Fact Sheet Number 7

How much retail and leisure floorspace do we need and where should it go?

Introduction

This fact sheet explains how we have determined the amount of retail floorspace needed for new shops over the next 15 years. It also sets explains how we have decided where this new floorspace should be directed to.

In drawing up our plans which are currently being consulted on we have drawn upon the following information:

- Annual RMBC monitoring of town centres
- Rotherham Town Centre Retail and Leisure Study, 2010, Colliers International & The Retail Group
- Rotherham Retail and Leisure Study, 2011, Colliers International
- Rotherham Renaissance Strategic Development Framework
- Responses to the Core Strategy Preferred Options and Revised Options consultations

These documents are available to download from the Council’s website: www.rotherham.gov.uk/forwardplanning

Key Retail Issues within Rotherham

Out of Centre Shopping

The 2011 Retail and Leisure Study found that out of centre retailing has expanded considerably in Rotherham over the past 15-20 years, and now accounts for over 70% of the borough’s total retail floorspace stock. Significantly (and very unusually), the proportion is higher for “high street” comparison goods shopping than for convenience goods (ie grocery shopping). Overall, more than three-quarters of retail sales in Rotherham are out of centre. Although a high percentage is common for bulky goods and to a lesser extent convenience goods, it is very rare for “high street” comparison goods turnover to be so dominated by out of centre retailing.

Spending Outside of Rotherham

The 2011 Study also found that of the £1,018 million of retail expenditure generated within Rotherham, around one-third leaks out to neighbouring areas, mainly to Sheffield District. The principal area of concern is non-bulky comparison goods shopping which forms the ‘main stay’ of town centres, where half of monies is spent outside of the borough.
The Need for Further Retail Floorspace

The 2011 Study considered the need for further retail floorspace to 2027. Its findings are summarised below:

Convenience floorspace (i.e. food shopping)
- A need for 8,660 sq m (gross)
- The main areas of need are Rotherham town centre, Wickersley / Bramley, and the western (predominantly rural) part of the borough. However we do not identify any need for additional large out of centre superstores especially since existing provision is relatively modern and well dispersed around the borough.

Non bulky comparison floorspace (i.e. smaller purchases such as clothing)
- A need for 3,090 sq m (gross).
- There is no floorspace requirement until beyond 2022 and even then it is very modest.
- The principal location where there is a strong need is Rotherham town centre. A material level of need has also been identified in the area covering Parkgate, Rawmash, Swinton and Wath, but this is primarily driven by estimated over-trading at Parkgate Shopping. Given that this location is out of centre and there is already a very strong mix of stores, the Council may consider that this qualitative need should not be met unless the provision can be provided nearby and in an existing centre.

Bulky comparison floorspace (i.e. DIY, furniture, large appliances)
- A need for 33,090 sq m (gross)
- We forecast modest quantitative requirements by 2022 and 2027. However, adding in the significant over trading which we believe is currently occurring within the borough as a whole (at the out of centre retail warehouses), substantially boosts the levels of quantitative and qualitative need.
- The substantial need is in zone 3 (Parkgate, Rawmash, Swinton and Wath), with little or no need for any additional retail provision elsewhere. The vast majority of the need is generated by estimated overtrading at the existing out of centre retail parks in Rotherham MB, primarily Parkgate Shopping. The Council must take a view on the extent to which this qualitative need should be planned for in terms of providing new retail floorspace, when there is already a good choice of bulky comparison goods stores within and (close by) outside of the borough.

Hierarchy of Retail Centres

Identifying a suitable hierarchy of centres is important to ensure that we direct new development to centres most appropriate to the type of development proposed. It is vital for when we are considering planning applications. In the current Unitary Development Plan Rotherham’s centres are classed either as town or local centres. As such these vary in terms of size and services offered and often do not meet the definitions of centres set out in national planning guidance.

The 2010 Rotherham Town Centre Retail and Leisure Study found that Rotherham benefits from a large and mixed profile resident base. The town centre benefits from high repeat visits and traders report a positive performance. The market is a strong asset as are many of the physical / environment aspects of the town centre.

However many of Rotherham's competing centres have been improved and developed over the last couple of decades and there is a significant need for an improved retail and leisure
offer in the town centre. There are opportunities for Rotherham town centre to reposition itself in the national retail ranking and to become more competitive with major rivals.

The Rotherham Retail and Leisure Study 2011 undertook healthchecks of Rotherham’s remaining town centres. This broadly concluded:

- **Centres with Good Vitality and Viability** - Wath-upon-Dearne and Wickersley
- **Centres with Average Vitality and Viability** – Bramley, Dinnington, Kiveton Park, Maltby, Parkgate, Swallownest and Thurcroft
- **Centres with Poor Vitality and Viability** – Rawmarsh and Swinton

The 2011 study suggested the following hierarchy of centres within Rotherham based on the definitions set out in Annex B of PPS4. Based on the healthcheck data the suggested strategy for each centre is also set out.

<table>
<thead>
<tr>
<th>Hierarchy</th>
<th>Centre</th>
<th>Strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Principal Town</td>
<td>Rotherham Town Centre</td>
<td>Maintain and enhance role as the principal town centre</td>
</tr>
<tr>
<td>Town Centre</td>
<td>Dinnington</td>
<td>Maintain the range of retail and service provision, reduce vacancies and improve townscape and landscaping</td>
</tr>
<tr>
<td></td>
<td>Maltby</td>
<td>Improve pedestrian mobility / accessibility, the quality and range of comparison shopping outlets, and environmental quality</td>
</tr>
<tr>
<td></td>
<td>Wath-upon-Dearne</td>
<td>Maintain the range of retail and service provision</td>
</tr>
<tr>
<td>District Centre</td>
<td>Kiveton Park</td>
<td>Improve the quality and range of retail and service provision, and environmental quality</td>
</tr>
<tr>
<td></td>
<td>Parkgate</td>
<td>Maintain the quality and range of retail and service uses, improve comparison goods provision</td>
</tr>
<tr>
<td></td>
<td>Swallownest</td>
<td>Maintain the quality and range of retail and service uses</td>
</tr>
<tr>
<td></td>
<td>Swinton</td>
<td>Improve environmental and physical quality of the shopping precinct in particular. Improve retail provision and pedestrian movement.</td>
</tr>
<tr>
<td></td>
<td>Wickersley</td>
<td>Maintain the range of retail and service provision, improve convenience retail provision</td>
</tr>
<tr>
<td>Local Centre</td>
<td>To be defined, but including Bramley, Rawmarsh, Thurcroft, and Waverley</td>
<td>Encourage developments which improve comparison goods and service facilities provision and reduce vacancies.</td>
</tr>
</tbody>
</table>

**Rotherham Town Centre**

The hierarchy above identifies Rotherham town centre as the main centre within Rotherham and the centre to which most new development should be directed. The following sections confirm the importance of this approach, highlighting key issues and activities relating to the regeneration of Rotherham town centre.

**Rotherham Renaissance**

Recognising the need to regenerate the town centre, in the autumn of 2001 the Council and its partners launched its urban renaissance programme, identifying a broad 25 year
vision and 10 goals for Rotherham town centre. Since then ‘Rotherham Renaissance’ has become a key priority, reflected in the plans, strategies and activities of the Council and its Partners.

Progress to date has included:
- New residential and commercial floorspace at Keppel Wharf and the Old Market Place
- A revitalised Imperial Buildings incorporating new residential space above refurbished retail units
- Improvements to Minster Yard
- Redevelopment of the former All Saints building site for quality public realm alongside the Minster
- Removal of the fountain in front of the markets entrance to improve the public realm
- Shopfront improvements around High Street
- Redevelopment of the train station which, once complete, will improve this key gateway into Rotherham town centre
- New civic offices and a planned new stadium for Rotherham United which will regenerate the vacant Guest & Chrimes site and make other sites available for redevelopment

The Renaissance Goals, which remain relevant aspirations to guide new development in and around the town centre, are:

1. Make the river and the canal a key part of the town's future. We want the river and the canal to become much loved parts of the town with public spaces and walkways lining their banks.
2. Populate the town's centre by creating good quality living. To sustain the long term health of the town centre we want to improve existing housing stock and provide greater choice and accessibility to good quality housing.
3. Place Rotherham within a sustainable landscape setting of the highest quality
4. Put Rotherham at the centre of a public transport network
5. Improve parts of major road infrastructure
6. Make Forge Island a major new piece of the town centre
7. Establish a new civic focus that not only promotes a more open and accessible type of governance but also embraces culture and the arts
8. Demand the best in architecture, urban design and public spaces for Rotherham
9. Improve community access to health, education and promote social well being
10. Create a broadly based, dynamic local economy with a vibrant town centre as its focus

With regard to Forge Island, whilst the site remains occupied by Tesco the operator has a long standing requirement for larger premises (as previously evidenced by the previously unsuccessful planning application to relocate to the former Guest and Chrimes site).

**Rotherham Town Centre Survey**

Town centre surveys have been carried out annually by the Council since 2001. The table below compares the latest data for Rotherham (July 2010) with that in 2001.

The table demonstrates the impact of competition from nearby retail centres and the recession, with 81 recorded vacancies in 2010, and the number of shops reducing from 259 in 2001 to 184 in 2010. 12,853 sq m of floorspace is vacant, accounting for 20% of the town centre’s units total floorspace.
Planned investment to improve Rotherham town centre has also contributed to this pattern. The Imperial Building which has recently re-opened has been closed for several years undergoing refurbishment and this will still be reflected to some degree in the vacancy figures, with some new units remaining to be let. Similarly the All Saints Building was demolished with the loss of 14 units. The economic downturn has made the planned redevelopment of this site for a mix of retail and office floorspace unviable, and the site is being redeveloped to provide quality open space which contributes to improvements in the centre’s public realm.

### Rotherham Town Centre Survey

<table>
<thead>
<tr>
<th></th>
<th>Year</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>2001</td>
<td>2010</td>
</tr>
<tr>
<td><strong>Total Number of Units</strong></td>
<td>421</td>
<td>399</td>
<td></td>
</tr>
<tr>
<td><strong>Total Floorspace (sqm)</strong></td>
<td>65,022</td>
<td>63,576</td>
<td></td>
</tr>
<tr>
<td>A1 – shops</td>
<td>259</td>
<td>184</td>
<td></td>
</tr>
<tr>
<td>A2 – financial &amp; professional services</td>
<td>40</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>A3 – Restaurants and cafés</td>
<td>44</td>
<td>21</td>
<td></td>
</tr>
<tr>
<td>A4 – drinking establishments</td>
<td>n/a</td>
<td>14</td>
<td></td>
</tr>
<tr>
<td>A5 – hot food takeaway</td>
<td>n/a</td>
<td>14</td>
<td></td>
</tr>
<tr>
<td>B1 – business</td>
<td>5</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>C3 – dwellinghouses</td>
<td>0</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>D1 – non-residential institutions</td>
<td>21</td>
<td>17</td>
<td></td>
</tr>
<tr>
<td>D2 – assembly and leisure</td>
<td>10</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Sui Generis</td>
<td>7</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td><strong>Number of Vacant Units</strong></td>
<td>35</td>
<td>81</td>
<td></td>
</tr>
<tr>
<td><strong>Total Floorspace Vacant (sqm)</strong></td>
<td>5,472</td>
<td>12,853</td>
<td></td>
</tr>
<tr>
<td><strong>% of Total Town Centre Units Vacant</strong></td>
<td>8.31</td>
<td>20.3</td>
<td></td>
</tr>
<tr>
<td><strong>% of Total Town Centre Floorspace Vacant (sqm)</strong></td>
<td>8.42</td>
<td>20.22</td>
<td></td>
</tr>
</tbody>
</table>

The UDP defines a number of Prime Shopping Streets where planning policy has tried to ensure that the retail function of the town centre is protected and enhanced. The table below shows that this has been reasonably successful with 77 of the 146 units (around half of the floorspace) being shops. However the impact of vacancies is evident with almost 18% of both units and floorspace within prime shopping streets being vacant.

### Uses on Rotherham Town Centre Prime Shopping Streets 2010

<table>
<thead>
<tr>
<th></th>
<th>Units</th>
<th>Floorspace (sqm)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1 – shops</td>
<td>77</td>
<td>16,639.6</td>
</tr>
<tr>
<td>A2 – financial &amp; professional services</td>
<td>26</td>
<td>5,328.3</td>
</tr>
<tr>
<td>A3 – Restaurants and cafés</td>
<td>8</td>
<td>1,047.6</td>
</tr>
<tr>
<td>A4 – drinking establishments</td>
<td>2</td>
<td>1,164.7</td>
</tr>
<tr>
<td>B1 – business</td>
<td>1</td>
<td>191</td>
</tr>
<tr>
<td>D1 – non-residential institutions</td>
<td>2</td>
<td>143.6</td>
</tr>
<tr>
<td>D2 – assembly and leisure</td>
<td>2</td>
<td>831.2</td>
</tr>
<tr>
<td>Sui Generis</td>
<td>2</td>
<td>336.9</td>
</tr>
<tr>
<td>Vacant</td>
<td>26</td>
<td>5,630.2</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>146</td>
<td>31,313.1</td>
</tr>
<tr>
<td><strong>Percentage vacant</strong></td>
<td>17.8</td>
<td>18</td>
</tr>
</tbody>
</table>
Retail Study Findings
The 2010 Rotherham Town Centre Retail and Leisure Study identified a number of ways in which the town centre could be improved:

- Broaden the appeal of the offer.
- Provide bigger stores and more national retailers.
- More quality independent retailers.
- More variety and better quality catering operators.
- A stronger & more varied leisure offer.
- Raise the profile of the market – to become a local landmark.
- Enhance Rotherham’s appeal as a family friendly destination.
- Develop & expand on the ‘sense of place’.

The Need for Further Leisure Floorspace
The 2011 Retail and Leisure Study concluded that there is a need for a cinema in the borough, preferably located in Rotherham town centre. It also identified potential scope for a swimming pool and a bowling centre to serve residents living in the south of the borough. Cafes/restaurants and pubs/bars were also considered appropriate uses throughout the hierarchy of centres, since numbers have declined in recent years and new provision would help clawback trips made to such facilities outside the borough and improve the diversity of centres.

In relation to hotels, there is little need for the Council to actively plan for additional facilities. However any proposals that come forward should be directed towards town centres in accordance with national planning guidance.

Findings from Core Strategy Revised Options Consultation
The Core Strategy Revised Options Consultation of May 2009 sought views on three possible options for the future of Rotherham town centre: to keep the town centre broadly the same size as it is at the moment, to expand the town centre, or for the town centre to be complementary to Parkgate Shopping Park (likely to involve a reduction in the size of the town centre and shopping area). Key findings of this consultation were:

- Just over half of those responding favoured option A, to keep the town centre broadly the same size as it is at the moment. However support is also evident both for expanding the town centre and developing a complementary role with Parkgate Shopping Park.
- Comments provided covered a wide range of issues including the current state of the town centre, the need for investment and the need to take forward the ideas in the Town Team Masterplan, to accepting that the town centre has declined and that the focus should be shifted to Parkgate. Many comments highlighted the areas of difference between the town centre and shopping centres such as Meadowhall and Parkgate Shopping Centre. There was also some doubt that improvement to the town centre will actually occur, whilst others highlighted the importance of ensuring that housing plays a key role in any future town centre strategy.
- Support for the 10 ‘Town Team’ Renaissance Goals was expressed.
- In terms of any town centre extension, comments were received in support of both a northward and southward extension whilst several responses indicated that this should be determined by further evidence base work and also depend on the types of facilities which might be offered.
- Other responders indicated broadly that the town centre should be concentrated in a more limited area, and that there is need to ensure that retail expenditure is not
lost to centres outside of the borough. Several comments highlighted other potential roles for the town centre, including more of an entertainment/leisure focus and the re-use of properties and land for housing.

**Chosen Retail Centres and Rotherham Town Centre Strategy**

The 2011 Retail and Leisure Study identified a number of key conclusions:

- The need for a strong town centre first approach – particularly in relation to Rotherham Town Centre
- An emphasis on the provision of non-bulky comparison goods
- Any proposal for a main food shopping outlet within or on the edge of Rotherham Town Centre should be supported

In line with national guidance the Core Strategy sets out a hierarchy of centres based on that suggested by the 2011 Retail and Leisure Study. Policy CS14 requires proposals to demonstrate how they contribute to the strategy set out for each centre.

Policy CS14 also sets out that we will plan to accommodate

- 9,000 sqm gross of convenience goods floorspace, and
- 11,000 sqm gross of comparison goods floorspace (comprising 3,000 sqm gross of non-bulky goods floorspace and 8,000 sqm of bulky goods floorspace).

With regard to bulky goods, floorspace the retail and leisure study identifies a quantitative need for 9,610 sqm. Factoring in qualitative need raises this need to around 33,000 sqm gross of bulky goods floorspace, however it is noted that much of this is derived from over-trading at existing out of centre retail parks. Given the existing bulky goods provision within the borough including vacant units it is considered more appropriate not to plan to meet all of the quantitative and qualitative need. The proposed comparison goods provision of 11,000 sqm gross includes 8,000 sqm gross to broadly meet the bulky goods floorspace need identified.

As the borough’s principal town centre the Core Strategy identifies that Rotherham town centre will be the main focus for new retail floorspace within the borough, anda commitment to improving the quality and diversity of retail and other town centre uses, promoting sustainable urban living, enhancing the public realm, and addressing social deprivation.

Policy CS15 also supports a sustainable, well integrated extension of Rotherham town centre with good links to public transport interchanges to accommodate longer term retail floorspace requirements. The site for this extension will be taken forward and allocated via the Sites and Policies DPD which is currently out for consultation at the Issues and Options stage. This proposes that the site of the existing civic offices north of the town centre, and which are due to be vacated, is allocated as a town centre extension. This site is well related to the existing town centre boundary and main shopping area, and has good access to both train and bus interchanges.

In support of Rotherham Renaissance Policy CS15 requires proposals to demonstrate how they support the 10 Renaissance goals. In addition the policy identifies support for the new football ground (which has outline planning permission) on the former Guest and Chrimes site and the delivery of a new entertainment, leisure and cultural quarter focused around a redeveloped Forge Island.
The 2010 town centre retail and leisure study identified how Rotherham town centre could respond to improve its position in relation to its competitors and deliver Renaissance aspirations. Policy CS15 takes these forward by supporting proposals which would assist in:

- broadening the appeal of the town centre offer
- delivering larger stores and more national retailers
- delivering more quality independent retailers
- improve the profile and improve the physical and environmental quality of the indoor and outdoor markets
- providing opportunity for tourism and leisure facilities, such as quality food and drink, cinema and hotel developments; and
- supporting development which enhances Rotherham town centre's appeal as a family friendly destination and contribute towards creating a safe, attractive and accessible town centre