted by recent Governments, research undertaken by Verdict¹⁷ indicates that between 2007 and 2012, the amount of out of centre floorspace increased by 23%. However, in very recent years, Colliers notes that the demand for out of centre representation has been limited, with those retailers seeking to acquire stores having a pick of vacant stock which has been made available through the administration of MFI (in November 2008), Land of Leather (in January 2009) and Focus DIY (in May 2011), amongst others. However, only five major out-of-town retailers have failed since June 2011, these being Allied Carpets, Clintons and Comet.
- 2.19 The national average vacancy rate in out of centre retail warehouses in 2012 is 3.9%, an increase of 0.3% since 2011. WYG can confirm that in 2013, the vacancy rate at Monks Cross, Clifton Moor and Foss Island was 4.6%¹⁸. Some of the voids created by the administrations remain un-let and the flooding of the market with so much unwanted space has acted to reduce rents. Retailers who have had their pick of the best stores include Dunelm, Pets at Home, Dreams, Matalan, Dixons Group, Go Outdoors, B&M, Mothercare, Next Home and TK Maxx.

¹⁶ 'What Does the Future Hold for Town Centres?', BCSC, September 2011

¹⁷ 'UK Out of Town Retailing', Verdict Datamonitor, April 2012

¹⁸ Taken from Table 26 of Appendix 3. (excludes under offer/construction)



2.20 Looking forward, Colliers indicates that whilst out of centre locations have witnessed low levels of development during the last two years, it is estimated that one million sq.ft of new space is to be completed in 2012. There are also an increasing number of retailers acquiring larger stores, including several department-store type format operators including John Lewis Home, M&S and Primark. The large out of centre Oakgate scheme which was recently approved by the City of York Council, for example, will accommodate M&S, John Lewis and Next stores.

Shopping Centre Development

2.21 It is evident that shopping centre retail development is starting to see signs of progress following 4 years of a virtual standstill with the British Council of Shopping Centres (BCSC) (2013) showing that 2013 has seen a significant improvement on 2012 in terms of new centres opening. Colliers suggests that the UK may never see a return to the level of shopping centre openings that was evident in recent times. The Trinity development in Leeds City Centre opened in March 2013 with 90% of the units pre-let was the most widely anticipated mall opening in 2013, however, other schemes (Whiteley Village and Jubilee Place) and extensions also opened in 2013 showing improved confidence in the retail market. In contrast to the average level of completions over the last five years (3.9 million sq.ft per annum), the 2013 level of shopping centre development is by comparison very modest at 1.5 million sq.ft. In 2008, for example, almost 8 million sq.ft of new floorspace opened across 14 new schemes nationwide. BCSC estimate that 2014 and 2015 will show an improvement on the limited level of activity seen in 2012, and by 2016 mall openings will exceed 2011 levels when delayed projects such as Bradford (Westfield), Bracknell Northern Quarter are scheduled to open, and it is expected that around 3 million sq.ft of floorspace will be delivered per year which exceeds 2011 levels, demonstrating increased confidence in delivering new floorspace.

2.22 Despite a more confident mood in recent times, viability is still considered to be challenging. There are three types of scheme which may be successfully delivered in the current challenging economic climate. The first of these will be where a town has a large, affluent catchment and an acknowledged undersupply of retail floorspace in both town centre and out-of-town locations. The second scenario relates to schemes which were very close to happening before the recession took hold, which may be revised to better meet the current needs of the market. Barnsley, Macclesfield, Bradford and Lichfield are examples of such schemes, and from our own involvement, we can confirm that both Bradford and Macclesfield are now being actively promoted after a difficult period due to increased confidence in the retail market. The third opportunity relates to development where the key anchor is a foodstore and, as a result, demand remains strong due to increased footfall.



- 2.23 Proposed schemes which will conform to one of these models are considered to be few and far between, and for development to begin again in earnest, it will be necessary for marked improvements in retailer demand, a strengthening of rental levels, further improvement in the investment market and, critically, the availability of finance at viable levels to occur. For those towns without an oversupply of floorspace and with sites which can be brought forward without excessive levels of cost, some development may be able to be brought forward within the next five years. However, such opportunities may be the exception rather than the rule.
- 2.24 In addition to their retail offer, consumers are increasingly travelling to larger centres for their overall experience and to use the leisure facilities. Colliers notes that the largest destinations draw from a wide catchment, hence the need to retain consumers for as long as possible. In the past, it was recognised that non-retail uses typically occupied less than 10% of the space, though this has increased in recent schemes, including Westfield in Stratford where catering and leisure units occupy over 20% of the space. The Grimsey Review also noted that town centre and high street plans must seek to create a complete community hub which can incorporate a variety of units, including housing, education, and leisure uses, as well as developing day time, evening and night time cultures. Therefore successful shopping developments need to ensure they comprise a wider variety of uses which are not necessarily reliant on comparison goods floorspace, but also that the floorspace is designed with flexibility to ensure that it can respond promptly to changes in market

Growth in E-tailing ('E-commerce')

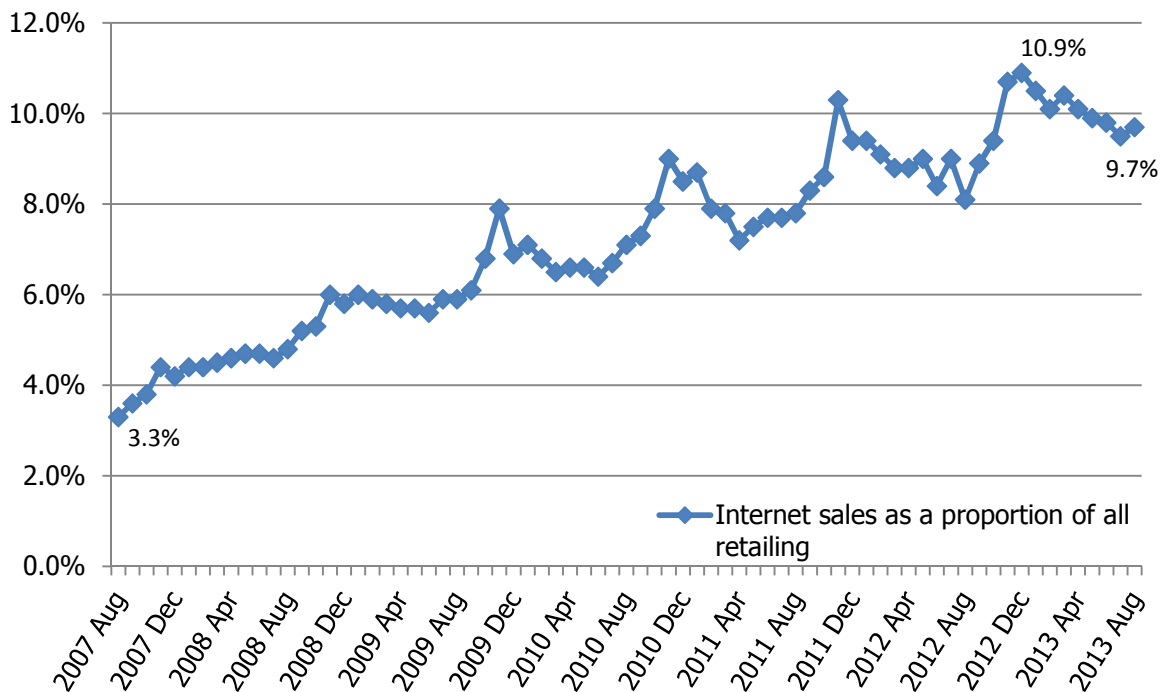
- 2.25 Many consumers who previously shopped in town centres and at retail parks are now using the internet for some of their purchases. It is estimated that internet sales accounted for 9.7% of all UK retail spending at August 2013¹⁹ and this trend is set to continue. Experian forecast that internet sales (non store) accounted for 12.3% of all UK retail spending at 2013²⁰ and Experian²¹ predicting that all non-store purchases will account for 20.5% of total retail expenditure at 2028. Experian estimates non-store sales in the UK is estimated £39.5 billion in 2013, with internet sales at £32.1bn and non internet sales (mail order, market, catalogue) at £7.3bn.²²
- 2.26 The rise in recent years of e-commerce has had a major impact upon retailers, developers and investors alike, with the top 10 e-retailers in 2012 including Amazon UK (16%), Shop Direct (5%), and

¹⁹ 'Retail Sales', Office for National Statistics, August 2013
²⁰ 'Retail Sales', Office for National Statistics, August 2013
²¹ Experian Retail Planner Briefing Note 11, October 2013
²² 'E-Commerce,' Mintel, July 2013



Next (4%)²³. As access to the internet/online shopping continues to grow through digital televisions, tablets and mobile phones, proportionally less money is anticipated to be spent on the high street or at retail parks.

Figure 2.1: Internet Sales as a Proportion of All Retailing



Source: 'Retail Sales,' Office for National Statistics, August 2013

2.27 The growth in internet as a sales medium has been enabled by the increase in access to the internet by households, which has reportedly²⁴ risen from 57% at 2006, to 77% at 2011, 80% at 2012 and 83% in 2013. A total of 21 million households in Great Britain now have internet access, an increase of 7.1 million since 2006. Experian (2013) identify that there are 52.7% internet users in the UK, representing 84.1% of the population.

2.28 Office for National Statistics (ONS) data²⁵ indicates that the number of people using the internet to purchase goods continues to rise, with 72% of the UK population purchasing products over the internet in 2013, compared to 53% in 2008. The most popular online purchases were clothes/sports

²³ 'E-Commerce,' Mintel, July 2013

²⁴ 'Statistical Bulletin: Internet Access Households and Individuals', Office for National Statistics, August 2013

²⁵ 'Statistical Bulletin: Internet Access Households and Individuals', Office for National Statistics, August 2013



goods, with 47% of internet users buying these items. In addition, 44% of users bought household goods and 21% bought food or groceries. Additional research conducted by the Interactive Media in Retail Group (IMRG) and analysts Capgemini²⁶ indicates that British shoppers spent £5.8 billion online in August 2012, a year-on-year growth of 11%. IMRG also states that all key retail sectors experienced improvements in sales between July 2011 and July 2012, particularly in the health and beauty (+30%), electrical (+30%) and gifts (+27%) sectors.

2.29 In addition, the proportion of households with access to the internet is expected to increase further over the coming years, alongside the growth in mobile phone and tablets with access via the new 4G spectrum. The ONS states that access to the internet using a mobile phone more than doubled between 2010 and 2013, from 24% to 53%. This has supported the strong growth recorded, together with improved consumer confidence in the security of online payment, deliveries and heavy demand for expensive electrical products available online. The option of using the internet to 'click and collect' in-store is also increasing in popularity, with the service accounting for a fifth of John Lewis internet orders. Online spending continues to be the key growth opportunity for national and independent retailers, accounting for increasing proportions of total sales. Such multi-channelling development strategies are actually driving demand for traditional outlets, whereby retailers are using bricks and mortar store as a showroom for their products with service locations for collection and drop off points for their online orders.

2.30 With regard to foodstore operators, food accounts for 20.5% of all internet sales, which equates to 3.1% of all food retailing²⁷. Verdict's research identifies that, with the exception of Morrisons (subject to a deal with Ocado to allow them to trade online), major retailers have seen their online business grow as online shopping has increased and, as a result, the likes of Asda and Sainsbury's have improved their geographical coverage and capacity. In particular, online sales at Tesco currently exceed £2 billion, with Colliers noting that the operator has a reported 48% online grocery market share. The grocery market is focusing on multi-channel retailing as a main driver to increased sales, with Tesco's expansion into click and collect format for its non-food items at 600 stores and Sainsbury's selling over 15,000 products online for local pick up or delivery, as well as Waitrose operating a very successful click and collect system. However, at present foodstore operators prefer to opt to distribute from stores rather than from centralised warehouses (commonly referred to as dark stores). However, this may change over time if pressure on stores becomes too much whereby

²⁶ 'IMRG Capgemini E-retail Sales Index', September 2012

²⁷ 'Shop Expansion and the Internet', CBRE, May 2012



operators may decide to move to centralised warehousing which would ultimately reduce demand for retail floorspace.

- 2.31 It is evident that internet shopping as a whole is having an impact upon traditional high streets, in light of increased competition and lower prices. Consequently, there is a possibility that online retailing will put some pressure on retail rental growth over the next five to ten years. However, it will be difficult to understand the true impact as the current economic downturn is also having a significant impact on rental levels. Having said that, it would appear that the smaller the centre, the greater the impact will be felt from online retailing. Within small shopping centres (sized between 5,000 sq.m and 20,000 sq.m), including those in market towns, it is likely that the growth of online shopping could reduce turnover notwithstanding any future growth in disposable income.

- 2.32 Despite some variance in the estimated future growth of online shopping, it is clear that e-tailing will not replace the 'shopping experience' as shopping is a social activity. In this regard, retailers are already adopting innovative approaches to encourage people to visit their store through 'try before you buy' concepts. For example, Ellis Bingham has installed Vertical Chill indoor ice climbing walls at five stores for customers to try equipment and to interact with products. For successful retailers, online selling provides an additional route to the market. Online retailers benefit from demand generated through physical channels whilst high-street outlets can benefit from reaching a wider customer base through the internet as well as through actual footfall. Those retailers who are likely to have a healthy future are those who are able to combine a strong high street presence with an interesting and closely related e-tail offer this can only be achieved through a well considered multi-channelling strategy.

Conclusion

- 2.33 In conclusion the retail market has undergone significant changes in recent years, which has been significantly affected by the wider economic conditions facing the UK, which has lead to a marked decline in established town centre as well as other retail formats. This has principally been caused by the decline in available expenditure due to suppressed disposable incomes. However, 2013 has seen an increase in confidence mainly driven by an improved economic outlook driven by improved employment and available of credit which has seen improved expenditure growth rates forecast moving forward, although still below pre-recession levels they are significantly higher than those recorded over the last 3 to 4 years. The growth in online sales has also influenced the need for new tangible floorspace in recent years, however with improved growth forecast and improving retailing sales coupled with the retail industry embracing innovative multi-channelling strategies. This provides



an opportunity for town centres to widen their audience in the future. To deliver this it will be critical that town centres are flexible enough to both embrace digital solutions whilst also providing appropriate and well managed retail floorspace that can showcase products and services. Only by adopting a well considered holistic strategy will the future vitality and viability of centres be secured.



3.0 Planning Policy Context

Introduction

- 3.01 Given that this Study seeks to provide important evidence to assist in the production of future retail planning policy, it is important to review existing national planning policy of pertinence to retail and town centre matters to explore the context for the Study and how it may impact upon the production of the Local Plan.

National Planning Policy Framework

- 3.02 The National Planning Policy Framework (NPPF) was published on 27th March 2012. The Framework replaces all former Planning Policy Statements, Planning Policy Guidance Notes and some Circulars with this single consolidated document.
- 3.03 The main theme of the NPPF is that there should be 'a presumption in favour of sustainable development'. In terms of plan-making, it is stated that local planning authorities should positively seek opportunities to meet the development needs of their area, with an emphasis on Local Plans having sufficient flexibility to adapt to rapid change.
- 3.04 In terms of economic development, it is set out within the NPPF's core principles that planning should proactively drive and support economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made to objectively identify and then meet the business and other development needs of an area, with positive responses made to wider opportunities for growth.
- 3.05 The NPPF stresses the Government's commitment to securing economic growth in order to create jobs and prosperity, with paragraph 17 stating that the planning system should do everything it can to support sustainable economic growth.
- 3.06 Paragraph 19 indicates that planning should operate to encourage and not to act as an impediment to sustainable growth, and that significant weight should be placed on the need to support economic growth through the planning system. The NPPF seeks to ensure that local planning authorities plan proactively to meet the development needs of business and support an economy fit for the 21st century.



3.07 The NPPF still recognises the need to promote the vitality and viability of towns and cities through the promotion of competition and growth management during the plan period. Paragraph 23 of the NPPF provides guidance for local planning authorities in drawing up Local Plans, it indicates that they should:

- recognise town centres as the heart of their communities and pursue policies to support their vitality and viability;
- define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centre. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;
- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

3.08 Paragraph 23 also indicates that needs for retail, leisure, office and other main town centre uses should be met in full and should not be compromised by limited site availability.



- 3.09 Paragraph 24 requires local planning authorities to adopt a sequential approach to the consideration of planning applications for main town centre uses that are not in an existing centre or in accordance with an up-to-date Local Plan. The following paragraph 25 indicates that that the sequential approach should not apply to applications for small scale rural offices or other small scale development.
- 3.10 Paragraph 26 indicates that local planning authorities should require an impact assessment for retail, leisure and office development outside of town centres which are not in accordance with an up-to-date Local Plan and if the development is over a proportionate, locally set threshold. Where there is no locally defined threshold, the default threshold will be 2,500 sq.m. We consider the need for a local impact threshold in providing our recommendations in respect of the Council’s future retail strategy at Section 8 of this report.
- 3.11 Paragraph 27 indicates that where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on the vitality and viability of a town centre or on existing, planned, committed investment in a centre it should be refused. However, we do not consider that this direction extinguishes the requirement set out in statute to first examine development plan policy and then all material considerations in determining a planning application.
- 3.12 The NPPF also recognises that retail activity should still, where possible, be focused in existing town centres. Retail and leisure proposals which cannot be accommodated in or adjacent to the town centre will have to satisfy a dual impact test and the sequential test.

‘Ensuring the Vitality of Town Centres’ National Planning Policy Guidance

- 3.13 The Ensuring the Vitality of Town Centres National Planning Policy Guidance (PPG) replaces the previous Practice Guidance providing a more concise document; however, the objectives remain comparable whereby the PPG promotes that local planning authorities should plan positively and support town centres to generate local employment, promote competition within and between town centres, and create attractive and diverse places for users. The PPG requires LPAs to fully assess and plan to meet needs for main town centre uses by adopting a town centre first approach. Paragraphs 2 and 3 of the PPG confirm that this should be delivered through a positive vision or strategy which is communicated through the development plan. The strategy should be facilitated through active engagement with the private sector and other interested organisations (including Portas Pilot organisations, Town Teams and so on). The PPG also confirms that any strategy should be based on evidence which clarifies the current state of town centres and opportunities to meet development needs and support centres’ vitality and viability.



3.14 Such strategies should seek to address the following matters:

- the appropriate and realistic role, function and hierarchy of town centres in the area of over the plan period, including an audit of the vitality and viability of existing town centres and their ability to accommodate new development;
- consideration of the vision for the future of each town centre and the most appropriate mix of uses;
- the assessment of the scale of development that a town centre can accommodate;
- the timeframe for new that new retail floorspace can be delivered;
- what other complementary strategies are necessary or appropriate to enhance the town centre to deliver the vision in the future; and
- the consideration of the enhancement of car parking provision including charging and enforcement mechanisms.

3.15 Paragraph 5 identifies key indicators for assessing the health of a centre that can be monitored over time. The PPG advises that not all successful town centre regeneration initiatives have been retail led or focused on substantial new development, but can involve measurements such as improved public realm, parking, and accessibility and other partnership mechanisms. Paragraph 7 identifies the importance of planning for tourism as an important component of any overall vision and indicates that local planning authorities should consider specific tourism needs (including locational or operational requirements) and opportunities for tourism to support local services, vibrancy and the built environment.

3.16 The PPG maintains the town centre first policy through the sequential test, with paragraph 9 requiring a thorough assessment of the suitability, viability and availability of locations when plan making with the consideration of sites linked to the forecast of future need and the type of land needed to accommodate main town centre uses. Paragraph 32 retains the requirement to consider both quantitative and qualitative need in planning to meet the need for main town centre uses.



The Portas Review - An Independent Review into the Future of Our High Streets

- 3.17 The Portas Review (December 2011) is an independent review undertaken by Mary Portas into the state of Britain’s high streets and town centres. The review considers the reasons why retail spending on the high street is falling, why there has been a decline of Britain’s high streets, and the benefits that can be brought about through the protection of Britain’s high streets. Portas puts forward 28 recommendations which include actions that Government, businesses and other organisations should take in order to create diverse, sustainable high streets where retailers can thrive.
- 3.18 The Government released a response to the Portas Review in March 2012. The response acknowledges that in response to the challenges facing the high street, namely out-of-centre retail development and online retailing, the high street will have to offer something new and different in order to create a diverse and competitive environment. In its response, the Government accepts a number of recommendations put forward in the Portas Review, including: the implementation of Town Teams (described as visionary, strategic and strong operational management teams for high streets); the provision of funding for pilot areas who are judged to have the best ideas for improving their town centres and high streets; investing in Business Improvement Districts; and support for a new National Market Day. The Government’s response seeks to encourage areas to think creatively about how their town centres can be enhanced in order to entice people back, including improvements which could be secured through the redesign of high streets, and the promotion of the evening and night time economy.

Other Relevant Documents

Economic and Retailing Growth Analysis and Visioning Work – Deloitte, June 2013

- 3.19 The objectives of the Economic and Retailing Growth Analysis and Visioning Work are to:
- Positively identify the development needs of York City over the plan period;
 - Create the foundation for an economic vision and a vision for York city centre;
 - Set out a strategy for the promotion of a competitive city centre; and
 - Set out a strategy for a diverse commercial/business base.
- 3.20 The document seeks to build on York’s Economic Strategy 2011-15 which established a target for York to become a top five UK city and a top ten mid-sized European city. The document seeks to build on



York city's position as one of the highest skilled cities in the UK and is the country's third fastest growing in population terms.

- 3.21 An assessment of York against comparative European cities is undertaken within the document. It is concluded that York's comparative areas of strength include its strong population growth, highly skilled workforce and strong private sector. However, York performs less well in terms of GDP and youth unemployment levels. When compared to other UK cities, the study found York to not have been as successful in attracting employment growth and minimising employment losses. In terms of future economic forecasting, it is predicted that the largest employment growth will be in the property and business service sector, wholesale and retail trade and transport and communications. When looking at existing employment locations in the city, the study concludes that York has no defined Central Business Area and that there are opportunities to upgrade the office provision in the city.
- 3.22 The document provides a summary of York's retail offer and describes York as being a dominant centre for its immediate catchment area, given the distances involved in travelling to and from other main centres. It is noted that as a major tourist and visitor destination, York draws spend from well beyond its primary catchment. York is described in the study as providing a multi-layered offer as:
- A day to day convenience shopping destination for the resident and working population;
 - A general comparison shopping role for the resident and working population;
 - A specialist retail role due the variety of shops in the city centre and at the York Designer Outlet;
 - A leisure orientated role which has a regional, national and international draw;
 - A primary tourism role due to the city's heritage and cultural attractions e.g. York Theatre Royal and York Art Gallery; and
 - A secondary tourism role due to the sporting and recreation offer e.g. York Races.
- 3.23 A health check of York is provided in the document which concludes that there is a strong mix of retail provision and diversity in York city centre. The department store offer is considered to be good, however, some stores are constrained by their building form and there are notable absentees. New retailers have been attracted to the city centre including H&M and Urban Outfitters. The market provision in the city is good, with specialist retailing very strong and the convenience goods offer in the city centre has improved through the introduction of a number of small format stores. The main deficiency in the city is noted as the lack of a wide variety of large floorplate stores. It is stated that although the historic characteristics of the city centre is one of York's key strengths, this presents a barrier to expansion and as a consequence development schemes are often relatively small scale and provide no significant increase in floorspace. Indeed, the PROMIS Report (November 2012) indicates



there were 47 reported retailer requirements for York, against a UK average of 13. Deloitte consider Castle Piccadilly to be arguably the only potential development area that could enable the city centre to expand in retail terms. It is noted that prime rents have fallen in recent years and that there has been growth in some off-prime streets. Vacancy rates are below the national average; however there are some issues with vacancies on gateway and specialist streets. Deloitte raise concern that footfall fell by 3% in the city centre between 2011 and 2012. Although the city centre benefits from good public transport links, the availability and price of car parking are considered a concern.

3.24 The study highlights a number of factors which will influence the capacity for growth in the city centre as follows:

- Monks Cross Expansion – Deloitte consider the development will divert circa £51m trade from the city centre, equating to an impact on existing turnover of 8.7%.
- Out of town facilities – Deloitte consider such facilities will have a greater market share in 2016 than the city centre.
- The need for additional floorspace requirements will be a challenge given the constrained nature of the city centre and lack of developable sites.
- Expansion of competitor sub-regional centre e.g. Leeds and Wakefield will challenge York’s retail sector.

3.25 As part of the assessment undertaken by Deloitte, engagement took place with Council members, business and the residential community. The key issues raised in response to this engagement included the need for development sites, particularly in proximity to the train station to accommodate York’s growing business sector. In terms of retailing, the need to ensure quality specialist retailers are encouraged over non-A1 uses was considered key.

3.26 A number of barriers to the growth of the city centre were highlighted including the desire to extend opening hours, the need to improve the quality of the streetscape, a requirement to improve pedestrian movement, a desire to maintain the quality of retailers and encourage independent retailers and the need to reduce congestion through the restriction of vehicle movement in favour of pedestrians.

3.27 Deloitte recommend a number of key deliverable actions which aim to facilitate growth in York, which are centred around the following six themes:



- Maintain city centre retail share in the short term, and grow city centre market share in the medium term;
- Become a top 5 UK city and a top 10 European City;
- Maintain the economic resilience of the City Centre;
- Support sector business growth with appropriate business premises;
- Build economic growth and job creation around existing strengths and opportunities; and
- Address the city's congestion issues.

3.28 The recommended actions to achieve these recommendations include:

- Supporting retailers to adapt to changing retail sector;
- Provide a credible site/s to secure city centre provision of new floorspace;
- Develop a clear access and parking strategy;
- Strive for perfection in the city centre appearance;
- Specific support for quality independent retailers and speciality shops;
- Identify locations for City Centre Grade A office space; and
- Investment in the public transport and tackling movement.



4.0 York Household Survey Results

Introduction

- 4.01 The undertaking of original market research enables in-depth analysis at a local level and allows the evaluation of the trade draw of particular centres and other retail destinations. The use of specifically commissioned and tailored survey research is fundamental to identifying the likely capacity for future retail floorspace 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.
- 4.02 A key requirement of this Study is the detailed understanding of shopping patterns in terms of the use of town centres and the identification of the city's catchment area. WYG commissioned specialist market researchers NEMS to undertake a comprehensive household telephone survey to identify consumers' habits and preferences in the Study Area. WYG also reviewed the previously commissioned household survey results (2007)²⁸ which were also undertaken by NEMS as part of the 2008 York Retail Study.

Study Area

- 4.03 Drawing on the empirical evidence that was collated for the previous Study in 2008 as well as retail evidence²⁹ that was submitted as part of the Oakgate scheme at Monks Cross in 2011, an important element of this Retail Study is to review previous shopping patterns within the local area to highlight any changes which have occurred since 2007 and 2010 and ascertain any impacts on behaviour which may have arisen as a result of the wider UK economic conditions, and also as a result of retail led development in the vicinity of the Study Area.
- 4.04 In November 2013, a survey of 1,800 households was undertaken within the defined Study Area which comprises twenty separate zones and which is consistent with the approaches undertaken in 2007 and 2010 to ensure that comparable analysis can be undertaken. The zones were defined according to postcode sector geography to assist in the collection of data for the purposes of a telephone based Household survey, rather than precisely representing the shopping catchment areas

²⁸ NEMS Market Research undertook the York Shopping Survey for GVA in July 2007 this formed the basis of the York Retail Study published in 2008.

²⁹ NEMS Market Research undertook a telephone household survey for HOW Planning in September 2010 as part of the Oakgate planning application, this was published as part of the Retail Assessment (September 2011).

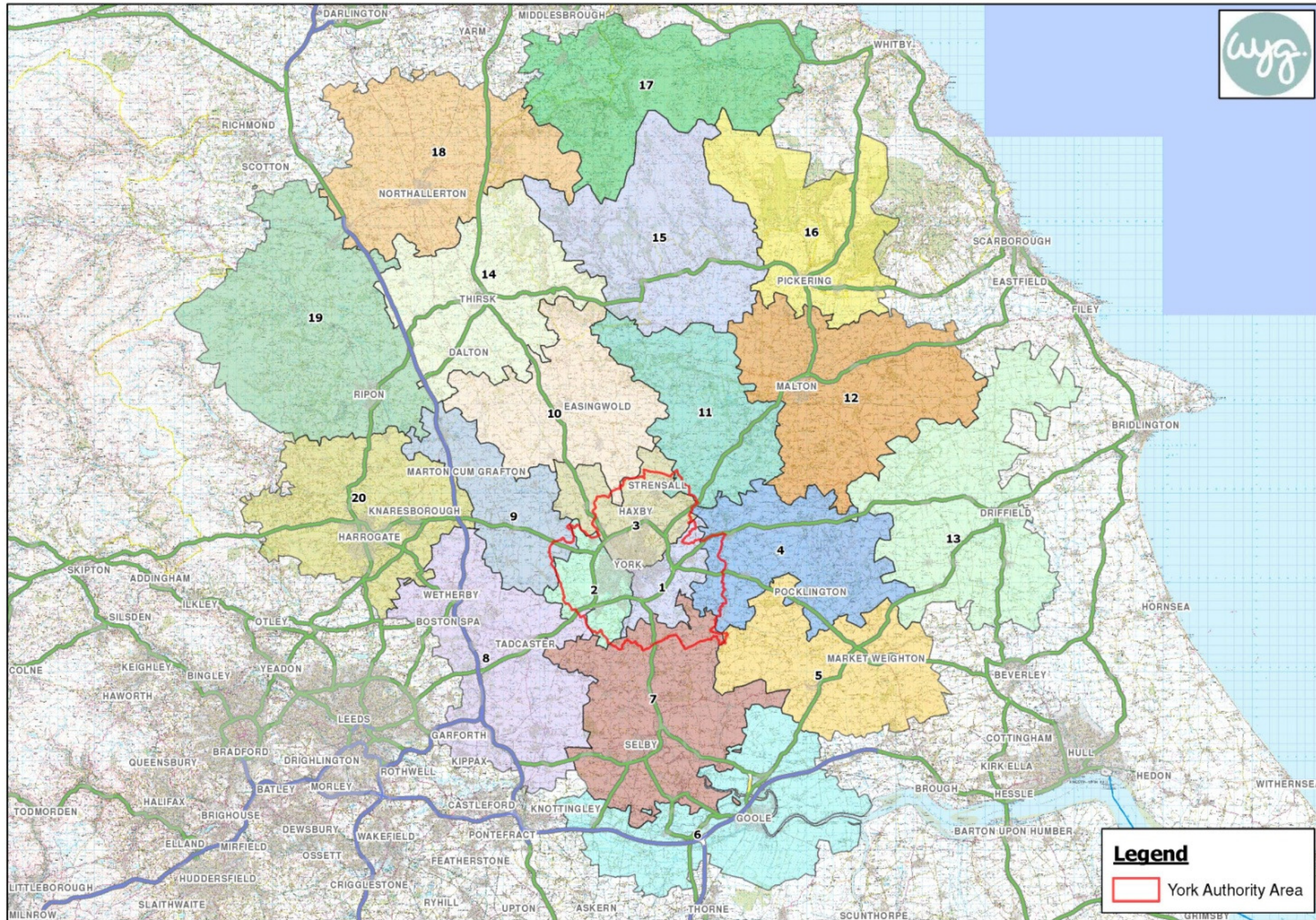


of the respective areas. The Study considers shopping behaviour within the wider area and in other local authorities, notably Harrogate, Ryedale, Selby, East Riding or Yorkshire, Hambleton and Leeds. Zones 1 to 3 cover York City administrative area ('York City'), while the other zones are located outside York City and cover neighbouring local authority areas.

4.05 A map of the Study Area is provided below at Figure 4.1. **Table 4.1** sets out the postcode areas which comprise each zone. The questions and full tabulation of results from the household survey are provided at Appendix 1. The sample across the Study Area has been equitably distribution at a lower level of postcodes (to 5 digits) and NEMS have confirmed this in their methodology in sections 1.3 to 1.5 provided in Appendix 1 of this Study.



Figure 4.1: Study Area and Zones for York Retail Study



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Table 4.1: Postcodes by Survey Zone

Survey Zone	Area	Postcode Sectors
Zone 1	York South East	YO 1 6, YO 1 7, YO 1 8, YO 1 9, YO10 3, YO10 4, YO10 5
Zone 2	York South West	YO23 1, YO23 2, YO23 3, YO24 1, YO24 2, YO24 3, YO24 4
Zone 3	York North	YO30 1, YO30 4, YO30 5, YO30 6, YO30 7, YO31 0, YO31 1
Zone 4	Pocklington	YO41 1, YO41 4, YO41 5, YO42 1, YO42 2
Zone 5	Market Weighton	YO42 4, YO43 3, YO43 4
Zone 6	Goole	DN14 0, DN14 5, DN14 6, DN14 7, DN14 8, DN14 9
Zone 7	Selby	YO 8 3, YO 8 4, YO 8 5, YO 8 6, YO 8 8, YO 8 9, YO19 6
Zone 8	Tadcaster/Wetherby	LS22 4, LS22 5, LS22 6, LS22 7, LS23 6, LS23 7, LS24 8
Zone 9	East Harrogate	YO26 7, YO26 8, YO26 9, YO30 2, YO51 9
Zone 10	Easingwold	YO61 1, YO61 2, YO61 3, YO61 4
Zone 11	West Ryedale	YO60 6, YO60 7, YO62 4
Zone 12	Malton	YO17 6, YO17 7, YO17 8, YO17 9
Zone 13	Driffield	YO25 3, YO25 5, YO25 6, YO25 9
Zone 14	Thirks/Dalton	YO 7 1, YO 7 2, YO 7 3, YO 7 4
Zone 15	North West Ryedale	YO62 5, YO62 6, YO62 7
Zone 16	Pickering	YO18 7, YO18 8
Zone 17	Great Ayton / Stokesley	TS 9 5, TS 9 6, TS 9 7, YO21 2
Zone 18	Northallerton	DL 6 1, DL 6 2, DL 6 3, DL 7 0, DL 7 8, DL 7 9
Zone 19	Ripon	DL 8 1, DL 8 2, HG 4 1, HG 4 2, HG 4 3, HG 4 4, HG 4 5
Zone 20	Central Harrogate	HG 1 1, HG 1 2, HG 1 3, HG 1 4, HG 1 5, HG 2 0, HG 2 7

4.06 The results of the household survey are utilised to calculate the expenditure claimed by each existing retail facility within the Study Area, a process which is considered in Section 6 of this report.

4.07 The household survey is also of assistance in identifying broad shopping patterns, including the frequency of visit, the incidence of linked trips, and the most popular means of accessing town centre facilities, the use of other town centre facilities, and so on. It should be noted that the commentary which follows in this section is based on the analysis of shopping trips undertaken, without any specific regard to the level of expenditure which may have occurred during a trip. Due to the same approach being adopted between the zones defined for this Study and those utilised previously in 2007 and 2010, an assessment of changes in shopper behaviour between 2007, 2010 and 2013 on a zone by zone basis has been possible.



Main Food Shopping Patterns

4.08 **Table 4.2** below indicates that all convenience stores situated within York City claim a combined market share of 34.8% of all main food shopping trips. The area's market share has fluctuated between 35.3% in 2007 and 33.6% in 2010, demonstrating that although the market share decrease between 2007 and 2010 by 1.7 percentage points the main food shopping market share has increased since 2010 by 1.2 percentage points and therefore has now only decreased by 0.5 percentage points since 2007. This is part due to improvements in the retail offer in Zones 4 and 10. In Zone 4 the Sainsbury's store at Pocklington has improved its trade retention as well as the introduction of Aldi at Robertson Close as increase the local main food trade retention. In Zone 10, the findings show that the retention of the local trade at the Co-Operative Food at Easingwold has significantly improved, reducing the need of Zone 10 residents to travel to facilities in York.

Table 4.2: York's Main Food Shopping Market Share Analysis by Zone (%)

Zone	Market Share (%)				
	2007	2010	2013	Difference 2007 to 2013	Difference 2010 to 2013
1	97.8	100.0	100.0	2.2	0.0
2	97.9	100.0	97.7	-0.2	-2.3
3	98.6	100.0	97.1	-1.5	-2.9
4	63.0	52.0	48.7	-14.3	-3.3
5	9.6	11.9	15.2	5.6	-3.3
6	1.1	2.8	2.0	0.9	-0.8
7	12.8	13.8	20.1	7.3	+6.3
8	9.9	7.2	12.5	2.6	+5.3
9	19.2	18.9	26.0	6.8	+7.1
10	70.3	53.3	53.1	-17.1	-0.2
11	54.2	59.2	59.0	4.8	-0.2
12	11.0	18.4	12.4	1.4	-6.0
13	0.0	2.5	0.0	0.0	-2.5
14	0.0	0.0	2.5	2.5	+2.5
15	16.7	29.9	35.9	19.2	+6.0
16	14.3	12.0	15.7	1.4	+3.7
17	1.4	1.4	0.0	-1.4	-1.4
18	0.0	0.0	0.0	0.0	0.0
19	1.3	0.0	0.0	-1.3	0.0
20	1.2	1.3	0.0	-1.2	-1.3
Total	35.3	33.6	34.8	-0.4	+1.2

Source: 2013 market shares derived from Table 3, Appendix 2 (2013 Study)

2010 market share provided by HOW Planning (2014) derived from Appendix 6 of Retail Assessment for Oakgate (2011)

Note: WYG has re-coded the 2007 survey results with NEMS, market shares adjusted to exclude SFT



4.09 Zones 1, 2 and 3 have a main food shopping market share of more than 95.0%. Each of these zones covers the York City administrative area and forms York City's primary catchment for main food shopping. Both the 2010 and 2013 household survey identifies that 100.0% of respondents from Zone 1 undertake their main food shop within York City. This is an increase of 2.2 percentage points to the main food shopping market share of 97.8% for Zone 1 which was recorded in 2007. The main food market shares of Zones 2 and 3 are also high at 97.7% and 97.1%. The market shares of these zones have decreased by 0.2% and 1.5% respectively since 2007, although these were found to both be 100.0% in the 2010 survey. Notwithstanding this, the figures show that the market share is high at greater than 97%. It is apparent that Zones 4, 10 and 11 form York City's secondary catchment for main food shopping trips, with these zones achieving market shares of 48.7%, 53.1% and 59.0% respectively. There has been a significant decrease to the main food market shares achieved by Zone 4 and 10 since 2007 due to the reasons explored in paragraph 4.08 above, where the market shares have decreased by 14.3 percentage points and 17.1 percentage points respectively. WYG note that the market share from Zone 10 has remained relatively stable since 2010 at circa 53% demonstrating that the decline may have stabilised. It is unsurprising that the zones which are located furthest away from York City achieve the lowest main food shopping market shares. Indeed, Zones 17, 18, 19 and 20 do not achieve any main food shopping market share. The results are generally consistent with that found in 2007 and 2010. This is due to these zones covering the local authority areas of Harrogate, Hambleton and Scarborough and therefore the people residing in these zones being located in closer proximity to other main food shopping destinations in their respective areas to those provided in York City.

4.10 Since 2007 and 2010, there have been improvements to the provision of convenience shopping facilities in York City, notably in respect of:

- Zone 1 – A Tesco Express (319 sq.m net³⁰) on Goodramgate in York city centre opened in 2012;
- Zone 1 – A Morrisons Local³¹ (250 sq.m net) opened in September 2013 on Spurriergate in York city centre;
- Zone 1 – A Tesco Express (274 sq.m net) on Low Ousegate in York city centre opened in 2010;
- Zone 1 – A Tesco Express (541 sq.m net) on Piccadilly in York city centre opened in December 2010;

³⁰ Net floorspace, based on 70% of gross floorspace figure

³¹ The Morrisons store had only been opened for two months at the time that the household survey was undertaken. No respondents to the household survey specified the Morrisons Local store which is likely to be due to the infancy of the store opening coupled with a high proportion of the store's trade being generated by visitors/tourists rather than local households.

- Zone 2 – A Lidl store (1,063 sq.m net) opened in February 2011 on Thanet Road in Dringhouses local centre;
- Zone 3 – A Morrisons store (3,721 sq.m) at Foss Island Retail Park opened in 2007.
- Zone 3 – An extension to the Sainsbury's store (4,604 sq.m net) at Monks Cross Retail Park commenced trading in July 2010;
- Zone 3 – A Waitrose store (2,038 sq.m net) opened in December 2010 at the former MFI unit on Foss Islands Road on the outskirts of York city centre; and
- Zone 3 – An Aldi store (1,125 sq.m net) opened in November 2008 at Monks Cross Retail Park.

Table 4.3: Main Food Shopping Market Share by Store (%)

Foodstore	Survey Zone (%)					
	Year	1	2	3	4	Total
Zone 1						
Morrisons, Foss Islands Retail Park, York	2013	27.9	13.9	7.2	4.0	4.2
	2010	22.6	0.0	8.1	6.5	2.5
	2007	-	-			-
Sainsbury's, Fossbank, York City Centre, York	2013	10.2	0.8	6.6	0.0	1.5
	2010	9.7	0.0	5.4	1.3	1.3
	2007	25.8	4.1	9.0	2.7	3.0
Waitrose, Foss Islands Road, York	2013	14.5	2.8	2.0	3.0	1.7
	2010					
	2007					-
Zone 2						
Morrisons (former Safeway), Front Street, Acomb, York	2013	0.0	13.3	1.6	0.8	1.6
	2010	5.4	21.7	2.0	1.3	3.0
	2007	0.0	19.6	0.0	0.0	2.2
Tesco Extra, Tadcaster Road, Askham Bar Centre, York	2013	5.8	32.3	0.6	0.0	4.5
	2010	7.5	49.9	1.3	1.3	6.2
	2007	3.4	9.3	0.7	0.0	1.7
Zone 3						
Aldi, Monks Cross Retail Park, York	2013	0.7	4.6	6.2	4.0	1.7
	2010	0.0	1.1	0.0	0.0	0.1
	2007					
Asda, Jockey Lane, Monks Cross, Huntington, York	2013	17.5	5.2	23.4	13.6	5.7
	2010	22.6	5.4	32.9	23.3	7.9



	2007	24.7	6.2	36.6	34.2	9.3
Sainsbury's, , Monks Cross, Huntington, York	2013	10.6	3.0	15.5	21.1	4.0
	2010	18.2	3.2	16.1	10.4	4.5
	2007	14.6	0.0	11.0	19.2	3.5
Tesco Extra, Stirling Road, Clifton Moor Centre, York	2013	0.0	6.7	27.1	2.1	5.5
	2010	2.2	10.9	27.5	2.6	5.6
	2007	7.9	17.5	30.3	1.4	7.9
Total	2013	87.2	82.8	90.2	48.7	30.5
	2010	88.1	92.2	93.2	46.8	31.1
	2007	76.4	56.7	87.6	57.5	27.6

Source: 2013 market shares derived from Table 3, Appendix 2 (2013 Study)
2010 market share provided by HOW Planning (2014) derived from Appendix 6 of Retail Assessment for Oakgate (2011)

Note: WYG has re-coded the 2007 survey results with NEMS, market shares adjusted to exclude SFT

4.11 **Table 4.3** indicates that the foodstores with the largest market share in York City are the Asda on Jockey Lane at Monks Cross and the Tesco Extra on Stirling Road at the Clifton Moor Centre which achieve market shares of 5.7% and 5.5% respectively. The market share obtained by both of these foodstores has decreased since 2007, from 9.3% and 7.9% respectively. The market share has also declined at a lesser rate since 2010 for the Tesco at Clifton Moor from 5.6% to 5.5% whereas the decline from the Asda at Jockey Lane has been more pronounced from 7.9% to 5.7%. Since 2007, the market share of the Tesco Extra at the Askham Bar and the Sainsbury's at Monks Cross has increased although the Tesco peaked at 6.2% in 2010 and has since declined to 4.5% and the Sainsbury store peaked at 4.5% in 2010 before declining to 4.0% at 2013. The improvement to the market share of the Sainsbury's at Monks Cross could be attributed to the extension to the store which took place in 2010. The market share of these two stores has increased since 2007, while the market share of all other foodstores has decreased. This is likely to be due to the opening of new foodstores including the Aldi at Monks Cross Retail Park, the Morrisons at Foss Island Retail Park and the Waitrose at Foss Island Retail Park which attract market shares of 1.7%, 4.2% and 1.7% respectively, but were not operating when the previous survey was undertaken in 2007. The changes which have occurred between 2010 and 2013 demonstrate that both the Aldi store at Monks Cross and the Morrisons at Fosse Island have both improved their main food market share as trading conditions mature. The combined main food market share achieved by these three new stores at 2013 is 7.6%, which broadly corresponds to the combined reduction in market share of 8.1 percentage points experienced by the Morrisons at Front Street, the Asda at Monks Cross, the Sainsbury's at Fossbank and the Tesco at Clifton Moor.



Table 4.4: Main Food Shopping Market Shares by Centre

Centre	Market Share (%)				
	2007	2010	2013	Difference 2007 to 2013	Difference 2010 to 2013
York City Centre	0.4	1.4	1.2	+0.8	-0.2
Monks Cross	13.0	12.5	11.7	-1.3	-0.8
Clifton Moor	8.1	5.6	5.5	-2.6	-0.1
Foss Island	3.2	3.8	7.6	+4.4	+3.8
Acomb District Centre	2.2	3.3	1.7	-0.5	-1.6
Haxby District Centre	0.3	0.4	0.4	+0.1	0.0
Local Centres	0.9	0.3	1.7	+0.8	+1.4
Other (undefined centres)	7.2	6.2	5.0	-2.2	-1.2
Total	35.3	33.6	34.8	-0.5	+1.2

Source: 2013 market shares derived from Table 3, Appendix 2 (2013 Study)

2010 market share provided by HOW Planning (2014) derived from Appendix 6 of Retail Assessment for Oakgate (2011)

Note: WYG has re-coded the 2007 survey results with NEMS, market shares adjusted to exclude SFT

4.12 **Table 4.4** shows the main food market share attracted by facilities in York city centre, the district centres of Acomb and Haxby, local centres and out-of-centre locations. It is evident that the out-of-centre facilities in York City attract a greater main food shopping market share than each defined centre in York City at 2013. Monks Cross attracts the greatest main food shopping market share of 11.7%, followed by Foss Island at 7.6% and Clifton Moor at 5.5%. The market share of Monks Cross and Clifton Moor have decreased by 1.3 percentage points and 2.6 percentage points respectively, the market share of Foss Island, which is located in closer proximity to York city centre than Clifton Moor and Monks Cross, has increased by 4.4 percentage points since 2007. This can be attributed to the Morrisons store and Waitrose store opening at Foss Island since 2007 and 2010. The Morrison store has increased its market share significantly between 2010 and 2013 and is the main reason for the increase. The main food shopping market share attracted by facilities in York city centre is much lower at 1.2%. The market share of the city centre has improved since 2007, at which time the city centre achieved a main food shopping market share of just 0.4%. In 2010 the evidence found that the market share was 1.4% so has seen a slight decrease to 1.2% at 2013. The lower main food market share of York city centre can be attributed to the lack of a main food supermarket being located in the city centre. The main food market share attracted by Acomb district centre is 1.7%, this is below the 3.3% that was recorded in 2010; principally, this decline is due to the trade diversion from the Morrisons at Acomb to the new Morrisons store at Foss Island. However, this represents a decrease of 0.5 percentage points since 2007 but represents a significant decline in its main food market share since 2010. The market share of Haxby district centre in both 2010 and 2013 is 0.4%, which is an increase of 0.1 percentage points since 2007 showing that shows signs of a stable main food



performance. The main food market share attracted by local centres has improved from 0.9% in 2007; it reduced to 0.3% in 2010 but has since increased to 1.7% in 2013. A notable main food shopping market share of 5.0% is achieved by other out-of-centre locations at 2013. This is a reduction of 1.2 percentage points since 2010 and a further 1.0 percentage point between 2007 and 2010 from the market share of 7.2% achieved in 2007 by other out-of-centre facilities.

Top-Up Food Shopping Patterns

4.13 **Table 4.5** below provides a breakdown of the 'top-up' food shopping market share achieved by facilities within York City by Zone. The total top-up shopping market share of facilities within York City is 30.6%. This is an increase of 2.3 percentage points since 2007, when the top-up shopping market share was 28.3%.

Table 4.5: York's Top Up Food Shopping Market Share Analysis by Zone (%)

Zone	Market Share (%)				
	2007	2010	2013	Difference 2007 to 2013	Difference 2010 to 2013
1	90.5	93.8	98.3	+7.8	-0.5
2	93.5	93.2	93.4	-0.1	+0.2
3	87.4	82.5	95.5	+8.1	+13.0
4	29.7	8.4	17.2	-12.4	+8.8
5	0.0	1.6	1.1	+1.1	-0.5
6	0.0	0.0	0.0	0.0	0.0
7	8.3	7.9	15.4	+7.1	+7.5
8	0.0	1.1	9.0	+9.0	+7.9
9	8.3	5.9	16.5	+8.2	+10.6
10	15.1	9.2	17.6	+2.5	+8.4
11	17.7	28.4	36.2	+18.4	+7.8
12	4.0	3.4	2.8	-1.2	-0.6
13	0.0	0.0	0.0	0.0	0.0
14	0.0	0.0	0.0	0.0	0.0
15	0.0	0.0	7.1	+7.1	+7.1
16	3.4	0.0	1.5	-1.8	+1.5
17	0.0	1.6	0.0	0.0	-1.6
18	0.0	0.0	2.2	+2.2	+2.2
19	1.7	0.0	0.0	-1.7	0.0
20	0.0	1.5	2.2	+2.2	+0.7
Total	28.3	25.4	30.6	+2.3	+5.2

Source: 2013 market shares derived from Table 3, Appendix 2 (2013 Study)
 2010 market share provided by HOW Planning (2014) derived from Appendix 6 of Retail Assessment for Oakgate (2011)

Note: WYG has re-coded the 2007 survey results with NEMS, market shares adjusted to exclude SFT



4.14 The top-up food shopping market share attracted by facilities within York City is greater than 90% in Zones 1, 2 and 3 which cover the York City administrative area and form the primary catchment for facilities in the City. The greatest market share is achieved by Zone 1 at 98.3%; the Zone has seen a gradual increase between 2007 and 2013, from an increase of 3.0 percentage points between 2007 to 2010 and then an increase of 4.5 percentage points since 2010. The increase in this zone's market share can be attributed to the opening of a number of new convenience stores in Zone 1 within the city centre, including the Tesco Express at Low Ousegate (274 sq.m net) and the Tesco Express at Piccadilly (541 sq.m net) which perform a primarily top-up shopping function. Of the zones located outside York City's administrative boundary, Zone 11 achieves the highest market share of 36.2% at 2013. The market share of this zone has increased by 10.7 percentage points between 2007 and 2010 and then 7.9 percentage points between 2010 and 2013, which can be attributed to improvements to top-up shopping facilities in York City. As would be expected, those zones which are located further away from York City achieve lower top-up shopping market shares. This is a result of the more localised nature of top-up shopping.

4.15 **Table 4.6** shows the top-up food shopping market shares achieved by the city, town and local centres, as well as out of centre locations in York City.

Table 4.6: Top Up Food Shopping Market Shares by Centre

Centre	Market Share (%)				
	2007	2010	2013	Difference 2007 to 2013	Difference 2010 to 2013
York City Centre	4.1	8.3	5.4	+1.3	-2.9
Monks Cross	3.3	2.5	3.5	+0.2	+1.0
Clifton Moor	4.3	1.8	2.9	-1.4	+1.1
Foss Island	1.7	2.2	2.3	+0.6	+0.1
Acomb District Centre	2.7	4.8	3.3	+0.6	-1.5
Haxby District Centre	1.4	2.2	1.9	+0.5	-0.3
Local Centres	7.7	2.2	10.1	+2.4	+7.9
Other (undefined centres)	3.0	1.4	1.3	-1.7	-0.1
Total	28.3	25.4	30.6	+2.3	+5.2

Source: 2013 market shares derived from Table 3, Appendix 2 (2013 Study)

2010 market share provided by HOW Planning (2014) derived from Appendix 6 of Retail Assessment for Oakgate (2011)

Note: WYG has re-coded the 2007 survey results with NEMS, market shares adjusted to exclude SFT

4.16 When reviewing the top-up shopping market shares achieved by defined centres and out-of-centre locations in York City, York city centre achieves a market share of 5.4%. This is an increase from the



top-up shopping market share of 4.1% which was achieved in 2007 (an increase of 1.3 percentage points) but a decrease since the recorded peak in 2010 at 8.3%. Again, the overall improvement since 2007 can be attributed to the improvements to the top-up shopping provision in York city centre, with new Tesco Express stores opening at Low Ousegate and Piccadilly. The top-up shopping market share achieved by local centres in York City has also improved since 2007, from 7.7% in 2007 to 10.1% in 2013. We would expect facilities in local centres to achieve a high top-up shopping market share, due to their role in catering for day-to-day needs of the surrounding communities. The top-up shopping market shares of Monks Cross, Clifton Moor and Foss Island are 3.5%, 2.9% and 2.3% respectively. Although the top-up market share of Clifton Moor has decreased by 1.4 percentage points since 2007 its market share since 2010 has improved. The market shares of Monks Cross and Foss Island have increased by 0.2 percentage points and 0.6 percentage points respectively since 2007, although WYG note that Monks Cross has improved its top-up market share since 2010 whereas facilities at Foss Island have remained relatively stable since 2010. The top-up shopping market share achieved by other out-of-centre facilities has decreased since 2007, from 3.0% in 2007 to 1.4% in 2010 and to 1.3% in 2013.

Linked Trips

- 4.17 By reviewing a number of questions within the household survey we have been able to review the link between specific foodstores and established town centres. 35.7% of respondents to the household survey link their shopping trip with another activity, with 8.2% linking their trip with non-food shopping, 3.3% linking their trip with other food shopping and 2.5% linking their trip with visiting a café, pub or restaurant. 13.0% of respondents linked their main food shopping trip with a visit to York city centre and 13.0% linked their trip with a visit to Monks Cross Retail Park.
- 4.18 Of the top food destinations set out in **Table 4.3**, the results show that 18.5% of respondents linked their main food shop with other retail/leisure led activities, with 63.3% stating that they undertook no linked trips. Of those linked trips that were undertaken, 13.0% were to York city centre, 13.0% were to Monks Cross Retail Park and 4.5% were to Clifton Moor Retail Park. However, only 2.0% of linked trips were to facilities in Acomb district centre and there are no linked trips to facilities in Haxby district centre.
- 4.19 The results show that some stores have a better propensity for encouraging linked trips whereby the Sainsbury's store at Monks Cross facilitates of linked trips for 27.7% of its customers and 23.3% of shoppers at the Asda at Monks Cross undertake linked trips. Conversely, only 8.6% of respondents shopping at the Tesco Extra at Tadcaster Road in Askham Bar and 11.0% of respondents shopping at the Aldi at Monks Cross link their shopping trip with another activity.



- 4.20 When looking at the locations where the linked trips generated from these nine main shopping destinations are undertaken, 100% of linked trips from the Sainsbury at Foss Bank and 82.6% of linked trips from the Waitrose are undertaken in York city centre. 100% of linked trips from the Aldi at Monks Cross and 77.1% of the linked trips generated from Sainsbury's at Monks Cross are undertaken at other facilities at Monks Cross. 79.0% of linked trips from the Morrisons at Front Street in Acomb are undertaken in Acomb district centre. No linked trips from the top nine food destinations are undertaken in Haxby district centre.
- 4.21 It is evident that where links are available between a foodstore and a defined centre, linked trips can be encouraged. For example, 100% of the linked trips generated from the Sainsbury's at Fossbank on the edge of York city centre are undertaken in the city centre and 79.0% of linked trips generated from the Morrisons at Front Street in Acomb are undertaken in the district centre.

Non-Food Shopping Patterns

- 4.22 The household survey also assessed shopping patterns for a variety of non-food or comparison goods. Such goods include non-bulky goods (clothing and footwear, small household goods, books, CDs and DVDs, recreational and toy goods and chemist goods) and bulky goods (electrical goods, furniture goods and DIY goods).
- 4.23 Facilities within York City retain a comparison goods market share of 46.5%, which is an improvement to the market share of 37.8% achieved in 2007 (an increase of 8.7 percentage points), however, as set out in **Table 4.7** WYG does hold some reservations about the comparison between the 2007 and 2013 data due to methodological differences between the two household surveys. This difference is validated by the results of the 2010 household survey which showed that the market share was 46.4% which is comparable to that found in 2013.
- 4.24 Zones 1, 2 and 3 which cover the York City administrative area and form York City's primary catchment achieve comparison goods market shares greater than 89.4%. Zones 1 and 2 achieve the highest comparison goods market shares of 92.8% and 93.0% respectively, which is an increase of 10.4 percentage points and 12.0 percentage points respectively since 2007 but represents a decline of 1.2 percentage points and 4.8 percentage points since 2010. Zone 3 achieves a market share of 89.4% which represents an increase of 8.2 percentage points to that found in 2007 but with a market share of 96.8% in 2010 shows a decline of 7.4 percentage points in recent years. Zones 4, 10, 11, 12, 15 and 16, which are located outside York City achieve comparison goods market shares greater than



50.0%. These zones are located to the north west of York City and evidently form York City's secondary catchment in terms of comparison goods shopping trips. The comparison goods market share of each of these zones has increased since 2007 but have seen mixed changes between 2010 and 2013 with Zones 4, 10 and 11 experiencing market share declines between 2010 and 2013 but Zones 12, 15 and 16 all experiencing increases during the same period. The zone which achieves the lowest comparison goods market share (4.5%) is Zone 18, which is unsurprising given that this zone contains Northallerton and is located in close proximity to Middlesbrough. Notwithstanding this, the comparison goods market share achieved by facilities in York City from this zone has increased by 2.5 percentage points since 2007. The overall results show that between 2007 and 2010 facilities in York City increased by 8.7% percentage points but have only increase by 0.1 percentage point between 2010 and 2013; however, this may in part be due to the recording of market shares at 2007. However, the results do show that since 2010 the market share of the city's facilities from the primary catchment area (Zones 1 to 3) has declined. The decline in the market share achieved by these core zones can be attributed to the increases in market shares achieved by facilities outside the Study Area. For example, the market share achieved by Leeds from Zones 1 to 3 has increased by 3.9 percentage points since 2010, and the market share achieved by facilities in Kirklees from Zones 1 to 3 has increased by 4.7 percentage points since 2010.



Table 4.7: Comparison Goods Market Shares Analysis by Zone (%)

Zone	Market Share (%)				
	2007	2010	2013	Difference 2007 to 2013	Difference 2010 to 2013
1	82.4	94.0	92.8	+10.4	--1.2
2	81.0	97.8	93.0	+12.0	-4.8
3	81.2	96.8	89.4	+8.2	-7.4
4	67.2	83.3	80.2	+13.0	-3.1
5	36.0	51.8	47.2	+11.2	-4.6
6	8.0	15.4	11.8	+3.8	-3.6
7	42.0	57.8	44.4	+2.4	-13.4
8	17.0	25.4	25.7	+8.7	+0.3
9	42.2	52.3	41.5	-0.7	-10.8
10	68.0	79.7	76.0	+8.0	-3.7
11	58.3	78.2	69.9	+11.6	-8.3
12	42.2	66.0	69.4	+27.2	+3.4
13	11.0	15.4	25.8	+14.8	+24.4
14	22.0	27.0	33.9	+11.9	+6.9
15	44.0	60.0	86.4	+42.4	+26.4
16	28.0	45.6	64.8	+36.8	+19.2
17	1.0	10.8	14.5	+13.5	+3.7
18	2.0	5.8	4.5	+2.5	-1.3
19	3.0	11.5	14.8	+11.8	+3.3
20	2.0	5.5	8.9	+6.9	+3.4
Total	37.8	46.4	46.5	+8.7	+0.1

Source: 2013 market share taken from Table 25, Appendix 3 (2013 Study)

2010 market share provided by HOW Planning (2014) derived from Appendix 7 of Retail Assessment for Oakgate (2011)

Note: The 2007 market shares are taken from Tables 4, 6, 8 of Appendix 7 of the Retail Study (GVA), the total figures is taken from calculation of the derived accumulated turnover of each identified destination divided by the level of identified available expenditure at 2007. WYG note that the GVA analysis is only limited to seven destinations and does not account for district or local centres and therefore probable that has underestimated the city overall market share. WYG also notes that the sub categories of different sectors within comparison goods is different between WYG and GVA approach. The market share from 2007 at 37.2% reflects the market share set out in Table 12 of the future capacity for York.

4.25 **Table 4.8** shows the comparison goods market share achieved by designated centres and out-of-centre facilities in York City. York city centre achieves the highest comparison goods market share of 22.8%. This is an increase to the market share of 21.0% which was achieved in 2007 and the 21.5% achieved in 2010. The out-of-centre facilities at Monks Cross and Clifton Moor achieve market shares of 9.5% and 9.1% respectively. The comparison goods market share achieved by Monks Cross has increased by 4.7 percentage points since 2007; the increase between 2010 and 2013 has been 1.3 percentage points. The market share of Clifton Moor has increased by 0.1 percentage points between 2007 and 2014, but with a market share of 12.1% in 2010 has seen decline of three percentage points. The comparison goods market share achieved by the York Designer Outlet has increased from



0.6% in 2007 to 1.3% in 2010 and to 2.2% in 2013. The market shares achieved by the district and local centres is substantially lower, however this is to be expected, particularly in relation to the local centres, which provide more of a daily convenience and service function. The market shares of Acomb and Haxby district centre have decreased by 0.1 percentage points each since 2010. The market share achieved by local centres has increased by 0.4 percentage points since 2010. Overall the increase in both the market shares achieved at both the city centre, Monks Cross and York Designer Centre has helped the city as a whole increase its overall market share from 37.8% in 2007 to 46.4% in 2010 to 46.5% in 2013.

Table 4.8: Comparison Goods Market Shares by Centre

Centre	Market Share (%)			Difference 2007 to 2013	Difference 2010 to 2013
	2007	2010	2013		
York City Centre	21.0	21.5	22.8	+1.8	+1.3
Monks Cross	4.8	8.2	9.5	+4.7	+1.3
Clifton Moor	9.0	12.1	9.1	+0.1	-3.0
Fossbank	-	0.7	0.5	+0.5	-0.2
York Designer Outlet	0.6	1.3	2.2	+1.6	+0.9
Acomb District Centre	0.4	0.2	0.3	-0.1	+0.1
Haxby District Centre	0.2	0.0	0.1	-0.1	+0.1
Local Centres	-	0.0	0.4	+0.4	+0.4
Other (undefined centres)	1.8	2.4	1.7	-0.1	-0.7
Total	37.8	46.4	46.5	+8.7	+0.1

Source: 2013 market share figures derived from Table 25a, Appendix 3
2010 market share figures provided by HOW Planning (2014) derived from Appendix 7 of Retail Assessment for Oakgate (2011)

Notes: The total figures for 2007 are different to those set out in Table 4.23 above, whereby WYG has sourced figures from the main text within the GVA Retail Study for key destinations such as York City Centre, Acomb and Haxby District Centres, for example paragraph 9.7, 7.12 and 7.23 respectively. Other destinations taken from Tables 4, 6, 8 of Appendix 7 of the Retail Study (GVA).

4.26 WYG has reviewed the evidence³² submitted as part of the appraisal of the Huntington Stadium planning permission (LPA Ref: 11/02581/OUTM) and various applications for variations to the Monks Cross Shopping Park (LPA Ref: 11/02199/OUTM, 11/02205/FUL, 11/02206/FUL and 11/02208/FUL), the latter of which was refused planning permission. The evidence provided and appraised by Deloitte found in the survey results from 2010 that the city centre comparison goods market share in 2010 was 21.6% and had slightly increased since 2007, therefore the 2013 market share shows that since 2010 the market share has increase marginally to 22.8%. At this point it is difficult with any degree of

³² Table 13 of Drivers Jonas Deloitte (now Deloitte) Retail Planning Review of Planning Applications at Monks Cross, dated 8th March 2012. This was based on data from a Telephone Household Survey completed by NEMS on behalf of HOW Planning in 2010 (for Oakgate Developments).



certainty to confirm the reason for the increase as it is likely to be due to a number of interrelated reasons rather than just one, but is likely to be in part due to the recorded increased patronage of main and top up food shopping in the city centre as demonstrated in Tables 4.4 and 4.6.

- 4.27 Similarly from a review of the evidence, facilities at Monks Cross had a market share of 8.2% in 2010 which was a significant increase from that found in 2007 by GVA, and the latest results show that this has increased again to 9.5% since 2010. The market share results for facilities at Clifton Moor show the fluidity of the customer's shopping patterns, whereby in 2007 the market share was 9.0%, in 2010 this had increased to 12.1%, however, the latest results show that this has decreased to 9.1% at 2013 and back to a level found in 2007. This may be due to current remodelling of Phase 1 which has seen a significant level of floorspace removed in recent years following planning permission to reconfigure some of the older space.
- 4.28 Overall the current (2013) comparison goods market share is 46.5% for all facilities across the city and is broadly comparable to that found in 2010 (46.4%) albeit marginally higher. This demonstrates that the improved retail offer at Leeds City Centre (Trinity Walk) and the wider economic recession that comparison goods facilities in York have been resilient to wider structural and technological changes that have occurred since 2007 and the overall market share between 2010 and 2013 has remained relatively stable

[Comparison Goods Shopping Patterns: Clothing & Footwear](#)

- 4.29 **Table 4.9** shows that in terms of shopping for clothing and footwear, facilities in York City attract 50.1% of shopping trips. This is comparable to the clothing and footwear market share of 50.0% which was achieved in 2007. However, it is marginally less than the clothing and footwear market share of 50.8% achieved in 2010. The small decrease to York City's market share since 2010 could be attributed to increased popularity of destinations within Leeds, Stockton-on-Tees and Wakefield. The market shares of these destinations have increased by 2.2, 1.7 and 1.7 percentage points respectively since 2010. The clothing and footwear market share achieved by York City is greater than the market shares achieved by York City for the remaining comparison good categories. The market shares of the core zones (Zones 1, 2 and 3) which cover the York City administrative area and form the City's primary catchment have decreased since 2007, by 7.9, 4.5 and 5.9 percentage points respectively. There has also been a decrease to the clothing and footwear market shares of the core zones (1, 2 and 3) between 2010 and 2013 of 6.7, 3.3 and 4.4 percentage points respectively. The decrease in the market share of the core zones can be partly attributed to the increased market share achieved by



Leeds city centre in each of these zones. This is likely to be a result of the improvements to shopping facilities in Leeds as a result of the Trinity Walk development.

4.30 The decrease to the market shares of the core zones since 2007 and 2010 has been offset by improvements to the market shares of a number of zones which form York City's secondary catchment, with the clothing and footwear markets shares of Zones 13, 15 and 17 having increased by more than 10 percentage points since 2007, with the market share of Zone 15 increasing by 17.7 percentage points since 2010 following a decrease in the market share of this zone between 2007 and 2010.

Table 4.9: Clothing and Footwear Market Shares Share Analysis by Zone (%)

Zone	Market Share (%)				
	2007	2010	2013	Difference 2007 to 2013	Difference 2010 to 2013
1	97.8	96.6	89.9	-7.9	-6.7
2	98.9	97.8	94.5	-4.5	-3.3
3	97.0	95.5	91.1	-5.9	-4.4
4	89.9	90.1	90.6	+0.8	+0.5
5	56.1	59.3	58.5	+2.4	-0.8
6	17.6	24.7	21.3	+3.7	-3.4
7	67.0	80.9	65.4	-1.6	-15.5
8	20.5	25.3	29.6	+9.1	4.3
9	49.3	52.0	42.3	-7.0	-9.7
10	89.6	87.9	79.1	-10.5	-8.8
11	81.5	88.7	87.2	+5.6	-1.5
12	69.4	76.5	69.4	0.0	-7.1
13	13.1	24.3	25.8	+12.7	+1.5
14	43.3	33.4	33.9	-9.4	+0.5
15	74.1	68.7	86.4	+12.3	+17.7
16	64.1	58.3	64.8	+0.8	+6.5
17	2.8	7.7	14.5	+11.7	+6.8
18	7.4	12.5	4.5	-2.8	-8.0
19	8.6	14.2	14.8	+6.1	+0.6
20	6.7	6.7	8.9	+2.2	2.2
Total	50.0	50.8	50.1	+0.1	-0.7

Source: 2013 market shares derived from Table 9, Appendix 3 (2013 Study)

2010 market share figures provided by HOW Planning (2014) derived from Appendix 7 of Retail Assessment for Oakgate (2011)

Note: WYG has re-coded the 2007 survey results with NEMS, market shares adjusted to exclude SFT

4.31 **Table 4.10** shows the clothing and footwear market shares achieved by the defined centres and out-of-centre facilities in York City. Although York city centre attracts the highest market share of 30.4%, the market share of the city centre has decreased by 3.7 percentage points since 2007 (a decrease of



10.9%). However, in more recent years (since 2010), the market share has increased marginally by 0.2 percentage points. Between 2007 and 2013, the market share achieved by Monks Cross increased by 1.6 percentage points (an increase of 15.0% from the base position) and the market share achieved by the York Designer Outlet increased by 2.1 percentage points (an increase of 100%). The market share of Monks Cross peaked in 2010, reaching 13.3%, but has since decreased by 1.0 percentage point between 2010 and 2013. The district centres and local centres, as well as other undefined out-of-centre facilities only attract a nominal clothing and footwear market share.

Table 4.10: Clothing Goods Market Shares by Centre

Centre	Market Share (%)				
	2007	2010	2013	Difference 2007 to 2013	Difference 2010 to 2013
York City Centre	34.1	30.2	30.4	-3.7	+0.2
Monks Cross	10.7	13.3	12.3	+1.6	-1.0
Clifton Moor	2.6	2.4	2.5	-0.1	-0.1
Foss Island	0.0	0.0	0.0	-	-
York Designer Outlet	2.1	4.0	4.2	+2.1	+0.2
Acomb District Centre	0.2	0.3	0.4	+0.2	+0.1
Haxby District Centre	0.0	0.0	0.0	-	-
Local Centres	0.1	0.0	0.0	-0.1	-0.1
Other (undefined centres)	0.2	0.6	0.4	+0.2	-0.2
Total	50.0	50.8	50.1	+0.1	-0.7

Source: 2013 market shares derived from Table 9, Appendix 3 (2013 Study)
 2010 market share figures provided by HOW Planning (2014) derived from Appendix 7 of Retail Assessment for Oakgate (2011)

Note: WYG has re-coded the 2007 survey results with NEMS, market shares adjusted to exclude SFT

Comparison Goods Shopping Patterns: Books, CDs and DVDs

4.32 It is evident from **Table 4.11** that 47.1% of shopping trips for Books, CDs and DVDs which originate in the Study Area take place in York City. Zones 1, 2 and 3 which cover York City's administrative area have market shares greater than 90%. Zone 2 achieves the highest market share, with 100.0% of Books, CDs and DVDs shopping trips from this zone being spent within York City. It has not been possible to compare the market share achieved by York City in relation to books, CDs and DVDs at 2013, with the market share attracted at 2007 due to variations in the household survey methodology.



Table 4.11: Books, CD's, DVD's Market Shares Share Analysis by Zone (%)

Zone	Market Share (%)
	2013
1	90.8
2	100.0
3	95.6
4	80.4
5	58.3
6	11.7
7	41.7
8	28.3
9	29.4
10	79.4
11	67.8
12	37.9
13	3.6
14	27.9
15	51.1
16	53.8
17	6.9
18	5.6
19	0.0
20	10.6
Total	47.1

Source: Table 11, Appendix 3 (2013 Study)

4.33 **Table 4.12** shows the books, CD and DVD market shares achieved by the defined centres and out-of-centre facilities in York City. York city centre achieves the highest market share of 31.3%. Monks Cross also achieves a considerable market share of 8.1%. Haxby and Acomb district centres achieve lower market shares of 0.2% and 0.6% respectively, while the local centres in York City achieving a market share for books, CDs and DVDs of just 0.2%.



Table 4.12: Books, CDs and DVDs Shopping Market Share by Centre/Location (%)

Centre	Market Share (%)
	2013
York City Centre	31.3
Monks Cross	8.1
Clifton Moor	2.9
Fossbank	0.5
York Designer Outlet	1.2
Haxby District Centre	0.2
Acomb District Centre	0.6
Local Centres	0.2
Other (undefined centres)	2.2
Total	47.1

Source: Table 11, Appendix 3

Comparison Goods Shopping Patterns: Small Household Goods

4.34 Facilities in York City attract 47.0% of shopping trips for small household goods (including home furnishings, glass and china items) generated in the Study Area. This is an increase (of 3.2 percentage points) to the market share which was achieved in 2007 of 43.8%. However, in recent years, since 2010, the market share has decreased marginally, by 0.2 percentage points. Again, Zones 1, 2 and 3 which cover the York City administrative area achieve market shares greater than 80%, as does Zone 4, the majority of which is located outside, but directly to the east of, York City. Notwithstanding the high market shares for small household goods achieved by Zones 1, 2 and 3, the market shares of each of these Zones has decreased since 2007 by 8.9, 2.1 and 10.5 percentage points respectively. Indeed, the market share of Zone 3 has substantially decreased, by 16.2 percentage points, since 2010, after increasing slightly (by 1.9 percentage points) between 2007 and 2010. The decrease in the market share of the core zones can be attributed to an increase in the market share of facilities outside the Study Area achieved by these zones. For example, since 2010, the market share achieved by Leeds increased by 4.6 percentage points in Zone 1 and 0.8 percentage points in Zone 3. In addition, the market share achieved by IKEA in Leeds was 2.8% from Zone 1 and 10.9% from Zone 3 in 2013; however, this destination was not recorded in the 2010 survey.



Table 4.13: Small Household Goods Market Shares Share Analysis by Zone (%)

Zone	Market Share (%)				Difference 2007 to 2013	Difference 2010 to 2013
	2007	2010	2013			
1	98.5	98.5	89.6	-8.9	-8.9	
2	98.4	100.0	96.3	-2.1	-3.7	
3	97.0	98.9	82.7	-14.3	-16.2	
4	80.0	91.2	86.6	+6.6	-4.6	
5	50.0	60.1	60.9	+10.9	+0.7	
6	15.1	19.1	10.4	-4.7	-8.7	
7	59.0	61.8	51.5	-7.6	-10.3	
8	20.3	27.2	27.9	+7.5	+0.7	
9	43.1	50.0	45.7	+2.6	-4.3	
10	79.6	79.3	73.1	-6.5	-6.2	
11	66.7	68.5	65.0	-1.7	-3.5	
12	46.3	67.4	61.6	+15.3	-5.8	
13	19.6	16.2	6.2	-13.4	-10.0	
14	12.7	19.3	24.5	+11.8	+5.2	
15	46.5	52.3	59.2	+12.7	+6.9	
16	26.7	39.6	41.3	+14.7	+1.7	
17	3.9	39.4	2.8	-1.2	-36.6	
18	0.0	11.5	0.0	0.0	-11.5	
19	0.0	11.3	11.5	+11.5	+0.2	
20	1.4	0.0	13.4	+12.0	+13.4	
Total	43.8	47.2	47.0	+3.2	-0.2	

Source: 2013 market shares derived from Table 13, Appendix 3 (2013 Study)
 2010 market share figures provided by HOW Planning (2014) derived from Appendix 7 of Retail Assessment for Oakgate (2011)
 Note: WYG has re-coded the 2007 survey results with NEMS, market shares adjusted to exclude SFT

4.35 **Table 4.14** shows the market shares achieved by the defined centres and out-of-centre facilities in York City in relation to small household goods. Although York city centre achieves the highest market share of 21.8%, the market share of the city centre has decreased since 2007, by 3.7 percentage points between 2007 and 2010, and by a further 11.5 percentage points between 2010 and 2013. During this period, the small household goods market share achieved by Clifton Moor has substantially increased, by 10.3 percentage points (from 1.0% in 2007 to 2.3% in 2010 to 11.3% in 2013) and the market share achieved by Monks Cross increased substantially, by 5.4 percentage points (from 4.4% in 2007 to 8.7% in 2010 to 9.8% in 2013). The market shares for small household goods achieved by Acomb district centre and the local centres in York City are substantially lower at 0.4% and 0.3% respectively, while no market share is secured by Haxby district centre.



Table 4.14: Small Household Goods Shopping Market Share by Centre/Location (%)

Centre	Market Share (%)				
	2007	2010	2013	Difference 2007 to 2013	Difference 2010 to 2013
York City Centre	37.0	33.3	21.8	-15.2	-11.5
Monks Cross	4.4	8.7	9.8	+5.4	-1.1
Clifton Moor	1.0	2.3	11.3	+10.3	+9.0
Foss Island	0.0	0.1	0.5	+0.5	+0.4
York Designer Outlet	0.8	1.1	1.9	+1.1	+0.8
Acomb District Centre	0.2	0.0	0.4	+0.2	+0.4
Haxby District Centre	0.0	0.0	0.0	-	-
Local Centres	0.0	0.0	0.3	+0.3	+0.3
Other (undefined centres)	0.5	1.8	1.0	+0.5	-0.8
Total	43.8	47.2	47.0	+3.2	-0.2

Source: 2013 market shares derived from Table 13, Appendix 3

2010 market share figures provided by HOW Planning (2014) derived from Appendix 7 of Retail Assessment for Oakgate (2011)

Note: WYG has re-coded the 2007 survey results with NEMS, market shares adjusted to exclude SFT

Comparison Goods Shopping Patterns: Toys, Games, Bicycles and Recreation Goods

4.36 In terms of shopping for recreational goods, facilities in York City in 2013 attract 45.6% of shopping trips. This represents a decrease to the market share achieved by facilities in York City in 2007 (48.0%) and in 2010 (45.9%). Facilities within York City attract over 80% of expenditure on recreational good from Zones 1, 2, 3, 4 and 10. The highest market share is achieved by Zone 1 (100.0%). The market share of Zone 1 was also 100.0% at 2007, however there was a decline to 89.5% in 2010. The zone which achieves the second highest market share is Zone 10, which achieves a market share of 97.3% at 2013. The market share of this zone, which lies directly to the north of York City, increased by 11.1 percentage points between 2007 and 2013, and by 15.5 percentage points between 2010 and 2013. Between 2007 and 2013, the market shares of Zones 2 and 3 which are within York City's administrative boundary have decreased by 9.2 and 8.2 percentage points respectively. The market shares of both of these zones increased between 2007 and 2010, but subsequently decreased by 12.5 and 9.1 percentage points respectively. The substantial decrease in the market share achieved from Zone 2 can be attributed to an increase in the market share of Leeds city centre from this zone, which has increased by 12.4 percentage points since 2010. While the decrease in the market share of Zone 3 can be attributed to an increase (by 9.0 percentage points) in the market share achieved by Hull city centre from this zone.



Table 4.15: Toys, games, Bicycles & Recreation Market Shares Share Analysis by Zone (%)

Zone	Market Share (%)				
	2007	2010	2013	Difference 2007 to 2013	Difference 2010 to 2013
1	100.0	89.5	100.0	0.0	+10.5
2	94.9	98.1	85.6	-9.2	-12.5
3	97.5	98.4	89.3	-8.2	-9.1
4	74.4	81.5	82.6	+8.3	+1.1
5	62.1	49.9	52.0	-10.1	+2.1
6	6.3	12.7	12.2	+5.9	-0.5
7	51.0	45.7	33.0	-18.0	-12.7
8	21.4	27.8	30.6	+9.2	+2.8
9	60.0	57.7	55.7	-4.3	-2.0
10	86.2	81.8	97.3	+11.1	+15.5
11	70.0	84.1	70.5	+0.4	-13.6
12	59.1	63.7	72.9	+13.8	+9.2
13	10.7	12.7	3.8	-6.9	-8.9
14	51.7	44.4	48.5	-3.2	+4.1
15	82.6	66.8	50.7	-31.9	-16.1
16	35.7	42.0	73.4	+37.6	+31.4
17	0.0	0.0	9.7	+9.7	+9.7
18	0.0	0.0	0.0	0.0	0.0
19	14.3	9.9	34.9	+20.7	+25.0
20	11.4	8.0	18.8	+7.4	+10.8
Total	48.0	45.9	45.6	-2.4	-0.3

Source: 2013 market shares derived from Table 15, Appendix 3 (2013 Study)

2010 market share figures provided by HOW Planning (2014) derived from Appendix 7 of Retail Assessment for Oakgate (2011)

Note: WYG has re-coded the 2007 survey results with NEMS, market shares adjusted to exclude SFT

4.37 When looking at the market shares for toys and recreation goods achieved by defined centres and out-of-centre facilities in York City, it is evident that although York city centre achieves the greatest market share of 18.9%, the market share of the city centre has decreased by 5.5 percentage points since 2007. Notwithstanding this, the market share of the city centre has increased slightly in recent years, by 0.6 percentage points since 2010. Between 2007 and 2013, the market shares of Clifton Moor and Monks Cross have increased by 1.0 and 2.1 percentage points respectively since 2007. However, in the shorter term (since 2010), the market share of Clifton Moor has decreased by 1.2 percentage points. At 2013, the out-of-centre facilities at Clifton Moor achieve market share of 14.4%, whilst the out-of-centre facilities at Monks Cross attract a market share of 9.2%. The household survey found that facilities in the district centres of Acomb and Haxby did not attract any shopping trips for toys and recreational goods. This is the same as the position in 2007.



Table 4.16: Toys, games, Bicycles & Recreation Shopping Market Share by Centre/Location (%)

Centre	Market Share (%)				
	2007	2010	2013	Difference 2007 to 2013	Difference 2010 to 2013
York City Centre	24.4	18.3	18.9	-5.5	+0.6
Monks Cross	7.1	8.2	9.2	+2.1	+1.0
Clifton Moor	13.4	15.6	14.4	+1.0	-1.2
Foss Island	1.4	2.0	1.1	-0.3	-0.9
York Designer Outlet	0.5	0.5	0.6	+0.1	+0.1
Acomb District Centre	0.0	0.0	0.0	-	-
Haxby District Centre	0.0	0.0	0.0	-	-
Local Centres	0.1	0.0	0.4	+0.3	+0.4
Other (undefined centres)	1.1	1.3	1.0	-0.1	-0.3
Total	48.0	45.9	45.6	-2.4	-0.3

Source: 2013 market shares derived from Table 15, Appendix 3 (2013 Study)

2010 market share figures provided by HOW Planning (2014) derived from Appendix 7 of Retail Assessment for Oakgate (2011)

Note: WYG has re-coded the 2007 survey results with NEMS, market shares adjusted to exclude SFT

Comparison Goods Shopping Patterns: Chemist Goods

- 4.38 Chemist goods are typically purchased in a similar manner to convenience items, with a large proportion of such trips taking place close to home (due principally to the similar nature of many such goods which reduces the propensity to 'shop around'). Accordingly, a wide range of facilities attract such shopping journeys, including the town centres, but also foodstores/superstores, local centres and local shopping parades.
- 4.39 **Table 4.17** shows that York City achieves a market share of 35.1% for chemist goods. It has not been possible to compare the market share achieved by York City in relation to chemist goods at 2013, with the market share attracted at 2007 due to variations in the household survey methodology. Zones 1, 2 and 3, which constitute York City's primary catchment, all achieve chemist goods market shares of over 90%. Zones 4, 10 and 11, which are located to the north and east of York City's administrative boundary, all achieve similar market shares of just over 50%. These zones form York City's secondary catchment in relation to chemist goods.



Table 4.17: Chemist Goods Market Shares Share Analysis by Zone (%)

Zone	Market Share (%)
	2013
1	99.3
2	100.0
3	100.0
4	52.0
5	14.7
6	7.7
7	33.5
8	9.4
9	24.1
10	52.2
11	53.8
12	14.3
13	0.0
14	6.2
15	32.7
16	14.4
17	0.0
18	0.0
19	0.0
20	0.0
Total	35.1

Source: Table 17, Appendix 3 (2013 Study)

4.40 York city centre attracts 16.3% of chemist goods shopping trips generated within the Study Area. The out-of-centre facilities at Foss Island also achieve a notable market share of 7.4%, with the York Designer Outlet attracting a market share of 2.7%, other undefined out-of-centre facilities attract a market share of 2.2% and facilities at Clifton Moor attract 0.1%. The district centres at Acomb and Haxby only achieve a low chemist goods market share, with Acomb achieving a market share of 0.2% and Haxby attracting a zero market share. The local centres in York City achieve a higher chemist good market share than the district centres at 4.1%.



Table 4.18: Chemist Shopping Market Share by Town (%)

Centre	Market Share (%)
	2013
York City Centre	16.3
Monks Cross	2.0
Clifton Moor	0.1
Foss Island	7.4
York Designer Outlet	2.7
Acomb District Centre	0.2
Haxby District Centre	0.0
Local Centres	4.1
Other (undefined centres)	2.2
Total	35.1

Source: Table 17, Appendix 3 (2013 Study)

[Comparison Goods Shopping Patterns: Electrical](#)

4.41 In terms of shopping for electrical goods, facilities in York City attract 42.4% of shopping trips undertaken by the population in the Study Area. The electrical goods market share increased by 3.6 percentage points between 2007 and 2010 (from 39.7% to 43.3%), and subsequently decreased by 0.9 percentage points between 2010 and 2013. Overall, between 2007 and 2013, the market share has increased by 2.7 percentage points from 39.7% in 2007 to 42.4% in 2013. Zones 1, 2 and 3 which are located within York City achieve electrical goods market shares greater than 90%. However, the market shares of these three zones, which form York City's primary catchment, have decreased since 2007. In the shorter term, since 2010, the market share of Zone 1 has increased by 1.6 percentage points, while the market shares of Zones 2 and 3 have decreased by 3.7 and 1.6 percentage points respectively. The decrease to the market share achieved from Zone 2 can be attributed to the increase (of 3.7 percentage points) to the market share achieved by other destinations outside the Study Area from this zone. In terms of Zone 3, the decrease in the market share can be attributed to the market share achieved by St Andrews Quay Retail Park in Hull increasing by 3.7 percentage points. Zones 4, 10, 11 and 15 achieve electrical goods market shares greater than 50% and therefore form York City's secondary catchment in relation to electrical goods. The market share of each of these zones has increased since 2007. This demonstrates that although the electrical goods market share of York City's primary catchment has decreased slightly since 2007, this has been offset by an increase to the market share from the City's secondary catchment.



Table 4.19: Electrical Market Shares Share Analysis by Zone (%)

Zone	Market Share (%)				
	2007	2010	2013	Difference 2007 to 2013	Difference 2010 to 2013
1	98.4	92.1	93.7	-4.7	+1.6
2	97.0	100.0	96.3	-0.7	-3.7
3	98.3	97.9	96.3	-2.0	-1.6
4	57.6	64.6	66.4	+8.8	+1.8
5	18.3	31.3	28.6	+10.3	-2.7
6	1.4	9.7	8.2	+6.9	-1.5
7	31.5	58.9	40.3	+8.8	-18.6
8	17.5	29.5	25.8	+8.2	-3.7
9	43.6	43.2	40.6	-3.0	-2.6
10	73.8	70.9	77.2	+3.4	+6.3
11	42.9	76.9	76.9	+34.0	-
12	19.4	60.9	43.3	+23.9	-17.6
13	8.8	9.1	4.7	-4.1	-4.4
14	27.3	29.2	35.7	+8.4	+6.5
15	40.3	56.4	52.8	+12.5	-3.6
16	22.0	36.9	15.0	-7.1	-21.9
17	0.0	1.7	3.6	+3.6	+1.9
18	0.0	0.0	2.8	+2.8	+2.8
19	3.5	5.5	0.0	-3.5	-5.5
20	1.6	0.0	0.0	-1.6	-
Total	39.7	43.3	42.4	+2.7	-0.9

Source: 2013 market shares derived from Table 19, Appendix 3 (2013 Study) and Appendix F (2007 Study) 2010 market share figures provided by HOW Planning (2014) derived from Appendix 7 of Retail Assessment for Oakgate (2011)

Note: WYG has re-coded the 2007 survey results with NEMS, market shares adjusted to exclude SFT.

The Household Survey questions relating to electrical goods in the 2007 survey, do not directly relate to the question relating to electrical goods included in the 2013 survey. We have therefore combined and averaged the responses received to the 2007 survey question 9 (which asked respondents 'where do you do most of your household shopping for domestic appliances such as washing machines, fridges, cookers and kettles?') and question 10 (which asked respondents 'where do you do most of your shopping for TV, Hi-fi, Radio, photographic and computer equipment?').

4.42 **Table 4.20** shows that the facilities which attract the greatest electrical goods market share are those located at Clifton Moor, which achieve a market share of 20.0%. This compares to York city centre which attracts an electrical goods market share of 15.2%. Since 2007, however, the electrical goods market share of York city centre has increased (by 6.7 percentage points), while the market share of Clifton Moor has decreased (by 4.9 percentage points). The market share of York city centre has increased steadily from 8.5% in 2007, to 11.4% in 2010, to 15.2% in 2013. In terms of Clifton Moor, although its market share increased from 24.9% in 2007 to 27.4% in 2010, the market share has fallen in the shorter term, reducing to 20.0% in 2013. A notable electrical goods market share of 5.2%



is achieved by Monks Cross. The district centres and local centres achieve lower market shares of 0.6% (Acomb district centre), 0.1% (Haxby district centre) and 0.3% (local centres).

Table 4.20: Electrical Shopping Market Share by Centre/Location (%)

Centre	Market Share (%)				
	2007	2010	2013	Difference 2007 to 2013	Difference 2010 to 2013
York City Centre	8.5	11.4	15.2	+6.7	+3.8
Monks Cross	4.4	3.2	5.2	+0.8	+2.0
Clifton Moor	24.9	27.4	20.0	-4.9	-7.4
Foss Island	1.8	0.1	0.2	-1.6	+0.1
York Designer Outlet	0.0	0.0	0.1	+0.1	+0.1
Acomb District Centre	1.1	0.9	0.6	-0.5	-0.3
Haxby District Centre	0.0	0.0	0.1	+0.1	+0.1
Local Centres	0.1	0.0	0.3	+0.2	+0.3
Other (undefined centres)	0.6	0.3	0.8	+0.2	+0.5
Total	41.5	43.3	42.4	+0.9	-0.9

Source: 2013 market shares derived from Table 19, Appendix 3

2010 market share figures provided by HOW Planning (2014) derived from Appendix 7 of Retail Assessment for Oakgate (2011)

Note: The Household Survey questions relating to electrical goods in the 2007 survey, do not directly relate to the question relating to electrical goods included in the 2013 survey. We have therefore combined and averaged the responses received to the 2007 survey question 9 (which asked respondents 'where do you do most of your household shopping for domestic appliances such as washing machines, fridges, cookers and kettles?') and question 10 (which asked respondents 'where do you do most of your shopping for TV, Hi-fi, Radio, photographic and computer equipment?').

Comparison Goods Shopping Patterns: Furniture

4.43 The facilities within York City achieve a market share of 32.5% for furniture goods. This is a decrease of 8.9 percentage points since 2007, when a furniture market share of 41.5% was achieved. The market share of York City increased by 2.3 percentage points between 2007 and 2010, but subsequently fell by 11.3 percentage points between 2010 and 2013. The decrease in York City's market share has coincided with an increase in the market share of centres and facilities within the Study Area located outside York City. For example, since 2007, the furniture goods market share of Wetherby (Zone 8) has increased by 1.9 percentage points and the market share of Thirsk (Zone 14) has increased by 1.5 percentage points. The improvement to the market share of these zones is more apparent when considering the shorter term as since 2010, the market share of Wetherby (Zone 8) has increased by 5.2 percentage points and the market share of Thirsk (Zone 14) has increased by 2.3 percentage points. The market shares achieved by Zones 1, 2 and 3 are above 75%. While the market share achieved by Zone 1 has increased since 2007 from 83.6% in 2007, to 88.4% in 2010, to 92.2% in 2013, the market shares of Zones 2 and 3 have decreased by 10.3 and 11.0 percentage points



respectively, with the majority of this reduction in market share taking place since 2010. WYG note that Habitat as part of the national administration of the store, the city centre store closed in September 2011 and may account for part of the reduction. The reduction in the market share of Zones 2 and 3 could also be partly attributed to an increase in the market share achieved by facilities outside the Study Area. For example, IKEA in Leeds achieved a market share of 6.1% from Zone 2 in 2013 and a market share of 4.8% from Zone 3 in 2013.

Table 4.21: Furniture Market Shares Share Analysis by Zone (%)

Zone	Market Share (%)				
	2007	2010	2013	Difference 2007 to 2013	Difference 2010 to 2013
1	83.6	88.4	92.2	+8.6	+3.8
2	90.9	91.5	80.6	-10.3	-10.9
3	86.7	90.9	75.6	-11.0	-15.3
4	78.8	76.8	69.4	-9.5	-7.4
5	41.3	47.9	27.1	-14.2	-20.8
6	4.9	11.8	2.9	-2.0	-8.9
7	38.8	42.9	18.9	-19.9	-24.0
8	21.2	24.6	11.1	-10.1	-13.5
9	53.2	47.2	22.4	-30.8	-24.8
10	75.6	70.6	59.2	-16.4	-11.4
11	58.3	74.7	43.8	-14.5	-30.6
12	47.1	66.2	24.9	-22.2	-41.3
13	12.5	14.7	7.8	-4.7	-6.9
14	25.9	12.5	6.5	-19.4	-6.0
15	56.7	55.6	22.0	-34.7	-33.6
16	39.0	54.4	25.2	-13.8	-29.2
17	0.0	4.5	0.0	0.0	-4.5
18	2.3	3.4	0.0	-2.3	-3.4
19	7.3	16.2	0.0	-7.3	-16.2
20	7.7	12.9	11.2	+3.5	-1.7
Total	41.5	43.8	32.5	-8.9	-11.3

Source: 2013 market share derived from Table 23, Appendix 3 (2013 Study) and Appendix F (2007 Study)
 2010 market share figures provided by HOW Planning (2014) derived from Appendix 7 of Retail Assessment for Oakgate (2011)

Note: WYG has re-coded the 2007 survey results with NEMS, market shares adjusted to exclude SFT

4.44 In terms of the furniture market shares achieved by defined centres and out-of-centre facilities in York City, York city centre achieves the greatest market share of 14.2%. However, this is a decrease to the market share achieved in 2007 of 19.1%. However, in more recent years the reduction in the city centre’s market share appears to have slowed down, with the market share decreasing by 4.3 percentage points between 2007 and 2010, and by 0.6 percentage points between 2010 and 2013. Between 2007 and 2013, the furniture market share of the out-of-centre facilities at Clifton Moor has



also decreased from 14.7% in 2007 to 9.6% in 2013 (a decrease of 5.1 percentage points), while the market share achieved by facilities at Monks Cross has increased from 4.8% in 2007 to 6.2% in 2013 (an increase of 1.4 percentage points). The market share achieved by both Clifton Moor and Monks Cross peaked in 2010 (at 8.1% and 18.3% respectively). Only a very limited furniture market share is achieved by Haxby district centre (0.4%) and the local centres (0.4%). However, this is to be expected given the role of these centres.

Table 4.22: Furniture Shopping Market Share by Centre/Location (%)

Centre	Market Share (%)				
	2007	2010	2013	Difference 2007 to 2013	Difference 2010 to 2013
York City Centre	19.1	14.8	14.2	-4.9	-0.6
Monks Cross	4.8	8.1	6.2	+1.4	-1.9
Clifton Moor	14.7	18.3	9.6	-5.1	-8.7
Foss Island	0.6	0.7	0.7	+0.1	-
York Designer Outlet	0.0	0.5	0.0	-	-0.5
Acomb District Centre	0.0	0.0	0.0	-	-
Haxby District Centre	0.1	0.0	0.4	+0.3	+0.4
Local Centres	0.1	0.0	0.4	+0.3	+0.4
Other (undefined centres)	2.3	1.2	1.0	-1.3	-0.2
Total	41.5	43.8	32.5	-8.9	-11.3

Source: Table 23, Appendix 3

2010 market share figures provided by HOW Planning (2014) derived from Appendix 7 of Retail Assessment for Oakgate (2011)

Note: WYG has re-coded the 2007 survey results with NEMS, market shares adjusted to exclude SFT

Comparison Goods Shopping Patterns: DIY

4.45 In terms of shopping for DIY and gardening goods, facilities located within York City attract 38.9% of shopping trips undertaken by the Study Area population. The market share of York City has decreased since 2007, from 45.2% in 2007, to 43.0% in 2010, to 38.9% in 2013. The market share has reduced by a total of 6.3 percentage points between 2007 and 2013. This decrease to the market share of York City can be attributed to the market shares of a number of centres and facilities within the Study Area, but outside York City having increased. For example, the market share of facilities in Harrogate (outside the town centre) has increased by 6.6 percentage points, with the Homebase at Plumpton Retail Park attracting a DIY goods market share of 8.5% and the B&Q at Skipton Road attracting a market share of 4.3%. Zones 1, 2 and 3 attract market shares greater than 95% and it is therefore evident that these zones form York City's primary catchment for DIY goods. Notwithstanding the high market share achieved in each of these zones, the market shares have decreased since 2007. In relation to Zone 1, although the market share decreased by 1.1 percentage points between 2007 and 2010, the market share has increased by 0.2 percentage points since 2010. However, the market



shares of Zones 2 and 3 have decreased since 2010. In relation to Zone 2, York City's market share has decreased by 2.4 percentage points since 2010. This has coincided with the market shares of other areas outside York City increasing during this period, including Wetherby town centre (increase of 1.3 percentage points since 2010) and Northside Retail Park in Leeds (increase of 2.2 percentage points since 2010). The market share achieved by Zone 3 has decreased by 1.1 percentage point since 2010, which has coincided with an increase in the market share of Pocklington town centre (Zone 4) by 0.6 percentage points and Beverley town centre by 0.6 percentage points.

4.46 Zones 4, 10 and 11 achieve DIY goods market shares greater than 50% and therefore form York City's secondary catchment. Since 2010, the market share achieved by several zones outside York City has decreased. This is due to increased retention rates in these zones. For example, the market share of Zone 10 has decreased by 29.9 percentage points since 2010, which can be attributed to the market share of Easingwold town centre increasing by 32.1 percentage points. It is likely that an improvement to facilities in Easingwold town centre selling DIY goods has reduced the need for residents to travel to facilities in York.



Table 4.23: DIY Market Shares Share Analysis by Zone (%)

Zone	Market Share (%)				
	2007	2010	2013	Difference 2007 to 2013	Difference 2010 to 2013
1	100.0	98.9	99.1	-0.9	+1.0
2	98.8	98.9	96.5	-2.3	-2.4
3	100.0	100	98.9	-1.1	-1.1
4	90.4	93.8	81.8	-8.6	-12.0
5	54.1	58.4	36.9	-17.2	-21.5
6	0.0	1.4	0.8	0.8	-0.6
7	28.6	31.8	27.4	-1.2	-4.4
8	26.9	21.9	21.1	-5.8	-0.8
9	78.1	71.9	48.0	-30.2	-23.9
10	84.6	83.9	54.0	-30.6	-29.9
11	60.9	65.4	62.0	+1.1	-3.4
12	52.4	45.8	29.4	-22.9	-16.4
13	15.5	6.3	15.6	0.0	+9.3
14	11.9	7.4	16.2	+4.3	+8.8
15	32.8	50.8	27.2	-5.6	-23.6
16	27.6	32.4	25.9	-1.7	-6.5
17	1.8	1.6	4.6	+2.8	+3.0
18	1.6	0.0	0.0	-1.6	-
19	4.1	11.2	0.0	-4.1	-11.2
20	5.3	7.1	2.1	-3.2	-5.0
Total	45.2	43.0	38.9	-6.3	-4.1

Source: Table 21, Appendix 3 (2013 Study)

2010 market share figures provided by HOW Planning (2014) derived from Appendix 7 of Retail Assessment for Oakgate (2011)

Note: WYG has re-coded the 2007 survey results with NEMS, market shares adjusted to exclude SFT

4.47 **Table 4.24** below shows that the areas in York City which attracts the greatest DIY goods market share are the facilities located at Clifton Moor which achieves a market share of 13.3% and other out-of-centre facilities in York City which attract a DIY goods market share of 15.5%. The market shares of these out-of-centre locations has decreased since 2007, with Clifton Moor’s market share decreasing by 2.5 percentage points and the market share of other undefined out-of-centre facilities decreasing by 6.6 percentage points. The B&Q store which is located at Clifton Moor Retail Park attracts 11.5% and the B&Q at Hull Road attracts a market share of 14.7%. The DIY goods market share achieved by York city centre is lower at 5.0%. Although the market share of York city centre decreased by 1.4 percentage points between 2007 and 2010, the market share increased by 1.0 percentage point between 2010 and 2013. The district centres of Acomb and Haxby attract a market share of 0.1% each, while the local centres attract a combined market share of 1.7%.



Table 4.24: DIY Shopping Market Share by Centre/Location (%)

Centre	Market Share (%)				
	2007	2010	2013	Difference 2007 to 2013	Difference 2010 to 2013
York City Centre	5.4	4.0	5.0	-0.4	+1.0
Monks Cross	0.6	1.2	1.1	+0.5	-0.1
Clifton Moor	15.8	18.4	13.3	-2.5	-5.1
Foss Island	1.2	1.5	2.0	+0.8	+0.5
York Designer Outlet	0.0	0.0	0.0	-	-
Acomb District Centre	0.1	0.2	0.1	-	+0.1
Haxby District Centre	0.0	0.0	0.1	+0.1	+0.1
Local Centres	0.0	0.0	1.7	+1.7	+1.7
Other (undefined centres)	22.1	17.8	15.5	-6.6	-2.3
Total	45.2	43.0	38.9	-6.3	-4.1

Source: Table 21, Appendix 3

Note: WYG has re-coded the 2007 survey results with NEMS, market shares adjusted to exclude SFT

Comparison Goods Shopping Patterns

- 4.48 In considering shopping patterns, it is relevant to note the proportion of the Study Area population which resides within York City, as assuming a relatively even and sustainable distribution of facilities across the Study Area and beyond, it might be expected that the market share claimed by York City will be broadly commensurate with its population. In this regard, we note that the population of Zones 1, 2 and 3 which roughly correspond to York City's administrative boundary have a population of 199,220 at 2013. Given the estimated Study Area population of 727,880 at 2013, we estimate that 27.4% of the Study Area population reside in York City. Accordingly, one might expect for York City to claim around 27% (or thereabouts) of shopping trips in any one goods category.
- 4.49 Accepting this 'benchmark' as a starting point, we note that York City's market share was more than 33% for clothing and footwear (50.1%), books, CDs and DVDs (47.1%), chemist goods (35.1%), toys and recreational goods (45.6%), small household goods (47.0%), DIY goods (38.9%), electrical goods (42.4%) and a furniture goods market share (32.5%) . The overall comparison goods market share of 46.5% shows that York City is meeting and exceeding expectations in terms of the market share achieved.
- 4.50 Notwithstanding the favourable comparison goods market share achieved by York City, it is important to note the market shares achieved by defined centres in comparison to out-of-centre facilities. It is evident that for some categories of goods, including toys and recreational goods, electrical goods and DIY goods, out-of-centre facilities are attracting a higher market share than defined centres in York



City. In addition, there are facilities outside the Study Area which are increasing their market share at the expense of York City. For example, the market share achieved by Leeds city centre has increased in relation to comparison goods, which is likely to be as a result of improvements to the Trinity Walk shopping centre.

Special Forms of Trading (SFT)

Table 4.25: Special Forms of Trading

	SFT (%)		
	2007	2013	Difference
Main Food Shopping	1.5	5.0	+3.5
Top-Up Shopping	0.3	0.5	+0.3
Clothing & Footwear	3.0	11.5	+8.5
Small Household Goods	8.8	10.8	+2.0
Books, CDs, DVDs		46.1	-
Recreation Goods, Toys etc	6.3	21.8	+15.6
Electrical Goods	11.3	26.1	+14.9
DIY Goods	0.2	3.8	+3.6
Furniture	3.9	5.6	+1.7

Source: NEMS Household Survey 2013 (weighted data)

Source NEMS Household Survey 2007 (weighted data)

- 4.51 The household survey identifies that 5.0% of respondents last undertook their main food shop using the internet. This is an increase from 2007, when 1.5% undertook their main food shopping via the internet. In terms of clothing and footwear, 11.5% last purchased such goods via the internet, which is an increase of 8.5 percentage points since 2007. For small household goods, 10.8% last purchased such goods using the internet, this compares to 21.8% for recreational goods. In terms of books, CDs and DVDs, 46.1% of respondents last purchased such goods via the internet, which are the type of goods most often purchased from the internet. The percentage of respondents who last purchasing electrical goods via the internet has increased from 11.3% in 2007 to 26.1% in 2013 (an increase of 14.9 percentage points). This compares to 3.8% of respondents who last purchased DIY goods via the internet (an increase of 3.6 percentage points since 2007) and 5.6% of respondents who last purchased furniture goods via the internet (an increase of 1.7 percentage points since 2007).
- 4.52 It is evident from the household survey results that the purchase of food and comparison goods over the internet is generally becoming increasingly more popular in York City, which reflects wider national trends, although bulky goods items are less likely to be sold through the internet.



4.53 Of those respondents to the household survey who stated that they purchase their main food shopping using the internet/use a home delivery service, the majority of respondents stated that they use Tesco (50.2%), 26.0% of respondents use Asda, 13.3% use Sainsbury's and 5.5% use Ocado.

Customer Behaviour

4.54 The results of the household survey are useful in understanding customer behaviour in terms of how people undertake their food and comparison goods shopping.

4.55 When respondents to the household survey were asked the main reason they choose to do their main food shopping at a particular store, most respondents (40.2%) explained that their chosen store was near to home. 10.7% of respondents stated that the reason was for lower prices, 6.6% stated habit and 6.0% stated the quality of food goods available.

4.56 The majority of respondents (67.3%) to the household survey do their main food shopping at least once a week. 13.9% do their main food shopping at least once a fortnight and 8.3% at least two times per week. Most respondents (45.1%) do their main food shopping on weekdays during the day, 15.4% on weekdays during the evening and 11.6% on Saturday. The majority of respondents (86.0%) normally travel to their main food shopping destination by car (as a driver or passenger), 8.3% walk and 2.6% travel by bus.



5.0 Consideration of District and Local Centres and Parades

Network of Centres

- 5.01 It is important that the City of York has a hierarchy of centres that are able to adequately service the day to day retail and community needs of the local population in as close a proximity to their homes as possible. This will help to promote sustainable shopping patterns as people should not have to travel far to meet their day to day needs, thereby reducing congestion in larger centres. This approach will help to ensure that lively, thriving places to visit and live are created which provide for both the retail needs of the local population, as well as community facilities such as doctors surgeries and libraries. The creation of a network of centres to serve local needs is particularly important for less mobile and more vulnerable members of the community. It is therefore necessary for York city centre to be supported by a network of district centres, local centres and neighbourhood parades.
- 5.02 In order to inform retail policy formulation, WYG has reviewed the existing centres in the City of York to identify the most appropriate role for those centres in a consolidated hierarchy of district and local centres, and neighbourhood parades. This assessment has involved WYG undertaking a review of the Council's own survey information for each centre, as well as a visit to each centre to undertake our own observations.
- 5.03 In order to determine the classification of each centre, an understanding of the distinct roles of district, local and neighbourhood parades is required.

District Centres

- 5.04 The NPPF and the PPG do not provide a definition of district centres. However, district centres are designed to act as the primary focus for shopping and other services to be delivered which respond to typical weekly retail, service and community requirements. District centres will provide a range of retail units and will act as a natural focus for investment to ensure that one journey can satisfy most needs of the local population.
- 5.05 District centres will usually contain 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. District centres should also have dedicated parking, and may also provide a public transport hub.



Local Centres

- 5.06 As with district centres, a definition of local centres is not provided in the NPPF or the PPG Practice Guidance. However, local centres have a role of catering for the day to day shopping needs of the local communities which they serve. Local centres serve a smaller catchment than district centres, and are unlikely to cater for the same level of passing trade and provide the same level of parking as district centres. They are primarily intended to service the needs of the population within walking distance.
- 5.07 Local centres will include a range of small shops of a local nature, which might include a small supermarket, a newsagent, a post office and a pharmacy, along with other facilities such as a hot food takeaway and laundrette.

Neighbourhood Parades

- 5.08 Neighbourhood Parades are likely to almost exclusively cater for the day to day needs of the immediate local population. DCLG guidance³³ defines neighbourhood parades as:
- a group of 5 to approximately 40 shops in one or more continuous rows;
 - has a mainly local customer base, with strong local links and local visibility, rather than being somewhere people would travel a significant distance to shop at;
 - has a number of independent small or micro-businesses with some multiples (Tesco Metro, Sainsbury's Local, Boots) and symbol affiliates (Spar, Londis, Budgens etc); and
 - being largely retail based (convenience stores, newsagents, greengrocers, bakers etc) though may include some local services (hairdressers, café etc).
- 5.09 The guidance also notes at paragraph 2.2.5 that neighbourhood parades have often become a 'hub' for other non-retail services and social provision, including health centres, community centres, libraries. It is explained that such uses add to the draw and diversity of neighbourhood parades, extending their role as a focus for residential communities.

³³ Parades of shops – towards an understanding of performance and prospects (DCLG, 2012)



5.10 Although the DCLG guidance is helpful in guiding our classification of the district and local centres and neighbourhood parades in the City of York, we consider that the DLCC definition of neighbourhood parades applies to both local centres and neighbourhood parades. It is our view that it is useful to break this definition down further to understand the distinct characteristics of both local centres and neighbourhood parades.

5.11 It is our view that neighbourhood parades will consist of a small continuous linear row of shops that serve the day to day needs of the immediate residential population. The retail units forming part of the parade are likely to be small in scale, with the majority of units providing a convenience function, alongside services which are likely to be required on a day to day basis such as takeaways or hairdressers. As neighbourhood parades will primarily serve a tight catchment which is in walking distance only limited parking is likely to be available, which may include roadside pull in spaces.

Centre Classification

5.12 In order to determine whether each centre in the City of York has the characteristics of a district or local centre, or neighbourhood parade, WYG has produced a matrix to record the characteristics of each centre. The complete matrix will be provided in an addendum to the Retail Study.

5.13 The surveys of each centre provided by the Council enabled us to determine the key facilities in each centre. We recorded whether each centre included the following retail uses and services:

- Superstore
- Supermarket
- Convenience Store
- Pharmacy
- Post Office
- ATM
- Bank
- Building Society
- Restaurant/cafe

5.14 For each identified retail and service facility in the centre, a score of one was provided, except in the case of a supermarket or superstore, with a score of two provided for a supermarket and a score of three for a superstore. Given the important contribution that community facilities make to the vibrancy



of centres and their role in catering for the needs of communities a score of one per community facility was given if the centre included the following community facilities:

- Library
- Doctor's Surgery/Health Centre
- Dentist
- Community Centre

5.15 A number of other indicators were also recorded in order to further understand the characteristics of the centre. These indicators included:

- Number of units
- Amount of floorspace
- Percentage of convenience goods floorspace
- Percentage of comparison goods floorspace
- Average size of retail (convenience and comparison) units
- Number of vacant units
- Percentage of vacant units
- Percentage of national operators
- Survey derived turnover of the centre

Although a specific score has not been attributed to each of this criterion, each criterion has been taken into account in applying WYG's professional judgement in relation to whether a centre is performing the function of a district, local or neighbourhood parades.

5.16 In addition to the indicators which will be included in the matrix, a description of each centre will be provided based on the qualitative assessment undertaken of each centre during WYG's site visit. Both the quantitative and qualitative factors will be taken into account in appraising each centre and determining its categorisation. Using all the information gathered, WYG will be able to assess the characteristics of each centre within the City of York against each other and identify any deficiencies in the distribution of the facilities in the City.

5.17 A list of the centres in York which have been surveyed in order to determine whether they perform the role of a district, local or neighbourhood parades is provided below:



- Blossom Street
- Bishopthorpe
- Acomb
- North Moor Road
- Station Avenue
- Hawthorn
- Haxby
- Strensall
- Barley Rise
- Brockfield
- Gillygate
- Monkton Road
- Saxton Place
- Shipton Road
- Eastholme Drive
- Crichton Avenue
- Burton Stone
- East Parade
- Gerard Avenue
- Fouth Avenue
- Tang Hall Lane
- Farndale Avenue
- Yarburgh
- Main Street
- University of York
- Hull Road
- Lawrence Street
- Broadway
- Carey Street
- Fishergate
- Fulford
- Heslington Road
- Main Street
- Elvington Main
- Wheldrake
- Beckfield Lane 1
- Beckfield Lane 2
- Boroughbridge Road 1
- Acomb Road
- Boroughbridge Road 2
- Garfield Terrace
- Poppleton
- Salisbury Terrace
- Cornlands Road
- Foxwood Lane
- Hamilton Drive West
- Melrosegate
- Millfield Lane
- Tadcaster Road
- Middlethorpe
- Moorcroft Road
- Wains Grove
- Thanet Road
- Acomb Wood
- Copmanthorpe Village
- Bootham
- Clifton Road
- Allerton Road
- Upper Poppleton
- Weatherby Road
- Bishopthorpe Village
- Abermarle Road
- Trafalgar Street
- Swann Street
- Lowther Street
- Haxby Road
- Walpole Street
- Huntington Road
- Oak Tree Lane
- Wigginton
- Dunnington
- The Village Stockton
- Hopgove Road
- Bad Bargain
- Hull Road 2
- Bramham Road
- Fairfields Drive
- Garden Street

5.18 An addendum to the Retail Study will set out WYG’s recommendations as to which centres should be defined as district, local and neighbourhood parades in the Local Plan. The addendum will also identify if there are any locations which WYG do not consider perform the role of a defined centre and should therefore be de-allocated. The extent of each centre boundary will be defined within the addendum document.



6.0 Population and Expenditure

6.01 This section of the report assesses the current baseline population and available expenditure (for both convenience and comparison goods) within the Study Area.

Study Area (Baseline) Population

- 6.02 The baseline population within each postal code sector has been calculated using Experian Micromarketer G3 data (2012 estimate, which was issued in February 2014). The baseline population data takes into consideration the findings of the 2011 Census release which has then been projected forward using Experian Micromarketer G3 data (which utilises growth rates which take into account Office for National Statistics population projections and current age and gender estimates), these figures do not reflect any spatial planning policy interventions which are dealt with in Section 8.
- 6.03 For the purpose of this Study, population and expenditure has been calculated at five year intervals to 2028 (i.e. at 2013, 2018, 2023, and 2028) but then adjusted to 2030 to reflect the Local Plan time horizon.
- 6.04 On this basis, the defined Study Area is estimated to contain a resident population of approximately 727,881 people at 2013 rising to 803,204 people at 2030. This represents an increase in population within the Study Area of 75,323 people (equating to an increase of 10.3%) between 2013 and 2030. In the zones which most closely correspond to the York administrative area (these being Zones 1, 2, and 3), we note that the population increases from 199,220 in 2013 to 220,848 in 2030, an increase of 21,628. The population figures are comparable to those found in the 2008 Study, which found between 2012 to 2029 to population would grow by 21,940 persons
- 6.05 **Table 6.1** provides a detailed breakdown of the forecast population change within each survey zone in each of the reporting periods to 2030.



Table 6.1: Study Area Population by Survey Zone (2013 to 2030)

Zone	2013	2018	2023	2028	2030
1	41,954	43,461	44,658	45,944	46,450
2	72,636	75,313	77,454	79,677	80,548
3	84,630	87,794	90,260	92,845	93,850
4	21,586	22,339	23,048	23,648	23,861
5	16,655	17,246	17,832	18,302	18,453
6	46,945	48,793	50,593	52,100	52,594
7	52,621	55,613	58,533	60,944	61,735
8	78,536	82,914	86,647	89,828	90,984
9	14,482	14,793	15,137	15,433	15,531
10	14,115	14,378	14,692	14,925	14,995
11	7,746	7,876	8,044	8,162	8,202
12	21,417	21,784	22,300	22,691	22,832
13	23,287	24,096	24,888	25,554	25,771
14	20,204	20,557	20,951	21,252	21,336
15	9,060	9,187	9,389	9,520	9,561
16	10,946	11,115	11,382	11,568	11,629
17	16,096	16,412	16,778	17,056	17,133
18	32,061	32,628	33,274	33,765	33,918
19	35,086	35,838	36,679	37,386	37,620
20	107,818	110,270	113,004	115,389	116,201
Total	727,881	752,407	775,543	795,989	803,204

Source: Experian Micromarketer G3 data

Retail Expenditure

- 6.06 In order to calculate per capita convenience and comparison goods expenditure, WYG has again utilised Experian Micromarketer G3 data which provides detailed information on local consumer expenditure which takes into consideration the socio-economic characteristics of the local population. Experian is a widely accepted source of expenditure and population data and is regularly used by WYG in calculating retail capacity.
- 6.07 The base year for the Experian expenditure data is 2012. Per capita growth forecasts have been derived from Experian Retail Planner Briefing Note 11, which was published in October 2013. For the purposes of this study, the following annual growth forecasts set out below by **Table 6.2** have been applied.



Table 6.2: Expenditure Growth Forecasts

Year	Convenience	Comparison
2012	-0.6	3.1
2013	-0.6	3.2
2014	-0.3	2.3
2015	0.1	2.8
2016	0.6	2.9
2017	0.9	2.9
2018	0.8	3.1
2019	0.9	3.1
2020	0.9	3.0
2021	0.9	3.0
2022	0.9	2.9
2023	0.9	2.9
2024	0.9	2.9
2025	0.8	2.9
2026	0.7	2.8
2027	0.7	2.9
2028	0.8	2.9
2029	0.8	2.9
2030	0.8	2.9

Source: Figure 1a, Retail Planner Briefing Note 11 (October 2013)

- 6.08 The latest growth forecasts suggest that the current downturn in the economy will continue to impact upon future convenience goods expenditure, at least in the short term. However, over the medium to long term it is expected that the forecast levels of growth will increase as the economy recovers. For convenience goods, Experian forecasts negative growth to 2014, before identifying a modest forecast increase of 0.1% at 2015. Experian identifies an estimated convenience goods increase of +0.9% at 2017 and, although some deviation in the rate is forecast thereafter, the rate of annual convenience goods growth forecast to 2030 does not fall below +0.7%.
- 6.09 By contrast Experian identifies an immediate and relatively strong annual comparison growth rate of +3.1% and +3.2% at 2012 and 2013 respectively. Whilst a drop in the rate of growth is anticipated at 2014 (to +2.3%), growth rates thereafter are forecast to be relatively stable, ranging from +2.8% to +3.1%. These figures compare to 3.8% annual growth rates that were identified by GVA in the Retail Study 2007, demonstrating that less growth is expected in this retailing sector than that previously predicted.



- 6.10 Growth in expenditure forecast in the longer term (beyond the next ten years) should be treated with caution given the inherent uncertainties in predicting the economy’s performance over time. Assessments of this nature should therefore be reviewed on a regular basis in order to ensure that forecasts over the medium and long are reflective of any changes to relevant available data.
- 6.11 Experian Retail Planner Briefing Note 11 also provides a forecast as to the proportion of expenditure which will be committed through special forms of trading (comprising ‘non-store retailing’, such as internet sales, TV shopping and so on) over the reporting period. We have ‘stripped out’ any expenditure which survey respondents indicated was committed via special forms of trading and instead have made an allowance derived from Experian’s recommendation.
- 6.12 In considering special forms of trading, it should be noted that many products which are ordered online are actually sourced from a physical store’s shelves or stockroom (particularly in the case of convenience goods). Accordingly, expenditure committed in this manner acts to support stores and should be considered ‘available’ to tangible retail destinations. Indeed, since the non-store retailing figures include supermarkets and other retailers that source internet goods sales from store space, the share of non-store retailing is over-stated from the point of view of those interested in physical retail outlets, particularly for convenience goods.’ Appendix 3 of Experian Retail Planner Briefing Note 11 states that:

‘Many stores sell online but source sales from regular stores rather than warehouses, implying an increase in required store floorspace to cater for rising internet sales.’

- 6.13 Due to this ‘over-statement’, in making an allowance for expenditure committed via special forms of trading, we adopt Experian’s adjusted figure (provided at Appendix 3 of the Briefing Note) which accounts for internet sales which are sourced from stores. The proportion of expenditure committed through special forms of trading cited below at **Table 6.3** is ‘stripped out’ of the identified expenditure as it is not available to stores within the Study Area.

Table 6.3: Special Forms of Trading Forecasts

Year	Convenience	Comparison
2013	2.5%	10.8%
2018	3.8%	14.5%
2023	4.8%	15.9%
2028	5.4%	16.0%
2030	5.6%	15.9%

Source: Appendix 3, Experian Retail Planner Briefing Note 11 (October 2013)



6.14 Using the above growth rates and special forms of trading allowances, it is possible to produce expenditure estimates for each survey zone under each population growth scenario at 2013, 2018, 2023, 2028 and 2030. In doing so, our assessment takes into account both per capita retail expenditure growth and population change. WYG note that the average convenience goods spent per capita is £1,947 across the Study Area, this is comparable to the national UK average of £1,969 per capita, however, the average convenience good per capita within Zones 1 to 3 is £1,729, which equate to 88% of the national average.

Convenience Goods Expenditure

6.15 Taking into consideration the above increases in population and per capita expenditure, it is estimated that, at 2013, the resident population of the Study Area generates some £1,312.7m of convenience goods expenditure³⁴. This is forecast to increase to £1,589.8m at 2030, which represents an increase of £277.1m (or 21.1%) between 2013 and 2030. In the short term to 2013 to 2018, we forecast that the available convenience goods expenditure will increase by £56.7m to £1,369.4m a 4.3% increase.

Table 6.4 Total Available Study Area Expenditure – Convenience (£m)

2013	2018	2023	2028	2030	Growth 2013-2018	Growth 2013-2023	Growth 2013-2028	Growth 2013-2030
1,312.7	1,369.4	1,460.5	1,550.7	1,589.8	56.7	147.7	237.9	277.1

Source: Table 2, Appendix 2

Main Food and 'Top-Up' Shopping

6.16 The proportion of convenience goods expenditure which is committed through main food shopping trips and through 'top-up' shopping trips has been estimated with reference to respondents' answers to Question 5 and Question 15 of the household survey, which ask respondents to estimate their weekly main food shopping expenditure and weekly top-up shopping expenditure respectively. We have analysed responses to these questions to derive an estimate of the split between main and top-up expenditure on a zonal basis. Across the whole of the Study Area, we calculate (by adding together our estimates of the monetary split between main and top up shopping expenditure within each zone) that the proportion of convenience goods expenditure directed to respondents' main food shopping destination equates to 79.8% of their overall convenience shopping expenditure. The

³⁴ Expressed in 2012 prices, as is every subsequent monetary value



remaining 20.2% of expenditure (which will typically be spent on regular purchases such as milk, bread and so on) is therefore attributed to the respondents' top-up convenience shopping destination.

6.17 By applying these estimates to the identified resident population of the Study Area, convenience goods expenditure at 2013 committed through 'main food' shopping trips is estimated to be £1,045.0m and through 'top up' shopping trips is estimated to account for £267.8m.

Comparison Goods Expenditure

6.18 At 2013, it is estimated that the resident population of the Study Area generates £1,977.1m of comparison goods expenditure, which is forecast to increase to £3,333.6m at 2030. This represents an increase of £1,356.5m (or 68.6%) between 2013 and 2030. Whilst this increase is clearly very significant indeed, it is a more modest rate than has previously been achieved due to the more circumspect level of comparison goods growth which is forecast over the short and medium term (and due to the expectation that an ever increasing proportion of comparison goods expenditure will be committed through internet shopping). As a consequence, the identified comparison goods expenditure growth of £274.8m within the Study Area between 2013 and 2018 represents a 13.9% increase.

Table 6.5 Total Available Study Area Expenditure – Comparison (£m)

2013	2018	2023	2028	2030	Growth 2013-2018	Growth 2013-2023	Growth 2013-2028	Growth 2013-2030
1,977.1	2,251.8	2,639.8	3,122.3	3,333.6	274.8	662.7	1,145.3	1,356.5

Source: Table 8, Appendix 3

6.19 For the purposes of this study, comparison goods expenditure has been divided into nine sub-categories: 'Furniture', 'DIY', 'Gardening Goods', 'Electrical' (these four categories collectively being referred to as bulky goods), 'Clothing & Footwear', 'CDs, DVDs and Books', 'Small Household Goods', 'Toys, Games, Bicycles and Recreational Goods' and 'Health and Beauty/Chemist Goods' (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zonal basis.



Inflow (Visitor/Tourism) Expenditure to York

- 6.20 With York recognised as important tourist destination in Yorkshire and the region's wider tourism economy, WYG has sought to establish the level of shopping expenditure that is attracted to the area from visitor and tourist spend. WYG has drawn from data provided by VisitYork which has been derived from new research which combines results from the tourism industry's 'Cambridge model' and the 'UK Events Market Trends Survey'. VisitYork data confirms that the total 'shopping' expenditure by visitors in York is £116.0m in 2012³⁵, in addition there is £125m is spent on food and drink, which we understand includes eating out at destinations such as restaurants, pubs, cafes etc. VisitYork identify that there are 7m visitors to York of which 6m are leisure visits and 1m business visits.
- 6.21 However, through liaison with VisitYork, WYG understands that some of the recorded visitor spend is within the general York and Yorkshire area and therefore to minimise the potential for double counting of residents from the adopted Study Area from the household survey, WYG has stripped out any respondents who reside in the Study Area. WYG found that approximately 6.0% of visitors were from postcodes within the Study Area. Therefore WYG estimate that the likely inflow from beyond the Study Area is £109.0m at 2012.
- 6.22 The YorkVisit data does not break down the shopping spend into comparison or convenience goods items. In drawing on the wider extent of the Study Area, WYG do not expect that a significant level of this expenditure will be convenience goods expenditure but the majority will be comparison goods expenditure. At 2013 WYG has assumed that around £10.8m (circa 10%) is spent at facilities in the city on convenience goods with a further £98.2m spent on comparison goods retail. We have assumed that a total of around £109.0m is spent in the city as a whole, which represents an inflow of around 3.3% of all expenditure when compared to the £3,289.8m (convenience and comparison goods) generated in the Study Area. This inflow (£109.0m) represents around 12.8% of the total expenditure generated (£848.8m) in the area covering the administrative area of York (Zones 1 to 3). As explored in Section 7 later, all retail facilities in York retain £1,357.7m of convenience and comparison goods spend therefore £109.0m visitor spend represents an inflow of 8%. WYG note that this compares to 34% assumed by GVA, based on the results of in street survey. WYG note that the comparison goods inflow (£98.2m) equates to around 11% of that retained at facilities (£920m) in York. WYG can also confirm from discussion with the agents (NTR) of York Designer Outlet that 11%

³⁵ VisitYork Press Release (11th February 2014)



of the centres turnover is derived from tourism spend (domestic, EU tourism and long haul tourism); this is comparable to that estimated by VisitYork.

Market Share of Expenditure of the Main Provision

- 6.23 Having estimated the level of expenditure which is generated by the resident population within the defined Study Area, it is necessary to identify the 'sphere of influence' of each of the defined centres and each centre's claimed market share of available expenditure. We have also considered other important destinations including district centres and other major retail parks (such as Clifton Moor and Monks Cross as well as York Designer Outlet as well other standalone retail category effectively being 'undefined' in planning terms). This Study has involved the completion of 1,800 household telephone interviews within the defined Study Area. By analysing the results of the survey, it is possible to estimate the levels of expenditure which are directed towards each principal centre's shopping facilities. The market shares for the various expenditure categories were identified in Section 4.
- 6.24 **Table 6.6** below summarises differing market shares achieved for each of the main retail destinations across the city, and shows that the main destinations for undertaking shopping trips is York city centre (14.5%) and the Monks Cross retail area (9.7%) followed by facilities at Clifton Moor (7.5%). When we consider the out-of-centre facilities at Monks Cross and Clifton Moor together (17.2%) they exceed the combined market share (14.5%) achieved by the city centre by 2.7 percentage points. The other key destinations, including facilities at Foss Island and York Designer Outlet (YDO) have a market share of 2.7% and 1.3% respectively showing their more limited shopping role, especially YDO which only draws comparison goods expenditure. YDO is the third most important destination (behind York City Centre and Monks Cross) for clothing and footwear goods. The retail provision at both Acomb and Haxby district centres have more localised roles, which are mainly focused towards convenience goods retailing representative of their more day to day local role. Similar the results found that cumulatively the network of local (and neighbourhood) centres retained 2.0% of generated trips across the wider Study Area, but these were mainly focused on main and top up food shopping trips showing the localised nature of these smaller centres. We note that 2.1% of trips are undertaken to other (undefined in planning policy terms) locations across the city.
- 6.25 Overall the facilities within the city retain approximately 41.1% of all local expenditure generated in the Study Area, with a further 41.4% going to facilities in the rest of the Study Area (but outside of York City), therefore the Study Area as a whole retains 82.5% of locally generated expenditure which is considered sustainable, with an outflow of 17.4% to destinations outside the wider Study Area. The results show that the secured market share for comparison goods is actually higher than that achieved



for convenience goods, demonstrating that York has a wider shopping influence from beyond its immediate catchment area, which is credit to its strong comparison goods retail offer. This is especially pertinent for the clothing and footwear goods which has the strongest retention of trade at 50.1% and as set out in Section 4 has remained at constant rate since 2007. Similar small household goods items are the second highest retention of trade at 47.1%, although this has been found to have increased since 2007. The lowest trade retention is for top up food shopping items at 30.6%.

6.26 The results indicate that 240,200 to York City to meet their convenience goods needs people and a comparison goods catchment area of 339,200 persons. The city's population is currently estimated at 198,000³⁶, the catchment demonstrates that facilities in York clearly influence shopping patterns (both convenience and comparison) beyond its administrative boundaries.

Table 6.6: York City Market Shares by Location

Destination	Market Shares by Category (%)										TOTAL [^]
	Convenience Goods		Comparison Goods								
	Main Food	Top-up Food	Furniture	DIY	Electrical	Clothing & Footwear	CDs, DVDs, books	Small H'hold	Recreation	Chemist	
York City Centre	1.2	5.4	14.2	5.0	15.2	30.4	31.3	21.8	18.9	16.3	14.5
Monks Cross	11.7	3.5	6.2	1.1	5.2	12.3	8.1	9.8	9.2	7.4	9.7
Clifton Moor	5.5	2.4	9.6	13.3	20.0	2.5	2.9	11.3	14.4	2.7	7.5
Foss Island	7.6	2.3	0.7	2.0	0.2	0.0	0.5	0.5	1.1	0.2	2.7
York Designer Outlet			0.0	0.0	0.1	4.2	1.2	1.9	0.6	0.0	1.3
Acomb District Centre	1.7	3.3	0.0	0.1	0.6	0.4	0.2	0.4	0.0	2.0	0.9
Haxby District Centre	0.4	1.9	0.4	0.1	0.1	0.0	0.6	0.0	0.0	0.1	0.3
Local Centres	1.7	10.1	0.4	1.7	0.3	0.0	0.2	0.3	0.4	4.1	2.0
Other (Undefined centres)	5.0	1.3	1.0	15.5	0.8	0.4	2.2	1.1	1.0	2.2	2.1
City Sub-Total	34.8	30.6	32.5	38.9	42.4	50.1	47.1	47.0	45.6	35.1	41.1
		33.0				46.5					
Other Study Area	55.5	64.1	50.1	47.8	40.6	25.0	41.7	32.5	34.2	57.6	41.4

³⁶ ONS Census 2011



Leakage Outside Study Area	9.7	5.3	17.3	13.3	17.0	24.9	11.2	20.5	20.1	7.3	17.4
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Source: York Household Shopping Survey (2013)

^ Based on cumulative market share of all categories (convenience goods and comparison goods)

Forecast Growth in Expenditure Attracted to Study Area

- 6.27 With forecast growth in convenience goods expenditure predicted to increase at an average of 0.5% per annum³⁷ across the whole of the period from 2013 to 2030, and with the Study Area population expected to grow from around 727,900 to 803,200 people over the same period, it is estimated that the Study Area will experience an increase in convenience goods expenditure of approximately £277.1m at 2030. Assuming a constant Study Area market share of 33.0%, this equates to an increase in retained (within York City administrative) convenience goods expenditure of approximately £91.4m at 2030. In the short term the convenience good expenditure growth to 2018 is estimated at £56.7m and based on the existing market share would equate to £18.7m being available.
- 6.28 The significant forecast increase in expenditure on comparison goods (an average of 2.5% per annum²⁹ increase in the period 2013 to 2030) would result in a further £1,356.5m of comparison goods expenditure being generated within the Study Area by 2030. Assuming a constant comparison goods market share of 46.5%, existing facilities within York will capture an extra £630.8m of comparison goods expenditure by 2030. In the short term (to 2018) the forecast increase in expenditure is £274.8m and again assuming the city continues to capture the same market share (46.5%), this equates to £127.8m.
- 6.29 This analysis is based on 'rolling forward' the current market share within the Study Area for each category of goods. This approach of rolling forward existing market share is in line with standard practice and does not take into account the desirability or need to 'claw back' leakage between expenditure directed to centres elsewhere, which might be achieved through improvements in retail provision or offer. However, in this regard it should be noted that the current comparison goods market share of the Study Area is considered reasonably healthy (at 46.5% for York City facilities and 76.8% for all facilities in the wider Study Area) and is comparable to the 44.1% identified in 2007, demonstrating that there is a high retention of local (comparison goods) expenditure and relatively limited expenditure leakage (23.2%), the largest expenditure leakage is to facilities in Leeds (6.2%), Hull (2.9%) and Wakefield (1.8%).

³⁷ Growth rates taken from Appendix 3 of Experian Retail Planner Briefing Note 11 (October 2013), and are adjusted to take into consideration SFT allowances.



6.30 In order for the Study Area (and York) to capture the significant future growth in retail expenditure which is forecast (particularly for comparison goods), it is likely that there will be a need to enhance future retail provision, thereby ensuring that this growth is not lost to competing centres and that the Study Area retention rate does not decline in the future.

6.31 If an excess of comparison or convenience goods expenditure manifests itself within the Study Area, this does not necessarily translate directly into a requirement for additional floorspace. In assessing quantitative need, it is also necessary to take account of:

- Existing development proposals;
- Expected changes in shopping patterns; and
- The current capacity and efficiency of retail floorspace within the established centres and elsewhere.



7.0 Capacity in York City (Baseline)

- 7.01 WYG has examined the need for new convenience and comparison goods floorspace over five year reporting periods to 2030 to coincide with the lifespan of any future Local Plan. At the outset, it is important to note that an assessment in the long term should be viewed with caution, due to the obvious difficulties inherent in predicting the performance of the economy and shopping habits over time. In any event, any identified need or capacity identified beyond 2018 should not necessarily be viewed as justification of new retail floorspace outside of centres as this could prejudice the implementation of any potential town centre redevelopment strategies or the development of more central sites which may be currently available or which could become available over time.
- 7.02 A complete series of quantitative capacity tables are provided at Appendices 2 and 3 to provide further detail in terms of the step-by-step application of the study methodology.

Capacity Formula

- 7.03 For all types of capacity assessment, the conceptual approach is identical, although the data sources and assumptions may differ. The key relationship is Expenditure (£m) (allowing for population change and retail growth) *less* Turnover (£m) (allowing for improved 'productivity') *equals* Surplus or Deficit (£m).
- 7.04 **Expenditure (£m)** – The expenditure element of the above equation is calculated by taking the population within the defined catchment and then multiplying this figure by the average annual expenditure levels for various forms of retail spending per annum. The expenditure is estimated with reference to a number of factors, namely:
- Growth in population;
 - Growth in expenditure per person per annum; and
 - Special Forms of Trading (e.g. catalogue shopping / internet).
- 7.05 **Turnover (£m)** – The turnover figure relates to the annual turnover generated by existing retail facilities within the Study Area. The turnover of existing facilities is calculated using Mintel Retail Rankings (2013) and Verdict UK Grocery Retailers reports (2013) – independent analysis which lists the sales density for all major multiple retailers.



- 7.06 **Surplus / Deficit (£m)** – This represents the difference between the expenditure and turnover figures outlined above. Clearly, a surplus figure will represent an under provision of retail facilities within the Study Area (which, all things being equal, would suggest that additional floorspace is required), whereas a deficit would suggest an over provision of retail facilities (and in these circumstances it would prove difficult to justify additional floorspace).
- 7.07 Although a surplus figure is presented in monetary terms, it is possible to convert this figure to provide an indication of the quantum of floorspace which may be required. The level of floorspace will vary dependent on the type of retailer proposed and the type of goods traded. For example, in the case of comparison goods, electrical retailers such as Currys (which is considered a bulky goods retailer) have a much higher sales density than other bulky goods retailers such as B&Q, and clothing and footwear (non-bulky goods) operators generally have a higher sales density than bulky goods retailers.

Capacity for Future Convenience Goods Floorspace

- 7.08 In order to ascertain the likely need for additional convenience goods floorspace in York, it is first necessary to consider the performance of the current provision. Given that the City is already relatively well provided for in terms of the number and variety of foodstore operators, it is assumed that the future convenience goods expenditure available to the city will be commensurate with its current market share. For each centre, it is also assumed in the first instance that the future expenditure available to the centre will be consistent with its current market share.
- 7.09 **Table 7.1** below indicates the current trading position compared against the 'benchmark' (or anticipated) turnover of existing convenience goods floorspace and projects this forward to 2030 assuming that the identified market share remains constant. The 'benchmark' turnover differs for each operator based on its average turnover per square metre throughout the country. Although robust up-to-date information is available in terms of the convenience goods floorspace provided by large foodstores, it can be more difficult to quantify the extent of local convenience provision as there is no single comprehensive database to rely upon. Where we have been unable to verify the exact quantum of floorspace provided by existing smaller-scale convenience stores, we have assumed that stores are trading 'at equilibrium' (i.e. the survey-derived turnover equates to the expected level of turnover). For each store, consideration has been given as to whether any of its turnover is likely to be derived as 'inflow' from outside the Study Area. Our judgement in this regard is informed by the store's operator, its size and its location within the Study Area. Given the extent of the Study Area we do not expect there to be significant levels of inflow to most of the convenience goods retail facilities



across the city, with the exception of city centre facilities which are likely to benefit from tourism footfall, quick stop lunch time trips and therefore we have made an adjustment to reflect this.

- 7.10 As this assessment is based upon a 'goods based' approach, which disaggregates expenditure by category type, it is important to recognise that major foodstore operators generally sell an element of non-food goods such as books, compact discs, clothing and household goods. To account for this, the typical ratio between convenience/comparison goods provision for operators³⁸ has been applied to the estimated net floorspace of each foodstore³⁹. This provides an indication of the likely sales area dedicated to the sale of convenience goods at each store.
- 7.11 Whilst survey results are commonly accepted as a means by which to identify existing shopping patterns, their findings should be treated with a 'note of caution' as they tend to have a bias towards larger stores and can understate the role of smaller stores and independent retailers, however, we have put measures into the survey design to reduce this bias.
- 7.12 **Table 7.1** indicates that, based on the current market share of existing facilities within the York administrative area (including the city centre, district and local centres, freestanding stores and so on), existing facilities achieve a convenience goods turnover of £432.7m at 2013. This equates to a market share of 33.0% of all convenience goods expenditure generated by residents within the Study Area. This figure is in excess of the estimated benchmark turnover (£407.9m) of the existing convenience goods floorspace and we therefore identify a expenditure surplus of £24.8m at 2013 (excludes inflow). In addition, and as set out in Section 6, we estimate that there is an additional £10.8m spent at facilities in the city centre through inflow, this represents an inflow of 2.5%. This increases the expenditure surplus to £35.6m at 2013. **Table 7.1** is derived from Tables 4, 5 and 6 of Appendix 2 which provide full details of all of inputs and assumptions relied upon in calculating this surplus.

³⁸ Derived from Verdict UK Food & Grocery Retailers (2013). Where Verdict data is not available or is considered not to appropriately reflect how a store trades in practice, we have applied professional judgement in the manner set out in the notes to Table 5 of Appendix 4

³⁹ Net sales areas have been sourced from Institute of Grocery Distribution data where available. Where such data is not available, we have applied professional judgement in the manner set out in the notes to Table 5 of Appendix 4



Table 7.1: Quantitative Need for Convenience Goods Floorspace in York City

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2013	407.9	443.5	35.6
2018	400.2	462.6	62.5
2023	401.4	493.4	92.0
2028	403.4	523.9	120.5
2030	404.2	537.1	132.9

Source: Table 6 (1a) of Appendix 2

- 7.13 We have 'rolled forward' the City's current market share (of 33.0%) in order to identify the likely convenience goods floorspace requirement to allow the City to continue to meet the convenience shopping needs of its residents. On this basis, given the limited forecast increases in convenience goods expenditure and population and allowing for year on year increases in the productivity of existing floorspace, we estimate that by 2018 there will be an expenditure surplus of £62.5m to support additional convenience goods floorspace within the Study Area. This surplus is forecast to increase to £92.0m at 2023, £120.5m by 2028 and to £132.9m at 2030. Account has been made for the turnover efficiency of existing convenience goods floorspace to increase (on the basis that operators have historically been able to make their existing floorspace more productive over time) in accordance with the projections set out in Table 4a of Experian Retail Planner Briefing Note 11 (these being -1.2% per annum at 2014, -0.7% per annum at 2015, 0.0% per annum between 2016 and 2020, and +0.1% per annum between 2021 and 2030).
- 7.14 This initial analysis does not take into account existing convenience goods floorspace commitments, which we estimate will have a combined benchmark turnover of £17.4m at 2012 prices, assuming that all are operating by 2018. Particularly significant foodstore development is proposed in the form of the proposed new M&S Simply Food at Monks Cross. WYG understand that the existing M&S Simply Food will remain open at the retail park. WYG estimate that the turnover of the new Simply Food store will be £14.9m at 2018. There is also a proposed Iceland store at Unit 4 Clifton Moor we estimate would have a turnover of £2.4m. The total turnover of both convenience goods planning commitments is estimated to be £17.4m (we do not expect these stores to benefit from any inflow and all their trade will be drawn from the Study Area).
- 7.15 After account is made for the estimated £17.4m convenience goods turnover of commitments in York, it is evident that there is still a quantitative need for additional convenience goods floorspace within the city at 2018. **Table 7.2** indicates that this need equates to an expenditure residual of £45.1m at



2018 which would support between 3,900 sq.m and 6,600 sq.m of additional net sales floorspace. The minimum figure is based on the identified need being met by one of the leading five foodstore operators (Asda, Morrisons, Sainsbury's Tesco and Waitrose) and is derived from the application of an average of their company average sales densities. The higher figure is based upon the need being met by a discount retailer, which will typically have a sales turnover in the order of £7,000 per sq.m.

7.16 Assuming once again that York's market share of 33.0% is 'rolled forward' in the period to 2030 (and allowing for improvements in sales density for both existing and committed floorspace); we estimate that the identified expenditure residual will increase to £74.6m at 2023, to £103.0m by 2028 and to £115.4m at 2030. This will result in a significant increased need throughout the city over the medium to long term, equating to a net convenience goods floorspace requirement of between 6,400 sq.m and 10,800 sq.m at 2023, increasing to between 8,800 sq.m and 14,900 sq.m at 2028, and to between 9,800 and 16,600 sq.m at 2030.

7.17 Whilst there are a number of ways in which such identified needs can be met, food superstores usually provide upwards of 2,000 sq.m of net convenience goods floorspace, and it is therefore evident that there is an immediate need which could support around two or possibly three food superstores in the city and that a further number could be supported over the medium to long term.

Table 7.2: Quantitative Need for Convenience Goods Floorspace in York City with Account Made for Commitments

Year	Convenience Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2013	35.6				
2018	62.5	17.4	45.1	3,900	6,600
2023	92.0	17.4	74.6	6,400	10,800
2028	120.5	17.5	103.0	8,800	14,900
2030	132.9	17.5	115.4	9,800	16,600

Source: Table 6 (1c) of Appendix 4

Capacity for Future Comparison Goods Floorspace

7.18 Turning to comparison goods capacity, it is first important to note that our methodology deviates from that which has been deployed in respect of convenience goods for two principal reasons. Firstly, it can be extremely difficult to attribute an appropriate benchmark turnover to existing comparison goods provision. Secondly, there tends to be greater disparity between the trading performance of



apparently similar comparison goods provision depending on its location, the character of the area and the nature of the catchment. As a consequence, we adopt the approach with comparison goods floorspace that it is trading 'at equilibrium' (i.e. our survey derived turnover estimate effectively acts as benchmark) at 2013. We assume that there is therefore a nil quantitative need for any additional floorspace across the city at 2013. Once again, it has generally been assumed that the future performance of each of the centres considered will be commensurate with their current market share.

7.19 Existing facilities within York achieve a comparison goods turnover of £920.0m at 2013. This equates to a market share of 46.5% of all comparison goods expenditure generated by residents within the Study Area. By 'rolling forward' this market share and making provision for inflow for 11% for the city centre (including approximately 47% inflow for York Designer Outlet being derived from outside the Study Area⁴⁰), we estimate that facilities in York will attract £1,159.7m of comparison goods expenditure at 2018, increasing to £1,359.5m at 2023, to £1,608.0m at 2028 and £1,716.8m by 2030 based on a continuation of York's current Study Area market share.

Table 7.3: Quantitative Need for Comparison Goods Floorspace in York City

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2013	1,018.2	1,018.2	0.0
2018	1,128.6	1,159.7	31.1
2023	1,248.5	1,359.5	111.0
2028	1,378.5	1,608.0	229.6
2030	1,434.2	1,716.8	282.7

Source: Table 27 (Table 1a) of Appendix 3

7.20 Given the forecast increases in comparison goods expenditure and population and allowing for year on year increases in the productivity of existing floorspace, we estimate that by 2018 there will be an expenditure surplus of £31.1m to support additional comparison goods floorspace within the Study Area. This surplus is forecast to increase to £111.0m at 2023 and then sharply to £229.6m at 2028 and to £282.7m at 2030. Account has been made for the turnover efficiency of existing comparison goods floorspace to increase (on the basis that operators are generally able to make their existing floorspace more productive over time) in accordance with the projections set out in Table 4b of Experian Retail Planner Briefing Note 11 (these being +1.9% per annum at 2014, +2.2% per annum at 2015, +2.1% per annum between 2016 and 2020, and +2.0% between 2021 and 2030).

⁴⁰ WYG has considered customer data provided by NTR Planning and consideration of VisitYork visitor expenditure data released in 2014.



7.21 Once again, this initial analysis does not take into account existing commitments⁴¹, which we set out in Appendix (Table 27a) we estimate will have a combined benchmark turnover of £152.1m (at 2012 prices) if it were to be assumed that each was operational at 2018. Significant floorspace is proposed in the form of the additional comparison goods sales area associated with the proposed Huntington Stadium scheme at Monks Cross with secured tenants include John Lewis, Marks & Spencer and Next (which we estimated would have a turnover of £128.5m) with a further £23.6m allocated to a number of other schemes across the city including unimplemented floorspace at York Designer Outlet and a series of reconfigurations at Monks Cross. We estimate that £132.8m of this turnover will be derived from the Study Area. WYG advise that we have excluded any extant planning permission for retail floorspace at the Hungate site as understand that since outline approval (LPA Ref: 12/02282/OUTM & 13/03015/FULM) of the Hungate scheme in 2006 the developers of the scheme have reassessed their commercial ambitions. The 6,400 sq.m retail (A1/A3/A4/A5) originally planned for and approved has been revised downwards and will not be met. Phase 1 has been built out as purely residential and Phase 2 will follow soon with a similar emphasis on residential (with some modest local retail use). The remaining four phases are expected to accommodate some commercial and retail use but will be largely residential. Therefore given the clear direction in the developer’s objectives for the sites, we do not believe that the permitted floorspace would absorb potential future capacity.

7.22 The estimated £132.8m turnover of comparison goods commitments is substantial and extinguishes any quantitative need for additional floorspace across the city over the medium term based on the assumption that the existing market share will remain constant. Accordingly, **Table 7.4** indicates a negative residual in the three reporting periods to 2023. A positive residual of £67.3m is identified at 2028 which would support between 9,900 sq.m and 16,600 sq.m of additional net sales floorspace. The minimum figure is based on the identified need being met through the delivery of high street floorspace and the minimum figure relates to need being met by bulky goods retailers or in smaller town centres (which both generally accommodate operators which achieve lesser sales densities).

⁴¹ Tables 6a and 27 of Appendix 2 sets out both convenience and comparison goods planning commitments across the City of York



Table 7.4: Quantitative Need for Comparison Goods Floorspace in York City with Account Made for Commitments

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2013	0.0				
2018	31.1	132.8	-101.7	-18,400	-30,600
2023	111.0	146.9	-36.0	-5,900	-9,800
2028	229.6	162.2	67.3	9,900	16,600
2030	282.7	168.8	113.9	16,200	27,000

Source: Table 27 (1c) of Appendix 3

¹ Average sales density assumed to be £5,000 per sq.m at 2013

² Average sales density assumed to be £3,000 per sq.m at 2013
2012 Prices

7.23 Drawing on the analysis that was undertaken by Deloitte when considering the economic impact of the proposed redevelopment of Huntington Stadium and the various proposals to reconfigure Monks Cross Shopping Park, WYG has sought to update the position based on the results of the new household survey results. WYG note that the MSCP reconfiguration was refused and therefore we have focused on the implications of the Huntington Stadium proposals only. Drawing on the trade diversion estimates considered by Deloitte we have been able to re-assess the potential impact in terms of the current recorded market shares. Based on previously agreed trade division⁴² from existing destinations WYG has readjusted the impact analysis against the new market share information from the survey and turnover of the proposed development Huntington Stadium. WYG estimate that the proposed development (that is now trading) will have a turnover of £128.5m at 2018. Adopting the trade diversion estimates adopted by Deloitte we have estimated a post development market share for each of the key destinations.

7.24 **Table 7.5** below shows the residual market share of the main destinations in York city and the wider Study Area. The results show that the market share for York city centre will decline from 22.8% to 20.3% or a 2.5 percentage point decline, which would represent an 11.0% impact on the city centre. The new figure is below the city centre market share of 21% recorded in 2007. The majority of the impact will be felt on other out-of-centre destinations; WYG has also readjusted the previous trade diversion assumptions on district and local centres as well as on the York Designer Outlet. The results show that the overall market share for the City as a whole would increase from 46.5% to 47.5%. We note that the Huntington Stadium could have a market share of 5.7% but increasing the market share

⁴² Trade Division estimates taken from Deloitte's 'Retail Planning Review of Planning Applications at Monks Cross: Addendum dated the 23rd April 2013 (Tables A3 and A4)



of all facilities at Monks Cross from 9.5% in 2013 to 14.0%. Although the results suggest that the overall market share of the city will increase as a result of this major development, the overall market share of the Study Area is likely to remain stable at circa 77.0%. The estimated result suggest that facilities at Monks Cross will trade at 69% of that retained by the city centre, to put this into perspective in 2013, facilities at Monks Cross traded at 42% of that achieved at the city centre, showing that there is a increasing erosion of the city centre’s dominance.

Table 7.5: Post Development Analysis Huntington Stadium

Destination	Market Share Prior to Development (2013)	Market Share Post Development (2018)
York City Centre	22.8	20.3
District Centres	0.4	0.4
Local Centres	0.4	0.4
Monks Cross Retail Park	9.5	8.3
Clifton Moor	9.1	8.5
York Designer Outlet	2.2	1.9
Foss Island	0.5	0.4
Other out-of-centre	1.7	1.6
<i>Huntington Stadium</i>	-	5.7
York City	46.5	47.5
Goole Town Centre	2.0	1.9
Selby Town Centre	3.0	2.8
Selby Out-of-Centre	0.6	0.6
Northallerton Town Centre	2.7	2.6
Ripon Town Centre	1.0	0.9
Harrogate Town Centre	13.1	12.9
Other	8.0	7.8
Total	76.8	77.0

Source: WYG (excludes any inflow from VisitYork).May not add up due to rounding

WYG note that this impact analysis does not includes other planning commitments including 13/01559/FULM.

7.25 With trading of the Huntington Stadium development commencing in April 2014, WYG has sought in **Table 7.6** below to update the previous quantitative capacity analysis based on an enhanced ‘city’ market share of 47.5% at 2018 and across the rest of the plan period. However, we would warn that it may be more sensible to review the impact of Huntington Stadium in 12 to 18 months to time to see whether the development has actually influenced local shopping patterns in the Study Area as



estimated and to assess the post development impact on the city centre and then review future needs accordingly, this process will ensure that the Study is kept under review and up to date to allow more robust decisions to be considered.

- 7.26 With an increased market share (47.5%) WYG estimate that facilities will achieve a comparison goods turnover of £1,183.8m at 2018 (including inflow) (this was previously estimated at £1,159.7m). By ‘rolling forward’ this enhanced market share and making provision of the same inflow assumptions, we estimate that facilities in York will attract £1,183.8m of comparison goods expenditure at 2018, increasing to £1,387.7 at 2023, to £1,641.4m at 2028 and £1,752.5m by 2030 based on a enhancement from York’s current Study Area market share.
- 7.27 With the Huntington Stadium fully trading at 2018 and after allowing for forecast increases in comparison goods expenditure and population and allowing for year on year increases in the productivity of existing floorspace, we estimate that by 2018 there will be a surplus of £55.2m to support additional comparison goods floorspace within the Study Area. This surplus is set to increase to £139.2m at 2023 and then to £263.0m at 2028 and to £318.3m at 2030.

Table 7.6: Enhanced Quantitative Need for Comparison Goods Floorspace in York City

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2013	1,018.2	1,018.2	0.0
2018	1,128.6	1,183.8	55.2
2023	1,248.5	1,387.7	139.2
2028	1,378.5	1,641.4	263.0
2030	1,434.2	1,752.5	318.3

- 7.28 Accordingly, **Table 7.7** allows for the previous planning commitments, and indicates a negative residual in the period to 2018 to 2023 on the assumption all these commitments are built. A positive residual of £100.7m is identified at 2028 which would support between 14,900 sq.m and 24,800 sq.m of additional net sales floorspace. We estimate that based on an increased market share then there would be a need for a further 5,000 to 8,200 sq.m of new floorspace from the current baseline position at 2028. However, WYG would raise caution with these figure as they are dependent on current forecasts and may need to be amended once more up to date information is available at that time. This approach also assumes that existing floorspace will trade at expected turnover levels, however, if these were to trade at higher densities (like that currently found at existing facilities) then it is likely that less floorspace will be required. Secondly we should note that there is currently 5,500



sq.m of vacant retail floorspace at Monks Cross, Clifton Moor and Foss Island as well as 6,900 sq.m⁴³ (or 5.8%) of floorspace in the city centre. Without undertaking a physical conditions survey of available vacant floorspace some of this floorspace could absorb future capacity if these become occupied by operators.

Table 7.7: Enhanced Quantitative Need for Comparison Goods Floorspace in York City with Account Made for Commitments

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2018	55.2	132.8	-77.6	-14,000	-23,300
2023	139.2	146.9	-7.7	-1,300	-2,100
2028	263.0	162.2	100.7	14,900	24,800
2030	318.3	168.8	149.5	21,200	35,400

Qualitative Need

7.29 The above analysis provides an assessment of quantitative capacity based, for the most part, on the current market share achieved by existing facilities in a particular centre being maintained. As found in both Sections 4 and 6, the results show that York city has a high retention of both convenience goods and comparison goods shopping patterns, with limited outflow of trade to other competing centres. However, previously noted, the comparison goods market share (46.5%) of the city is higher than that achieved for convenience goods (33.0%) This is mainly as a result of the strength of the comparison goods provision in the City of York mainly around York City Centre, Monks Cross and Clifton Moor, which alone attract 38% of the comparison goods trips retained at facilities within the city or 42.5% of trips within the wider Study Area.

7.30 In terms of convenience goods retailing, we have found that the main food market shares in the city's principal areas (Zones 1, 2 and 3) are extremely high at 100%, 97.7% and 97.1% respectively and showing negligible outflow. However, as found in Section 4, the results show that the level of main food trade retention has also decreased marginally since 2007 in Zones 2 and 3 as a result of supermarket provision being introduced outside the city area but retention in Zone 1 has increased since 2007.

⁴³ GOAD 2014, gross figure assume 70% gross to net ratio



7.31 As set out in the quantitative analysis earlier, we found that the existing main convenience good provision when considered together is over trading by £24.8m per annum. This suggests that, cumulatively, convenience goods floorspace is effectively 'over trading' by 6%.

7.32 As previously highlighted, the above assessment assumes that the existing market share of Study Area expenditure claimed by facilities in a particular zone will continue going forward. Clearly, in reality, as additional development is implemented, market shares may change. There may also be qualitative benefits associated with improving provision in a particular zone in order that it can claim a greater share of expenditure going forward. The qualitative need for additional provision is of particular pertinence to convenience goods retailing and we set out below a summary of the convenience goods expenditure within each zone which is retained each zone, both in monetary terms and as a proportion of expenditure. Whilst the trading levels are considered sustainable when considered together across Zones 1 to 3, the overall results mask some of the expenditure movement that currently occurs across the city.

Table 7.8: Retention of Convenience Goods Expenditure within Each Zone

Zone	Convenience Goods Expenditure at 2013 (£m)	Retained Convenience Goods Expenditure within Zone at 2013 (£m)	Convenience Goods Leakage at 2013 (£m)*	Proportion Retained at 2013 (%)
1	64.6	12.9	51.7	19.9
2	127.3	71.0	52.5	55.8
3	146.8	130.3	11.8	88.7

Source: Table 4 of Appendix 2

* This represents the expenditure that is leaked to other facilities in the York city

7.33 **Table 7.8** should be viewed in the context of the geography of the Study Area; we have focused on Zones 1 to 3 focused on facilities in York. It is evident that there are significant differences in the trade retention of convenience goods expenditure which originates within each zone. This is particularly the case in Zone 1 (which covers the south eastern area of the city), when compared to Zone 3 (which covers the north areas of York).

7.34 In addition and to understand the convenience goods shopping patterns in more detail, **Table 7.9** show where the retained expenditure in each Zone is derived from. This considers expenditure movement from Zones 1 to 3 in York but also from outside York from Zones 4 to 20. The results show that contrasting patterns, for example in Zone 1, facilities are not necessarily reliant on visitors from one particular Zone, for example most (34%) convenience goods expenditure is derived from its immediate area (Zone 1), with then comparable levels being drawn from Zone 2 and 4 but also from beyond York. In Zone 2 the results show that the vast majority (76.9%) of trade is drawn from



residents in Zone 2 with limited (4.2%) of trade drawn from both Zones 1 and 3, with nearly 15% trade drawn from beyond York (mainly Zone 7 (Selby) and 8 (Tadcaster)). However, on review of facilities in Zone 3, we found that a much more diverse trade draw, where 43.1% of the facilities in Zone 3 being drawn from its immediate area (although this represents 88% of the total convenience goods expenditure generated in Zone 3), with 26.8% of its trade drawn from beyond York (from 10 survey zones, mainly Zones 4, 7, 8 and 10), but then also draws from Zones 1 and 2 (with 15.7% and 14.3% respectively). The results demonstrated the popularity of facilities in Zone 3, whereby shoppers from beyond York chose to travel past facilities in Zones 1 and 2 to satisfy their convenience goods needs. The results clearly show that facilities in Zone 3 clearly influence convenience goods shopping patterns in York, where 70% of all retained convenience goods expenditure is spent at facilities in Zone 3. This is mainly as a result of the strength of offer at Monks Cross, Clifton Moor and Foss Island.

Table 7.9: Trade Draw of Convenience Goods Facilities within Each Zone

Zone	Total Convenience Goods Retention at 2013 (£m)	Derived Convenience Goods Expenditure within Zone1 at 2013		Derived Convenience Goods Expenditure within Zone2 at 2013		Derived Convenience Goods Expenditure within Zone3 at 2013		Derived Convenience Goods Expenditure within Zones 4 to 20 at 2013	
		£m	%	£m	%	£m	%	£m	%
1	37.8	12.9	34.0	9.1	24.1	7.9	20.8	8.0	21.2
2	92.4	3.9	4.2	71.0	76.9	3.9	4.2	13.5	14.6
3	302.5	47.6	15.7	43.3	14.3	130.3	43.1	81.2	26.8
Total	432.7	64.4	14.9	123.5	28.5	142.1	32.8	102.7	23.7

Source: Table 4 of Appendix 2

* This represents the expenditure that is leaked to other facilities in the York city

7.35 The results show that the level of convenience goods retention in Zone 1 is limited at just 19.9%, whereby the vast majority (80.1%) of residents in Zone 1 travel to facilities outside the zone. However, we note that 65% of these trips are to facilities at Foss Island which sits on the southern extremity of Zone 3 and is well positioned and accessible for residents in Zone 1. WYG note that there is 11.5% main food trade retention compared to a top up food retention in Zone 1 of 57.3%. The results show that there may be scope for improvement in main food shopping retention in Zone 1. The results show that 28.8% of Zone 1 residents travel to facilities at Monks Cross to satisfy their main food shopping. A further 5.8% of residents in Zone 1 travel to the Tesco at Askham Bar (located in Zone 2). Despite its low local trade draw, as shown in **Table 7.9** above facilities in Zone 1 do draw from beyond its immediate area although the levels of expenditure are generally relatively low in value. From analysis of the results we believe that there is scope to increase the local main food trade retention in Zone 1 to a level (between 50%-60%) comparable to Top Up food retention through



positive interventions that would help reduce the need of residents to travel but at the same time would help to alleviate the overtrading of facilities at Monks Cross and help to promote a more equitable distribution of main food shopping trips.

7.36 The results show that facilities in Zone 1 are trading just below expected levels (£48.6m) when compared to expected benchmark levels (£52.0m), whilst facilities in the city centre are trading above expected levels this is mainly as a result of inflow from tourism spend. However, facilities in the network of local centres are generally under trading, whilst out-of-centre facilities demonstrated mixed trading performance whilst the Aldi at Fulford Road is trading at expected levels the Iceland is trading at 70% of benchmark levels. The results do show that there is circa £51.7m of convenience goods expenditure that is currently generated in Zone 1 that is spent at facilities in Zones 2 and 3, with over 90% of this going to facilities at Monks Cross and Foss Island. As explored later facilities in Monks Cross are overtrading by around £7.3m and can be explained in part by residents from Zone 1 travelling to facilities in the area. WYG believe that there is a qualitative need to improve convenience goods retailing in Zone 1, this will first help increase the level of expenditure that can be retained locally and secondly help to reduce the over-trading that is occurring at Monks Cross and promote more equitable and balanced shopping patterns in the city which could help reduce the need to travel and reduce strategic traffic congestion.

7.37 In terms of Zone 2, the results found that 53.3% of the zone's residents undertook their main food shop at facilities within the zone, this compares with a top up retention of 68.0%, the results show that a significant number of main food shop trips are undertaken at facilities in Zone 3. As shown in **Table 7.8** above, just 55.8% of locally generated convenience goods expenditure is retained in Zone 2. The results found that around half of the outflow of main food trips was to foodstores at Foss Island with the remaining being spent at facilities at either Clifton Moor or Monks Cross. However, we also note that facilities in Zone 2 has more limited trade draw from beyond its immediate area, whereby 76.9% of Zone 2 facilities turnover is derived from Zone 2 with the rest of the turnover coming from beyond York. The results show the dominance of the Tesco at Askham Bar, which attracts 50% of all the convenience goods expenditure that is retained in Zone 2, although we note that the store is overtrading by 10%. Additionally the results show that the Morrisons at Acomb is overtrading by 60% of expected levels. Cumulatively facilities at local centres in Zone 2 are trading at expected levels (£20m). Despite the expenditure leakage to facilities in Zone 3, the results from the quantitative assessment show that the facilities in Zone 2 are cumulatively over trading by £13.1m which is 16.5% above expected benchmark levels. With the leakage of convenience goods expenditure to facilities in Zone 1 and 3 estimated at around £52.5m coupled with the over trading of existing facilities we believe that there is a qualitative need to address the clear deficiency in



provision. Whilst we accept that there will always be level of expenditure movement across an urban area, we conclude that the levels are significant and could be rebalanced if appropriate and new provision is provided within an existing centre in Zone 2 as first preference and this will be explored later in Section 9.

7.38 In relation to Zone 3 as stated earlier, the convenience goods provision is extensive, with large scale supermarkets available at Monks Cross, Clifton Moor and Foss Island. As found earlier these facilities are dominating convenience goods shopping patterns across the city, with 68% of all the city's retained expenditure spent at facilities in Zone 3. The facilities also draw 26.8% of their trade from beyond York demonstrating the influence these facilities have on the wider area. Cumulatively the results show that facilities in Zone 3 are overtrading by £25.9m which is 9% above expected levels. However, this hides the difference in performing stores across Zone 3, whereby facilities in Haxby district centre are trading a third below expected levels, cumulatively the network of local centres are trading at expected levels (circa £15.6m). However, the results show that the Aldi, Asda at Monks Cross are both trading well above their expected levels (Aldi in particular is trading significantly above), the Tesco Extra at Clifton Moor is also trading significantly (circa 60%) above expected levels as is the Morrisons at Foss Island at 21%. We also note that Waitrose at Foss Island, the Sainsbury's and M&S Simply Food at Monks Cross are trading at expected levels. Conversely the results show that the Asda at Layerthorpe and the Sainsbury's at Foss Island are trading well below expected levels. Notwithstanding the strong performance of facilities in Zone 3, there is no qualitative need for new facilities in this area, as 30% of the trade draw for these facilities is from Zones 1 and 2 and therefore if new convenience goods facilities can be secured in Zones 1 and 2 then we believe that this could address the level of overtrading. Such a strategy will help reduce the need to travel which may help towards reducing localised congestion on the highway network⁴⁴ which will encourage local expenditure to be spent locally which may help improve the vitality and viability of those defined centres in Zones 1 and 2 through the increased propensity to encourage linked trips.

7.39 The issues apparent in Zones 1 and 2 are such that any future planning applications seeking to provide additional convenience goods floorspace in locations accessible to these zones should also be viewed in the context of the qualitative benefits which could arise from the implementation of the proposals. Accordingly, whilst the quantitative assessment undertaken earlier in this section should be seen as the starting point for the assessment of the need for future convenience goods floorspace, the deficiencies in provision highlighted above are a further important consideration and introduction of

⁴⁴ Transport Infrastructure Investment Requirements' by Parsons Brinckerhoff



new facilities in these two zones would promote an equitable and more balanced convenience goods sector.

7.40 Due to the nature of comparison goods retailing (where many purchases are occasional in nature and would ordinarily result in trips to higher order centres to take advantage of the greater choice available), we do not consider that there are any such deficiencies which need to be addressed in the same manner. **Table 7.10** indicates that zones 1 and 2 attract more than five out of every ten pounds spend in tangible stores, these being Zone 1 (accommodating York City Centre) and Zone 3 (accommodating Monks Cross, Clifton Moor, Foss Islands), whilst Zone 2 only attracts one pound of every ten. The patterns of expenditure noted below are broadly in line with our expectations and whilst shoppers which shows that the significant comparison goods offer in Zones 1 and 3, then existing facilities attract the local spend and consequently the level of comparison good offer in Zone 2 is extremely limited, for example there is just 0.35 sq.m of floorspace per capita, this compares to 1.5 sq.m and 1.2 sq.m per capita in Zones 1 and 3 respectively. The results in Table 7.28 also show that there is very limited expenditure leakage from Zones 1 to 3 whereby less than 10% of locally generated expenditure is spent at facilities outside York, demonstrating sustainable shopping patterns.

Table 7.10: Retention of Comparison Goods Expenditure within Each Zone

Zone	Comparison Goods Expenditure at 2013 (£m)	Retained Comparison Goods Expenditure within Zone at 2013 (£m)	Comparison Goods Leakage at 2013 (£m)*	Proportion Retained in Zone at 2013 (%)	Proportion Retained in Study Area at 2013 (%)
1	96.7	47.7	42.1	49.3%	92.8%
2	193.5	22.5	157.5	11.6%	93.0%
3	219.9	111.8	84.8	50.8%	89.4%

Source: Table 25 of Appendix 3

* This represents the expenditure that is leaked to other facilities in York city

7.41 The above analysis provides an assessment of quantitative capacity based, for the most part, on the current market share achieved by existing facilities in a particular centre being maintained. In addition we have sought to establish how comparison goods shopping patterns may have changed since 2007 and 2010. **Table 7.11** shows the market share performance of the three main shopping destinations in York in the primary catchment area (Zones 1 to 3) and the wider Study Area (Zones 1 to 20). As explained earlier the results show that York city centre market share has increased within the Study Area since both 2007 and 2010, however, the results do show that its market share in Zones 1 to 3 has actually declined by 5 percentage points from 47% in 2007, to 44% in 2010 and to 42% at 2013. This represents an 11% decline. In terms of facilities in Monks Cross the results show that the market



share from Zones 1 to 20 has nearly doubled since 2007 from 5.0%, to 8.2% at 2010 to 9.5%, this increase is also found in the primary catchment where the market share has doubled from 8.4% in 2007, to 14.0% at 2010 and to 16.8% and can be considered as a key contributor to the decline of the city centre’s market share. In terms of facilities at Clifton Moor, the results show that its wider market share has remained relative stable at 9.0% within the Study Area, although it did peak at 12.1% in 2010; however, like Monks Cross, its market share in Zones 1 to 3 has increased from 20.0% in 2007 to 28% by 2010 but then reduced to 22.2 % at 2013. The results show that the increased popularity of both Monks Cross and Clifton Moor since 2007 and 2010 from the city’s principal residents has had an impact on the shopping attractiveness of the city centre to the city residents. However, the market share from the wider area has actually increased during the same period suggesting that it wider draw has actually improved. The results also show the marked improvement of York Designer Outlet which has increased its trade both from the immediate urban area of York (Zones 1 to 3) and from the wider Study Area (Zones 1 to 20).

Table 7.11: Retailing Performance of Main Retail Destinations 2007, 2010 to 2013

Destination	Zones 1 - 20			Zones 1 to 3		
	2007	2010	2013	2007	2010	2013
York City centre	21% (£449m)	21.5% (£449)	22.8% (£450m)	47% (£279m)	44% (£242m)	42% (£214m)
Monks Cross	5.0% (£105m)	8.2% (£171.0)	9.5% (£187.3m)	8.4% (£49m)	14% (£76.0m)	16.8% (£85.8m)
Clifton Moor	9.0% (£191m)	12.1% £254.0m)	9.1% (£180.3m)	20.0% (£118m)	28% (£152.4m)	22.2% (£113.4m)
York Designer Outlet	0.6% (£16.0)	1.3%	2.2% (£43.4m)	0.7% (£5.2m)		2.0% (£10.1m)

Source: 2013 data taken from Table 25 and 25a of Appendix 3
 2010 Market Share data and expenditure derived from HOW Planning derived from Appendix 7 (Table 16) of Retail Assessment for Oakgate, rebased to 2012 prices (from 2005 price base), HOW did not identify York Designer Outlet individually in their analysis.
 2007 data taken from Table 9.9 of York Retail Study 2008 (and Table 3 and 7 for York Designer Outlet), WYG has rebased turnover figures to 2012 Prices

7.42 In addition to the above changes to shopping patterns, WYG would also note that the findings of this Study found that trading performance of existing retail parks is strong, for example facilities at Monks Cross cumulatively over trading (derived) against their expected benchmark levels (see Table 26, Appendix 5) where on average the retail park trades on average at circa £7,775 per sq.m similarly Clifton Moor is over trading at circa £6,440 per sq.m. WYG also estimates that comparison goods floorspace at McArthur Glen trades at average of approximately £5,600 per sq.m. However the results show that the city centre trades at around £9,850 per sq.m with inflow or £9,080 per sq.m without any inflow allowance. The results show the degree of popularity of existing facilities and show that



existing facilities are performing extremely well in terms of the derived sales densities against expected benchmark level.

- 7.43 Although in Section 4, we have found that the overall market share for comparison goods in York has increased from 37.8% in 2007, to 46.4% at 2010 to 46.5% at 2013 the results mask some underlining changes in specific good types. For example the city centre's market share for clothing and footwear has decreased from 34.1% in 2007 to 30.2% at 2010 to 30.4% at 2013, and although the city centres market share for such items is higher than its general comparison goods market share (22.8%), it does highlight that the market share for such an important good type has declined by 11% since 2007 but has remained relatively stable between 2010 and 2013 at circa 30%. This can be in part attributed to gains made by both facilities at Monks Cross (+1.6%) and York Designer Outlet (+2.1%) since 2007. The two facilities have had adverse impact on the trading performance of the city centre's clothing and footwear sector and this will need to be carefully monitored over time, especially given that this sector represent around 25% of the comparison goods market. Furthermore the city centre's market share for small household good item has also declined from 37.0% in 2007 to 33.3% at 2010 and to 21.8% at 2013 and this was found to be against advances by Monks Cross, Clifton Moor and York Designer Outlet since 2007. This category of goods represents 19% of the available comparison goods expenditure, therefore together with clothing and footwear such declines in market share over key retail sectors may lead to a decline in the performance of the city centre's overall comparison goods market share and therefore there is a danger that this could damage the city centre's wider vitality and viability.
- 7.44 WYG has found the number of comparison good outlets in the city centre has declined from 392 units in 2007 to 359 units in 2014 which represents an 8% decline whilst the level of comparison good floorspace has also declined since 2007 from 55,700 sq.m (net) to 49,600 sq.m⁴⁵ representing a decline of 11%. The decline has also been found in the prime A rental levels achieved in the city centre, whereby data from Colliers⁴⁶ shows that Prime A have decreased by 16% since 2008 (which peaked at £210 per sq.ft) with 2012 levels at around £175 per sq.ft. The results show that the market share and the physical floorspace and units has declined since 2007 and we would therefore recommend that in order to arrest such decline further out-of-centre retailing should be resisted and the priority should be to improve the comparison goods sector over the plan period to at least previous past levels as a minimum to help offset the impact and advancement of out-of-centre

⁴⁵ Table 10, Appendix 7 of the York Retail Study (2008) identified a net comparison goods floorspace of 55,698 sq.m this compares to 49,610 sq.m identified at 2014 by GOAD (gross is 70,870 sq.m)

⁴⁶ Colliers (2012) through EGI



facilities. Therefore in conclusion there is a strong qualitative need to improve the type and range of comparison goods in the city centre.

Conclusion

- 7.45 In conclusion, WYG have identified that there is significant quantitative and qualitative need for new convenience goods floorspace across the city over the plan period, at this stage and without consideration of other growth strategies or regeneration plans, we believe that new convenience goods provision should be focused towards well located and positioned centres in Zones 1 and 2, we believe that this would create a more equitable and balanced network of facilities which would help address the over trading and dominance of facilities in Zone 3, namely Monks Cross and Clifton Moor.
- 7.46 In terms of comparison goods retailing, based on the current market share being retained, we have found that the facilities in the city are performing extremely well with strong sales densities, and low vacancy levels in the city centre and principal retail parks. Despite this strong performance, the historical trends shows an alarming shift in activity away from the city centre towards the surrounding retail parks and shopping destinations, although the wider trade draw of the city centre is strong the results show that draw of local residents is diminishing with local residents choosing to travel to facilities at Monks Cross, Clifton Moor and York Designer Outlet. Although the findings show that the decline of the city centre's market share has stabilised since those found in 2004 and 2007 it does show that the without careful control the future of the city centre may become vulnerable as there has been a significant decline in key sectors (clothing and footwear and small household items) between 2007 and 2013 and therefore the priority will be to improve the attractiveness of the city centre and to reverse the long terms decline of the centre and to control new out-of-centre facilities



8.0 Local Plan Capacity in York City (Growth Strategy)

- 8.1 In terms of the predicted housing growth in the emerging Local Plan, the Council has provided household projections and housing needs over the future plan period in accordance with paragraph 159 of the NPPF. These figures different to those in the baseline position in Section 7 which were principally based on forecast population growth that does not allow for housing growth strategies in the local plan. Drawing on the strategic housing land sites that have been identified in the Local Plan, WYG has sought to estimate the likely retail capacity implications of the delivery of these sites on the previous baseline position explored in Section 7.
- 8.2 The Council has provided WYG with details of the draft allocated housing sites across the city. WYG has been able to assign each site to the Survey Zones used for the purposes of this study. Based on an average household per unit of 2.3 we have estimated that an additional 43,400 persons could be located in York at the end of the plan period.
- 8.3 As indicated by **Table 8.1** (which updates **Table 7.1**), under Local Plan Growth Strategy' the identified Study Area is estimated to contain a resident population 759,063 people at 2018 rising to 787,593 people at 2023 and to 820,146 people at 2028 and 840,874 by 2030. This equates to a greater increase in the Study Area population of 37,670 people (a 5.1% increase) when compared to the baseline position set out in Section 7. The total increase in population is 112,990 (previously 75,300 persons) which represents an increase of 15.5% from the 2013 position (previously 10.3%).



Table 8.1: Local Plan Growth Strategy Population by Survey Zone (2013 to 2030)

Zone	2013	2018	2023	2028	2030
1	41,954	45,286	47,376	59,571	64,067
2	72,636	76,600	79,862	81,631	83,810
3	84,630	91,339	97,184	101,421	110,641
4	21,586	22,339	23,048	23,648	23,861
5	16,655	17,246	17,832	18,302	18,453
6	46,945	48,793	50,593	52,100	52,594
7	52,621	55,613	58,533	60,944	61,735
8	78,536	82,914	86,647	89,828	90,984
9	14,482	14,793	15,137	15,433	15,531
10	14,115	14,378	14,692	14,925	14,995
11	7,746	7,876	8,044	8,162	8,202
12	21,417	21,784	22,300	22,691	22,832
13	23,287	24,096	24,888	25,554	25,771
14	20,204	20,557	20,951	21,252	21,336
15	9,060	9,187	9,389	9,520	9,561
16	10,946	11,115	11,382	11,568	11,629
17	16,096	16,412	16,778	17,056	17,133
18	32,061	32,628	33,274	33,765	33,918
19	35,086	35,838	36,679	37,386	37,620
20	107,818	110,270	113,004	115,389	116,201
Total (S1)	727,881	759,063	787,593	820,146	840,874
Baseline	727,881	752,407	775,543	795,989	803,204
Difference	0	6,656	12,050	24,157	37,670

Table 1 (S1) of Appendix 4

Source: 2013 data derived from Experian Micromarketer G3 data and adjusted to reflect Local Plan (2013)

8.4 In order to identify the available expenditure under this population scenario, we have again applied the convenience and comparison per capita expenditure data sources from Experian Micromarketer G3 data and applied this to the adjusted population estimates. **Table 8.2** provides a summary of the distribution of new housing across Zones 1 to 3, most (41%) of the new population will be created in Zone 1 with 39% of the new population delivered in Zone 3 with just 21% in Zone 2. The greatest increase in population (42%) will occur between 2023 and 2028, with 32% delivered between 2013 and 2018 and the remaining 26% delivered



between 2018 to 2023. The phasing of new household formation will have implications on the provision of new convenience and comparison goods floorspace.

Table 8.2: New Population (2013 to 2028)

Zone	2013-2018	2018-2023	2023-2028	2013-2028
1	3,330	2,090	12,190	17,610
2	3,960	3,260	1,770	8,990
3	6,710	5,850	4,240	16,800
Total	14,000	11,200	18,200	43,400

Rounded to nearest 10 dwellings

8.5 As would be expected greater expenditure growth is forecast under the 'Local Plan Growth Strategy', with the estimated resident population generating £1,380.7m of convenience goods expenditure at 2018; this is just £11.3m more than the baseline position. Convenience goods expenditure is then forecast to increase to £1,657.8m by 2030 that represents an increase of £345.1m. This compares to the baseline growth of £277.1m between 2013 and 2030, representing an additional £68.0m of expenditure due to the increased population. The increased population leads to a 26.3% increase in convenience goods expenditure (previously 21.1%).

Table 8.3 'Local Plan Growth Strategy' Total Available Expenditure – Convenience (£m)

	2013	2018	2023	2028	2030	Growth 2013- 2018	Growth 2013- 2023	Growth 2013- 2028	Growth 2013- 2030
Baseline	1,312.7	1,369.4	1,460.5	1,550.7	1,589.8	56.7	147.7	237.9	277.1
Local Plan	1,312.7	1,380.7	1,481.8	1,593.1	1,657.8	68.0	169.0	280.4	345.1
Difference	0.0	11.3	21.3	42.4	68.0	11.3	21.3	42.4	68.0

Table 2 (S1) of Appendix 4

8.6 Based on Local Plan growth, it is estimated that the Study Area population will generate £2,270.4m of comparison goods expenditure at 2018 (again, excluding special forms of trading) that represents £18.6m extra to the baseline position, which is forecast to increase to £3,475.5m by 2030, representing an increase of £1,498.4m. This compares to the baseline growth of just £1,356.5 between 2013 and 2030, representing an additional £141.9m of expenditure. This represents a 75.6% increase on the 2013 comparison goods expenditure level, previously the baseline growth was estimated at 68.6%.



Table 8.4 'Local Plan Growth Strategy' Total Available Expenditure – Comparison (£m)

	2013	2018	2023	2028	2031	Growth 2013- 2018	Growth 2013- 2023	Growth 2013- 2028	Growth 2013- 2030
Baseline	1,977.1	2,251.8	2,639.8	3,122.3	3,333.6	274.8	662.7	1,145.3	1,356.5
Local Plan	1,977.1	2,270.4	2,678.2	3,207.4	3,475.5	293.3	701.1	1,230.3	1,498.4
Difference	0.0	18.6	38.4	85.0	141.9	18.6	38.4	85.0	141.9

Table 7 (S1) of Appendix 5 (may not add up due to rounding)

Future Quantitative Capacity for Convenience Goods (Local Plan Growth Strategy)

8.7 The quantitative exercise undertaken at Section 7 has been followed again to consider the implications of the population growth set out in Local Plan Growth Strategy at the city level only to provide a more broad indication on the relative difference in available expenditure facilitated by the increased population.

York (Global) – 'Local Plan Growth Strategy'

8.8 Through the application of the higher population Local Plan Growth Strategy, **Table 8.5** identifies an estimated expenditure surplus for York of £35.6m at 2013 (beyond the expected benchmark turnover of existing stores), which is expected to grow to £66.3m at 2018, to £99.2m at 2023, to £134.8m at 2028 and to £155.9m by 2030. This represents an increase in the baseline position of £3.8m at 2018, £7.2m at 2023, £14.3m by 2028 and £23.0m at 2030.

Table 8.5: Estimated Capacity for Convenience Goods Facilities in York under Local Plan Growth Strategy

Year	Turnover - £m	Available Expenditure - £m	Surplus Expenditure - £m
2013	407.9	443.5	35.6
2018	400.2	466.5	66.3
2023	401.4	500.6	99.2
2028	403.4	538.2	134.8
2030	404.2	560.1	155.9

Table 6 (S1) (Table 1a) of Appendix 4



8.9 With the increase level of population estimated across the Study Area has increased the level of surplus expenditure by £23.0m over the plan period and this will be available above and beyond that identified for new facilities in the baseline position. **Table 8.6** shows that despite increased population extant planning permissions still absorb 26.2% of the identified capacity in the short term up to 2018, which suggests that there is scope for new provision over this period and this should be actively promoted at this point in time (and above that indicated in the baseline).

Table 8.6: Quantitative Need for Additional Convenience Goods Floorspace in York under Local Plan Growth Strategy

Year	Convenience Goods				
	£m			Floorspace Requirement (Net)	
	Residual (from Table 8.5)	Implemented	Residual Expenditure	Min	Max
2013	35.6				
2018	66.3	17.4	48.9	4,200	7,100
2023	99.2	17.4	81.8	7,000	11,900
2028	134.8	17.5	117.3	10,000	16,900
2030	155.9	17.5	138.4	11,800	19,900

Table 6 (Table 1b) of Appendix 4

8.10 The Local Plan position shows that there would be a residual capacity of £138.4m at 2030, which compares to a baseline residual capacity of £115.4m at 2030. The results show that even with increased population growth under the Local Plan, there is additional capacity for convenience floorspace at city level at 2018 (beyond that already committed) based on the current market share being sustained at the baseline position (between 4,200 sq.m and 7,100 sq.m (net)). Between an extra 300 sq.m (net) and 500 sq.m (net) floorspace would be required above that identified in the baseline position by 2018. This will increase to an extra 600 sq.m (net) and 1,100 sq.m (net) at 2023 to that identified in the baseline position. At 2028 an extra 1,200 sq.m (net) and 2,000 sq.m of new additional convenience goods floorspace can be justified above the baseline position. Similarly at 2030 an additional 2,000 sq.m (net) and 3,300 sq.m (net) of convenience goods expenditure will be required.

8.11 Therefore if the Local Plan is adopted it will not result in any material change to future retail capacity up to 2018 or above that identified in the baseline position. However, this increase will



become more significant over the plan period and as new housing development is brought forward. Given the relatively significant difference the population increases derived from the Local Plan Growth Strategy it is likely that appropriate retail locations will need to be considered at some of the proposed strategic site to accommodate any new retail (as well as community) facilities to support new communities this will be explored in Section 9.

Future Quantitative Capacity for Comparison Goods (Local Plan Growth Strategy)

8.12 The quantitative exercise in Section 7 has been repeated again to consider the implications of the population growth set out in the Local Plan. Full Tabulations are available in Appendix 5.

York (City Wide) – Growth Strategy

8.13 Under the Local Plan Growth Strategy, **Table 8.7** indicates that the comparison that the comparison goods facilities across the city could claim in the order of £1,789.9m (compared to £1,716.8m at baseline) of comparison goods expenditure (both bulky and non-bulky), generated within the Study Area at 2030. Assuming this market share is maintained (at 46.5%) and 'rolled forward' through future years, given increases in forecast comparison goods expenditure and projected increases in the Study Area population, we estimate that by 2018 an additional £40.7m (compared to £31.1m at baseline) originating from the Study Area will be spent on comparison goods, this represents an additional £9.6m to that identified at the baseline position. After allowing for an adjustment in the turnover efficiency of existing floorspace over the same period, a surplus of £130.8m is available at 2023 (compared to £111.0m at baseline) to support additional floorspace. This identified surplus is forecast to increase to £273.4m at 2028 (compared to £229.6m at baseline). The identified surplus is then forecast to increase to £355.8m at 2030 (compared to £282.7m at baseline). This shows that the Local Plan will increase overall capacity by £73.1m at 2030 when compared to the baseline position.



Table 8.7: Estimated Capacity for Comparison Goods Facilities in York (City Wide) under 'Local Plan Growth Strategy'

Year	Turnover - £m	Available Expenditure - £m	Surplus Expenditure - £m
2013	1,018.2	1,018.2	0.0
2018	1,128.6	1,169.3	40.7
2023	1,248.5	1,379.3	130.8
2028	1,378.5	1,651.8	273.4
2030	1,434.2	1,789.9	355.8

Table 27 (Table 1a) of Appendix 5

8.14 Allowance of extant planning permission to the Local Plan position is shown in **Table 8.8** below. The results show that, even with increased population growth as part of the Local Plan, as with the baseline position there is no capacity for new floorspace in the short term to 2018, however, over the plan period there is capacity for between 26,600 sq.m (net) and 44,300 sq.m (net) for additional comparison floorspace at city wide level beyond those already committed when current market share is maintained. This is compared to 16,200 sq.m (net) and 27,000 sq.m identified in the baseline position, which is an extra 10,400 sq.m to 17,300 sq.m which represents a significant increase on the baseline position.

Table 8.8: 'Local Plan Growth Strategy' Quantitative Need for Comparison Goods Floorspace in York (city wide) – Extant Planning Consents

Year	Comparison Goods				
	£m			Floorspace Requirement (sq. m net)	
	Residual (Taken from 8.7)	Extant	Residual	Min	Max
2018	40.7	132.8	-92.2	-16,600	-27,700
2023	130.8	146.9	-16.2	-2,600	-4,400
2028	273.4	162.2	111.1	16,400	27,400
2030	355.8	168.8	187.0	26,600	44,300

Table 27 (Table 1c) of Appendix 5

8.15 As with the convenience good findings, the need for comparison goods retailing above and beyond that identified in the baseline position linked to the Growth Strategy through new residential development will create a material change the retail strategy to that set out in the baseline position. However, with the baseline position there are significant vacant floorspace across the city that could absorb some of this capacity. Furthermore, given the potential fluidity of the residential housing market and the implementation of new housing stock over the plan



then this will need to be regularly monitored to ensure future needs are appropriately met based on actual housing delivery.

Summary

- 8.16 The modelling of the above Local Plan Strategy could generate a large number of tables and we therefore summarise the principal identified requirements for York below under the baseline and Local Plan population growth scenario. In the York urban area there is a clear quantitative need for additional convenience goods floorspace across the reporting period to 2030.
- 8.17 **Table 8.9** demonstrates there is a notable difference for additional convenience goods floorspace under both the baseline and Local Plan Growth Strategy under the short to long term. Even at this reporting period up to 2018, there is capacity for a substantial level of convenience goods floorspace under the baseline and Local Plan Strategy and a minimum requirement of 3,900 sq.m (net) which could increase to 4,200 sq.m (net) under the Local Plan over the first five years. Over the longer term to 2030, there is a need for at least 9,800 sq.m (net) under baseline increasing to a need for at least 11,800 sq.m (net) under the Local Plan Growth Strategy.
- 8.18 Turning to future need for additional comparison goods floorspace, given the significant extant planning commitments in the area, any identified need is effectively extinguished up to 2023 based on the baseline and Local Plan Strategy. However, after 2028, there is an identified quantitative need under both the baseline and Local Plan (and assuming the existing market share is retained at 46.5%). Equating to a minimum of 9,900 sq.m of additional floorspace under the baseline, increasing to 16,400 sq.m (net) under the Local Plan at 2028. This increases significantly to 2030, however, WYG would raise caution with any figures beyond 2018 as any estimates may change over time and affect any long term estimates.



Table 8.9: Quantitative Need for Additional Convenience and Comparison Goods Floorspace in York

Year	Scenario	Convenience Goods			Comparison Goods		
		Residual (£m)	Minimum (sq.m)	Maximum (sq.m)	Residual (£m)	Minimum (sq.m)	Maximum (sq.m)
2018	Baseline	45.1	3,900	6,600	-101.7	-18,400	-30,600
	Local Plan	48.9	4,200	7,100	-92.2	-16,600	-27,700
2023	Baseline	74.6	6,400	10,800	-36.0	-5,900	-9,800
	Local Plan	81.8	7,000	11,900	-16.2	-2,600	-4,400
2028	Baseline	103.0	8,800	14,900	67.3	9,900	16,600
	Local Plan	117.3	10,000	16,900	111.1	16,400	27,400
2030	Baseline	115.4	9,800	16,600	113.9	16,200	27,000
	Local Plan	138.4	11,800	19,900	187.0	26,600	44,300

In 2012 prices

- 8.19 As previously set out in Section 7, WYG sought to review the likely impact of the proposed Huntington Stadium site on the existing and future market share of York as a whole. **Table 8.10** seeks to summarise the position of the both the maintained (46.5%) and enhanced market share (47.5%) capacity based on both the baseline and Local Plan Growth Strategy. The results show that there is no capacity in the period to 2018 under both scenarios and existing extant planning permission will meet any needs up to 2018.
- 8.20 The above maintained market share position at 2023 shows no or negligible capacity, however, this does increase when the enhanced market share is considered with the Local Plan growth Strategy where between 2,000 sq.m and 3,400 sq.m of additional comparison goods floorspace could be delivered. As found earlier, there is significant comparison goods floorspace capacity identified beyond 2028 based on the existing market share being retained, this increases significantly under the enhanced market share baseline and Local Plan Growth Strategy, by 2030 WYG estimate that a capacity of between 31,800 sq.m and 53,000 sq.m of comparison goods floorspace could be supported under either scenario (on the maximum assumed sales density). This compares to between 21,200 sq.m (net) and 35,400 sq.m (net) at the baseline position. However, this level of additional floorspace is predicted on the basis of an increased market share driven by new out-of-centre facilities and therefore WYG would advise that after the implementation of the proposed Huntington stadium scheme in 2014 then the performance of this should be monitored in 2015 to review the post development impact of the scheme on local shopping patterns to reassess future needs at 2018 through to 2030.



Table 8.10: Enhanced Quantitative Need for Additional Comparison Goods Floorspace in York

Year	Scenario	Comparison Goods (Existing Market Share)			Comparison Goods (Enhanced Market Share)		
		Residual (£m)	Minimum (sq.m)	Maximum (sq.m)	Residual (£m)	Minimum (sq.m)	Maximum (sq.m)
2018	Baseline	-101.7	-18,400	-30,600	-77.6	-14,000	-23,300
	Local Plan	-92.2	-16,600	-27,700	-67.9	-12,200	-20,400
2023	Baseline	-36.0	-5,900	-9,800	-7.7	-1,300	-2,100
	Local Plan	-16.2	-2,600	-4,400	12.5	2,000	3,400
2028	Baseline	67.3	9,900	16,600	100.7	14,900	24,800
	Local Plan	111.1	16,400	27,400	145.4	21,500	35,800
2030	Baseline	113.9	16,200	27,000	149.5	21,200	35,400
	Local Plan	187.0	26,600	44,300	224.1	31,800	53,000

Existing Market share results taken from Table 8.9 above

Enhanced market share results taken from Table 7.7 for baseline position and WYG estimate for

In 2012 prices



9.0 Future Retail Planning Policy Recommendations

Introduction

9.01 The NPPF requires LPAs as part of their Local Plan to set out a strategy for the management and growth of centres over the plan period. As part of their strategy, LPAs should, inter alia:

- Recognise town centres as the heart of their communities and pursue policies to support the viability and vitality;
- Define a network and hierarchy of centre this resilient to change to anticipated future economic changes;
- Define the extent of town centres and primary shopping areas, based on clear definition primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- Promote competitive town centre that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- Allocate a range of suitable site to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres;
- Allocate appropriate edge of centre sites for main town centre that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre site cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre; and
- Set policies for the consideration of proposal for main town centre uses which cannot be accommodated in or adjacent to town centres.



9.02 Each of the above requirements is considered where relevant below in relation to the City of York and its principal city, district and local centres.

Retail Strategy

9.03 Since 2008, the retail landscape across the UK has dramatically changed, whereby expenditure growth forecasts have been significantly suppressed (especially in the short term). This has been coupled with the increasing popularity of special forms of trading (specifically online sales). In addition to the above wider economic conditions, the retail landscape across the City York has changed since 2008 which has implications for the future strategy. For example the City has experienced the introduction of new foodstore provision namely at Foss Island through a new Waitrose and Morrisons and the introduction of Aldi at Monks Cross as well as the extension to the Sainsbury's store at Monks Cross. More importantly the city centre has experienced the introduction of small grocery stores operated by national chains which has sought to increase basket shopping needs and draw trade from the high levels of footfall that are using the city centre. Despite physical improvements to the convenience goods sector in the city, the results show that the market share within the Study Area for main food shopping trips is comparable to the market share at 2007 at circa 35%. However, there has been a marginal increase to the market share in the shorter term, since 2010, with the market share increasing by 1.2 percentage points during this period. The top up market share for the city as a whole has improved by 10% since 2007. The results also show that the positive interventions in respect to the introduction Morrisons and Waitrose at Foss Island has reduced the main food market share of supermarket of facilities at both Monks Cross and Clifton Moor as well as increased linked trips with the city centre. The Study has found that over 71.2% of all main food expenditure is spent at out-of-centre facilities, this represents over a two percentage points increase since 2007, where the main food market share was 68.8%, demonstrating that more residents are shopping at out-of-centre locations. Conversely given the improvements in city and district centre top up provision, the Study has found that there is less dependence on out-of-centre top-up shopping, whereby in 2008 32.8% of trips were to out-of-centre locations but is now 28.4%, which represents a 4 percentage point decrease.

9.04 In relation to the identified quantitative and qualitative assessment in both Sections 7 and 8, WYG's recommends that the Council's strategic approach to convenience goods retailing



should seek to address the over reliance on Zone 1 and 2 residents using facilities in Zone 3. These facilities dominate the convenience goods shopping patterns across the city and reducing their dominance would help to reduce the need to travel which would help reduce localised congestion as well as encourage the retention of trade in Zones 1 and 2.

- 9.05 In the consideration of quantitative and qualitative need in Zone 1, we found that the level of derived turnover from Zone 1 to facilities outside is significant and that in order to claw back such trade, we believe that a foodstore of between 2,000 sq.m (net) and 2,500 sq.m (net) convenience floorspace would help to reverse such expenditure levels. From review of the distribution of local and neighbourhood parades and the call for site submissions that have been made to the local plan, there are no obvious sites that have been identified that we believe could provide a site that could accommodate the scale of floorspace required.
- 9.06 In terms of sites ST7 and ST23 located on Metcalfe Lane, WYG estimate that together the sites will yield nearly 2,260 new residential units between 2013 and 2030 with an estimated resident population of circa 4,900. WYG estimate that together both sites could support a local centre over the plan period, and estimate that a foodstore of between 800 sq.m (net) and 1,100 sq.m (net) could anchor such a local centre to support the new local population and to provide a top-up food destination to help meet daily needs.
- 9.07 In considering the quantitative and qualitative need identified in Zone 2, the level of proposed housing identified on sites ST1 and ST2 will together yield an estimated 1,400 residential units up to 2030. WYG would recommend that a new local centre could be located in this location to serve future residents post 2023. WYG would recommend that any centre should be well positioned along Boroughbridge Road to enhance the local centres visual prominence on this arterial road to expose the centre not only to the new local community but also to help service the existing residents in Zone 2.
- 9.08 In terms of the future strategy and in order to address the quantitative and qualitative need identified within Sections 7 and 8, WYG would recommend that the proposed retail hub at York Central is maintained (ST5) in the short up to 2018 in Zone 2, this should be in the form of a convenience goods net floorspace of between 1,500 to 2,500 sq.m. Introduction of a foodstore in this out-of-centre location would also help to increase links with the city centre similar to those recorded between Foss Island and the city centre albeit from the west side of



the city centre rather than the east. Although the site sits in an out-of-centre location it is located in a sustainable location with the south easterly extremity of the site well positioned to the city centre and potentially able to support linked trips with the city centre. The site's highway accessibility is somewhat limited to Leeman Road to the north and east and it is separated by the main rail lines creating a peninsula urban form bound by railway lines to the north, south and east (as well as the west). Any new main food facility at Central York will need to be well positioned visually as part of a mixed use development as the success of any foodstore provision will be dependent on strong accessibility to the wider York city community in Zone 2 as well as serving any new residential and business community within the wider masterplan. There may be opportunities to link any foodstore development with the wider Acomb Road local parade. The allocation of retail at this location could also help to facilitate highway links from the south to the central area of the York Central site to improve its connectivity with the wider community and create the values to part fund important highway infrastructure. This would require further investigations through a formal masterplanning process.

9.09 In respect of site ST14 (Zone 3), WYG estimate that if completely developed over the plan period, the site could accommodate circa 2,800 new dwellings to the north of Clifton Moor. This would yield a potential resident population of nearly 6,440 persons. WYG estimate that on its own this level of new population could accommodate between 1,200 sq.m (net) and 2,000 sq.m (net) of new convenience goods floorspace (depending on end operator). However, as found in the quantitative assessment, the existing Tesco Extra at Clifton Moor is significantly over trading by 60% when compared to national averages, and therefore it may be difficult to introduce a new operator to this location given the dominance of the Tesco Extra store. However, given WYG's strategy to strengthen the convenience goods offer in Zones 1 and 2 we believe that the current overtrading experienced at the Tesco Extra will be reduced over the plan period as new facilities in these two Zones claw back trade that is currently spent in Zone 3. This level of floorspace could form part of a district centre that would seek to meet the daily needs of the residents but should also provide other civic, community and retail service facilities compatible to support the new community and this should be formulated through a masterplan for the site. Any local centre should be phased towards the later part of the plan period between 2023 and 2028 and once the majority of the residential has been built. Any first phases of residential development could be supported in the short term by existing facilities at Clifton Moor adjacent to the site.



9.10 In relation to the Whinthorpe New settlement proposed under ST15, WYG estimate that if the new settlement is adopted in the local plan, then this could yield an estimated 4,680 new dwellings which could support in excess of 10,760 residents. WYG estimate that this could support a district centre that could accommodate a supermarket (convenience goods floorspace) of between 2,000 sq.m (net) and 2,700 sq.m (net) (depending on end operator) which could be supported by other retail service and leisure service facilities as well as civic and community facilities commensurate to the scale of the new community. The scale of any retail and community development will need to be considered through a masterplanned approach.

9.11 In terms of comparison goods retailing, the Study has found that York city centre remains the principal shopping destination for such goods in the Study Area. It also remains an extremely attractive destination for tourist and external spend which is identified by VisitYork data. However the results show that whilst its comparison goods market share may have stabilised following the decline recorded since 2004⁴⁷. It is clear that facilities at Monks Cross and York Designer Outlet have both advanced their market shares since 2007 and 2010. At the same time we have seen the market share at facilities at Clifton Moor remain stable at around 9%. This is probably due to the general bulky goods restrictions in place at Clifton Moor. However, the results show that the city centre's market share for clothing and footwear and small household goods has diminished since 2007. Although, in relation to clothing and footwear the market share of the city centre appears to have stabilised since 2010, in terms of small household goods there has been a clear decline in the market share of the city centre in the shorter term, since 2010. The decline in the city centre's market share in relation to these comparison goods categories has been as a result of advances from Monks Cross and YDO. The results clearly show that local residents within the urban area of York are increasingly using out-of-centre facilities to satisfy their comparison goods shopping trips and there is a danger if continued this could expose the city centre to tourism and visitor spend over time, which could leave the city centre vulnerable to wider externalities.

9.12 In fact, facilities in York perform extremely well with the trade retention of comparison goods being found to be significantly higher than that retained for convenience goods demonstrating the city's wide influence in the region. With a clear trend towards

⁴⁷ City centre market share was 31% in 2004 (paragraph 9.7 of GVA Retail Study 2008)



decentralisation of comparison goods shopping facilities over the last 15 years and with continued investment in out-of-centre facilities at Huntington Stadium, it is likely that more expenditure over the next 5 years will be spent at out-of-centre facilities than the city centre and this could lead to further decline in the performance of the city centre. Therefore, WYG believe any future strategy should seek to control the future expansion of out-of-centre comparison goods retailing in the short to medium term.

9.13 WYG agree with the previous Deloitte advice on York Designer Outlet (YDO), whereby the evidence within the Retail Study Update shows that the market share of YDO has doubled since 2007 in the clothing and footwear, small household goods sectors showing that the current format is successful. This is in the context that the city centre's market share has declined markedly in these two sectors since 2007. Although WYG accept that this decline cannot be attributed purely to the YDO as other out-of-centre destinations (Monks Cross and Clifton Moor) have compounded the decline. Furthermore, the Retail Study Update has also identified that after extant planning commitments (including unimplemented floorspace at YDO⁴⁸) are taken into account there is limited or no capacity for new floorspace across the city until after 2023 based on the baseline and Local Plan Growth Strategy, and therefore given the lack of capacity, any new floorspace is likely to impact on other existing destinations in the city, including the city centre. With the significant increase in floorspace recently completed at Huntington Stadium and given the estimated impact of 11% on trading performance of the city centre, WYG believe that given that the city centre is the City's jewel in the crown then this should be protected against further expansions of retail floorspace until the estimated impact are fully understood.

9.14 Only after such time should the expansion of YDO be reconsidered through the local plan process. WYG recognise that YDO brings economic benefits to the city and contributes to the overall city's economic success this is not justification on its own to expand the facility further. From review of the first representations made by NTR there was no compelling evidence to confirm that the YDO acts a complementary role to the city centre, as stated above there is evidence the Retail Study Update that shows the role of the city centre is diminishing in terms of the sectors that both destinations act within. NRT on behalf of YDO

⁴⁸ Correspondence from NTR confirms that an additional 3,244 sq.m (gross) can be delivered under previous planning permission (97/01350/FUL); however, this may need to be restricted within the current building envelope.



has since provided information (prepared by GLK Research) on the origin of YDO's customer base and behaviour published in May 2013. This useful information confirms that YDO has an extensive catchment area, with 32% of its visitors originating from 0 to 30 minute drivetime, with a further 23% from between 30 and 45 drivetime, 20% from between 45 and 60 minute drivetime, 14% from 60 to 75 minute drivetime and then 10% from 75 to 90 minute drivetime. The results do clearly confirm that the YDO draw a significant level of customers from beyond York, indeed, 68% of visitors are from beyond a 30 minute drivetime demonstrating the regional attractiveness of YDO. As part of our quantitative assessment WYG has allowed for such an inflow level at YDO in light of the inflow expenditure identified by both VisitYork and the trade draw from our adopted Study Area. WYG estimate that the turnover of YDO is between £90.0m and £95.0m, of which nearly 50% is derived from the Study Area with the remaining drawn from beyond the Study Area, we believe that this is broadly consistent with the research by YDO. The information from YDO also validates the findings of the Household Survey that found that more people in the local area of York (either Zones 1, 2 and 3 of the Retail Study or 0-15 minute drivetime) are visiting the facility than they were in 2007, 2010, 2012 and 2013. Although this is the context of the wider trade draw of YDO.

- 9.15 WYG do not believe that there is any compelling quantitative and qualitative evidence to justify the allocation of the extension of the YDO and such an extension is predicated on the reliance of a high proportion of customers travelling to the facility from beyond 30 minutes drivetime and mainly by private motor vehicle. Therefore WYG would recommend that if any new floorspace is to be promoted at YDO then this should be dealt with through the consideration of Policy R4 of the Local Plan and other relevant development control policies and paragraph 24, 26 and 27 of the NPPF rather than through a specific allocation, as there is no persuasive evidence to justify its expansion.
- 9.16 Representations to the call for sites has been made on the existing Ford dealership at Monks Cross. The site is out-of-centre and the findings of this retail study have demonstrated that the role and performance of the general Monks Cross has improved significantly since 2007 and 2010. This increase was found in the clothing and footwear, small household goods, recreation and furniture sectors, conversely the city centre has seen decline in its market share in these sectors and therefore there is a real danger that further new retail floorspace beyond that already permitted at Monks Cross and Huntington Stadium is likely to lead to



further decline of the city centres role. This is compounded by the findings of the Retail Study that there is no capacity (based on retention of the current market share) up to 2023 and therefore any further retail development before this period is likely to have a impact as there is no growth to offset any impact (as well as gains in SFT). Like our advice above on YDO we do not believe there is any justification to allocate this site for new retailing. The representations for the site were based on the older estimates by Deloitte and therefore there is no justification to allocate the site at this time. We believe that any further retail floorspace at Monks Cross should be controlled by the criteria in the NPPF rather than through a plan led allocation as there is no evidence to support the level of floorspace in this out-of-centre location.

- 9.17 There is also no evidence to suggest that the dealership is likely to close so we would question the desire to obtain retail on the site especially when there is a viable sui generis land use which is compatible with the surrounding retail park.
- 9.18 We believe that the Council should act very carefully over the next two years, which will require the careful evaluation of the impact of the John Lewis/M&S/Next development on the city centre to establish whether the 22% market share of the city centre is reduced as estimated as a result of this development. Therefore no further out-of-centre floorspace should be promoted at this stage and therefore it would be best to deal with new opportunities through a development control mechanism rather than through strategic policy and land allocations. WYG would agree that Policy R4 of the Local Plan should continue to identify the areas of Monks Cross, YDO and Clifton Moor as out-of-centre retail destination that are subject to restrict mechanisms to control further expansion as well as restrictions which could change the nature of goods that can be sold from existing and future floorspace.
- 9.19 WYG also agree with the Council's content within Policy R4 of the Local Plan that proposals for out-of-centre retailing should only be permitted where the sequential and impact tests can be satisfied, and where proposals are in accordance with other policies within the Local Plan. This approach will ensure that the Council in accordance with the tests of the NPPF retains adequate controls on out-of-centre floorspace, we agree that conditions should be attached to any approved proposals for out-of-centre floorspace, where necessary, in order to restrict the amount of floorspace and goods to be sold. As explained, York city centre is vulnerable to effects of out-of-centre retailing and as such Policy R4 will seek to ensure that out-of-centre



development does not have a harmful impact on the vitality and viability of York city centre, and other defined centres.

9.20 In relation to Policy R3 which deals with York City Centre, WYG generally support the approach set out in the Preferred Options. On review of the representation made in relation to Castle Piccadilly, that is identified under site allocation ST20, the owners LaSalle UK Ventures Property confirm that comprehensive retail led regeneration is unviable after the decision to approve the Huntington Stadium site in 2012. WYG agree with LaSalle UK Ventures Property that any in centre investment is likely to have been lost in the short to long term, especially in light of the limited capacity that this Retail Study Update has found to 2023. Whilst the whole site may be considered the sequentially preferable site for future retail needs for the city, it is now unlikely that this will come forward in the form of retail development that was previously considered by the Council and LaSalle UK Ventures Property. Therefore, we would recommend that the inclusion of ST20 as an exclusively retail allocation should be reconsidered. We believe that a more pragmatic and flexible approach would be to consider this regeneration site as a mixed use development opportunity. This approach may still include an element of retail and leisure development that could still seek to enhance the city centre's offer but would also introduce other employment and residential uses which could strengthen and complement the wider city centre's role and function and in turn help to increase the vitality and viability. WYG agree with LaSalle UK Ventures Property that a mixed use approach would be more appropriate in delivery of smaller scale development which is more in keeping with the historic built environment in the city centre and help to create more sustainable development forms. This approach would be more flexible to responding to changes in the market over the plan period.

9.21 With most of the identified future capacity, WYG do not believe that there is any requirement to identify any sites for new comparison goods retailing in the local plan. Most of the future requirements could in essence be met through the new floorspace at Huntington Stadium site and other planning permissions up to 2023. There is also some floorspace capacity available through vacant units at out-of-centre retail parks and the city centre that could absorb some of the identified capacity and once trading performance further improves as the wider economy recovers. WYG would therefore recommend that this position is monitored over the next five years to 2018 and then review the position again to see whether any further



capacity (beyond that identified in this Study) between 2018, 2023 and 2028 is required at that time.

Hierarchy

- 9.22 The draft retail strategy for the City of York is provided in Policy R1 of the preferred option, this clearly sets out the network of centres as follows:
- York City Centre;
 - District Centre (Haxby and Acomb);
 - Local Centres (including village centre) (list of centres to be provided in an Addendum);
 - Neighbourhood Parades (list of centres to be provided in an Addendum).
- 9.23 WYG note that neither the NPPF nor the associated PPG provide a definition on what constitutes a district or local centre; however, this was previously provided in PPS4 and its associated Practice Guidance. However, we believe that the above definitions represent sound tiers in the hierarchy for planning for future community needs and in the absence of new guidance still represent previous best practice of relevance to preparation of an appropriate hierarchy.
- 9.24 As set out in Section 5, WYG has provided advice on the network of district, local and neighbourhood parades across the city and identifies which centres should be identified in the development plan.
- 9.25 WYG notes that Policy R1 of the Preferred Option seeks to identify and protect and enhance neighbourhood parades and parades of shops. Although WYG note that in the NPPF⁴⁹ it states that any reference to town centres excludes small parades of shops of purely neighbourhood significance and therefore these do not necessarily need to be protected in planning terms,

⁴⁹ Annex 2, NPPF definitions within Town Centres (page 57)



through our review of existing neighbourhood parades in York, WYG have identified that the follow centres perform an important role in catering for the needs of a discreet catchment and thus contribute to York's overall retail function. As such, WYG agrees with Preferred Option R2 in that development proposals for main town centre uses in the defined centres should be acceptable in principle provided that the proposal consolidates, maintains or improves the function of the centre, is appropriate in scale and nature, will contribute positively to the centre and will not have a significant detrimental impact upon residents or the environment.

- 9.26 As explained, the market shares achieved by the defined centres in York have been subject to decline in relation to certain categories of goods as a result of improvements to out-of-centre market shares. WYG agrees with the aims of Preferred Options Policy R1 and R2 which seek to maintain and enhance the vitality and viability of these defined centres.
- 9.27 WYG recommends the inclusion of neighbourhood parades within the retail hierarchy identified at Policy R1. In order to safeguard and enhance the established retail hierarchy, any proposals for additional retail development outside the defined centres should be subject to the requirements set out in Policy R4.

Primary Shopping Area and Frontages

- 9.28 WYG recommends the introduction of primary and secondary shopping frontages in York city centre. This will allow the Local Planning Authority to control the uses that will be permitted in such locations in order to support the vitality and viability of the town centre. Annex 2 of the NPPF provides the following definitions for primary and secondary shopping frontages:

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

- 9.29 WYG consider that York city centre's primary shopping frontages include those frontages located along Coney Street, Davegate, Market Street, Feasegate, High Ousegate, the northern side of Coppergate, the Coppergate Shopping Centre, the north western end of Piccadilly, the south western end of Pavement, Parliament Street and the northern side of St Sampsons Square.9.30 WYG would advise that the Local Planning Authority should seek to



maintain the concentration of retail activity along these primary shopping frontages. WYG recommend that Policy R3 should seek to safeguard and enhance A1 uses along these frontages in order to support and enhance the vitality and viability of the city centre through the protection and improvements to retail provision⁵⁰. WYG recognise that non A1 uses can contribute to competitive town centres particularly as shopping activity is often seen by consumers as a leisure activity to be combined with trips to other establishments, for example cafes and restaurants. As such, it is recognised that there is a place for non-A1 uses within primary shopping frontages in order to complement the concentration of retail uses, WYG advise that non-A1 uses should be managed to ensure that they do not dominate the primary shopping frontage. As such, it is recommended that criteria are included at Policy R3 to set out the circumstances when non-A1 uses on primary shopping frontages would be deemed suitable. It is considered that a minimum of 70% A1 uses should be required within the primary shopping frontage unless it can be demonstrated that non-A1 uses would be beneficial to the vitality and viability of the city centre.

9.31 WYG recommend that York city centre’s secondary retail frontage should be focused on streets including Lendal Street, Blake Street, Stonegate, Low Petergate, Swinegate and Grape Lane. Although the secondary frontages in the city centre should predominantly contain retail uses, they represent an opportunity for complementary uses that provide wider diversity and contribute to the character of the city centre. Therefore, it is recommended that although Policy R3 should seek to retain a concentration of retail uses with secondary frontage, non-retail uses should also be considered favourably where such uses will have a positive impact on the shopping character and function of the secondary shopping frontage.

9.32 As indicated at paragraph 9.28 above, based on a clear definition of primary and secondary frontages, it is necessary for LPAs to identify the primary shopping area of existing centres as this forms the basis in terms of the application of the sequential approach to retail development. In this respect, Annex 2 of the NPPF provides the following definitions for the primary shopping area (PSA) as follows:

⁵⁰ The Technical Consultation on Planning published by DCLG (July 2014) proposes to incorporate into a revised wider A1 use class the majority of financial and professional services currently found in A1. It is proposed that the Use Class Order will be revised in respect of use classes A1 and A2, and the names of both use classes revised to better reflect their scope. As the document is out for consultation and does not form policy, this proposal is not reflected in WYG’s recommendations in relation to Policy R3.



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

9.33 WYG consider that a PSA should be introduced which is bounded by Duncombe Place and the properties to the south of Museum Street to the north, the River Ouse to the west, Bridge Street, Nessgate and Castlegate to the south west, the River Foss to the south, and to the east including the properties to the east of Fossgate, Colliergate and properties on the southern part of Goodramgate. We believe that the proposed PSA includes the areas where retail development is most concentrated. In Appendix 6 WYG has set out our recommendations for York's City Centre Primary Shopping Area and Primary and Second Shopping Frontages.

Thresholds

9.34 In accordance with best practice, it is appropriate to identify thresholds for the scale of edge-of-centre and out-of-centre development which should be subject to an impact assessment. WYG does not consider that a blanket threshold is suitable for all types of centre across an administrative area. For example, a 500 sq.m convenience store (which could be operated by Tesco Express or Sainsbury's Local) will likely have a greater impact on a small centre than a similar facility would on York City Centre. Therefore, in developing the policy in the future, it is more appropriate to have a range of thresholds, depending upon which centre the development applies to.

9.35 Accordingly, policy could 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 role and function of the particular centre. WYG note that from a review of existing district and local centres as well as undefined neighbourhood parades, the average retail floorspace across the existing network of centres is less than 780 sq.m (both convenience and comparison goods floorspace).

9.36 For a centre the size of York city centre, performing the regional and tourist role that it does, it is recommended that development providing greater than 1,500 sq.m gross of floorspace for main town centre uses in an edge or out-of-centre location should be the subject of an impact assessment. However, any future policy should allow the local planning authority



some degree of discretion on requesting a retail impact assessment. It is considered appropriate to reduce the thresholds for development around the district centres to greater than 500 sq.m gross and for local and neighbourhood parades development proposals that are greater than 200 sq.m. In our experience, it will only generally be development of a scale greater than these thresholds which could lead to a 'significant adverse' impact, which could merit the refusal of an application for town centre uses. The above thresholds have had consideration to the Sunday trading limit of trading floorspace of 280 sq.m (net). These thresholds should equally apply to variation of condition applications for existing floorspace whereby the nature of the goods to be sold may change which would ultimately change local trading patterns and have an effect on established centre. For example, with the average gross floorspace of a local centre in York being approximately 800 sq.m. Therefore a development which represents a quarter of this is more likely to impact on its future trading. Similarly in terms of district centres, we estimate that 500 sq.m (gross) would represent between 6% and 15% of existing retail floorspace in those centres and therefore there is a susceptibility that such centres could be impacted upon by such a scale of development.

- 9.37 The proposed thresholds at city, district, local and neighbourhood parade levels are considered to reflect the relatively small size of some of the centres at the lower end of the retail hierarchy and their consequent potential susceptibility to alternative 'out-of-centre' provision. In WYG's experience a 200 sq.m (gross) operation located outside but in proximity to a defined local or district centre may well impact on its performance. However, in practice, it is envisaged that a proposal of just greater than 200 sq.m adjacent to a local or neighbourhood parade would generally only require an Impact Assessment of limited length (i.e. for development of such a scale, impact may be able to be dealt with as part of the covering letter accompanying the application). Where an application proposal is above the stated impact threshold we would recommend that the applicant discusses and agrees the scope of any retail impact assessment which is appropriate to the scale and nature of the proposed development, and identifies any specific local issues that may be evident.