Doncaster Retail, Leisure and Town Centres Study

Volume 1: Main Report

July 2015
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For and on behalf of GVA Grimley Ltd

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Executive Summary

Purpose of Study

The overall aim of the Retail, Leisure and Town Centres Study ("the study") is to provide an up-to-date and robust evidence base on retail and leisure needs within the borough to inform the preparation of Doncaster Metropolitan Borough Council’s ("the council") emerging Doncaster Local Plan. Below, we summarise the principal findings from the various lines of research and analysis that informed the study, comprising the following main elements:

- a performance analysis of Doncaster town centre and the smaller town centres of Mexborough and Thorne each centre using a range of indicators of vitality and viability (commonly referred to as a ‘health check’);
- current shopping patterns in the convenience and comparison retail sectors, informed by a new telephone survey of households;
- retail expenditure capacity for new comparison and convenience floorspace in the borough; and
- key quantitative and qualitative retail needs and our main strategic recommendations for each centre.

Town Centre Health Checks

We undertook a detailed and up-to-date assessment of the vitality and viability of Doncaster town centre as well as Mexborough and Thorne town centres, the two largest centres in the borough after Doncaster. Our assessments use a range of indicators of vitality and viability and are informed by our own on-site surveys of each centre together with desk-based research that draws on published primary and secondary data. As well as providing the base position for the future monitoring of town centre vitality and viability, this exercise identifies the key strengths of the three town centres as well as deficiencies and areas that would benefit from improvement.

Doncaster

Doncaster town centre as a whole is a generally healthy town centre performing in accordance with its role as an important sub-regional shopping destination. The Frenchgate Centre and adjacent primary shopping streets in the north west of the primary shopping area provide the focus of Doncaster’s retail offer and are performing well. The Frenchgate Centre has improved the quantity and quality of its comparison retail offer following an extension and refurbishment in 2006, and currently benefits from a concentration of mainstream fashion multiples, a relatively low vacancy rate
and a middle market fashion offer. The wider town centre also benefits from the presence of several department stores (Debenhams, BHS, a House of Fraser outlet and a Marks & Spencer).

However, there is a spatial imbalance in performance across the centre and the performance of secondary retail areas in the east and south of the primary shopping area is considerably weaker. Overall, Doncaster town centre has experienced a decline in the quantity of its comparison retail offer in recent years, partly driven by wider changes in the retail sector, with this decline concentrated in areas outside of the Frenchgate Centre. The location of the town’s transport interchange, which adjoins the Frenchgate Centre, has exacerbated the focus of activity on the Frenchgate Centre. Other key concerns for Doncaster are falling pedestrian footfall outside of the Frenchgate Centre and the high level of vacancy across secondary parts of the primary shopping area.

Convenience provision in the centre is currently very limited, with no store functioning as a main-food shopping destination following the closure of Tesco. As well as representing a deficiency in the diversity of the town centre offer, larger supermarkets also act as important anchor stores in a centre, and the town centre is therefore missing out on the footfall and ‘linked trips’ generated by such provision.

Doncaster’s leisure and food/drink offer is limited and appears to have reduced in recent years. There is an over-concentration of pub/bar uses, and conversely very limited representation from café/restaurant uses which become important in the ‘transition’ period between retail trading hours and the evening economy. The introduction of more family dining restaurants, as well as a cinema, are both considered to be vitally important in this respect.

Mexborough

The performance of Mexborough town centre in relation to a number of health check indicators was reasonable up until the recent closure of its Tesco Metro store. However, there are areas of concern that threaten the future vitality and viability of Mexborough town centre. With the closure of Tesco, the centre has lost its main convenience anchor store and national multiple foodstore provision in the centre is currently limited to two small frozen food specialists. The absence of a ‘mainstream’ supermarket represents a major weakness in the centre’s offer, particularly given the role of the centre as a local convenience shopping destination. This issue could potentially be addressed through:

- the reoccupation of the former Tesco Metro unit by a major national supermarket operator; and/or
- the provision of a new supermarket on the former United Carpets site on the edge of the town centre.
There is a declining number of comparison multiple retailers and the quality of comparison businesses is focused towards the discount end of the market. Around the outdoor market place on York Square there is evidence of a declining environment and a notable concentration of vacant units, although these issues will hopefully be addressed through the current works to upgrade and transform the market place.

**Thorne**

Thorne is performing reasonably well for a town centre of its size and provides an attractive market town environment, a monthly farmers market within the market square and a strong convenience offer. There is a reasonable mix of comparison retailers and range of everyday retail services, takeaways and public houses.

There are some weaker health check indicators, which represent a concern. The number of vacant units in the centre is high and has increased considerably since 2009, with concentrations of vacant units at the junction of Silver Street/Market Place and on Finkle Court. The pedestrian environment on King Street is poor and footfall is low in this area, and there is limited representation of cafes and restaurants within the town centre.

Investment to address prominent vacancies, provide a quality environment within Market Place and improve connectivity between Finkle Street and King Street/the Sainsbury's store would enable the centre to harness its potential as a historic market town. In particular, it would provide an attractive focal point for visitors within the Market Place, drive footfall on King Street and support linked trips between the Sainsbury’s store (and potentially a Lidl store, should planning permission be granted) and Finkle Street. An improved café/restaurant offer would also assist in attracting visitors to the centre and increasing dwell times.

**Current Shopping Patterns**

A total of 1,100 household telephone surveys were completed across the borough in March 2015, which sought to establish a detailed picture of residents' shopping and leisure habits, as well as residents' views on the strengths and weaknesses of Doncaster town centre. The findings of the household survey underpin our assessment of current patterns of retail expenditure at the main retail destinations within the borough. An overview of the current pattern of expenditure and the current retention rate for comparison and convenience retail goods within Doncaster is set out below.

**Comparison Goods Shopping Patterns**

- A high level of residents’ expenditure on comparison retail goods is spent in destinations within the borough (78%), indicating that the range and quality of the borough’s comparison offer is
currently meeting their needs. Leakage to destinations outside of the borough is inevitable, but relatively modest given Doncaster’s proximity to the Meadowhall Shopping Centre and Sheffield city centre – both regional shopping destinations – as well as Parkgate Shopping Park in Rotherham.

- The main comparison retail destination within the borough – Doncaster town centre – attracts over half of all residents spending in stores on comparison goods. Doncaster also attracts significant spending from residents in neighbouring areas to the east and south of the borough. The centre has substantially increased its market share since the previous retail study, both within and beyond the borough, which we attribute primarily to the improved offer and performance of the Frenchgate Centre. These important pieces of evidence confirm Doncaster’s sub-regional role in terms of comparison retailing and suggest that the centre has strengthened its position since the previous retail study. However, we emphasise that the rise in market share is not reflective of the performance of the town centre beyond the Frenchgate Centre. Evidence from the health check reveals a spatial imbalance in the vitality and viability of the centre, with high levels of vacancy, falling footfall and a declining retail offer outside of the Frenchgate Centre.

- After Doncaster town centre, the most significant destinations for comparison shopping are retail parks and other out-of-centre destinations. The most popular destination is the Meadowhall shopping centre; followed by the York Road retail park area and Wheatley retail park, both in Doncaster; and Parkgate shopping park in Rotherham. Resident spending in the main out-of-centre comparison goods destinations both within and outside of the borough is substantial and amounts to almost half that spent in Doncaster town centre.

- Aside from Doncaster town centre, none of the defined centres in the borough, including Mexborough and Thorne town centres, are particularly significant in comparison retail terms. Mexborough and Thorne town centres attract no significant trade draw beyond their own zones, indicating that the attraction of these centres is very localised roles in terms of comparison goods retailing in accordance with their intended role.

Convenience Goods Shopping Patterns

- A high level of residents’ expenditure on convenience goods is spent in destinations within the borough (86%). Convenience shopping is generally undertaken on a more localised basis than comparison shopping and the limited expenditure leakage to destinations outside of the borough reflects the proximity of such destinations for residents in peripheral parts of the borough.

- The most popular individual destinations for food and grocery shopping are Asda at Dome Leisure Park, Tesco Extra at Woodfield Plantation, Asda in Carcroft and Tesco in Edenthorpe.

- The main foodstores in Doncaster town centre – Sainsbury’s, Marks & Spencer, and Tesco (prior to its closure) – together with other convenience retail destinations in the centre, collectively
achieve a market share of just 6.1% (14.5% within Doncaster town centre’s local zone, Zone 1). The dominance of out-of-centre foodstores in the borough is evident, with spending in the six main out-of-centre foodstores in Doncaster amounting to almost five times that spent in Doncaster town centre as a whole. The role of Doncaster town centre as a convenience retail destination is therefore limited and the market share of the centre has declined from 16.6% in 2010 (19.0% within Zone 1), an issue exacerbated by the recent closure of Tesco.

- The only part of the borough where we consider there to be a localised deficiency in convenience goods provision is in Zone 8, which encompasses Thorne town centre. Less than a third (28.9%) of Zone 8 residents’ spending on convenience goods is spent in centres and stores located within Zone 8, and Thorne town centre achieves a low market share of only 22.7% within Zone 4. The existing Sainsbury’s store in Thorne town centre is relatively small scale and there are no large food superstores elsewhere in the town. We would expect that, if the emerging proposal for a Lidl store in Thorne town centre were to come forward, this would assist in meeting the identified lack of provision in this part of the borough. The commitment for a new superstore at Capitol Park in Thorne would also increase trade retention in Zone 8. However, this commitment is in an out-of-centre location and would divert trade from Thorne town centre. Tesco also pulled out as the confirmed operator for the scheme in January 2015.

- In Zone 4, which encompasses Mexborough town centre, 59.7% of residents’ spending on convenience goods is spent in centres and stores located within Zone 4, confirming that most convenience shopping is undertaken on a relatively localised basis. However, Mexborough town centre achieves a market share of just 5.4% within its local zone (Zone 4), and this is likely to have fallen since the closure of Tesco Metro in the centre. Whilst there is no localised deficiency in convenience goods provision in Zone 4, the market share of Mexborough town centre is extremely low and is considered to represent an underperformance given Mexborough’s role as a local convenience shopping destination. As noted in our town centre health check, this could potentially be addressed through the reoccupation of the former Tesco Metro unit by a supermarket operator and/or the provision of a new supermarket on the former United Carpets site.

**Retail Capacity**

We assess the growth in retail expenditure which is expected to come forward in the study area over the plan period, and translate this expenditure growth into a requirement for new comparison and convenience goods retail floorspace.

The study identifies a requirement for **up to 12,300 square metres** net comparison goods floorspace in the period up to 2032, assuming that all of the existing commitments identified in the study are implemented. However, we understand that it is possible that a number of the existing ‘commitments’
will not be implemented. If we assume that only those two existing commitments that are already under construction are implemented then the quantitative requirement increases to **up to 33,700 square metres** of net comparison floorspace arising in the period up to 2032.

The council should direct new floorspace to town centres in the first instance – in accordance with national planning policy. The focus of the comparison goods requirement should be on Doncaster town centre, with a smaller allocation to support the development of Mexborough and Thorne town centres. We also consider that a small amount of comparison floorspace should be allocated to support the development of existing and/or new district and local centres in the borough.

On this basis, we have indicatively allocated 75% of the comparison goods floorspace requirement for the borough to Doncaster town centre, 10% each to Mexborough and Thorne town centres, and the remaining 5% to other existing/new centres in the borough. It is emphasised that this distribution is indicative only and should the comparison goods floorspace requirements identified for each centre not come forward over the plan period, then the council should direct the floorspace requirements to Doncaster town centre in the next instance. Moreover, the indicative distribution of the comparison goods floorspace requirement for the borough should not preclude appropriate in-centre development coming forward in Doncaster, Mexborough or Thorne town centres should suitable development opportunities arise.

Should all of the convenience goods floorspace for which planning permission exists come forward, we identified that there is **no quantitative requirement** for the council to plan for any additional convenience goods floorspace in the borough, as these existing commitments will ‘claim’ all future growth in convenience goods spending. If all ‘commitments’ except those currently under construction are excluded, we identified a quantitative need for **up to 8,300 square metres** of net convenience floorspace in the borough arising in the period up to 2032.

**Recommendations**

The main strategic recommendations for each centre, based on the findings of the study, are summarised below.

**Doncaster**

- **Convenience:** The absence of a main food shopping destination in Doncaster town centre represents a key qualitative deficiency in the town centre offer. There is an under representation of national multiple foodstore operators in the centre and **further foodstore provision** should generally be considered positively. Should all of the convenience goods floorspace for which planning permission exist come forward, we identified that there is no requirement for the council to plan for any additional convenience goods floorspace in Doncaster town centre, as these
existing commitments will ‘claim’ all future growth in convenience goods spending. However, it is possible that a number of the existing ‘commitments’ will not be implemented and in this situation there is an indicative quantitative capacity for up to 4,000 square metres of net convenience floorspace in Doncaster town centre in the period up to 2032. The key opportunity site for new foodstore provision in Doncaster is considered to be the Waterdale area, which would provide a sufficiently strong anchor store to draw footfall south from the primary shopping area.

- **Comparison:** We recommended that the council proactively plan for between 9,200 and 25,300 square metres of additional comparison floorspace in Doncaster town centre in the period up to 2032. The lower end this range represents the requirement taking account of all current commitments and the higher end represents the requirement should only those commitments already under construction come forward. We recommend that the council closely monitor the progress of the committed schemes to identify where schemes will not be delivered and review the quantitative requirements for new comparison floorspace regularly throughout the plan period. The substantial opportunity sites in Doncaster town centre would be sufficient to accommodate the identified comparison goods floorspace requirements arising over the local plan period.

- **Leisure:** There is a quantitative and qualitative need for new commercial leisure facilities in Doncaster town centre, including restaurants and cafés, a new cinema, and family entertainment facilities such as a climbing wall, skate park or soft play centre. Enhancement in the commercial leisure sector represents the biggest opportunity for the strengthening of the vitality and viability of Doncaster town centre over the course of the plan period. There is clear scope to introduce a multiplex cinema facility in Doncaster town centre to enhance competition in the borough as a whole, allied to multiple and family-orientated restaurants, complementing and enhancing the recent development which has taken place in the Civic and Cultural Quarter. Proposals for other restaurant/café uses and small-scale leisure facilities should be considered favourably where they will contribute to the wider vitality and viability of the town centre.

**Mexborough**

- **Convenience:** We identified a qualitative need for a mainstream supermarket offering a full range of food and grocery products in Mexborough. This need would be met by the implementation of the planning permission for a new foodstore on the former United Carpets site off Station Road, but is additional to the reoccupation of the vacant Tesco Metro store in the town centre as this store was trading at the time the household telephone survey was being undertaken.

- **Comparison:** There is no specific requirement for the council to proactively plan for new comparison retail provision in the town over the plan period, as Mexborough primarily fulfils a convenience and service function. Nevertheless, there is scope for the offer to be enhanced in order to allow for local shopping needs to be adequately met and we identified quantitative
capacity for **between 1,200 and 3,300 square metres** of additional comparison floorspace in Mexborough in the period up to 2032. Incremental enhancements of the retail offer within Mexborough should be supported, provided that proposals are of an appropriate scale. The delivery of a new foodstore in the town, with an appropriate non-food offer, would also enhance the choice and range of comparison goods available.

- **Leisure**: There is a qualitative need for new **café/restaurant** uses in Mexborough town centre to diversify the town centre offer and broaden the evening economy.

**Thorne**

- **Convenience**: We identified a qualitative need for further **supermarket** provision in Thorne to improve to enhance the local convenience offer, improve local consumer choice and reduce the need for residents to travel to destinations further afield, and sufficient quantitative capacity within the borough to deliver on the qualitative recommendations. We would expect that, if the emerging proposal for a Lidl store in Thorne town centre were to come forward, this would assist in meeting the identified lack of provision in this part of the borough.

- **Comparison**: As for Mexborough, there is no specific requirement for the council to proactively plan for new comparison retail provision in Thorne over the plan period. However, incremental enhancements of the comparison retail offer should be supported and we identified quantitative capacity for **between 1,200 and 3,300 square metres** of additional comparison floorspace in the period up to 2032. The delivery of a new foodstore in Thorne, which would include an element of comparison floorspace, would help to enhance the choice and range of comparison goods available.

- **Leisure**: There is a qualitative need for new **café/restaurant** uses in Thorne town centre to help to diversify the town centre offer and broaden the evening economy.
1. Introduction

Purpose of the Study

1.1 Doncaster Metropolitan Borough Council ("the council") instructed Bilfinger GVA to undertake a Retail, Leisure and Town Centres Study ("the study"). The overall aim of the study is to provide an up-to-date and robust evidence base on retail and leisure needs within the borough to inform the preparation of the council's emerging Doncaster Local Plan. The findings from the study can also be used by the council when considering planning applications for the retail, leisure and other town centre uses within the borough.

1.2 GVA\(^1\) previously prepared the Doncaster Retail Study in 2010 (the "2010 study") and a subsequent update 2012 (the "2012 update"), which provided a robust and sound evidence base to inform the development of Doncaster's Local Development Framework, and in particular the Core Strategy.

1.3 Our work draws on the results of a new household telephone survey of shopping patterns, together with up-to-date population and expenditure data and forecasts, which take account of the economic upswing following on from the recession, and current planning commitments for new retail development in the borough.

Structure of the Report

1.4 The remainder of our report is structured as follows:

- **Section 2: Planning Policy Context and Sub-Regional Context** sets out the requirements of current national policy documents insofar as they relate to Doncaster's centres and the location of town centre uses and planning for sustainable development, and reviews the local planning policy context. We further provide a summary of the existing and proposed changes to the retail and leisure offer of those centres within the wider sub-regional hierarchy of most influence on the shopping patterns of the borough's residents.

- **Section 3: Retail and Leisure Trends** details the implications of national economic and market trends on retailing in the borough;

- **Section 4: Doncaster Town Centre** contains an overview of both in and out of centre retail and leisure provision in Doncaster, and a health check assessment of Doncaster town centre.

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1 Now part of Bilfinger GVA.
- **Section 5: Mexborough and Thorne Town Centres** contains health check assessments of the borough’s smaller town centres of Mexborough and Thorne.

- **Section 6: Current Patterns of Retail and Leisure Spending** describes current shopping patterns in the comparison and convenience retail sectors, and patterns of spending on leisure services and cultural activities, based on the survey of households which was undertaken by NEMS Market Research in February 2015.

- **Section 7: Assessment of Retail Expenditure Capacity** provides our assessment of quantitative need in the retail sector up to 2032.

- **Section 8: Need for Leisure Uses** considers the need for additional commercial leisure uses.

- **Section 9: Summary of Findings and Recommendations** contains a review of our findings against the 2010 and 2012 outputs, and sets out our advice on the most appropriate strategy for meeting identified needs for town centre uses, and recommendations on how the evidence base can be used to assist the determination of future planning applications.

1.5 Separately bound Volumes 2 and 3 contain the appendices to the main report - various health check tables and figures, and retail and leisure capacity spreadsheets - and the household survey results, respectively.
2. Planning Policy and Sub-Regional Context

2.1 In this section we set out the planning policy context of greatest relevance to the preparation of the emerging Doncaster Local Plan, as set out in the National Planning Policy Framework and associated Planning Practice Guidance, together with the Core Strategy and the saved policies of the Unitary Development Plan (UDP), which form part of the current adopted development plan for Doncaster. We further provide a summary of the existing and proposed changes to the retail and leisure offer of those centres which can be expected to compete for expenditure with centres in the borough, and in particular Doncaster town centre.

Planning Policy Context

National Planning Policy Framework

2.2 The National Planning Policy Framework was published on 27 March 2012 and sets out the government’s planning policies for England. It replaces the suite of national Planning Policy Statements, Planning Policy Guidance and some Circulars with a single, streamlined document.

2.3 At the heart of the National Planning Policy Framework is a ‘presumption in favour of sustainable development’, which should be seen as a golden thread running through both plan-making and decision-taking. The National Planning Policy Framework encourages local planning authorities to positively seek opportunities to meet the development needs of their area.

2.4 The National Planning Policy Framework continues to recognise that the planning system is plan-led and therefore local plans, incorporating neighbourhood plans where relevant, are the starting point for the determination of any planning application. In line with the government’s aim to streamline the planning process, each Local Planning Authority should produce a single local plan for its area, with any additional Development Plan Documents or Supplementary Planning Documents to be used only where clearly justified.

2.5 The National Planning Policy Framework advocates a ‘town centres first’ approach, and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. In planning for town centres local planning authorities should:

- recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
• 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 shopping 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 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 economic development needed in town centres. Where town centre sites are not available, Local Planning Authorities should adopt a sequential approach to allocate appropriate edge-of-centre sites;
• 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
• where town centres are in decline, plan positively for their future to encourage economic activity.

2.6 Local planning authorities should ensure that the local plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. These assessments should be integrated and take full account of relevant market and economic signals. Local Planning Authorities should use the evidence base to assess, inter alia:

• the needs for land or floorspace for economic development, taking account of both quantitative and qualitative requirements for all foreseeable types of economic activity over the plan period, including retail and commercial leisure development;
• the existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs;
• the role and function of town centres and the relationship between them, including any trends in the performance of centres; and
• the capacity of existing centres to accommodate new town centre development.

2.7 Ultimately, whilst the National Planning Policy Framework (paragraph 154) specifies that local plans should be aspirational, they are required to be realistic and deliverable. They should
address the spatial implications of economic, social and environmental change and set out opportunities for development and clear policies indicating what will or will not be permitted and where. The recommendations of this study are therefore grounded within this context.

2.8 The National Planning Policy Framework constitutes a material consideration which local planning authorities should take into account from the date of publication in development management decisions.

Planning Practice Guidance

2.9 In March 2014 the Department for Communities and Local Government launched the web-based Planning Practice Guidance, which cancelled a number of previous planning practice guidance documents, including the Practice Guidance on Need, Impact and the Sequential Approach (2009). Although it does not constitute a statement of government policy, it provides technical guidance on how to prepare a robust evidence base and how to assess the impact of proposals for main town centre uses.

2.10 The web-based resource provides guidance on how to assess and plan to meet the needs of main town centre uses in full through production of a positive vision or strategy for town centres. This strategy should be based on evidence of the current state of town centres and opportunities to meet development needs and support their viability and vitality and should consider:

- the appropriate and realistic role, function and hierarchy of town centres in the area over the plan period. This will be informed by audits of existing centres to assess their role, vitality, viability and the potential to accommodate new development. It should cover a three to five year period, but also take the lifetime of the local plan into account and be reviewed regularly;
- the most appropriate mix of uses in the centre to enhance overall vitality and viability;
- the potential to expand centres or enable new development or redevelopment of under-utilised spaces to accommodate the scale of need identified for main town centre uses. This should involve evaluating different policy options (for example, expanding the market share of a particular centre) or the implications of wider policy such as infrastructure delivery and demographic or economic change;
- appropriate timeframes for provision of new retail floorspace;
- complementary strategies that may be necessary or appropriate to enhance the town centre and help deliver the vision for its future; and
2.11 In seeking to identify appropriate, sequentially compliant development site opportunities, it is necessary to complete a thorough assessment of the suitability, viability and availability of locations for main town centre uses. The guidance directs local planning authorities to take full account of relevant market signals when planning for town centres and keep land allocations under regular review.

2.12 The Planning Practice Guidance sets out a range of indicators relevant when assessing the health of town centres over time, and we use these indicators as the basis of our ‘health check’ assessments set out in sections 3 and 4. These include:

- diversity of uses;
- proportion of vacant street level property;
- commercial yields on non-domestic property;
- customer views and behaviour;
- retailer representation and intentions to change representation;
- commercial rents;
- pedestrian flows;
- accessibility;
- perceptions of safety and occurrence of crime; and
- state of town centre environmental quality.

2.13 When planning for town centres, local planning authorities should take full account of relevant market signals and keep retail land allocations under regular review. Where it is not possible or appropriate to accommodate identified capacity in town centre locations, Local planning authorities should plan positively to identify the most appropriate alternative strategy for meeting the need for these main town centre uses, having regard to the sequential and impact tests.

2.14 When applying the sequential approach in plan-making, local planning authorities should take into account the need for main town centre uses, the supply and demand for land, and whether there are sites which are suitable, available and viable having regard to the nature of the need that is to be addressed. If the additional main town centre uses cannot be accommodated in town centre sites, the next sequentially preferable sites should be considered. Local plans should contain policies to apply the sequential test to proposals for
main town centre uses that may come forward outside identified sites or locations allocated in the local plan.

**Doncaster Unitary Development Plan (July 1998)**

2.15 The Doncaster Unitary Development Plan sets out both strategic and local planning policies to guide and co-ordinate development in the borough up to 2001. Many of the UDP policies were saved beyond this date by the secretary of state, of which some were subsequently replaced by the Core Strategy and the Barnsley, Doncaster and Rotherham Joint Waste Plan. However, a number of the saved policies of the UDP remain in force until they are eventually replaced by the emerging local plan.

2.16 Saved policy TC3 identifies eight town centre sites considered suitable for development, which we consider in our review of opportunity sites presented in Section 4. Remaining saved UDP policies primarily relate to development planning matters. In particular, saved policies TC4 to TC7 seek to protect the retail function of Doncaster town centre and set out the council’s requirements in relation to the location of large scale shopping development, and change of use to non-shopping uses within the primary and secondary shopping areas and frontages in Doncaster.

**Doncaster Local Development Framework**

**Core Strategy (May 2012)**

2.17 The Core Strategy is a development plan document and forms part of Doncaster’s development plan (Local Development Framework). The Core Strategy sets out the overall planning framework to guide Doncaster’s future development needs over the period to 2028. Chapter 2 of the Core Strategy sets out the vision for the borough, together with a range of objectives to achieve that vision. The Core Strategy also sets out how the borough and the places within it (including town centres) will evolve and develop and outlines some of the key development opportunities within existing town centres.

- **Doncaster town centre** will be at the heart of the borough’s economic growth and experience an expansion of its retail core, and will see the development of offices, leisure, cultural and civic facilities. It will be a retail and leisure destination of regional and wider significance and have a dynamic and vibrant urban centre, with Doncaster Market at its heart. There will be new and enhanced cultural, leisure and shopping facilities, with particular focus on new development in the Waterdale area to improve links between town centre and established communities. There will also be a strong professional services sector, focused on the substantially redeveloped areas of the Civic and Cultural Quarter.
and St Sepulchre Gate West. It will be a great place for pedestrians and easily accessible by a variety of transport modes. Doncaster Waterfront, Marshgate, St Sepulchre Gate West, Waterdale and the Civic and Cultural Quarter will have been developed for new housing and other uses. The historic core of the town will be protected and enhanced, including the listed buildings and conservation areas and the setting of heritage assets, such as the Mansion House, St. George’s Minster, Christ Church and the Corn Exchange.

- **Mexborough town centre** will be a thriving town centre for shopping and services in the south west of Doncaster and adjoining parts of the Dearne Valley. The town centre will be extended and enhanced, including new and better retail facilities, new office development, canal-side housing development and better links to Mexborough railway station.

- **Thorne town centre** will be a thriving centre, restored to its market town status. The historic character of Thorne town centre will have been regenerated and enhanced by high quality infill, and it will have a significantly improved choice of shopping and leisure. Its historic buildings will be retained and sympathetically restored.

2.18 An update on the sites identified above is provided throughout the report. The Core Strategy also includes a series of theme-based policies; the relevant ones in the context of this study are listed below.

**Policy CS7 – Retail and Town Centres**

2.19 In order to promote choice, competition and innovation across Doncaster, this policy outlines the location of town centre uses (e.g. shops, offices and leisure facilities) according to the retail hierarchy set out below:

- **Sub-Regional Centre**: Doncaster Town Centre;
- **Town Centres**: Thorne, Mexborough;
- **District Centres**: Adwick, Amthorpe, Askem, Bawtry, Conisbrough, Tickhill;
- **Local Centres**: Woodfield Plantation, Rossington, Carcroft, Skellow, Bentley, Hatfield, Dunsforth, Intake, Balby, Moorends, Edlington, Stainforth, Edenthorpe, Denaby Main; and
- **Neighbourhood Shopping Parades**.

2.20 **Appendix 1** shows the location of the highest order centres within the borough (district centres and above). This is based on an extract from the Core Strategy (Map 2: Key Diagram).

2.21 Policy CS7 clarifies that Doncaster town centre will remain the largest centre in the borough, and directs proposals for major town centre uses sequentially to the “Primary Shopping Area” and then to the wider town centre. After Doncaster, priority will be given to improving retail
facilities in Mexborough and Thorne. The extent of Doncaster’s Primary Shopping Area is shown indicatively in Figure 4.1 in Section 4 where further details on the extent of Doncaster’s Primary Shopping Area are also provided.

2.22 The policy also seeks to enhance and maintain the vitality and viability of all of the borough’s centres, as well as their existing range of uses including local markets. This will involve widening the range of uses and encouraging convenient and accessible shopping, service and employment facilities to meet the day-to-day needs of residents.

2.23 On large new urban extension sites not within easy travelling distance of existing retail services, new local centres will be established or existing retail functions adapted to serve the needs of residents. The policy advises that such centres should be of an appropriate scale, and should not undermine the role or function of other centres within the retail hierarchy.

2.24 Retail and other uses (including leisure, entertainment, cultural and tourist facilities as well as other mixed-uses) that would support the vitality and viability of the centres in the hierarchy below Doncaster town centre will be directed sequentially to these centres provided that they are of a scale and nature that is appropriate to the size and function of the centre, and would not lead to unsustainable trip generation from outside their catchments.

Policy CS8 – Doncaster Town Centre

2.25 Policy CS8 outlines how Doncaster town centre will continue to be developed as a thriving and accessible retail and leisure destination of regional importance. It also sets out the principles that will guide growth and change in Doncaster town centre as follows:

- Key town centre uses that would enhance the vitality and viability of Doncaster town centre (including retail, leisure, entertainment, arts, cultural and tourism uses) will be directed sequentially to the Primary Shopping Area and then to the wider town centre.

- Other town centre uses that would support growth and deliver facilities and services associated with a successful regional town (including hotels, non-key leisure uses and civic, cultural, education, health and residential uses) will be acceptable in principle within the wider Doncaster town centre.

2.26 The policy identifies a range of specific measures to deliver this regeneration, which include:

- coordinating investment to ensure that Doncaster Market has a long-term future; and

- focusing major development opportunities towards the Waterfront, Marshgate, Civic and Cultural Quarter and St Sepulchre Gate West areas (as shown on Figure 4.1).

2.27 The following proposals are identified under policy CS8 to facilitate the growth and environmental quality of the town centre including individual character areas in line with the
vision and aims of the Doncaster Town Charter and Doncaster Town Centre Masterplan. The policy supports proposals that will

- revitalise the Waterdale Shopping Centre area as a mixed-use development complementary to the existing retail provision in the town centre;
- provide better opportunities for the independent retail and commercial sectors particularly around the market and in the Lower Wheatley area;
- promote and diversify the education, leisure, cultural facilities and night-time and evening economy with special emphasis on supporting tourism;
- bring about environmental improvement and economic regeneration especially at Hall Gate Triangle, Copley Road/Netherhall Road, Spring Gardens/Duke Street and the Minster Quarter;
- improve places for pedestrians, cyclists and the disabled by enhancing public transport accessibility, car parking, signage and streets, with special emphasis on reducing the severance caused by the Trafford Way/Church Way corridor and improving the links to Balby Island, St Sepulchre Gate West, Waterfront, Hyde Park and Lower Wheatley; and
- create high-quality public spaces, particularly at Waterfront, Waterdale, Doncaster Market, Doncaster Minster, St Sepulchre Gate West, railway station and recognise the need to provide more greenspace.

**Emerging Doncaster Local Plan**

2.28 The council has begun work on preparing a new Local Plan. This is the next generation of plan and will replace the Core Strategy and current saved UDP policies. During its preparation, the council carried out a ‘call for sites’ consultation where the public and landowners/developers were asked to promote sites that they wished to be considered for development in the new plan.

**Sub-Regional Context**

2.29 Doncaster does not operate in isolation and it is important to understand the nature of the existing and emerging retail and leisure offer in surrounding centres, which may compete with the centres in Doncaster for residents’ spending. This is an important consideration given that planned improvements can materially impact upon shopping patterns (market share), future performance and overall vitality and viability of a centre.

2.30 Below, we provide a summary of the existing and proposed changes to the retail and leisure offer of those centres which can be expected to compete for expenditure with centres in the
borough, and in particular Doncaster town centre. Informed by the findings of the household survey of shopping patterns which was undertaken in support of this study (discussed further in Section 6), the principal competing centres are Leeds, Sheffield, Scunthorpe and Rotherham, as well as the out-of-town shopping facilities at Meadowhall Shopping Centre in Sheffield and Parkgate Shopping Park in Rotherham. A summary of the retail and service floorspace within the main competing centres surrounding Doncaster is provided in Table 2.1 (which is ordered by the amount of comparison goods floorspace at each location) below.

Table 2.1 –Retail and Service Floorspace in Competing Centres

<table>
<thead>
<tr>
<th></th>
<th>Comparison Retail Floorspace</th>
<th>Convenience Retail Floorspace</th>
<th>Retail Service</th>
<th>Leisure Service</th>
<th>Financial &amp; Business Services</th>
<th>Vacant</th>
<th>Total Retail and Service Floorspace</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leeds</td>
<td>131,200</td>
<td>28,400</td>
<td>17,800</td>
<td>89,900</td>
<td>16,500</td>
<td>32,900</td>
<td>316,800</td>
</tr>
<tr>
<td>Meadowhall SC</td>
<td>112,500</td>
<td>1,000</td>
<td>2,400</td>
<td>13,300</td>
<td>2,000</td>
<td>1,600</td>
<td>132,700</td>
</tr>
<tr>
<td>Doncaster</td>
<td>75,000</td>
<td>18,500</td>
<td>9,200</td>
<td>37,900</td>
<td>14,200</td>
<td>21,500</td>
<td>176,100</td>
</tr>
<tr>
<td>Sheffield</td>
<td>68,500</td>
<td>30,800</td>
<td>5,800</td>
<td>54,500</td>
<td>12,300</td>
<td>23,800</td>
<td>195,600</td>
</tr>
<tr>
<td>Parkgate Shopping Park</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>52,100</td>
</tr>
<tr>
<td>Scunthorpe</td>
<td>40,100</td>
<td>16,300</td>
<td>6,900</td>
<td>27,400</td>
<td>11,300</td>
<td>15,900</td>
<td>117,900</td>
</tr>
<tr>
<td>Rotherham</td>
<td>22,500</td>
<td>8,900</td>
<td>6,700</td>
<td>14,800</td>
<td>8,200</td>
<td>9,800</td>
<td>70,800</td>
</tr>
</tbody>
</table>

Source: Experian Goad Category Reports (varying dates) and Completely Retail

2.31 Leeds is located around 45 kilometres from Doncaster town centre and is the largest centre in the Yorkshire and Humber region. Leeds currently offers some 317,000 square metres of retail and service floorspace (compared to approximately 176,000 square metres of retail floorspace in Doncaster). Leeds provides a good range of fashion retailers, including upmarket and high fashion retailers, three department stores (including one of only seven Harvey Nichols stores outside London) and six shopping centres, including the Trinity Leeds scheme which opened in March 2013. Trinity Leeds is occupied by a range of mainstream and upmarket retailers including Marks & Spencer, H&M, Primark, BHS, Next Amani Exchange and Urban Outfitters, and has strengthened the city’s fashion offer. A new 120,000 square metres shopping centre - Victoria Gate - is set to open in autumn 2016 to the east of the central shopping area and will be anchored by a John Lewis department store.

2.32 Meadowhall Shopping Centre is located around 25 kilometres south west of Doncaster, off junction 34 of the M1. Meadowhall is the largest indoor shopping centre in Yorkshire and provides some 133,000 square metres of retail and service floorspace, of which 112,000 is comparison retail floorspace, across over 280 stores. Most of the stores are major high street retailers and include Debenhams, House of Fraser, M&S, H&M, Primark, Next and Topshop, as
well as up market fashion retailers such as LK Bennett and Paul Smith. The centre is also home to a Vue cinema and range of branded restaurants. A large concentration of primarily bulky goods retail warehousing is also located in vicinity of Meadowhall, most notably at Meadowhall Retail Park which includes Hobbycraft, PC World and Toys R Us. A flagship Next Home & Garden store recently opened on a site adjacent to the Meadowhall Shopping Centre.

2.33 Sheffield is around 32 kilometres south-west of Doncaster, although the offer in the city centre is more limited than would typically be expected for a city of its size (a total of approximately 196,000 square metres of retail and service floorspace of which some 69,000 square metres is comparison retail floorspace), in part due to the proximity of Meadowhall Shopping Centre which draws trade away from the city centre. The city centre nevertheless includes John Lewis and Debenhams department stores, a good range of typical national multiple retailers (Marks & Spencer, H&M, Top Shop and so on), a strong independent retail sector, and an excellent cultural offer. Significant investment in the expansion of the city centre retail offer was stalled by the economic downturn and the withdrawal of the preferred developer, Hammerson. Sheffield City Council is now in the process of assembling land for a revised proposal, before seeking a new development partner. In the meantime, the regeneration of the Moor shopping area is currently underway, and will introduce a new Primark store, cinema and family restaurants in a two-phase development programme which is expected to complete in early 2017.

2.34 Scunthorpe, around 30 kilometres to the east of Doncaster, has a relatively limited retail offer compared to Doncaster (a total of some 118,000 square metres of floorspace of which 40,000 square metres is comparison retail floorspace), but its proximity to some of the eastern parts of the borough means some trade draw can be expected. The majority of multiple retailer representation can be found in The Parishes Shopping Centre; key retailers include BHS, H&M and Wilkinson.

2.35 Rotherham is located around 19 kilometres to the south west of Doncaster. Whilst its town centre is relatively small (approximately 71,000 square metres of which 22,000 square metres is comparison retail floorspace), the Parkgate Shopping Park, located on the northern-eastern edge of Rotherham (and thus is relatively accessible for many residents in the Doncaster area), is a significant competing shopping destination, and is an open A1 retail park which includes representation from stores such as Marks & Spencer, Matalan, River Island, Next and Currys PC World, as well as a number of factory outlet stores and a Morrisons supermarket.

2.36 Doncaster is located in relatively close proximity to the two regional shopping centres of Leeds and Sheffield, as well as the Meadowhall Shopping Centre which also performs a regional function. Leeds and the Meadowhall Shopping Centre both have a superior comparison retail
offer in terms of both scale and quality, although the amount of comparison retail floorspace in Sheffield is more comparable to that in Doncaster. Comparison retailing forms the core of the ‘high street’ retail offer and is a key determinant affecting people’s choice of shopping destination. Ongoing retail development in these locations, combined with increasingly mobile shoppers, means these centres will continue to offer strong competition for Doncaster town centre.

Summary of the Planning Policy and Sub-Regional Context

- The government’s main objective is to support and encourage sustainable economic growth. In seeking to achieve this, the National Planning Policy Framework adopts a presumption in favour of sustainable development. It seeks to focus retail and leisure development within existing centres and supports the promotion of competitive town centres that provide customer choice and a diverse retail offer. Town centres are recognised as the heart of communities and local authorities should pursue policies to support their vitality and viability.

- The National Planning Policy Framework makes it clear that local planning authorities should ensure that needs for retail, leisure, office and other ‘town centre’ uses are met in full and are not compromised by limited site availability. The onus is therefore on local planning authorities to identify suitable sites, adopting a sequential approach to site selection, which can be used to accommodate ‘town centre’ uses over the plan period. In a location such as Doncaster, where there is strong pressure for out-of-centre retail development, this represents an important requirement.

- A new national Planning Practice Guidance has been published since the previous 2012 (Doncaster Retail Study) update was completed. The Planning Practice Guidance places an increased emphasis on adopting a positive vision or strategy for town centres and the need for diversification compared to its predecessor. This adds a new element to the retail study and resulting recommendations for planning policy.

- At present, the adopted Doncaster Core Strategy and saved policies of the Doncaster UDP constitute the development plan for the borough; these were adopted prior to the publication of the National Planning Policy Framework and Planning Practice Guidance. Doncaster’s emerging Local Plan will replace the saved UDP and Core Strategy policies and designations. In preparing the Local Plan, existing policies therefore need to be reviewed against the National Planning Policy Framework and Planning Practice Guidance to ensure the emerging Local Plan is sound, robust and compliant with national policy and legislation.

- Doncaster is located in relatively close proximity to a number of regional and other major shopping destinations, including Leeds, Meadowhall Shopping Centre, Sheffield and
Parkgate Shopping Centre. On-going retail development in these locations represents competition for Doncaster town centre, and has the potential to influence shopping patterns of the borough’s residents. It will therefore be important for Doncaster to similarly consolidate and improve its town centre offer to ensure the vitality and viability of the centre is maintained and improved in light of the competition from surrounding centres.
3. **Retail and Leisure Trends**

3.1 It is essential that the future strategy for the borough is formulated in the context of the wider economic climate. This section therefore considers the impact of the economic conditions on retail and leisure provision in the borough and how wider economic and social trends are likely to influence both local resident and operator requirements in the future.

3.2 This section also provides a brief analysis of relevant government research and town centre strategies which have come forward over the last few years, partly in response to the retail and leisure trends identified, in order to promote a consistent policy objective which seeks to strengthen the respective centres.

**Economic Upswing**

3.3 Analysis published by Experian\(^2\) concluded that following several years of subdued performance, including a period of recession, a ‘strong economic upswing’ took place in early 2013, driven by increases in consumer spending and business investment. Experian note that whilst there remain drags on growth in terms of fiscal constraint and a weak export market, ‘low inflation, strong employment growth and high levels of consumer and business confidence point to sustained expansion, albeit at a more modest pace’.

3.4 Consumer and investor confidence is tentatively returning, and Doncaster will benefit directly from the upturn in the wider national economy as footfall and expenditure in town centres increases.

**Changing Retailer Space Requirements**

3.5 The retail sector has undergone significant changes over the last decade which has fundamentally altered how, where and when we shop. This has had major implications for retailers’ space requirements, which, combined with the recent recession, has changed the retail landscape of our towns and cities.

3.6 During the recession, retailers’ margins were squeezed, whilst other costs have continued to rise and a raft of multiple and independent retailers have either collapsed or significantly shrunk their store portfolios. The growth of the internet means that retailers no longer need stores in every town to achieve national coverage, and many are therefore focusing their

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2 Experian Retail Planner 12.1 (October 2014)
development programmes on the provision of large flagship stores in strategic locations, supported by smaller satellite stores and transactional websites.

3.7 The larger flagships accommodate full product ranges whilst smaller stores offer more select ranges, supplemented by internet kiosks allowing access to the full range. This offers many advantages to retailers including lower property costs, more efficient logistics and being able to open stores where there is a high level of demand despite there being space restrictions. This ‘polarisation’ of retailing is enabling larger dominant centres – such as Leeds, York and Sheffield – to continue to attract key retailers (where good quality, modern floorspace is available), with medium and smaller sized centres potentially struggling to attract investment.

3.8 As a large sub-regional centre, Doncaster should be able to continue to attract major retailers and the availability of good quality retail floorspace, particularly in the Frenchgate Centre, is an important asset. However, Doncaster’s proximity to a number of higher order centres may result in the centre being ‘off radar’ for some retailers, particularly high end retailers, for whom representation across the UK is more limited. Smaller town centres such as Mexborough and Thorne will be more affected by this trend and will need to focus on more local and day-to-day shopping and services.

Internet Growth and Multi-Channel Retailing

3.9 The popularity of online retailing has grown rapidly since 2008 and growth in online spending is expected to continue to outpace growth in total retail sales each year. As shown in Figure 3.1, the non-store retailing market share will rising from 14.1% of all retailing in 2015 to 18.5% in 2020.

![Figure 3.1 Market share of non-store retail sales](image)

Source: Experian Retail Planner 12.1 (October 2014)

3 This includes all non-store online spending (estimated up to 2013 and projected for 2014 onwards).
3.10 As the online shopping population reaches saturation, any future growth in the market is likely to come from increased spend driven by new technology, a better ‘browsing’ experience and improved delivery options. The growth in online sales has previously raised concerns about the continued need for bricks and mortar stores; however trends indicate that online and in-store shopping channels are becoming increasingly blurred.

3.11 The ‘click and collect’ market is the largest on-line growth sector in the UK at the current time. It is forecast to be one of the most significant drivers of growth, with expenditure set to grow by 82% between 2014 and 2019 to £6.5 billion (Verdict’s Click and Collect in the UK 2014 report). Verdict emphasise that the importance of click and collect should not be underestimated and that maintaining a store network that can offer locality, whilst also having highly informative websites to drive growth, is now a fundamental requirement. It can be used as an important tool in helping town centres to continue to have an important role and function, by being a footfall generator in its own right.

3.12 The significant forecast growth in ‘click and collect’ has been acknowledged by the government in reforms to planning rules recently (April 2015) came into force, extending general permitted development rights to enable shops to build new ‘click and collect’ facilities without the need for a planning application.

3.13 It is apparent that, despite being a relatively new concept for the retail sector to embrace, click and collect is affirming that physical stores will continue to have a role in the multichannel shopping environment. The advantages of physical stores, in terms of the shopping experience, service and immediacy of products in a showroom setting, will ensure that a network of key stores remains a fundamental component of retailer’s strategies to provide an integrated multichannel retail proposition. Importantly for Doncaster, the click and collect phenomenon will drive an occupier desire to have physical store units across town centres.

Out-of-Centre Retailing

3.14 Retailers are opting to develop stores in the most strategic and cost effective locations, with a notable resurgence of out-of-centre destinations, which offer benefits of lower rents, larger retail units and in most cases, free car parking. According to Verdict, out-of-town retailing is the only form of retailing which has seen store numbers increase consistently since 2000.

3.15 The recovery of market confidence is further benefitting out-of-town retailing. Vacancy rates have fallen, footfall has increased, and many retailers are seeking expansion in out-of-centre locations. A number of these are traditional town centre retailers which have developed out-of-town store formats, including John Lewis and Next, who have both launched new types of
stores specifically designed for out-of-centre locations (‘John Lewis at Home’ and ‘Next Home & Garden’) in recent years. A Next Home store is located adjacent to the Meadowhall Shopping Centre in Sheffield, although the nearest John Lewis at Home store is located some distance from Doncaster in Tamworth in Staffordshire.

3.16 Another trend is the evolution of traditional retail ‘box’ warehouse developments into retail parks, sub-dividing units, expanding the product offer, and developing beyond just retail to introduce food and beverage, encouraging longer dwell times. Retail park owners are also refurbishing their retail parks; i.e. public realm, walkways, car parks, signage, landscaping and seating to enhance the visitor experience.

3.17 We are aware that there has been significant pressure for out-of-centre retail development in Doncaster in recent years, and a number of permissions for new retail floorspace of this nature have been granted.

The Role of Town Centres

3.18 The town centre has traditionally been the main location where residents undertake their shopping needs. However, with continued strong competition from out-of-centre retail development and increased competition from online retailing, there is no doubt that the future role of the town centre needs to adopt away from solely being a shopping destination. Emerging trends suggest that many centres will be used increasingly for leisure and social activities, with more bars, restaurants, food outlets and community spaces opening in vacant units.

3.19 As retailers improve their multichannel offer, the expectation is that town centre stores will be used increasingly as showrooms to support e-retailing (with click and collect points and safe drop boxes for customers to collect online orders, and in-store kiosks for customers to make online purchases). Towns will need to capitalise on the opportunities that click and collect services offer for ‘linked trips’ spending, and ensure that it is an integral part of any future town centre strategy. Where overall demand for retail floorspace stabilises or declines, it is anticipated that more secondary and tertiary space, which suffers from lower levels of footfall, may be converted into other uses, including residential.

3.20 Enhancing the non-retail offer so that town centres function as more than just retail locations will also help drive footfall and increase dwell time. Towns should promote unique attractions such as heritage assets, historic buildings and cultural facilities which can differentiate a centre, make it more of a ‘destination’, and improve its attractiveness. A vital component of this will be making town centres as accessible as possible, with improved and affordable car parking, as well as investment in public realm and place marketing initiatives.
Foodstore Trends

3.21 The top four supermarkets (Sainsbury’s, Tesco, Asda and Morrisons) continue to dominate the market and represent approximately 75% of the total convenience market. With vast store networks and online offers, their coverage is reaching peak levels and the ‘race for floorspace’ has significantly diminished. Expansion plans are increasingly focused on redevelopment and refurbishment of existing stores rather than on delivering new floorspace through new superstore development. In some cases, space within larger format stores has been sub-let to restaurants, gyms and children’s play centres. Sainsbury’s have recently commenced a trail of sub-letting space in their larger stores to concessions operated by Argos.

3.22 Both Sainsbury’s and Tesco are devoting increasing amounts of space in their stores to promote their own-label clothing ranges. In early 2015, Tesco and Morrisons confirmed plans to close a number of underperforming stores – a mixture of supermarkets and smaller-format stores. The confirmed closures included the Tesco supermarket in Doncaster town centre and the Tesco Metro store in Mexborough town centre. Both of these stores ceased trading in April 2015.

3.23 The development of smaller convenience store formats for top-up food shopping has become increasingly popular in response to consumers seeking to reduce waste by moving from weekly shops to more frequent smaller shops, or to avoid the high fuel prices associated with travelling long distances. As a result, many of the main operators are expanding their smaller concept stores – Tesco Express, Sainsbury’s Local, M Local, Little Waitrose etc – and these stores are now an established part of the convenience goods market in the UK. Aldi and Lidl are also trialling smaller convenience store formats with a view to further expansion within this specific grocery sector. There is an indication that this sector may also be approaching saturation, and both Morrisons and Tesco have closed poorly-performing smaller-format stores in recent months.

3.24 The value/discount retailers are continuing to expand rapidly, having gained considerable market share during the recession, and successfully further built on this as the economic recovery continues. Aldi and Lidl have both succeeded in attracting customers who originally looked to trade down in price but not quality. Whilst this was initially viewed as a temporary response to the recession, it is clear that a more permanent shift in shopping preferences towards quality, value-orientated goods has occurred. This has placed significant pressure on the mainstream larger-format retailers who are now responding with substantial price cuts. The Danish discount retailer Netto has recently re-launched in the UK, in a joint-venture agreement.

4 Kantar Worldpanel, January 2015
with Sainsbury’s, and has confirmed expansion plans across the north of England. A Netto store at Thorne Road Retail Park in Doncaster commenced trading in November 2014.

3.25 Food retailers are also continuing to develop online offers to meet increasing consumer demand for convenient food shopping, much of which is still fulfilled through existing store networks. Click and collect services are expanding into the grocery sector with some retailers offering drive-through collection points, or options for shoppers to collect their shopping at local train stations.

The Portas Review

3.26 In May 2011, Mary Portas was appointed to lead an independent review into the future of the high street, in response to the effects of the recession on the retail industry and local high streets in particular. The report suggested measures to tackle the further decline of the high street. The 28 separate recommendations included a call to strengthen policy in favour of ‘town centres first’ following the publication of the (then draft) National Planning Policy Framework. Other recommendations from the report included:

- running town centres like businesses, by strengthening the management of high streets and developing the “Business Improvement District” model;
- reviewing the business rate system to better support small businesses and independent retailers;
- ensuring a strong town centre first approach in planning;
- looking at disincentives for landlords leaving properties vacant, empowering local authorities where landlords are negligent and making proactive use of Compulsory Purchase Order powers; and
- including the high street in neighbourhood planning and encouraging innovative community uses of empty spaces.

3.27 The government published its formal response to the Portas Review in March 2012, which accepted the majority of its recommendations. Twelve ‘Portas Pilot’ towns were chosen to participate in a scheme designed to help to rejuvenate their shopping areas. In addition, the government provided investment to help Business Improvement Districts access loans for set-up costs and funding for the High Streets Renewal Fund to reward towns which are delivering innovative plans to bring their town centres back to life. Other initiatives included:

- an annual national market day;
- doubling small business rate relief; and
community involvement in the redesigning the concept of their high streets to reinvigorate areas of decline to increase footfall and encourage people to live in town centres.

**Summary of Retail and Leisure Trends**

- The ‘traditional’ high street continues to face a number of challenges stemming from the impacts of the recent economic downturn, the tightening of retail spending in recent years, and continued significant changes in consumer shopping behaviour. The growth in online shopping and multi-channel retailing acts as tough competition for the high street, but also presents opportunities for the high street to capitalise on services like ‘click and collect’, and for retailers to move towards a seamless transition between store-based and virtual shopping experiences.

- Out-of-centre retailing remains an ever-present source of competition, and market evidence suggests that many retail parks have performed well during the economic downturn, and are becoming increasingly attractive to ‘high street’ retailers. Portfolio aspiration is generally to increase footfall through a greater product offer and mix of uses to encourage footfall and longer dwell times.

- Town centre strategies which support the continued evolution of the high street are ever more vital. This may involve providing a high quality shopping ‘experience’, maximising the benefits of tourist trade, and improving the mix of retail and non-retail outlets to increase length of stay and spend.

- It will be important for town centres to be well positioned to be able to adapt to on-going changes in the retail and leisure sector over the development plan period and to reaffirm their unique selling points – unique attractions such as heritage assets, historic buildings and cultural features – which can differentiate a centre and improve its attractiveness. Doncaster benefits from a variety of heritage and cultural attractions as identified as part of our health check assessment in Section 4, including its historic markets, market place and halls, and the new Cast theatre, which should be capitalised on.

- The on-going pattern of polarisation suggests that larger centres such as Doncaster are well placed to maintain and enhance their offer. However, this is dependent on continued investment to ensure the right mix of retailers and other services.

- It will be important for Doncaster to embrace and not compete against multi-channel retailing, by ensuring that the centre is responsive to changes in technology. This will enable the centre to tap into opportunities such as the continued growth in click and collect purchases, which provides town centres with an increasing opportunity for linked trips to other town centre destinations when customers collect orders from stores. Ensuring a vibrant and diverse mix of non-retail uses will also be essential, which should be balanced with a strategy which seeks to qualitatively distinguish the centre from higher
order retail locations by emphasising its uniqueness - the local markets and independent offer, quality of place and distinctive heritage assets.
4. **Doncaster Town Centre**

**Introduction**

4.1 Comprehensive up-to-date monitoring of town centre performance is an important exercise which is required to identify the strengths and weaknesses of a centre, establish how its vitality and viability can be improved, and to effectively plan for the future of the centre. We have undertaken a detailed and up-to-date assessment of the vitality and viability of Doncaster town centre (commonly referred to as a ‘health check’) as well as Mexborough and Thorne town centres, the two largest centres in the borough after Doncaster. Our assessment of these centres is set out in Section 5.

4.2 Our assessments use a range of indicators of vitality and viability in accordance with those set out in the in the Planning Practice Guidance\(^5\). The assessments are informed by data provided by Experian Goad’s town centre land use survey maps and ‘category reports’\(^6\), together with our own on-site surveys of each centre undertaken in February 2015 and desk-based research that draws on published primary and secondary data. We have also had regard to findings of the household telephone survey of residents across the borough – undertaken by NEMS Market Research in support of this study – to assess customer views and behaviour. We draw comparisons with the findings of the health check updates completed as part of the 2012 update.

4.3 As well as providing the base position for the future monitoring of town centre vitality and viability, this exercise identifies the key strengths of the three town centres, their deficiencies and areas that would benefit from improvement. We then use this information to inform the recommendations in subsequent sections of our report.

4.4 Our health check assessments (and subsequent analysis) refer to different types of retail and leisure floorspace, as follows.

- **‘Convenience’** goods refer to food shopping – including supermarkets and specialist stores such as bakers, greengrocers, off licences and so on.
- **‘Comparison’** goods refer to non-food shopping – including fashion, home furnishings, electrical items, DIY goods, books and music.
- **‘Retail Services’** refer to uses such as hairdressers, beauty salons, opticians, travel agents and vehicle repairs.

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5 Paragraph 5 of the ‘Ensuring the viability of town centres’ category (Reference ID: 2b-005-20140306).

6 Experian Goad’s most recently available survey data for Doncaster town centre was from June 2014 and for Mexborough town centre from September 2012. No Goad survey data was available for Thorne town centre.
‘Leisure Services’ refer to commercial leisure services such as restaurants, cafes and takeaways; bars, pubs and nightclubs; betting shops, amusements and bingo halls; theatres and cinemas. Non-retail uses such as arts centres and museums are not included in Experian Goad’s analysis, but are accounted for qualitatively through our own analysis.

‘Financial and Business Services’ refer to uses such as banks and building societies; printing and copying; employment and careers agencies; estate agents and solicitors.

Overview of Doncaster Town Centre

4.5 Doncaster town centre is a centre of sub-regional importance and provides a prime focus for shopping, leisure, employment, education, health, and cultural activities and facilities for residents within and beyond the borough. It encompasses a wide area stretching from the river Don to the north, Milethorn Lane and Broxholme Lane to the east, College Road to the south, and the railway line to the west, as shown in Figure 4.1.

4.6 The primary shopping area – the retail core of the town centre – is defined as the area between the A630/ Frenchgate Centre/former Tesco store/Church Way to the west and Market Road, East Laith Gate and Waterdale to the east (also shown in Figure 4.1):

- Primary and secondary shopping frontages are allocated within the primary shopping area. The primary frontages include a high proportion of retail uses and are located in the north west of the primary shopping area, in the Frenchgate Centre, on the pedestrianised streets of St Sepulchre Gate, French Gate, High Street, and Baxtergate leading to Market Place, which form the focus of retail activity.

- Secondary frontages offer a greater diversity of uses, such as a greater proportion of restaurant and retail service uses, and are broadly located in the east and south of the town centre, with some occupying more central and interconnecting locations. The majority of the primary frontage area of Doncaster, including High Street, St Sepulchre Gate, French Gate and Market Place and Goose Hill, is pedestrianised.

4.7 Doncaster has a large number of retail and service uses, with approximately 700 retail and service units and a total of 176,000 square metres of gross floorspace within the Primary Shopping Area7, providing a scale of services and facilities of sub-regional significance.

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7 Source: Experian Goad Doncaster, which we updated to February 2015.
The Frenchgate Centre in the north west of the primary shopping area provides the primary focus for national and regional multiple retailers. In particular, the Upper West Mall of the Frenchgate Centre between Next and Debenhams forms Doncaster’s “prime pitch” (the part of the town centre where pedestrian flows and competition for retail representation is greatest, and rents are noticeably higher than elsewhere). Retailers located here include H&M, River Island, Topshop/Topman, New Look, Monsoon and Schuh. At ground level, BHS, Boots, Superdrug and Argos are located on the North Mall with frontage onto Frenchgate, and Sainsbury’s provides an important anchor in the south of the shopping centre. Away from the North Mall, the remainder of the ground level including those stores fronting onto St Sepulchre Gate is characterised by a higher proportion of budget and discount outlets, vacancies, and independent operators than elsewhere in the Frenchgate Centre.

8 Promis Retail Report for Doncaster, downloaded 3 March 2015.
4.9 Three important multiple clothing / department stores are located outside of the Frenchgate Centre north along Baxtergate / Market Place (namely, Marks & Spencer, House of Fraser Outlet and Primark). Whilst the House of Fraser Outlet store is rather dated, all three of these stores are sizable and act as important anchors that attract shoppers out of the Frenchgate centre to the south and up to the Market Place, particularly on non-market days. Nevertheless, these stores sit in proximity to a number of discount and secondary retail outlets, and the dominance of Frenchgate Centre as the preferred location for multiple retailers, particularly fashion retailers, is clear.

4.10 Market Place provides a focal point for independent market traders and activity within the town centre. With some 400 stalls in four separate indoor market halls (the Corn Exchange, Wool Market, Fish Market and General Market), the market is fully functional three-days-a-week (on Tuesdays, Fridays and Saturdays) although many of the food stalls operate on other days of the week. The outdoor market also opens on Wednesdays, trading in antiques and bric-a-brac goods.

4.11 Until recently, a large Tesco foodstore occupied a prominent position off Church Way, to the north of the Frenchgate Centre, providing a key anchor driving footfall along Frenchgate. This store ceased trading in April 2015, and is currently under refurbishment for a B&M store, which is expected to open in autumn 2015.

4.12 Towards the southern fringe of the primary shopping area, there are two smaller shopping centres mainly accommodating independent operators, as well as budget and discount multiple retailers. The Waterdale Centre is an open street precinct located in the south of the centre, which is anchored by an Iceland store. The Waterdale Centre has a particularly tired and worn feel with nearly half of all units vacant and a number of other units underused. The smaller Colonnades Centre is adjacent to the Waterdale Centre and accommodates a Home Bargains, Fulton Foods and Poundworld.

4.13 Cast, Doncaster’s new performance venue, hosts a variety of live theatre, music, dance, comedy and other such events. Cast (along with a new Civic Centre) represents the first phase in the development of Doncaster’s new Civic and Cultural Quarter, which is located within the south of the town centre. The performance venue provides the leisure anchor for the new quarter, which is also expected to include a range of restaurants once fully complete. The Civic and Cultural Quarter is the focus of the council’s strategy to regenerate the southern end of the town centre on the back of providing an improved leisure offer in the centre.

4.14 The Doncaster Little Theatre and the Diamond Live Lounge - a new live music venue - provide further variety to the cultural offer. The remaining town centre leisure offer provides a mix of
traditional evening/night-time uses, primarily public houses and clubs, which are focused in the north east of the town centre around Silver Street/Market Road, East Laith Gate and Hall Gate, and it is apparent that these uses occupy a significant proportion of the units in this part of the centre. The Frenchgate Centre food court provides a focus for fast-food restaurant uses, and a small cluster of independent restaurants is located on Nether Hall Road, just outside the north eastern boundary of the town centre.

Out of Centre Retail and Leisure Provision in Doncaster

4.15 Doncaster has a substantial amount of out of centre retail and leisure provision as highlighted in the plans at Appendix 2 and summarised below.

- Wheatley Retail Park is the largest retail park in Doncaster and is located around 3 kilometres north east of the town centre off the A630. The centre encompasses some 14 non-food retail outlets and is the only retail park in the area that accommodates a significant number of traditionally high street retailers, which include Next, Argos, Boots, Matalan and TK Maxx. An Asda superstore, Gala Bingo and two small food outlets also form part of the centre. Wheatley Retail Park competes directly with the retail offer in Doncaster town centre.

- Crompton Retail Park is located adjacent to Wheatley Retail Park and contains a Dunelm Mill, Marstons pub and restaurant and a Goals Soccer Centre.

- Danum Retail Park is Doncaster's second largest retail park, located off York Road around 1.5 kilometres to the north west of Doncaster town centre. The retail park comprises 10 non-food retail units with major occupiers including Mothercare, Carpetright, Currys and PC World. A smaller retail park - Arkwright Road Retail Park – adjoins Danum Retail Park and includes Wilsons Carpets and Bedtime Doncaster (a bed superstore).

- A number of other retail parks and free-standing retail warehouses and stores are located nearby on the other side of York Road. Centurion Retail Park, a SCS and a gym, a Morrisons store, and Spotborough Road retail park are all located within around 500 metres to the south east (i.e. in the direction of Doncaster town centre) of the Danum Retail Park/Arkwright Retail Park. Centurion Retail Park, around 1 kilometre north west of the town centre, provides the largest of these destinations and accommodates seven non-food retailers, including Home Bargains, Maplin and Pets at Home.

- The York Road area provides a substantial cluster of out-of-centre retailing, which we subsequently refer to collectively as the “York Road Retail Park Area”.

- The smaller Thorne Road Retail Park and Leger Way Retail Park (also known as Sandall Retail Park) are located around 4 kilometres north east of Doncaster town centre off the A630, near to Wheatley Retail Park. Thorne Road Retail Park encompasses four non-food
units (Dunelm Mill, B&M, Pets at Home and Wren Kitchens) as well as an Iceland store and a McDonalds. Leger Way Retail Park comprises a Lidl, Home Bargains, Motor World and a KFC drive through.

- Balby Road Retail Park is located around 1.5 kilometres south west of the Doncaster town centre and contains a Lidl, Fitness First and McDonald’s drive through.

- Lakeside Village Outlet Shopping Centre, some 3 kilometres south east of the town centre, contains some 45 retail units. Occupiers include Marks & Spencer, Next, Clarks, Gap, Pilot and Pavers, all in outlet form. A large Toys r Us and Porcelanosa store also form part of the shopping centre, along with four fast-food/restaurant outlets.

- A B&Q warehouse is located at Catesby Business Park off White Rose Way, around 4 kilometres south east of Doncaster town centre. A Morrisons store is also located nearby.

- In addition to the foodstores mentioned above, a Tesco Extra store is located around 4 kilometres south of Doncaster town centre in Woodfield Plantation/Balby, which is the largest foodstore in Doncaster and an Asda superstore is located at Dome Leisure Park around 2.5 kilometres east of the town centre. Other main out-of-town foodstores in Doncaster include Sainsbury’s in Edenthorpe, Aldi on Bamsley Road in Doncaster and Sainsbury’s at Thorne Road in Doncaster.

- As well as the Asda store, Dome Leisure Park is home to an 11-screen Vue Cinema and Superbowl, as well as a number of food and drink outlets including Brewers Fayre, Frankie & Benny’s, McDonalds, Nando’s and Pizza Express. The Dome Leisure Centre is also located nearby.

4.16 The plans at Appendix 2 show that almost all of the out-of-centre retailing in Doncaster is within a 5-10 minute drive of the town centre. As such, these competing destinations can be considered to be within close proximity to the town centre, and the nature of the retail offer in some of the locations means the retail parks can act as direct competition with the town centre offer.

**Health Check of Doncaster Town Centre**

**Diversity of Main Town Centre Uses**

4.17 Our diversity of uses analysis is set out in Table 1 at Appendix 3 and summarised in Tables 4.1 and 4.2 below. Our assessment is based on Experian’s latest Goad survey for Doncaster town centre undertaken in June 2014, which we updated to reflect the position at February 2015. Table 4.1 further compares the composition of units in Doncaster town centre at 2015 with the position at March 2012 as identified in the 2012 study.
Table 4.1 – Doncaster Town Centre Composition of Units

<table>
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<tr>
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<tbody>
<tr>
<td></td>
<td>Units</td>
<td>% of Total</td>
<td>UK Average</td>
</tr>
<tr>
<td>Comparison Retail</td>
<td>212</td>
<td>29.1%</td>
<td>32.5%</td>
</tr>
<tr>
<td>Convenience Retail</td>
<td>49</td>
<td>6.7%</td>
<td>8.4%</td>
</tr>
<tr>
<td>Retail Services</td>
<td>83</td>
<td>11.4%</td>
<td>14.1%</td>
</tr>
<tr>
<td>Leisure Services</td>
<td>166</td>
<td>22.8%</td>
<td>22.4%</td>
</tr>
<tr>
<td>Financial and Business Services</td>
<td>78</td>
<td>10.7%</td>
<td>10.9%</td>
</tr>
<tr>
<td>Vacant</td>
<td>141</td>
<td>19.3%</td>
<td>11.4%</td>
</tr>
<tr>
<td>Total</td>
<td>729</td>
<td>100.0%</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

Source: Experian Goad survey (June 2014), Bilfinger GVA on-site Survey (February 2015) and the 2012 study.

Table 4.2 – Doncaster Town Centre Composition of Floorspace

<table>
<thead>
<tr>
<th></th>
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<tbody>
<tr>
<td></td>
<td>Floorspace (sq.m)</td>
<td>% of Total</td>
<td>UK Average</td>
</tr>
<tr>
<td>Comparison Retail</td>
<td>74,990</td>
<td>42.6%</td>
<td>36.1%</td>
</tr>
<tr>
<td>Convenience Retail</td>
<td>18,470</td>
<td>10.5%</td>
<td>15.0%</td>
</tr>
<tr>
<td>Retail Services</td>
<td>9,160</td>
<td>5.2%</td>
<td>7.4%</td>
</tr>
<tr>
<td>Leisure Services</td>
<td>37,870</td>
<td>21.5%</td>
<td>23.2%</td>
</tr>
<tr>
<td>Financial and Business Services</td>
<td>14,180</td>
<td>8.0%</td>
<td>8.2%</td>
</tr>
<tr>
<td>Vacant</td>
<td>21,460</td>
<td>12.2%</td>
<td>9.3%</td>
</tr>
<tr>
<td>Total</td>
<td>176,130</td>
<td>100.0%</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

Source: Experian Goad survey (June 2014), Bilfinger GVA on-site Survey (February 2015) and the 2012 study.

Convenience goods

4.18 Tables 4.1 and 4.2 indicate that the convenience retail provision in the centre is low compared to the UK average in terms of both the number of units and overall floorspace. Table 1 at Appendix 3 further reveals that the proportion of supermarkets in the centre is particularly low compared to the UK average. This position has since worsened following the closure of the centre’s main supermarket – the 2,029 square metres net Tesco store off Church Way – in April 2015, which occurred after our survey in February 2015.

9 Source: Experian Goad Mexborough Category Report, September 2012.
10 Index of % of total units in Mexborough compared to UK average, where UK average = 100.
11 Source: 2012 Doncaster Retail Study Update.
12 Index of % of total floorspace in Mexborough compared to UK average, where UK average = 100.
13 The recent closure of Tesco means that the centre has now lost 20% of its convenience floorspace compared to 2012.
4.19 Whilst this is a significant under representation in convenience provision, we note that the Doncaster’s markets make an important contribution to diversity in this retail category; something which is not fully identified from the Experian Goad assessment, which categorises Doncaster’s markets as just three individual market units. Nevertheless, convenience floorspace in the centre remains limited for a centre the size of Doncaster.

4.20 Following the closure in April 2015 of the Tesco foodstore off Church Way, in the north west of the primary shopping area, the Sainsbury’s store at the Frenchgate Centre currently provides the largest foodstore in the centre. The Sainsbury’s store is relatively modest in size (1,569 square metres net) and has no dedicated or at level car parking (the nearest parking is in the Frenchgate Centre’s rooftop car park and is accessed via a lift). Whilst town centre supermarkets typically cater for smaller, basket-sized shopping purchases rather than ‘main’ shopping trips, we consider that the ability of this store to function as the principal supermarket serving the town centre is somewhat limited.

4.21 The remaining convenience retail provision in the centre, including the national multiple foodstores (a foodhall within the Marks & Spencer store, two Iceland stores and a Costcutter) and the independent operators, all relatively small. We would expect each of these stores to mostly cater to basket/’top-up’ shopping only.

4.22 The national multiple foodstore provision in the centre is therefore limited for a centre the size of Doncaster, representing both a cause for concern and a clear opportunity for the town centre to enhance its offer.

Comparison goods

4.23 Tables 4.1 and 4.2 indicate that the proportion of comparison retail outlets in Doncaster town centre is below the UK average. It should be noted however, that market traders are not counted individually under the Experian Goad classification, with the market halls as a whole classified as a single convenience retail outlet. When measured as a proportion of floorspace, comparison retail provision in the centre is significantly above the UK average and indicates that comparison units in the centre tend to be larger than average, which we would expect given the sub-regional status of Doncaster.

4.24 Table 1 at Appendix 3 further reveals that the proportion of department and variety stores in Doncaster is substantially above the UK average. Large department stores (which in Doncaster comprise Debenhams, Marks & Spencer, BHS and a House of Fraser Outlet store) provide important attractors to a centre.

4.25 Clothing and footwear provision also plays an important role in attracting visitors to a centre. In Doncaster, the overall proportion of outlets and floorspace in each of the various clothing
and footwear sub-sectors is broadly in accordance with the UK averages. The centre benefits from representation of almost all of the mainstream high street clothing and footwear retailers, including Primark, Dorothy Perkins, New Look, H&M, Topshop, Topman, River Island, Next, Monsoon, Clarks, USC and Schuh. However, whilst there are a high number of lower and middle market retailers, there are few higher quality fashion multiples. This partly reflects the trends for these types of operators to focus their trading in the higher order centres/locations, such as Leeds.

4.26 The town centre also contains a wide array of other national comparison sector multiples – including, Superdrug, Boots, Waterstones, Clas Ohlson, WHSmith, HMV, Wilko, Carphone Warehouse, Vodafone, Clintons and Sports Direct – as well as a varied independent retail offer. Table 1 at Appendix 3 shows that the town centre contains representation in almost all of the comparison goods sub-sectors with no significant gaps, indicating that the centre is meeting most residents’ comparison shopping needs.

4.27 Table 4.1 further shows that the number of comparison retail outlets in the centre has fallen by 26 (-11%) since 2012, continuing the decrease in comparison retail provision in the centre identified in both the 2012 and 2010 studies. This decrease reflects wider trends in the retail sector as discussed in Section 3.

Services

4.28 Table 4.1 indicates that the loss of comparison retail provision in the town centre has not been fully compensated for by a rise in service sector uses, which is a cause for concern.

4.29 Whilst Doncaster town centre contains a broad retail service sector (as shown in Table 1 at Appendix 3), the number of outlets and proportion of floorspace dedicated to retail services in Doncaster town centre is below the UK average in both instances.

4.30 Table 1 at Appendix 3 shows that the provision of leisure services in the centre varies considerably across the leisure services sub-categories. The provision of pubs, bars and nightclubs in the centre is strong, as is the proportion of bingo, amusements and betting offices. Whilst the proportion of cafes is comparable to the UK average, Doncaster’s restaurant sector offer is weak for a town of its size, with restaurant provision in the centre significantly below the UK average. Of the restaurants that are located in the centre, a number are situated in close proximity to the bars and nightclubs on Bradford Row, Priory Walk, and to the north of Silver Street/East Laith Gate. Given their location, these restaurants are likely to primarily serve younger adults in connection with visits to the adjacent drinking establishments, rather than families or older residents. Nether Hall Road, which offers an attractive and less drinking-focused environment, also contains a growing number of more small independent restaurants which provide a range of cuisines including Greek, Italian and
Nevertheless, there is a distinct lack of family-orientated restaurants in the centre, as well as a lack of branded restaurants.

Table 1 at Appendix 3 suggests that the provision of cinemas and theatres is also limited. However, the new Cast theatre, which is located just outside of the primary shopping area, provides Doncaster with a theatre and performance venue befitting of its sub-regional status and complements the Doncaster Little theatre that is already present in the centre. The Diamond Live Lounge – a live music venue - also recently opened in previously vacant property. The absence of a cinema in the town centre represents a major gap in its leisure offer, although this is expected to be addressed as part of the on-going development of the Civic and Cultural Quarter as detailed later in this section.

Representation of financial and business services in Doncaster town centre is broadly in line with the UK average.

Offices

The office market activity report completed by Knight Frank in 2011 identified that although a notable number of office developments have taken place in Doncaster town centre, a significant proportion of the existing town centre stock is either 1960s buildings or converted Victorian residential housing. It is our consideration that this situation has not altered, and that the town centre office market is limited.

Currently, the Doncaster office market is orientated around First Point business park and Doncaster Lakeside. First Point business park is located off junction 3 of the M18 motorway, around 2 kilometres south of the town centre, which provides around 180,000 square metres of office, industrial and warehousing space). Lakeside is located around 1 kilometre north east of First Point business park and provides approximately 13,000 square metres of office space alongside a range of other uses including residential, restaurant, bars and retail.

Proportion of Vacant Street Level Property

Table 4.1 shows that Doncaster contained 141 vacant units in February 2015. This equates to a vacancy rate, measured by the proportion of vacant units, of 19.3%, which is substantially above the UK average of 11.4%. When measured by the proportion of floorspace, the vacancy rate is 12.2% compared to the UK average of 9.3%. Whilst vacancy in the centre is significantly above the UK average in terms of both the number of vacant outlets and the quantity of vacant floorspace, the lower vacancy rate in terms of floorspace suggests that the vacant units in the centre tend to be smaller in size, which can limit their attractiveness to many operators.
The previous studies (2010 and 2012) both identified substantial increases in vacancy in the centre dating back to 2005. Table 4.1 above further reveals that this trend has continued, with an additional 9 vacant units in the centre at February 2015 compared to March 2012.

As discussed in Section 3, there has been significant upheaval in the retail sector over the last decade, leading to closures, rationalisation and re-organisation amongst national multiple retailers and rising vacancy rates nationwide. Most recently, Phones 4U and the Doncaster-based Cooplands bakers both went into administration in September 2014 and February 2015 respectively. All Phones 4U outlets and nearly half of Cooplands outlets were closed nationwide, including a three Phones 4U and two Cooplands outlets in Doncaster. Nevertheless, vacancy in Doncaster town centre is particularly high.

We note that five of the vacant units in the centre are small units within the newly renovated Kings Arcade on St Sepulchre Gate, which had previously remained vacant since 2010, and provide an opportunity for small independent businesses to open up in proximity to the primary retail area.

Examination of the locations of vacant units – as shown in the vacancy plan of Doncaster town centre at Appendix 4, which is reproduced as Figure 4.3 above – reveals that vacancy in the centre is widespread across the town centre, with particular concentrations of vacant units in the following areas.

- Waterdale Centre.
- The ground floor of the Frenchgate Centre on West Mall.
- Cleveland Street/Duke Street, south west of The Colonnades.
- Cleveland Street, north east of The Colonnades / Waterdale Centre.
- Scot Lane.
- Bowers Fold.
- Silver Street / East Laith Gate junction.
- Copley Road (just outside the town centre boundary to the north east).

4.40 With the exception of the ground floor of the Frenchgate Centre, vacancy is generally concentrated outside of the primary shopping frontage areas defined on the proposals map and within the secondary shopping areas of the town centre.

4.41 Vacancy within the primary shopping frontage streets is relatively low. At the time of our survey in February 2015, the most notable vacancy in this area was Danum House, a large and prominent unit at the southern end of St Sepulchre Gate opposite the Frenchgate Centre. Danum House had lain vacant since mid-2011. Peacocks has since opened on part of the ground floor of Danum House (in June 2015) and a British Heart Foundation furnishing store is also set to open in the unit. Whilst the reoccupation of Danum House is certainly positive for the centre, that such a large and prominent unit in the centre has been let to value/charity retailers suggests that demand for retail space outside of the Frenchgate Centre is low.

4.42 Whilst short term, churn-related vacancy is essential to enable a centre to adjust and change, the prevalence of vacancy in Doncaster is indicative of long term structural vacancy, which has been found to have a detrimental impact on centres, affecting shoppers' perception of the centre, routes through the centre and dwell times, and is a matter of concern.

Retailer Representation

4.43 The quality of the retail offer within a centre provides an indication of its vitality and viability. The representation of national and regional multiples indicates the extent to which the centre is successful in attracting both retailers and shoppers and developing itself as a comparison destination.

4.44 Experian’s latest GOAD Category report for Doncaster town centre, which we updated to reflect the position at February 2015, identifies 230 multiple retailers and service operators in Doncaster as shown in Tables 4.4 and 4.5 below, equating to just under a third (32%) of all retail and service outlets in the centre. This represents a decrease from 39% in November 2008 as identified in the 2010 study.
Table 4.4 – Doncaster Town Centre Multiple Units

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<tr>
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</thead>
<tbody>
<tr>
<td></td>
<td>Multiple Units</td>
<td>% of Total</td>
<td>UK Average % of Total</td>
</tr>
<tr>
<td>Comparison Retail</td>
<td>108</td>
<td>47.0%</td>
<td>42.9%</td>
</tr>
<tr>
<td>Convenience Retail</td>
<td>20</td>
<td>8.7%</td>
<td>11.3%</td>
</tr>
<tr>
<td>Retail Services</td>
<td>18</td>
<td>7.8%</td>
<td>9.7%</td>
</tr>
<tr>
<td>Leisure Services</td>
<td>46</td>
<td>20.0%</td>
<td>20.0%</td>
</tr>
<tr>
<td>Financial and Business Services</td>
<td>38</td>
<td>16.5%</td>
<td>16.2%</td>
</tr>
<tr>
<td>Total Multiples</td>
<td>230</td>
<td>100.0%</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

Source: Experian Goad Category report (June 2014) and Bilfinger GVA on-site Survey (February 2015).

Table 4.5 – Doncaster Town Centre Multiple Floorspace

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<tr>
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</thead>
<tbody>
<tr>
<td></td>
<td>Multiple Floorspace (sq.m)</td>
<td>% of Total</td>
<td>UK Average % of Total</td>
</tr>
<tr>
<td>Comparison Retail</td>
<td>59,500</td>
<td>62.5%</td>
<td>47.8%</td>
</tr>
<tr>
<td>Convenience Retail</td>
<td>9,010</td>
<td>9.5%</td>
<td>23.2%</td>
</tr>
<tr>
<td>Retail Services</td>
<td>3,340</td>
<td>3.5%</td>
<td>4.7%</td>
</tr>
<tr>
<td>Leisure Services</td>
<td>14,200</td>
<td>14.9%</td>
<td>15.5%</td>
</tr>
<tr>
<td>Financial and Business Services</td>
<td>9,170</td>
<td>9.6%</td>
<td>8.8%</td>
</tr>
<tr>
<td>Total Multiples</td>
<td>95,220</td>
<td>100.0%</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

Source: Experian Goad Category report (June 2014) and Bilfinger GVA on-site Survey (February 2015).

4.45 In the comparison goods category the number of comparison multiples in the centre has decreased by 16 outlets since 2011. Nevertheless, the number of multiples (47.0%) remains above the national average (42.9%) and this position is even more marked when measured in terms of floorspace, which are strong vitality indicator and indicative of the good representation of key attractors in the town centre.

4.46 As noted at the beginning of this section, many of the major national comparison retailers are represented in the centre, including three department stores and almost all of the mid-market clothing retailers. Notable operators not present in the town centre include John Lewis, TK Maxx, Zara, Gap, Oasis, Warehouse, Office, Accessorize, Bank and The Body Shop.

14 Source: 2012 Doncaster Retail Study Update
15 Index of % of total multiple floorspace in Doncaster compared to UK Average, where UK Average = 100.
16 Source: 2012 Doncaster Retail Study Update
17 Index of % of total multiple floorspace in Doncaster compared to UK Average, where UK Average = 100.
4.47 Consistent with our diversity of uses assessment, there is below average representation of multiple convenience goods provision in Doncaster town centre, particularly when measured by floorspace. This position has since worsened following the closure of the centre’s Tesco store in April 2015 and the only mainstream national supermarket operator present in the town is now Sainsbury’s.

**Intentions to Change (Operator Demand)**

4.48 Retailer demand to locate in a town centre provides a good indication of the health and viability of a centre. The retail and service operator property requirements for Doncaster at March 2015 as published in the Focus EGI database are set out in Table 2 at Appendix 3.

4.49 The Focus database indicates that there are currently limited convenience and comparison retailer requirements for Doncaster (as a town rather than specifically for the town centre) and none are for major high street retailers. Consequently, Doncaster has a low level of demand for a town of its size and status and the quality of demand is particularly poor, with interest limited to discount and charity operators rather than major national multiple operators. Nevertheless, there are a number of property requirements from food and drink operators, reflecting the wider pattern of growth in this sector nationally, and indicates a demand from these types of operators to locate in Doncaster (subject to the availability of suitable properties).

**Customer Views and Behaviour**

4.50 As detailed in Section 6, a telephone survey of 1,102 households was undertaken across the borough’s catchment area as shown in the plan at Appendix 5. Further details on the definition of the catchment area, including the primary and secondary catchment areas are provided in Section 6. Residents were asked a series of questions in relation to Doncaster town centre regarding their frequency of visits, views on the offer and quality of the centre and suggested improvements. The findings of the household survey in relation to Doncaster town centre are set out below.

**Frequency of visits**

4.51 The findings of the household survey reveal that 38.9% of respondents residing within the catchment area of the borough regularly visit Doncaster town centre. When asked their frequency of visits to Doncaster town centre, 2.2% of total respondents stated that they visit the town centre daily, 8.8% visit the town centre several times a week, 15.6% visit weekly and 12.3% visit once a fortnight. However, two fifths (43.3%) of respondents living in the Doncaster catchment area visit once every three weeks or less, and 17.4% never visit Doncaster.
4.52 However, the household survey findings reveal that few residents within Doncaster's catchment area regularly visit Doncaster town centre in the evening. Amongst those respondents who stated that they visit Doncaster town centre, 5.3% visit the centre in the evening once every three weeks or more, 10.5% visit once a month, 15.9% visit a few times a year or less, and 67.2% never visit Doncaster in the evening.

4.53 Frequency of evening visits amongst those respondents within the primary catchment area only was only slightly higher than across the catchment area as a whole, with a total of 19.6% of primary catchment area respondents visiting once a month or more (compared to 15.9% across the overall catchment area). However, 63.6% of respondents in the primary catchment area still never visit Doncaster in the evening.

4.54 Those respondents who visit Doncaster town centre were also asked how often they visit the town centre markets. Over a quarter (26.6%) stated that they regularly visit the markets, with 18.7% visiting at least once a week, 7.9% visiting once a fortnight, 13.7% visiting once a month, and 16.7% visiting a few times a year. Less than a third (29.3%) of those that visit Doncaster town centre never visit the town centre markets, and 31.7% only visit the centre on market day.

Reason for Visit

4.55 Amongst those catchment area respondents that visit Doncaster town centre, the most popular reason for visiting was for non-food shopping which was cited by nearly half of respondents (49.7%). This was followed by 16.6% of respondents making trips into Doncaster town centre for both food and non-food shopping. Food shopping was the main reason for visiting was for 8.1% of respondents. Other main reasons identified for visiting the centre were for the choice of financial services such as banks and building societies (8.4% of respondents), the range of daytime and eating establishments (3.4%), the choice of leisure facilities (2.6%) and that the centre is close to work (2.9%).

Mode of Travel

4.56 The main mode of transport into Doncaster town centre was cited by those who visit as being by car/van as a driver (61.8%), followed by 9.7% travelling in by the same means as a passenger. 19.4% of visitors to the town centre did so via bus, and 5.0% travelled in by means of train. Only 1.5% and 0.4% of visitors travelled into Doncaster town centre by foot or bicycle respectively.
Main Likes

4.57 Those who visit Doncaster town centre were asked what they most like about the centre. Up to three responses for each interviewee were recorded. The most popular overall response was that Doncaster has a good selection/choice of multiple shops, which was cited by around a third of respondents (28.2%). Other likes identified were the centre's convenience and proximity to residential areas (11.0%), its familiarity (10.4%) and the selection/choice of independent shops (11.9%).

Main Dislikes

4.58 Similarly, up to three ‘dislikes’ were recorded for those interviewees resident within the Doncaster zone, who visit Doncaster town centre. The most popular specific dislike identified was the unattractive environment (8.3%), followed by the lack of car parking (6.8% of respondents) and the associated cost of car parking (6.7%). The poor choice of independent shops (3.5%), the poor choice of multiple/chain shops (3.0%) and the area being too busy (2.5%) were other factors disliked by those interviewed. ‘Nothing at all’ was cited by over half (51.7%) of all respondents.

Suggested Town Centre Improvements

4.59 The main suggested improvement to Doncaster town centre that would encourage respondents to shop more often is for the increased provision of car parking (8.7%). Improvements to the appearance of the environment was cited as another factor which, if improved, would influence people’s desire to visit the centre (7.6%). A demand for more independent shops (5.6%), the improvement of cleanliness/maintenance of the centre (4.2%) and cheaper parking (3.6%) were amongst the other factors determined by interviewees as key to attracting more visitors. Of those questioned, 18.7% stated nothing in particular and 16.2% stated don’t know. 20.0% stated that in their opinion there was no need to improve Doncaster town centre at all.

Summary of Household Survey Findings

4.60 The findings of the household survey indicate that a large number of residents in Doncaster and its surrounding catchment regularly visit Doncaster town centre. Many residents choose to visit Doncaster because of the shops and facilities available in the centre; its good selection of multiple shops was identified as the main reason for visiting the centre by a third of respondents and was the most popular reason for liking the centre. This highlights Doncaster’s role as an important comparison shopping destination for residents across the borough and within its wider catchment area.
4.61 The survey results indicate that residents are most keen to see physical improvements to the town centre, notably an increase in the provision of parking and improvements to the general appearance of the environment.

Commercial Yields and Rents

Rents

4.62 Data sourced from national and local agents by PMA, as summarised in Table 3 in Appendix 3 shows that prime Zone A rents in Doncaster reached £125 per square feet at the end of 2014. Prime town centre rents in Doncaster are therefore relatively high; amongst the comparator centres Doncaster is behind only Meadowhall, Leeds, Sheffield and Hull. Following the economic recession, Doncaster experienced a less severe decline in its prime Zone A rents than the comparator centres featured in Table 3 in Appendix 3 (expect the Meadowhall Shopping Centre, which also experienced only a slight decline) and has since recovered its prime town centre rents, which are indicative of the strength Doncaster’s national multiple retailer offer and prime town centre pitch within the Frenchgate Centre.

Yields

4.63 Away from the Frenchgate Centre and St Sepulchure Gate, the fall in prime Zone A rents since 2008 has been reflected elsewhere in the town centre. Recent letting data indicates that rents on Baxtergate and High Street have fallen considerably since before the recession.

Movement in the National Retail Rankings

4.65 We charted the movement in the UK shopping venue rankings experienced by Doncaster town centre and various comparator centres, as shown in Table 4.6, using Venuescore data from the Javelin Group. The Venuescore UK shopping rankings are based on the total number of national non-food or comparison retail multiples located within a centre. Utilising a system

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of weighting, the Venuescore analysis reflects the range and quality of national retailers represented in a centre.

Table 4.6 - Movement in the National Retail Rankings

<table>
<thead>
<tr>
<th>Centre</th>
<th>Location Grade</th>
<th>Venuescore 2014-2015</th>
<th>Venuescore 2011-2012</th>
<th>Venuescore 2010</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td>2014 Rank</td>
<td>Market/Fashion Position</td>
<td>2011 Rank</td>
</tr>
<tr>
<td>Leeds</td>
<td>Major City</td>
<td>3</td>
<td>Upper Middle/Fashion Forward</td>
<td>6</td>
</tr>
<tr>
<td>Sheffield</td>
<td>Major City</td>
<td>22</td>
<td>Middle/Fashion Moderate</td>
<td>35</td>
</tr>
<tr>
<td>Hull</td>
<td>Major Regional</td>
<td>36</td>
<td>Middle/Fashion Moderate</td>
<td>17</td>
</tr>
<tr>
<td>Doncaster</td>
<td>Major Regional</td>
<td>45</td>
<td>Middle/Fashion Moderate</td>
<td>44</td>
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<tr>
<td>Wakefield</td>
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<td>69</td>
<td>Lower Middle/Fashion Moderate</td>
<td>82</td>
</tr>
<tr>
<td>Barnsley</td>
<td>Regional</td>
<td>152</td>
<td>Lower Middle/Fashion Moderate</td>
<td>187</td>
</tr>
<tr>
<td>Scunthorpe</td>
<td>Sub-Regional</td>
<td>205</td>
<td>Lower/Fashion Moderate</td>
<td>187</td>
</tr>
<tr>
<td>Rotherham</td>
<td>Sub-Regional</td>
<td>250</td>
<td>Lower/Fashion Moderate</td>
<td>270</td>
</tr>
</tbody>
</table>


4.66 Doncaster town centre broadly maintained its position in the retail rankings between 2010 and 2014, ranking 45th nationally in 2014, which is the same as in 2010. This indicates that whilst overall comparison retail provision in the centre has decreased over this period, this decline has been limited to independent operators. Moreover, the national multiple comparison offer in Doncaster town centre has moved up the quality scale from a ‘lower middle’ market position in the 2010 and 2011 rankings, to a ‘middle’ market position in 2014, which is a positive reflection on the attractiveness as a shopping destination.

4.67 Over this same period, Leeds and Sheffield ( graded as major city centres) and Wakefield and Barnsley (graded as regional centres) have all risen in the retail rankings. Hull, the only other major regional comparator centre, has fallen 23 places in the rankings over the same period.

4.68 Doncaster town centre is ranked sixth in the Yorkshire and Humber region, behind Leeds, York, Sheffield, Hull and the Meadowhall Shopping Centre.

Pedestrian Flows

4.69 Pedestrian counts at 16 locations within Doncaster’s primary shopping area are undertaken annually by the council. The number of pedestrians passing in both directions is counted at each count location over five 15 minute intervals between 10:30 am and 4:30 pm on the last Wednesday and Saturday in March each year. We have compared this data for the years 2015, 2012, 2010 and 2007 to provide an insight into pedestrian movements and change in footfall across the primary shopping area, as set out in Table 5 and Figure 1 at Appendix 3.
4.70 The results show that Saturday is by far the busiest of the two days in the town centre; in 2015, approximately 23,000 people were counted across the count location points on Saturday compared to some 16,600 people on Wednesday. The busiest overall count location was on Baxtergate (Location 5), where some 9,100 people were counted across the two days, followed by St Sepulchre Gate (Location 6) and Market Place (Location 4), where approximately 6,300 people were counted at each site. Note that no counts were undertaken in the Frenchgate Centre, which encompasses Doncaster’s prime pitch and is where the highest footfall would be expected.

4.71 Footfall declines quickly away from the primary shopping frontage streets of Baxtergate, Sepulchre Gate and Market Place. Footfall at the eastern end of High Street and on Hall Gate is around a third that in the busiest part of the town centre (Baxtergate), in and around the Colonnades footfall is about fifth of that on Baxtergate, and in other parts of primary shopping area footfall is around a tenth of on Baxtergate.

4.72 Figure 4.7 highlights the decline in footfall across the town centre since 2007. The total footfall across all the count location points and the two count days fell between 2007 and 2015 by 18% on Wednesday and 37% on Saturday. The decline in footfall is widespread throughout the primary shopping area, although the Waterdale area has experienced the greatest reduction (a 60% decrease within the Waterdale Centre) and footfall in the Colonnades has also fallen considerably (a 55% drop). Footfall on Baxtergate, St Sepulchre Gate and Market Place has also declined over this period, albeit to a lesser extent (an average 22% decrease across the three count locations).

Figure 4.7 – Pedestrian count across 16 sites in Doncaster’s Primary Shopping Area (during five 15 minute intervals between 10:30 and 16:30 on one day)

Source: Doncaster council data
This fall in footfall can be attributed to the growing dominance of the Frenchgate Centre within Doncaster town centre and wider retail trends, which have led to a contraction of the town centre retail offer and rising vacancies. These declines in footfall are evidently a cause for considerable concern, with footfall on the busiest retail day decreasing by over a third in an eight year period. This trend needs to continue to be monitored carefully, and a continued downward momentum will pose a threat to the sustained vitality and viability of the town centre as a whole.

Accessibility

Doncaster is well connected to the strategic transport network, and occupies a strategic position in close proximity to the A1(M), M18 and M180 motorways, as well as other major roads including the A19 and A638. These link the centre to surrounding neighbourhoods, cities and towns including Sheffield, Barnsley, Rotherham, Wakefield, and Scunthorpe. The main strategic highway routes serving the town centre are the A638, which runs both south east and north west from the town centre), the A6182 (which runs south from the town centre), Balby Road (south west), Wheatley Hall Road/A630 (north east from the town centre).

Doncaster town centre is also served by an inner relief road (Church Way/A630) which cuts across the town centre and is heavily trafficked at peak times and suffers from high traffic speeds at other times. Whilst providing an important strategic north-south link across the town centre for vehicles, the town centre suffers from a degree of severance between the retail core to the south of Church Way/A630 and the town centre areas to the north, which includes key development sites such as Doncaster Waterfront (an overview of opportunity sites in Doncaster is provided later in this section) and Marshgate. The river Don and navigation canal also form a major barrier to the north of the centre.

Doncaster benefits from high quality integrated railway and bus stations within the town centre, which are directly connected to the Frenchgate Centre. However, integration between the railway and bus interchange and the rest of the town centre is poor, with access requiring pedestrians to pass up through the first floor of the Frenchgate Centre, or cross the busy A630 Trafford Way and walk via the back of the Frenchgate Centre and car park entrance.

Doncaster railway station is a major point of interchange serving the East Coast Main Line, cross-country routes between the south coast and north-east, and local services. It provides local services to Rotherham, Scunthorpe, Meadowhall and Sheffield, calling at all stops including Swinton, Mexborough, Conisbrough, Thorne and Adwick. Direct connections are also provided to London, Leeds, Hull, Sheffield, Manchester and Manchester Airport, York, Newcastle, Edinburgh, Birmingham. Major investment is planned to expand and improve
Doncaster railway station to include a new platform and passenger bridge to provide access to the platform. Work is expected to begin shortly.

4.78 Regular bus services operate to/from Doncaster to surrounding towns, centres and residential communities including services to Rotherham, Sheffield, Meadowhall, Robin Hood Airport, Goole, Lakeside Shopping Centre, Mexborough and Thorne. In addition to the bus interchange, bus stops are located around the town centre including a concentration at Duke Street, Hall Gate, Silver Street and College Road.

4.79 The main town centre car parks are the Frenchgate Centre multi-storey and rooftop car parks in the west of the town centre (approximately 900 spaces for shoppers and 500 spaces for rail users within the multi-storey car park, and 300 spaces within the rooftop car park), and the Civic Quarter multi-storey car park on College Road (850 spaces) in the south of the centre. The surface Markets car park (250 spaces) is located in the north of the centre and the Waterdale Shopping Centre car park offers 350 spaces. Significant car parking (>1,000 spaces) is also available beyond the markets car park, just north of Church Way, East Laith Gate car park (100 spaces) and land to the rear of Frances Street and King Street (115 spaces) serve the east of the town centre. In addition to the off-street car parks named above are a number of smaller car parks and on-street pay and display spaces. Parking charges apply at all of the town centre car parks listed above (Monday to Saturday daytimes).

4.80 However, access to largest car park in the town centre – the Frenchgate multi-storey – is via Grey Friar’s Road to the rear of the former Tesco store and is rather convoluted, and the Frenchgate Centre rooftop car park is poorly configured and difficult to navigate. Whilst the Frenchgate multi-storey and rooftop car parks provide direct access to the Frenchgate Centre, pedestrians are required to pass through the Frenchgate Centre to access other parts of the town centre. Beyond the Frenchgate Centre car parks, car parking adjacent or in close proximity to the primary shopping frontage streets (broadly the pedestrianised area of the town centre) is more limited and disparate, with the Markets Car Park providing the most substantial car park within easy reach of the primary shopping frontage streets and other nearby provision spread across a number of small car parks.

4.81 The locations and cost of car parking can impact on the use of a centre and drive footfall in areas close to cheap or free car parking, but also potentially deter visitors from other parts of the centre. Convenient and cheap car parking can make it easier for visitors to access specific shops or parts of the town centre and help attract visitors to a centre. A potential lack of convenient and high quality car parking in Doncaster town centre in close proximity to the centre’s primary shopping frontage streets may explain why the findings of the household survey identified a lack of car parking as one of the main reasons for disliking Doncaster town centre and an increase in provision the main suggested improvement.
4.82 Whilst we consider the supply of car parking to be adequate, it is considered there is an opportunity for the use of car parks outside the Frenchgate Centre to play a role in reinvigorating the vitality and viability of the wider town centre. This may include discounted / free car parking at certain days / times of the week, for example.

State of the Environmental Quality

4.83 Doncaster town centre benefits from a rich architectural heritage and much of the north and central areas of the primary shopping area are designated as a conservation area (east of Silver Street/Market Road, north of Printing Office Street, and along Hall Gate). This part of the town centre is home to a large number of heritage assets and attractive buildings, including the grade 1 listed St George’s Church (known as Doncaster Minister) located to north of the primary shopping area and inner ring road, which dominates skyline of the town.

4.84 The 2010 study identified seven different character areas in the primary shopping area that still prevail. A plan illustrating the location of the general character areas is reproduced as Figure 4.2. An overview of each of the character areas within the primary shopping area, as well as the surrounding areas of Nether Hall / Copley Road, St. Sepulchre Gate West, Waterfront and Marshgate (as shown in Figure 4.1 above) is provided below.

Figure 4.2 - Character Areas

Source: 2010 study
Market Place

4.85 To the north west of the central shopping area is the Market Place area, which sits at the historic heart of the town centre. The area lies within the conservation area and comprises the historic market hall buildings (The Market Hall, Com Exchange and Fish Market, which are all grade II* listed and the Wool Market, which is a grade II listed building) and Market Place – a major pedestrianised civic space at the front of the Com Exchange - interspersed with modern infills. The Market Place was recently refurbished, and provides a focal point of activity within the town centre. The markets generate significant pedestrian activity during trading hours, although the area is relatively quiet on non-market days.

4.86 The A630 (Church Way) severs the market from St George’s Minster. The absence of a clearly defined edge between Church Way and the Market Place also reinforces this separation while the large surface car park and low grade market stalls to the north are unsightly and blight the area.

Central Shopping Area

4.87 A variety of attractive and historic buildings are also located in the primary shopping frontage area surrounding St Sepulchre Gate, Baxtergate, Priory Place, High Street and Scot Lane. The majority of this area is pedestrianised and benefits from a good quality and attractive public realm featuring intermittent planting and public seating.

Frenchgate

4.88 The Frenchgate Centre is located immediately west of this area, occupying a prominent position within the town centre on St Sepulchre Gate. The extension and modernisation of the Frenchgate Centre in 2006 has provided a modern, light and clean pedestrianised environment.

Colonnades

4.89 The Colonnades Centre in the south of the town centre is functional and well-maintained with limited vacancies, but suffers from a dated appearance and the inward facing retail units mean that the centre’s contribution to the vitality of the wider area itself is limited. The wider Colonnades area, which includes Duke Street and the southern end of Cleveland Street are dominated by a number of large vacant buildings and poor quality or vacant frontages. Overall, the quality of the streetscape in this area is poor with a hotchpotch of uses and buildings of varying height and design, narrow walkways cluttered with bus stops, run down shop fronts, and limited seating and public facilities. The general condition of the pedestrian environment could benefit from improvement.
The Colonnades Centre also forms a key gateway into the primary shopping area, leading onto the inner ring road (Trafford Way) and public transport interchange. However, the building line along Trafford Way currently comprises of the rear elevation of the office buildings along the A630.

Waterdale

Adjacent to the Colonnades Centre is the Waterdale Centre, a dated shopping precinct with a high number of vacancies and low pedestrian footfall. This area of the town centre would appear to have suffered a steady decline over a number of years as part of a shift in pedestrian activity towards the Frenchgate Centre, and both the environmental quality as well as the quality of the retail offer is noticeably lower than in the primary shopping frontage area.

Hall Gate / Silver Street

Hall Gate (running east/west) and Silver Street (running north/south) form the two main secondary retail streets in the north east of the town centre and are characterised by a concentration of bars, restaurants and takeaways, interspersed with lower quality retail and professional service provision (solicitors, estate agents). These streets are not pedestrianised and pavements are fairly narrow with a number of bus stops. Silver Street is the main night-time leisure destination and comprises a number of low quality buildings and a concentration of vacancies at its northern end; overall the environmental quality is poor.

Hall Gate forms part of Doncaster's conservation area, and whilst many of its buildings are attractive and well-maintained buildings, a number of shop fronts are of poor quality, which compromise the environmental quality of this area.

Nether Hall Road / Copley Road

Nether Hall Road and Copley Road are located immediately adjacent to the Primary Shopping Area and extend from the Market Place in a north west direction. The area offers a good secondary retail location popular with specialist retailers and eateries and forms an extension to the Primary Shopping Area. These streets and are surrounded by a concentrated residential area of terraced housing.

It is evident that a high proportion of the units on Nether Hall Road and Copley Road are service operators, including a high concentration of restaurants, cafes and take-aways and a strong multi-cultural representation. The area has emerged in recent years as an important part of the daytime and evening leisure offer in Doncaster, and whilst the streets adjoin the Primary Shopping Area they have effectively formed their own sense of identity separate to...
the Primary Shopping Area. However, linkages and linked trips between the town centre and this area are, however, currently limited.

**Civic and Cultural Quarter**

4.96 To the south east of the Waterdale Centre, just outside of the town centre boundary, is the new Cast theatre, Civic Centre and a large public open space (Sir Nigel Gresley Square), recently constructed as part of Doncaster’s new Civic and Cultural Quarter. This area is now provides a high quality and modern built environment, and has increased footfall and raised the profile of this part of the town centre. However, pedestrian linkages to other parts of the town centre are still poor.

**St. Sepulchre Gate West**

4.97 St Sepulchre Gate West is located in the west of the town centre, adjacent to the primary shopping area. The railway station, a grade II listed building, and integrated bus station is located at the northern edge of the area. To the south of the station, the area includes a mix of uses, including a number of small independent shops, businesses and industrial units.

4.98 Despite being well located near to the bus and rail stations, and adjacent to the primary shopping area, this area has suffered from a lack of investment following the construction of the A630 (Trafford Way) in the 1960s. Trafford Way causes significant severance between this area and the rest of the town centre, creating a disconnected “edge-of-town” feel.

4.99 Although the area contains a number of distinctive buildings, the quality of the overall environment is generally poor and outdated, with a mismatch of property styles, uses, ages and design qualities. The area also lacks a clear gateway or landmark identity, with the listed railway station somewhat ‘lost’ behind the heavy road infrastructure.

**Summary**

4.100 Overall, the north and western part of the primary shopping area are attractive and well-maintained. Nevertheless, there are a number of prominent vacancies within this area that detract from the overall environmental quality around the Market Place, on St Sepulchre Gate, Scot Lane and a former theatre building on Church Way, as well as a number of more run down units in peripheral parts of this area, such as some of the market stalls north of the Market Place. Elsewhere in the town centre, to the east and south, the environment is generally less well maintained.
Opportunity Sites and Planned Development

4.101 Drawing the findings of the previous 2012 and 2010 studies and our up-to-date review of Doncaster town centre, we have identified the potential development opportunities listed below with which to enhance the town centre offer in Doncaster.

Key Primary Shopping Area Sites

- **Market Car Park**: This large short stay surface level car park lies at the northern end of the town centre within the Primary Shopping Area; adjoining the market. It primarily serves the market traders and their customers, and is short stay at their request in order to encourage higher trip generation. Clearly, any redevelopment would require the retention of parking spaces, but some form of retail/leisure development might be appropriate to contribute to the vitality and viability of this area further. The retention of car parking would be strongly supported by the market traders. The council is currently seeking funding to improve the ‘Irish Middle Market’, a rundown area of stalls and kiosks adjacent to the Wool Market. The council’s initial proposals are to retain some of existing stalls and encourage more of a ‘pop up’ food market in this area, although there may be opportunities to develop a multi-level building in this area.

- **Land at Frances Street and King Street (to the north of Hall Gate)**: This site lies on the northern side of Hall Gate and comprises a large NCP car park as well as back offices and service yards. Vehicular access to the site could be a constraint although use could be made of the vacant site fronting onto Hall Gate or the creation of a route through from Silver Street or East Laith Gate. This would effectively open the site up for development and more effectively link the site to primary and secondary shopping streets. It would likely be suitable for a mixed use town centre scheme, perhaps including some residential element. Any loss of car parking would have to be considered by the council as part of their overall parking strategy.

- **Former Tesco Site, Church View**: This site is located in the north west of the town centre. Whilst currently located within the town centre boundary, the site is located to the north of A630 Church Way, the main strategic highway route through Doncaster, and functions more as an edge-of-centre location. We consider that this site would be suitable for a range of non-retail uses which would help concentrate the critical mass of retail and town centre uses within the ring road. However, B&M recently announced its plans to open a store on the former Tesco site in autumn 2015.

- **The Waterdale Centre and adjacent land**: The shopping centre was purchased in late 2013 by St. Modwen, who have signalled their intention to invest in the centre in the short term to improve occupancy and footfall, and in the longer term to undertake infill or
partial redevelopment to provide a modern and attractive retail space, which could include a smaller format convenience store. A rolling programme of improvements to the centre is currently underway. St Modwen is planning to redevelop the Young Street car park, adjacent to the Waterdale Shopping Centre. The proposed development includes plans for a two-storey building, incorporating 1,000 square metres of ground floor retail space and a further 1,000 square metres of space on the first floor, planned for a variety of uses, including office, leisure and restaurants.

- **Colonnades Shopping Centre**: A strategic review of the Colonnades Shopping Centre was completed by Bilfinger GVA in February 2015, which sets out recommendations for a programme of modernisation to include a clean-up of the mall areas, lighting improvements, street furniture, signage and rebranding of the centre, and modernisation of the shop fronts. The potential enclosure of the mall with a glass roof over the open void area was also considered.

- **Frenchgate Shopping Centre**: Planning permission was granted for the change of use from retail/offices (use class A1/B1) to gymnasium (use class D2) in December 2014 to provide a 1,900 square metre gym accessed from St Sepulchre Gate as well as the roof top car park (planning application reference 14/02313/FUL and 15/00989/FUL). The gym will be occupied by Lifestyle Fitness. Planning permission was granted for the hotel application in February 2015 (planning application reference 14/02593/FULM), which proposes the change of use of a five-storey office block above the shopping centre to provide 56 en-suite rooms to the upper four floors, with conferencing, bar and reception facilities beneath.

**Other Key Town Centre Sites**

- **Civic and Cultural Quarter**: Outline planning permission for the development of Doncaster’s Civic and Cultural Quarter on 11 hectares of land in the south-west of the town centre was granted in March 2010 (reference 08/02535). The first phase was completed in 2013 and includes new civic offices, a state-of-the-art performance venue called ‘Cast’, a new public square (Sir Nigel Gresley Square) and a refurbished 850-space multi-storey car park. The development of 97 houses on the site is now underway (known as ‘The Gables’). Plans are afoot to develop a new six-screen, 1,600-seat cinema and four restaurants alongside the existing Cast theatre, which will help to complete Sir Nigel Gresley Square. A full planning application is expected to be submitted shortly with a view to the scheme opening in 2016. The continued development of the Civic and Cultural Quarter provides the opportunity to substantially improve the leisure offer of Doncaster town centre as well as introducing a new residential community, which will in itself generate new footfall into the town centre.
• **Marshgate:** The Marshgate site covers an area of approximately 5.2 hectares and is located in the north fringe of the town centre. It is defined by North Bridge Road to the east and waterways on the other three sides. The council envisage the mixed-use gateway development of the site to include new homes, local employment opportunities, community facilities, local leisure and shopping uses and public space, that is well-integrated with the rest of the town centre. Outline planning permission was granted at appeal in June 2013 for up to 9,000 square metres of new retail floorspace to provide a food superstore and retail units, as well as a range of other uses including financial and professional services, employment, restaurant, café and takeaway, education and training, vehicle showroom and MOT services (reference 11/02769/OUTM and appeal reference APP/F4410/A/1/3/2200700). This permission has not yet been implemented.

• **Doncaster Waterfront:** This 46 hectare site is located in the north of the town centre and is bounded by Church Way to the east, the East Coast Main Line to the west and the river Don to the north. The development of the Waterfront is a key regeneration priority of the council, which has worked for a number of years to facilitate the development of the area surrounding the marina, through land assembly and the provision of infrastructure. The site is envisaged as a residential-led mixed-use quarter, including, commercial, recreation, community facilities and new public open spaces, which take advantage of its waterside location, together with small-scale leisure and retail uses that serve the local area.

• **St Sepulchre Gate West:** This site is located adjacent to Doncaster railway station, forming the western gateway into the town centre. The council has identified the potential for this area to be redeveloped as a high quality mixed-use quarter, building on its excellent transport links, with a focus on office, hotel and residential uses and public realm improvements around the station area.

**Smaller Sites in the Primary Shopping Area**

4.102 There are also a number of smaller opportunity sites within the Primary Shopping Area, including:

• **Bowers Fold:** The declining, small precinct has a number of vacant units and detracts from the overall environment. Comprehensive redevelopment could open up the site and improve linkages from Market Place through to Silver Street. A more comprehensive option could include a review of the wider block north of Bower Fold, between Market Place and Silver Street.

• **54-70 Silver Street:** These units comprise of the former La Barraca bar and restaurant and adjacent vacant units at the north of Silver Street. The units at 54-60 and 64-66 Silver Street are of a particularly poor quality, and whilst the former La Barraca and the offices above
have been vacant for some time, this property is currently under refurbishment for a new bar. The refurbishment and/or redevelopment of these units would considerably enhance the environment compared to their current poor quality.

- **17-19 Cleveland Street** These two units comprise the former Wilkinson store and an adjoining unit. Both units are of a poor quality and have been vacant for some time. Redevelopment of the units or refurbishment would considerably enhance the environment compared to their current state. We understand that one of these units has recently been occupied by a charity shop.

### SWOT Analysis

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>• A centre of sub-regional importance providing a high level of comparison retail floorspace.</td>
<td>• High and increasing levels of vacancy across the town centre and a number of concentrations of prominent and long term vacancies.</td>
</tr>
<tr>
<td>• Success of the Frenchgate Centre extension in attracting national multiple retailers to the town.</td>
<td>• Limited foodstore anchors.</td>
</tr>
<tr>
<td>• Strength of the centre’s prime pitch within the Frenchgate Shopping Centre.</td>
<td>• Poor quality street environment in secondary areas</td>
</tr>
<tr>
<td>• Variety of anchor department and large clothing stores.</td>
<td>• Poor integration between the prime pitch and other parts of the town centre.</td>
</tr>
<tr>
<td>• Large quantity of car parking</td>
<td>• Poor integration between the public transport interchanges and the town centre beyond of the Frenchgate Centre.</td>
</tr>
<tr>
<td>• The Civic and Cultural Quarter, which provides a clear focus for this area of the town centre and is helping to diversify the evening economy.</td>
<td>• Weak leisure offer, with limited café/restaurant provision, a lack of family orientated and national multiple restaurants, and the absence of a cinema and family orientated entertainment facilities.</td>
</tr>
<tr>
<td>• Highly accessible centre with an integrated train and bus station adjacent to the primary shopping area.</td>
<td>• Relatively few high quality fashion multiples / independent boutique stores.</td>
</tr>
<tr>
<td>• Compact and walkable primary shopping area.</td>
<td>• Budget and discount nature of the retail offer outside the Frenchgate Centre, with value/charity shops occupying a number of prominent positions.</td>
</tr>
<tr>
<td>• Predominately pedestrianised shopping environment.</td>
<td>• Declining pedestrian footfall across the town centre.</td>
</tr>
<tr>
<td>• Environmental quality of the centre is good in prime retail areas with a variety of attractive and historic buildings including the Market Place and market hall buildings.</td>
<td>• Limited retail anchors outside of the Frenchgate Centre and Baxtergate to drive footfall in other parts of the town centre, in particular in the Waterdale Centre.</td>
</tr>
<tr>
<td>• Vibrant late night economy.</td>
<td>• The Waterdale shopping centre suffers from a dated building fabric, high vacancy and low footfall.</td>
</tr>
<tr>
<td>• Successful indoor and outdoor markets.</td>
<td>• Severance caused by the A630 and A638.</td>
</tr>
<tr>
<td>• Independent shopping provision in the centre, including a cluster of independent shops in the primary shopping area.</td>
<td></td>
</tr>
<tr>
<td>Opportunities</td>
<td>Threats</td>
</tr>
<tr>
<td>------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------</td>
</tr>
<tr>
<td>• Ongoing public and private investment (e.g. Cultural and Civic Quarter and Waterdale Shopping Centre) and interest, especially from food and drink operators.</td>
<td>• Quantity and strength of out-of-centre retailing in Doncaster, with a number of retail parks trading as open A1 and offering representation from major high street retailers, meaning they compete directly with the town centre. Competition from such destinations is also increasing and further out-of-centre development is in the pipeline such as the expansion of Wheatley Retail Park to include an M&amp;S Foodhall (which opened in May 2015) and a new larger Next store.</td>
</tr>
<tr>
<td>• Open up the station area and parts of the Frenchgate Centre to improve links to the main shopping streets and the public realm</td>
<td>• Long-term structural vacancy, compromising the quality of the town centre environment and perceptions of the town centre.</td>
</tr>
<tr>
<td>• The success of Doncaster’s national multiple non-food offer and the Frenchgate Centre in particular in attracting shoppers to the town, which provides a strong footfall generator for other parts of the town centre to tap into.</td>
<td>• Closure of the Tesco store (off Church Way), a key anchor store that previously drove footfall along Frenchgate.</td>
</tr>
<tr>
<td>• Potential to attract a variety of high quality and branded restaurants and cafes to the town centre on the back of an expanding evening leisure offer, which includes the recently opened Cast performance venue and Diamond Lounge live music venue, as well as the proposed new cinema.</td>
<td>• The Dome Leisure Park, which provides a cinema and family-orientated multiple restaurants in competition with the town centre offer. New restaurant/leisure units are also in the pipeline at the park, and this may serve to dilute demand for operator representation in the town centre.</td>
</tr>
<tr>
<td>• Substantial local authority land ownership to drive redevelopment in the centre.</td>
<td>• Emerging proposals for the development of a cinema at the Frenchgate Centre, which could impact on the potential to attract a cinema to the Civic and Cultural Quarter and would not facilitate the revitalisation of the south eastern parts of the town centre.</td>
</tr>
<tr>
<td>• Scope to improve the car parking environment and the public realm in general - including the provision of more open areas where people can congregate.</td>
<td>• Number of development opportunities in and close to the town centre, including the former Tesco site, surface car parks, waterfront sites, the remaining Civic and Cultural Quarter site, the Colonnades Shopping Centre and St Sepulchre Gate West.</td>
</tr>
<tr>
<td>• Number of development opportunities in and close to the town centre, including the former Tesco site, surface car parks, waterfront sites, the remaining Civic and Cultural Quarter site, the Colonnades Shopping Centre and St Sepulchre Gate West.</td>
<td>• Refurbishment and potential redevelopment of the Waterdale Shopping Centre to provide a strong retail anchor store at the southern end of the town centre.</td>
</tr>
<tr>
<td>• Refurbishment and potential redevelopment of the Waterdale Shopping Centre to provide a strong retail anchor store at the southern end of the town centre.</td>
<td>• Broaden the customer and visitor base of the town centre through developing the office market.</td>
</tr>
</tbody>
</table>

**Summary of the Vitality and Viability of Doncaster Town Centre**

- Doncaster is a generally healthy town centre performing in accordance with its role and function as an important sub-regional shopping destination. The Frenchgate Shopping Centre and adjacent primary shopping streets in the north west of the primary shopping area provide the focus of Doncaster’s retail offer and are performing well. The Frenchgate Centre has improved the quantity and quality of its comparison retail offer following an extension and refurbishment in 2006, and currently benefits from a concentration of
mainstream fashion multiples, a relatively low vacancy rate and a middle market fashion offer representing an upwards shift in its market position. The wider town centre also benefits from the presence of several department stores (Debenhams, BHS, a House of Fraser outlet and a Marks & Spencer).

- However, there is a spatial imbalance in performance across the centre and the performance of secondary retail areas in the east and south of the primary shopping area is considerably weaker. Overall, Doncaster town centre has experienced a decline in the quantity of its overall retail offer in recent years, particularly in the comparison retail sector, with this decline concentrated in areas outside of the Frenchgate Centre. Pedestrian footfall outside of the Frenchgate Centre has declined considerably since 2007, particularly so in secondary parts of the town centre. The location of the town’s transport interchange, which adjoins the Frenchgate Centre, has exacerbated the focus of activity on the Frenchgate Centre.

- Convenience provision in the centre is currently very limited, with no store functioning as a main-food shopping destination following the closure of Tesco. As well as representing a deficiency in the diversity of the town centre offer, larger supermarkets also act as important anchor stores in a centre, and the town centre is therefore missing out on the footfall and ‘linked trips’ generated by such provision.

- Another key concern for Doncaster is the level of vacancy in the centre. A contraction in the demand for retail floorspace as a result of wider trends and the impacts of the recession, combined with the ongoing shift in the focus of activity to the Frenchgate Centre following its 2006 refurbishment and extension, has left an excess of floorspace and high levels of vacancy across secondary parts of the town centre.

- Doncaster’s leisure and food/drink offer is limited and appears to have reduced in recent years. There is an over-concentration of pub/bar uses, and conversely very limited representation from café/restaurant uses which become important in the ‘transition’ period between retail trading hours and the evening economy. A key challenge for Doncaster is to diversify its town centre offer, to enable the centre to capitalise on the success of the Frenchgate Centre by attracting shoppers to other parts of the town centre and increasing dwell times. The introduction of more family dining restaurants, as well as a cinema, are both considered to be vitally important in this respect.
5. Mexborough and Thorne Town Centres

Introduction

5.1 In this section we set out our appraisal of the vitality and viability of the borough’s two market towns of Mexborough and Thorne. Mexborough and Thorne are defined as town centres in the Doncaster Core Strategy and are important service centres for their local catchments.

Mexborough Town Centre

5.2 Mexborough is the largest town centre in the borough after Doncaster and fulfils a wider role in meeting the local shopping and service needs of the wider Dearne Valley area.

5.3 Mexborough town centre is a traditional linear centre with the main retail provision located along the pedestrianised High Street. High Street is split into two distinct character areas with primarily traditional buildings located on the northern side of the street and a more modern retail parade set around York Square to the south.

5.4 Until recently, the main convenience retail provision within the centre comprised a (1,573 square metres net) Tesco Metro store on High Street, which acted as an important anchor store for the centre. However, this store ceased trading in April 2015 as one of 43 unprofitable stores closed by Tesco nationwide as a cost-cutting measure and the unit is currently vacant (as at May 2015). In addition, a (954 square metres net) Co-operative Food store formerly located on Swinton Road in the west of the town centre closed soon after the previous health check survey in the 2012 update was completed, although this unit has since been re-occupied by a non-food retailer (The Original Factory Shop).

5.5 The non-food offer is predominately orientated towards daily top-up comparison shopping, such as chemist items, beauty products and household goods. The town has a range of local service uses, including banks, hairdressers and opticians, commensurate with a centre of its size and catchment.

5.6 The centre also includes an indoor market hall and outdoor market, which are important local attractions. The market comprises over 90 stalls offering a variety of convenience and comparison goods. Full market days take place on Mondays, Fridays and Saturdays with a second hand market held every Thursday.
5.7 Leisure provision in the centre is focused on public houses, bars and takeaways, which are predominantly located at the eastern end of the town centre along Bank Street. However, a handful of cafes and one restaurant are also located in the centre.

5.8 A Lidl store is located to the south of Greens Way bypass, around 50 metres to the south of the town centre across the busy A6023. Following the closure of the Tesco Metro store, the Lidl now acts as the main foodstore serving Mexborough. Despite its proximity to the town centre, however, the store is physically disconnected from the town centre limiting its potential to support linked trips with the town centre. A Farmfoods store is also located around 600 metres west of the town centre on Wath Road, at the junction with Oak Road.

Diversity of Main Town Centre Uses

5.9 Tables 5.1 and 5.2 below set out the composition of Mexborough town centre by use category in terms of both the number of units and amount of floorspace, respectively. Our assessment is based on Experian’s latest Goad survey for Mexborough town centre from September 2012, which we updated to reflect the position at February 2015. The UK averages from GOAD at February 2015 are provided to highlight the relative performance of the town centre. Tables 5.1 and 5.2 further examine the changes in the town centre composition since September 2012.

5.10 Tables 5.1 and 5.2 identify a total of approximately 22,700 square metres of ground floor floorspace for retail and service units (retail, leisure and financial and business services combined), comprising 149 units.

Table 5.1 - Mexborough Town Centre Composition of Units

<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Units</td>
<td>% of Total</td>
<td>UK Average</td>
</tr>
<tr>
<td>Comparison Retail</td>
<td>43</td>
<td>28.9%</td>
<td>32.5%</td>
</tr>
<tr>
<td>Convenience Retail</td>
<td>18</td>
<td>12.1%</td>
<td>8.4%</td>
</tr>
<tr>
<td>Retail Services</td>
<td>21</td>
<td>14.1%</td>
<td>14.1%</td>
</tr>
<tr>
<td>Leisure Services</td>
<td>29</td>
<td>19.5%</td>
<td>22.4%</td>
</tr>
<tr>
<td>Financial and Business Services</td>
<td>17</td>
<td>11.4%</td>
<td>10.9%</td>
</tr>
<tr>
<td>Vacant</td>
<td>21</td>
<td>14.1%</td>
<td>11.4%</td>
</tr>
<tr>
<td>Total</td>
<td>149</td>
<td>100.0%</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

Source: Experian Goad survey (September 2012), Bilfinger GVA on-site Survey (February 2015).

19 Index of % of total units in Mexborough compared to UK average, where UK average = 100.
### Table 5.2 – Mexborough Town Centre Composition of Floorspace

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Floorspace (sq.m)</td>
<td>% of Total</td>
<td>UK Average % of Total</td>
</tr>
<tr>
<td>Comparison Retail</td>
<td>6,412</td>
<td>28.3%</td>
<td>36.1%</td>
</tr>
<tr>
<td>Convenience Retail</td>
<td>5,448</td>
<td>24.0%</td>
<td>15.0%</td>
</tr>
<tr>
<td>Retail Services</td>
<td>1,817</td>
<td>8.0%</td>
<td>7.4%</td>
</tr>
<tr>
<td>Leisure Services</td>
<td>5,667</td>
<td>25.0%</td>
<td>23.2%</td>
</tr>
<tr>
<td>Financial and Business Services</td>
<td>1,951</td>
<td>8.6%</td>
<td>8.2%</td>
</tr>
<tr>
<td>Vacant</td>
<td>1,391</td>
<td>6.1%</td>
<td>9.3%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>22,687</strong></td>
<td><strong>100.0%</strong></td>
<td><strong>100.0%</strong></td>
</tr>
</tbody>
</table>

Source: Experian Goad survey (September 2012), Bilfinger GVA on-site Survey (February 2015).

5.11 The proportion of convenience floorspace was significantly above the UK average at the time of our survey. However, following the closure of the Tesco and Cooperative stores, convenience floorspace in the centre now stands at approximately 17%, which nevertheless remains slightly above the UK average.

5.12 Table 5.1 shows that the proportion of convenience retail units in Mexborough town centre, at 12.1%, is significantly above the UK average of 8.4\(^{21}\). The convenience retail provision in the centre has until recently been reasonably good, albeit with a focus in the discount end of the market. The high street includes small convenience stores, a number of bakers, a butcher, greengrocers, health food shop, and various independent market traders. However, the recent closure of the Tesco Metro store has resulted in the loss of the centre’s main convenience store, a key anchor, and the only ‘mainstream’ foodstore operator in the centre.

5.13 Tables 5.1 and 5.2 show that the proportion of comparison retail outlets in Mexborough town centre is below the UK average, reflecting historical trends. In terms of clothing there is a strong representation of ladies clothing stores and charity shops and low representation of

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\(^{20}\) Index of % of total floorspace in Mexborough compared to UK average, where UK average = 100.

\(^{21}\) It should be noted that Experian’s Goad categorisation excludes Mexborough’s outdoor market stalls and classifies the market hall as a single convenience retail unit. Taking the market offer into account, the number and variety of convenience operators in the centre will be even higher than suggested by Table 5.1.
general/men’s clothing stores. However, we consider that the existing comparison retail provision is reasonable given the size of the town.

5.14 Retail service provision in Mexborough town centre is broadly in accordance with the UK average and has increased slightly since 2012, in terms of both the number of outlets and amount of floorspace. Representation of health and beauty outlets (i.e. barbers, hair salons, beauticians etc.) is particularly high.

5.15 The number of leisure service outlets has also increased slightly since 2012, but remains slightly below the UK average. The change in service sector uses in the centre since 2012 highlight the important and growing service function of Mexborough town centre, reflecting the national trend for growth in such uses.

5.16 Mexborough also has good representation in the financial and business services category, with a number of high street banks, building societies, financial services, property and legal services.

**Proportion of Vacant Street Level Property**

5.17 Table 5.1 above indicates that as of September 2012 (when the Experian Goad Survey was completed) there were 23 vacant units in Mexborough town centre, equating to a vacancy rate of 15.4%. Our survey, undertaken in February 2015, identified 21 vacant units which equates to a vacancy rate of 14.1%. Although the number of vacant units has reduced between the 2012 and 2015 surveys, the vacancy rate is still above the current UK average of 11.4%.

5.18 Interestingly, although the vacancy rate in terms of number of units is far higher than the national average, the percentage of floorspace is far below the national average. This illustrates that the vacant units are in general smaller units. We note that this position has recently changed, with the 1,852 square metres gross former Tesco unit currently vacant, more than doubling the level of vacant floorspace in the centre.

5.19 Six of the vacant units identified in the GOAD 2012 survey have now been occupied by varying occupiers, including The Original Factory Shop, a bar, convenience store and baby clothing store. However, four units which were used for financial services, a furniture store, bakery and a public house are now vacant. The public house (Mexborough Working Man’s Club) off Main Street is being actively marketed.
Table 5.3 – Re-occupied units in Mexborough since September 2012

<table>
<thead>
<tr>
<th>Retail Fascia / GOAD Classification</th>
<th>Address</th>
<th>Retail Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>Children’s and Infants Wear</td>
<td>16 Hartley Street</td>
<td>Comparison</td>
</tr>
<tr>
<td>Department &amp; Variety Stores</td>
<td>11 Main Street</td>
<td>Comparison</td>
</tr>
<tr>
<td>Bars &amp; Wine Bars (Tommy’s Bar)</td>
<td>92 Main Street</td>
<td>Leisure Services</td>
</tr>
<tr>
<td>Financial Services (The Money Shop)</td>
<td>49-51 Main Street</td>
<td>Financial &amp; Business Services</td>
</tr>
<tr>
<td>Cafes (Buttercup Tea Rooms)</td>
<td>Bank Street</td>
<td>Leisure Services</td>
</tr>
<tr>
<td>Convenience Store (Olive Fine Foods)</td>
<td>10 Montagu Shopping Arcade</td>
<td>Convenience</td>
</tr>
</tbody>
</table>

Source: Bilfinger GVA On-site Survey February 2015.

5.20 Although there is a higher than average vacancy rate there is a healthy turnover of units, which illustrates that the town centre has remained a reasonably attractive place for retailers. This suggests the centre is in reasonable health. However, the loss of Tesco as the main convenience anchor store in the centre could affect the centre’s ability to retain and attract retailers going forward. The relatively recent closure of this store means it is too early for the impacts of this closure on the vitality and viability of the rest of the centre to be fully assessed. However, we consider that the re-occupation of the former Tesco unit, which is currently being marketed to let, by an operator able to attract local residents into the town centre and generate linked trips with other town centre destinations will be critical for the vitality and viability of the town centre in the long term.

Retailer Representation

5.21 The main national multiples presently represented in Mexborough town centre are B&M Bargains, Superdrug, Card Factory, Specsavers and The Original Factory Shop (a discount department store), as well as the Heron Foods and Fulton Foods as noted above.

5.22 According to our survey, national multiple retailers occupy 29 out of the 149 units in the centre (19% of all retail units), compared to 37 units in our 2010 survey and 39 units in our 2012 survey. In floorspace terms, national multiples occupy 8,826 square metres (gross) of the total overall floorspace within the centre (22,687 square metres gross). This represents a marginal increase in floorspace compared to the 2012 survey (8,760 square metres), but a decrease from the 9,755 square metres identified in the 2010 survey.

5.23 The continued decline in national multiple representation within the town centre is a cause for concern, but also provides an opportunity to diversify. This trend is most likely a reflection of both current retail trends for the rationalisation of store portfolios and the relatively secondary nature of Mexborough in terms of catchment size and existing offer. Diversification to
accommodate new independent businesses could, however, provide opportunities to qualitatively distinguish Mexborough from competing centres.

Movement in the National Retail Rankings

5.24 We charted the movement in the UK shopping venue rankings experienced by Mexborough and Thorne town centres and various comparator centres, as shown in Table 5.4, using Venuescore data from the Javelin Group. It should be noted that the Venuescore rankings are based on the presence of national multiple outlets, with no credit given for the presence of independent operators. Analysis of a centre’s position in the shopping venue rankings can therefore be a rather blunt tool, and so other indicators – which consider the presence and quality of independent operators – are also important in assessing the health of smaller centres such as Mexborough and Thorne.

Table 5.4 - Movement in the UK Retail Rankings

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td></td>
<td>2014 Rank</td>
<td>2011 Rank</td>
<td>2010 Rank</td>
<td>2007 Rank</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mexborough</td>
<td>Minor District</td>
<td>1,167</td>
<td>Lower</td>
<td>1,216</td>
<td>1,452</td>
<td>953</td>
</tr>
<tr>
<td>Dinnington, Sheffield</td>
<td>Minor District</td>
<td>1,406</td>
<td>Lower</td>
<td>2,029</td>
<td>1,830</td>
<td>1,448</td>
</tr>
<tr>
<td>Wath Upon Deane</td>
<td>Minor District</td>
<td>1,468</td>
<td>Lower Middle</td>
<td>1,724</td>
<td>1,452</td>
<td>1,626</td>
</tr>
<tr>
<td>Thorne</td>
<td>Local</td>
<td>1,680</td>
<td>Lower</td>
<td>1,814</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Penistone, Bamsley</td>
<td>Local</td>
<td>1,680</td>
<td>Lower Middle</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Chapeltown, Sheffield</td>
<td>Local</td>
<td>1,895</td>
<td>Lower Middle</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Bolsover</td>
<td>Local</td>
<td>2,146</td>
<td>Lower</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Maltby, Rotherham</td>
<td>Local</td>
<td>2,775</td>
<td>Lower</td>
<td>2,142</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>


5.25 Mexborough town centre is graded as a “Minor District” in the retail rankings. Its position in the retail rankings fell almost 500 places between 2007 and 2010. Since then, however, Mexborough has gradually begun to recover its position in the rankings, rising 285 places between 2010 and 2014 to rank 1,167th nationally in 2014. However, this is still 214 places less than in 2007. Over the 2007 to 2014 period, Dinnington and Wath Upon Deame (both graded as Minor District Centres) have risen in the retail rankings, by 281 and 459 places, respectively. This indicates that Mexborough town centre was particularly affected by the impacts of the recession and whilst recovery over the last five years has been strong, the centre has not yet regained its pre-recession position.
Accessibility

5.26 The A6023 runs to the south of the town centre and links Mexborough town centre with Conisbrough and beyond to the A1(M) and Doncaster to the east. To the west the A6023 and A6022 connect Mexborough with Swinton, Wath Upon Deame, Brampton and beyond to the M1 and Rotherham.

5.27 Mexborough train station is located around 200 metres south of the town centre to the south of the A6023 Greens Way. Whilst the busy A6023 Greens Way acts as a barrier to pedestrian movement, a pedestrian crossing provides a direct pedestrian link between the train station to the town centre. Mexborough train station is located on the Sheffield to Doncaster line and provides two services per hour (Monday to Saturday daytimes) westbound to Sheffield, with one service per hour continuing to Worksop. Two eastbound services per hour (Monday to Saturday daytimes) travel through Doncaster to Scunthorpe, Adwick or Hull.

5.28 Mexborough bus station is located in the south west of the town centre in the north side of the A6023 Greens Way, around 100 metres south of the High Street. It provides six regular services (217, 218, 220, 221, 222 and X20) providing links north to Bolton upon Deame and Goldthorpe; east to Denaby Main, Conisbrough and Doncaster; south to Swinton and Rotherham; and west to Wath Upon Deame and Barnsley.

5.29 As mentioned above, the primary shopping area is pedestrianised providing safe and easy pedestrian movement within this area. Areas either side of this, however, are characterised by narrow pavements and few pedestrian crossings, inhibiting pedestrian movement within these areas.

5.30 Mexborough town centre is well provisioned with car parking facilities. The latest GOAD plan identified over 550 parking spaces within eight car parks which are located throughout the centre. The largest car park is the multi-storey car park on the south side of the centre with (backing onto the Tesco). Other car parks are provided on Bank Street, Market Place, John Street, Swinton Road and Garden Street. The majority of parking within the centre is free and unrestricted, providing more than adequate provision for those accessing the centre by car.

5.31 Mexborough town centre is therefore highly accessible by a range of transport modes especially by public transport and car and is well connected to surrounding settlements in the Deame Valley such as Swinton, Conisborough and Wath upon Deame, supporting its role as a local convenience and service centre serving the wider Deame Valley area.
State of the Environmental Quality

5.32 The High Street running through the centre of the town is pedestrianised, which enhances the environment for existing and future retailers in Mexborough. In various parts of the centre street furniture is provided along with some landscaping. Towards the fringes of the centre some of the existing units are run down and would benefit from investment.

5.33 Environmental quality within York Square has deteriorated since the previous survey, with a number of the units surrounding the square currently vacant, including the former Tesco Metro unit. A £470,000 programme of improvements to Mexborough’s indoor and outdoor market (which are located within/adjacent to York Square) recently began, comprising the installation of new market stalls, creation of a larger public open space in the square, a new entrance and new seating. The investment will substantially improve the quality of the market environment and the town’s public square.

5.34 The town centre turns its back to the main road (the A6023), and the centre’s bus and train stations, secluding the main retail street from passers-by on the main road and creating a sense of isolation. The prevalence of car parking alongside the main road further affects perceptions of the quality of the environment in the centre. People driving past the centre on the main road see the rear of units, service areas and car parking, creating perceptions of a low and poor quality profile of the centre.

5.35 Our observations suggest that the centre is relatively busy with the highest footfall is in the pedestrianised High Street area.

Opportunity Sites and Planned Development

5.36 The former United Carpets site off Station Road in Mexborough provides an opportunity site to improve the retail and leisure offer in Mexborough. This 2.7 hectare site is in an edge-of-centre location, around 150 metres south of Mexborough town centre. The council resolved to approve an outline planning application for the development of the site for a food superstore (use class A1, 2,928 square metres net), petrol filling station, access and associated car parking and ancillary works (reference: 11/03131/OUTM) in April 2012, subject to a section 106 agreement. However, a section 106 legal agreement has still not been signed.
**SWOT Analysis**

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mexborough provides the second largest town centre in the borough after Doncaster and fulfills a wider role serving the residents of the wider Dearne Valley area.</td>
<td>The centre currently lacks of a large supermarket offering a full range of food and grocery products, which would also provide an important generator of footfall in the centre and support linked trips with other town centre destinations.</td>
</tr>
<tr>
<td>Reasonable mix of comparison retailers for the size of the centre.</td>
<td>Multiple convenience retail provision in the town is limited and the remaining multiples provide only a discount/frozen foods offer.</td>
</tr>
<tr>
<td>A strong and varied independent convenience offer.</td>
<td>The quality of multiple comparison goods retailers is low, and the number of multiples has fallen since 2010.</td>
</tr>
<tr>
<td>Mexborough has a good representation of retail and financial/business services</td>
<td>Limited restaurants to provide a more varied evening leisure offer.</td>
</tr>
<tr>
<td>Presence of an indoor market hall and tri-weekly outdoor market.</td>
<td>The former Tesco store - one of the centre’s largest units in the heart of the primary shopping centre – is currently vacant. There is also a concentration of vacant units in York Square, where the Tesco unit is located, as well as on Bank Street.</td>
</tr>
<tr>
<td>A decreasing vacancy rate in the centre prior to the closure of the centre’s Tesco Metro store. Six of the vacant units identified in 2012 have now been occupied by varying occupiers which indicates a healthy level of churn within the town centre.</td>
<td>Some deterioration of environmental quality in York Square and evident lack of investment in the quality of some of the units in secondary retail areas/peripheral parts of the town centre.</td>
</tr>
<tr>
<td>The overall environmental quality of the town centre is good, centred along the pedestrianised High Street.</td>
<td>Inward facing nature of the centre and lack of active frontage onto the main road, which isolates the centre from people in cars passing-by.</td>
</tr>
<tr>
<td>Good accessibility by public transport (train station and bus depot) and private car.</td>
<td></td>
</tr>
<tr>
<td>Plentiful supply of free and unrestricted car parking.</td>
<td></td>
</tr>
<tr>
<td>Whilst representation of national multiples in the centre has declined since 2010, Mexborough has risen in the UK retail rankings over this period, indicating that the centre has fared better that other similar centres in this respect.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>The programme of improvements to Mexborough’s indoor and outdoor market will substantially improve the quality of the market environment and provides an opportunity to attract more shoppers to the town centre. The investment in York Square will also provide an attractive focal point for visits to the centre, increase footfall in this area and help to attract operators to the vacant units in this area.</td>
<td>The town centre has lost both its two mainstream convenience anchor stores since 2012 – Co-operative Food, which closed in late 2012, and Tesco Metro, which closed in April 2015. The important role of the centre as a convenience shopping destination is currently significantly diminished and is a concern for the centre going forward.</td>
</tr>
<tr>
<td>The decline in multiple representation in the centre provides an opportunity to develop the role of the centre as a distinctive local service and leisure destination and to boost the centre’s daytime and evening economies.</td>
<td>A high proportion of vacant units and, currently, a high level of vacant floorspace following the recent closure of Tesco Metro.</td>
</tr>
<tr>
<td>The availability of the former Tesco unit provides an opportunity to attract a new anchor tenant into the centre.</td>
<td></td>
</tr>
</tbody>
</table>
- The potential development of the United Carpets site to provide a new large foodstore close to the town centre, improving the convenience offer and helping to support linked trips with the town centre.
- Raise the profile of the centre through the creation of more active frontage and a higher quality environment along the main road, focusing on the bus and railway station gateways.

**Thorne Town Centre**

5.37 Thorne is a historic market town located approximately 14 kilometres north east of Doncaster town centre. Thorne is a small town centre and provides a local focus for shopping, leisure and cultural activities as well as housing, employment, health and education. Thorne contains a total of 135 retail and service units, and provides a significant convenience offer – principally a 1,171 square metres net Sainsbury’s store in the north west of the town centre off Field Road, which provides the centre’s main anchor store – together with comparison and service uses commensurate with its role as a principal local town, and a monthly market. The town centre boundary for Thorne is shown in Figure 5.1.

**Figure 5.1 - Thorne Town Centre**

5.38 Retail provision within the centre is focused along two main streets, King Street and Finkle Street, the latter of which is pedestrianised. Retail and service units are also located at either end of the centre along Silver Street and Market Place, as well as along The Green and the...
Market Place, a market square which provides the historic heart of the town centre. A farmers’ market is held in the Market Place on the first Sunday of every month 9am - 2pm and a monthly craft market also takes place on a Saturday. There are no out-of-centre retail facilities in Thorne. The nearest out-of-centre retail provision is on the outskirts of Doncaster, some 9 kilometres south-west of Thorne town centre.

**Diversity of Main Town Centre Uses**

5.39 Table 5.6 below sets out the composition of the number of units in Thorne town centre.

Table 5.6 – Thorne Town Centre Composition of Units

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Units</td>
<td>% of Total</td>
<td>UK Average % of Total</td>
</tr>
<tr>
<td>Comparison Retail</td>
<td>44</td>
<td>32.6%</td>
<td>32.5%</td>
</tr>
<tr>
<td>Convenience Retail</td>
<td>17</td>
<td>12.6%</td>
<td>8.4%</td>
</tr>
<tr>
<td>Retail Services</td>
<td>21</td>
<td>15.6%</td>
<td>14.1%</td>
</tr>
<tr>
<td>Leisure Services</td>
<td>21</td>
<td>15.6%</td>
<td>22.4%</td>
</tr>
<tr>
<td>Financial and Business Services</td>
<td>10</td>
<td>7.4%</td>
<td>10.9%</td>
</tr>
<tr>
<td>Vacant</td>
<td>22</td>
<td>16.3%</td>
<td>11.4%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>135</td>
<td>100.0%</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

Source: Experian Goad survey (September 2014), Bilfinger GVA on-site Survey (February 2015) and the 2012 study.

5.40 The total number of retail units within Thorne town centre has increased from 133 to 135 since 2012. The overall number of retail and service units in the centre has therefore remained fairly steady.

5.41 The table identifies that the number of comparison retail units has increased by 3 units since 2012 and brought the percentage of comparison retail units in line with the UK average. The split of comparison units is heavily weighted towards carpet retailers (4 units), florists (3 units), general furniture (3 units) and vehicle related units (4 units). Against the UK average there is an undersupply of telephone stores (none), newsagents and clothing stores, although it not uncommon for smaller centres such as Thorne to have a greater number of gaps in their comparison goods retail offer.

5.42 The number of convenience units has also increased from 15 to 17 units which has further increased the provision of convenience stores (12.6%) in comparison to the UK average (8.4%). The split of convenience units within Thorne is heavily weighted towards bakeries (6 units),

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22 Source: Experian Goad Mexborough Category Report, September 2012
23 Index of % of total units in Mexborough compared to UK average, where UK average = 100.
butchers (3 units), frozen food stores (2 units) and smaller convenience stores (3 units). As stated above, there is an edge-of-centre Sainsbury’s store located in the northern part of the town centre.

5.43 The overall service offer within Thorne, encompassing retail, leisure and financial/business services, has reduced by 7 units since 2012. Of some concern is that the proportion of service units has reduced to 38.6%, which is well below the UK average of 47.4%.

5.44 The proportion of retail service uses in the centre (15.6%) is slightly above the national average (14.1%). The centre contains a particularly high representation in the health and beauty sub-category (16 out of the total 21 retail service units are occupied by hairdressers and health/beauty salons). A focus on health and beauty outlets is typical for a centre the size of Thorne, and since the centre also has a post office, two opticians and a travel agents, we consider that the overall retail service provision is reasonable.

5.45 Leisure services uses in the centre comprise 15.6% of the total units (21 units), which is well below the national average of 22.4%. This can be attributed towards the limited number of bars (1 unit), cafes (4 units) and restaurants (1 unit). There is however an above average number of takeaways (8 units) and public houses (4 units), again reflecting trends which are quite typical of smaller centres.

5.46 Representation of financial and business services is below the national average due to the limited number of building societies (none), financial services (1 unit), property services (i.e. estate agents, 2 units). There is however an above average number of banks (5 units) within the town centre.

Proportion of Vacant Street Level Property

5.47 Table 5.6 above shows that the number of vacant units has increased from 18 units in 2012 (equating to a vacancy rate of 13.5%) to 22 units (a vacancy rate of 16.3%). The current vacancy rate of 16.3% is significantly above the UK average of 11.4% This compares to 10 units in November 2009 and 21 vacant units in July 2007. Whilst the vacancy rate has therefore risen considerably since 2009, the current number of vacant units in the centre is only 1 above the position at 2007.

5.48 Examination of the locations of vacant units reveals that vacancy in the centre is spread across the town centre. However, there is a cluster of five vacant units on Finkle Court, off Finkle Street, and on Market Place/the bottom of King Street. A number of the vacant units on Market Place and the bottom of King Street are listed buildings and are particularly prominent given their location in the heart of the town centre, which can significantly affect perceptions of the centre and its overall vitality and viability.
Retailer Representation

5.49 The findings of our survey in February 2015 identified the following multiple retailer representation in the town centre:

- **Convenience**: a total of 5 units (2,964 m²) in the town centre are occupied by national multiple operators; this floorspace is predominantly related to the existing Sainsbury’s store.

- **Comparison**: a total of 1,718 m² (8 units) are occupied by national multiples. The primary non-food retailers are Boots and Superdrug.

5.50 A total of 13 units are therefore occupied by multiple operators, which represents a significant decrease from the 22 units in November 2009 and 27 units in July 2007. This reflects, at least in part, wider retail trends for the consolidation of multiple retail outlets in larger centres.

5.51 We consider that the nature of the retail offer in Thorne reflects the relatively localised and predominantly service-based function that the town centre currently performs.

Movement in the National Retail Rankings

5.52 We charted the movement in the UK shopping venue rankings experienced by Thorne town centre and various comparator centres using Venuescore data from the Javelin Group, as shown in Table 5.4 above.

5.53 Thorne town centre achieves a “Local” grade in the national retail rankings and has improved its position between 2011 and 2014, rising 647 places from 1,814th in 2011 to 1,680th in 2014. No Venuescore data is available for Thorne prior to 2011. Thorne ranks higher than three of the comparator centres that are also graded as Local – Maltby, Bolsover, and Chapeltown in Sheffield – and the same as Penistone in Barnsley. Maltby’s position in the rankings fell between 2011 and 2014.

Accessibility

5.54 Thorne is situated around 13 kilometres north east of Doncaster town centre, around 1 kilometres north of the M180 and 1 kilometre east of the M18, providing links to the M62 to the north. There are two rail stations within Thorne, Thorne North and Thorne South, which are both located around 700 metres from the town centre. Thorne North is located on the Hull to Doncaster train line and provides hourly services (Monday to Saturday daytime) to Doncaster and Hull and beyond. Thorne South is located on the Doncaster to Cleethorpes line and provides hourly services (Monday to Saturday daytime) to Sheffield, Meadowhall, Rotherham, Doncaster and Scunthorpe.
A number of bus services provide regular access to and from Doncaster as well as Goole (services, 86, 86A, 87, X8 and 494).

There are a number of small off street car parks in Thorne town centre, including on Queen Street, The Green, off The Green and Bridge Street. Informal car parking also takes place on vacant sites on King Street and Church Street. The majority of car parking is free and unrestricted and whilst current parking provision appears to be adequate, the use of vacant sites suggests a lack of sufficient formal car parking in the centre and future redevelopment of these sites could comprise the availability of car parking in the centre. The informal car parking is also of a low quality, with poor and uneven surfacing.

State of the Environmental Quality

Much of the town centre core is designated as a conservation area. The centre is characterised by an attractive mix of small-scale retail, commercial and residential properties, primarily dating from the eighteenth and nineteenth centuries, although there are also a handful of significant earlier building. The historic Market Place forms the heart of the town centre. The town centre encompasses a number of listed buildings, focused on the Market Place and the southern end of King Street, that provide the centre with distinct heritage assets.

Thorne benefits from a pedestrianised primary shopping area along The Green and Finkle Street and the presence of a market square (Market Place) at the junction of Church Street, King Street and Silver Street. The pedestrianised area is relatively busy, and well maintained with the shop frontages and building facades for the most part in good condition.

However, other parts of the centre - including along King Street, Church Street and Silver Street - are characterised by narrow pavements and roads. King Street/Silver Street provides the main strategic road through Thorne, and pedestrian safety in this area is compromised. Few formal crossing points are provided on King Street, and this part of the town centre is dominated by cars and not well connected to the rest of the primary shopping area. Pedestrian footfall is low and the impact of the poor quality pedestrian environment on vitality and viability of this part of the town centre is evident.

A modern and high quality Sainsbury’s store is located in the north east of the town centre off King Street, which provides an important anchor store for the centre. Improving pedestrian linkages across King Street, between the primary shopping and the Sainsbury’s store, could better support linked trips with other destinations in the town centre.

In the southern part of the centre, around Silver Street, Bridge Street and Church Street, there are a number of poorly maintained and rundown units and shop fronts, providing a poor
quality street environment. As noted above, the town centre also contains a number of persistent and prominent vacancies in this area, including the grade II listed 1 and 2 Market Place buildings, which form the core of the town's historic seventeenth century centre. Both of these buildings have been vacant for some time and are identified as ‘at risk’ and significantly detract from the environmental quality of the Market Place.

5.62 Overall, Thorne benefits from an attractive historic town centre with a number of distinctive local heritage assets such as Peel Hill Motte. The quality of the built environment is generally high. However, the quality of the retail units and shop fronts reduces away from the primary retail area and a number of prominent and persistent vacancies detract from the overall environmental quality. Investment in addressing vacancy and improving the quality of the public realm Market Place in particular, along with improved links between the primary shopping area and the Sainsbury’s store, offers a significant opportunity to add vibrancy to the town centre.

Opportunity Sites and Planned Development

5.63 We have identified three opportunity sites within Thorne as follows:

- **No 1 & 2 Market Place** is centrally located in the market square at the heart of the town centre. This site includes a vacant listed building (which the council has identified as being ‘at risk’ due to decay and neglect) and back land.

- **Land at the rear of King Street** is an edge-of-centre located, as stated, to the rear of existing shops that front onto King Street which is the main route through the centre of the town for vehicles. The site is partially vacant but there are heritage issues due to the proximity to Thorne Motte ancient monument, which is located just to the north of the town centre, so any proposals would need to be sensitive to the character of the area. We understand that part of the site has been earmarked for a residential care home.

- **Land to the north of Darley Road** is an edge-of-centre brownfield site located immediately north of the town centre boundary, adjacent to the Sainsbury’s store. A planning application for the development of a Lidl food store on the site is expected to be submitted shortly. We would expect that the introduction of a Lidl store to this location – which is within close proximity to and easily accessible on foot from the town centre via Darley Road/Field Road – would facilitate linked trips with the town centre, thereby supporting its vitality and viability – although as it is not within the town centre any application will be required to demonstrate accordance with the National Planning Policy Framework and development plan.

5.64 Outline planning permission was granted in December 2011 for large mixed-use regeneration scheme comprising a new food superstore (to be occupied by Tesco), hotel and leisure uses,
as well as significant new employment development at Capitol Park, gateway site around 1 kilometre west of the town centre (reference: 10/03149/OUTM, 14/01957/REM). Tesco pulled out of the scheme in January 2015, although an alternative supermarket operator could potentially still come forward.

**SWOT Analysis**

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>• A small market town and the third largest town centre in the borough.</td>
<td>• Below average representation of service sector uses which has decreased since 2012. In particular, there are a limited number of cafes and restaurants that add to the visitor experience and help keep shoppers in the town centre for longer (known as ‘dwell time’).</td>
</tr>
<tr>
<td>• Strong convenience retail offer with a rise in the number of convenience retail outlets since 2012.</td>
<td>• The number of vacant units has increased considerably since 2009 and is significantly above the UK average.</td>
</tr>
<tr>
<td>• A good mix of comparison retailers with a rise in the number of comparison outlets since 2012.</td>
<td>• A concentration of vacant units on Finkle Court and at the junction of Silver Street/Market Place, including a number of prominent and persistent vacancies that negatively affect perceptions of the centre and dwell times.</td>
</tr>
<tr>
<td>• An above average proportion of retail services, including a post office and range of high street banks.</td>
<td>• Although the proportion of retail services is above national average, a particularly high number are occupied by hairdressers and health/beauty salons.</td>
</tr>
<tr>
<td>• Strong representation in the takeaways and public houses categories.</td>
<td>• King Street falls within the Primary Shopping Area, but suffers from a poor quality environment with narrow pavements, heavier traffic, and lower levels of pedestrian activity. King Street provides the main link between the retail and historic core of the town centre and the edge-of-centre Sainsbury’s anchor store; linkages between the store and the rest of the town centre are of a poor quality.</td>
</tr>
<tr>
<td>• The presence of a strong convenience anchor (Sainsbury’s), which serves to attract local residents into the town and facilitate linked trips with other destinations in the town centre.</td>
<td>• The southern and south eastern part of the town centre, behind the market square, is particularly run down with a number of poorly maintained units.</td>
</tr>
<tr>
<td>• Monthly farmers and craft markets.</td>
<td>• A number of free off-street car parks.</td>
</tr>
</tbody>
</table>
Opportunities

- Investment in the Market Place site, in particular to improve environmental quality and address prominent vacancies, provides an opportunity to capitalise on one of the centre’s key sites as a distinct focal point for visitors to the centre.
- Some potential to enhance the role of the market area, which acts as a strong attractor for centres of this type and scale.
- The proposed edge-of-centre Lidl development would improve local consumer choice, help to attract more residents to Thorne and support linked trips with destinations in the town centre.
- Development of the vacant King Street buildings also offers opportunity to support the revitalisation of the centre.

Threats

- The number of national multiple retailers in the centre has fallen considerably since 2007, which we consider is primarily a consequence of wider trends. The town centre will need to adapt to refocus its role towards convenience shopping, retail service and leisure uses.

Summary of Vitality and Viability of Mexborough and Thorne Town Centres

Mexborough

- The performance of Mexborough town centre in relation to a number of health check indicators was reasonable up until the recent closure of its Tesco Metro store. However, there are areas of concern that threaten the future vitality and viability of Mexborough town centre. With the closure of Tesco, the centre has lost its main convenience anchor store and national multiple foodstore provision in the centre is currently limited to two small frozen food specialists. The absence of a ‘mainstream’ supermarket represents a major weakness in the centre’s offer, particularly given the role of the centre as a local convenience shopping destination. This issue could potentially be addressed through:
  - the reoccupation of the former Tesco Metro unit by a major national supermarket operator; and/or
  - the provision of a new supermarket on the former United Carpets site on the edge of the town centre.

- There is a declining number of comparison multiple retailers and the quality of comparison businesses is focused towards the discount end of the market. Around the outdoor market place on York Square there is evidence of a declining environment and a notable concentration of vacant units, although these issues will hopefully be addressed through the current works to upgrade and transform the market place.
Thorne

- Thorne is performing reasonably well for a town centre of its size and provides an attractive market town environment, a monthly farmers market within the market square and a strong convenience offer. There is a reasonable mix of comparison retailers and range of everyday retail services, takeaways and public houses.

- There are some weaker health check indicators, which represent a concern. The number of vacant units in the centre is high and has increased considerably since 2009, with concentrations of vacant units at the junction of Silver Street/Market Place and on Finkle Court. The pedestrian environment on King Street is poor and footfall is low in this area, and there is limited representation of cafes and restaurants within the town centre.

- Investment to address prominent vacancies, provide a quality environment within Market Place and improve connectivity between Finkle Street and King Street/the Sainsbury’s store would enable the centre to harness its potential as a historic market town. In particular, it would provide an attractive focal point for visitors within the Market Place, drive footfall on King Street and support linked trips between the Sainsbury’s store (and potentially a Lidl store, should planning permission be granted) and Finkle Street. An improved café/restaurant offer would also assist in attracting visitors to the centre and increasing dwell times.
6. Current Patterns of Retail Spending

6.1 The last comprehensive survey of shopping patterns across the borough and adjoining local authority areas was completed in November 2009. The council has commissioned a new household survey of residents across the borough and in adjoining local authority areas to provide up-to-date evidence on shopping patterns, the findings of which underpin this study. The household telephone survey was carried out across 1,100 households in March 2015, and in this section we review the key findings.

Household Survey Methodology

Study Area Definition

6.2 The study area for the survey is shown in the plan at Appendix 5 which is reproduced as Figure 6.1 below. The study area is based on postcode sector boundaries. The study area broadly encompasses the administrative area of the borough along with the surrounding areas to the north, east and south of the borough, which form part of its catchment (namely the areas of Goole, Crowle, Epworth, Retford and Maltby/Carlton, as well as the parts of the Dearne Valley outside of the borough).

6.3 The study area comprises ten study zones (Zones 1-4 and 6-11) based on those adopted for the 2009 survey in the 2010 study to enable a comparison between the findings of the new household survey with those from the 2009 survey. We have excluded Zone 5 (Pontefract) from the current study as the findings of the 2009 household survey indicate that this area does not form part of the borough’s catchment.

6.4 Zones 1 to 4 and 7 to 11 (Doncaster, Hatfield/Doncaster North, Bawtry/Tickhill, Mexborough/Conisborough, Adwick le Street, Goole, Thorne, Epworth, Retford and Maltby/Carlton) are the same as those defined for the 2009 household survey. Zone 6 encompasses the corresponding zone adopted for the 2009 survey, but additionally includes the south-western part of Zone 5, essentially to fill the ‘gap’ left by the omission of Zone 5 with those residents of Zone 5 that are most likely to shop in the borough.

6.5 Zones 1 to 4, 6 and 8 represent Doncaster’s primary catchment area (“the PCA”), with Zones 7 to 9 and 10 forming Doncaster’s secondary catchment area. The primary catchment area broadly covers the administrative area of the borough, whereas the overall study area also includes those parts of Doncaster’s which are located adjacent to but beyond the primary catchment area, enabling us to better assess the direction of expenditure inflow and leakage in the borough.
Population and Expenditure

6.6 Office for National Statistics based population projections for each of the survey zones in the 2015 base year are set out in Tables 1A to 1C at Appendices 6 and 7, and are sourced from Experian via Micromarketer Online. The total population across all of the study area zones amounts to approximately 564,500 people in the 2015 base year.

6.7 Expenditure per person on convenience and comparison goods for each of the survey zones in 2013 were sourced from Experian via Micromarketer Online, as set out in Table 2A at Appendices 6 and 7 respectively.

6.8 In Table 2b at Appendices 6 and 7, we have made a deduction from the expenditure per capita on convenience and comparison goods to take account of the proportion of expenditure spent through special forms of trading (i.e. expenditure that does not take place in shops, such as internet and mail order shopping24). The deduction for special forms of trading in shops, such as that via mail order houses, door to door salesmen and stalls and markets. It also includes spending using digital TV and over the Internet.

24 Experian define SFT as expenditure that does not take place in shops, such as that via mail order houses, door to door salesmen and stalls and markets. It also includes spending using digital TV and over the internet.
trading is based on the estimates of non-store retail sales at 2015 provided by Experian, of 12.5% of total comparison retail expenditure and 2.3% of total convenience retail expenditure.

6.9 The total expenditure pot at 2015 is derived from the products of Tables 1 and 2B at Appendix 6 for comparison goods and Appendix 7 for convenience goods. In total, approximately £1,448 million of comparison expenditure and £1,055 million of convenience expenditure is available to residents of the study area in 2015, excluding spending on special forms of trading.

**Comparison Goods**

**Main Destinations in Doncaster Borough for Comparison Goods Shopping**

6.10 Table 6.5 sets out the estimated comparison goods turnover of the main comparison goods shopping destinations within the borough, drawn from the residents of its primary catchment area (Zones 1 to 4, 6 and 8, as detailed at the beginning of this section), which are set out in column ‘Doncaster Borough PCA Total’ of Table 6 at Appendix 6.

6.11 Table 6.6 confirms that Doncaster town centre is by far the main comparison shopping destination for residents of the primary catchment area. The centre attracts over half of all spending on comparison goods amongst residents of the primary catchment area, equating to approximately £521 million.

6.12 However, all other defined centres within the borough are much less significant in comparison retail terms. Amongst the defined centres, Carcroft attracts the next highest level of comparison expenditure after Doncaster, of £13.2 million, equating to a market share of 1.3% followed by Mexborough town centre (£12.7 million/1.3%) and Thorne town centre (£10.3 million/1.0%). Carcroft therefore attracts a greater share of comparison retail spending than the town centres of Mexborough and Thorne, which we consider can be attributed to the presence of an Asda superstore and large DFS store in Carcroft; the remaining comparison retail provision in the centre is relatively limited and small scale.

6.13 After Doncaster town centre, the most significant destinations in the primary catchment area for comparison shopping are retail parks and other out-of-centre destinations. The locations of Doncaster’s main out-of-centre comparison retail destinations are shown in the plan at Appendix 2. The most popular destination is the York Road area - including Danum, Arkwright, Centurion, Spotborough Road Retail Parks as well as a number of free-standing stores in the area - which collectively attracts the second-highest level of comparison retail spending in the borough of £43.8 million, equating to a market share of 4.5%. Key retailers with the York

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25 Retail Planner Briefing Note 12.1, October 2014.
Road retail park area include Currys, PC World, SCS and Pets at Home. Wheatley Retail Park - which includes Next, Argos, Matalan and TK Maxx - is the most popular individual out-of-centre destination in the borough and attracts £36.4 million of comparison retail spending, equating to a market share of 3.7% B&Q on White Rose Way (£20.6 million) and Lakeside Village Outlet (£19.2 million), which includes Marks & Spencer, Clarks and Gap outlets stores.

Table 6.5 Main Destinations for Comparison Goods Expenditure within Doncaster Borough PCA

<table>
<thead>
<tr>
<th>Main Non-Food Shopping Destinations within Doncaster Borough PCA</th>
<th>Comparison Goods Expenditure (£m)</th>
<th>2015 Market Share (%)</th>
<th>2012 Market Share (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Defined Centres</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Doncaster Town Centre</td>
<td>521.0</td>
<td>52.8%</td>
<td>41.9%</td>
</tr>
<tr>
<td>Carcroft</td>
<td>13.2</td>
<td>1.3%</td>
<td></td>
</tr>
<tr>
<td>Mexborough Town Centre</td>
<td>12.7</td>
<td>1.3%</td>
<td>1.2%</td>
</tr>
<tr>
<td>Thorne Town Centre</td>
<td>10.3</td>
<td>1.0%</td>
<td>0.5%</td>
</tr>
<tr>
<td>Balby</td>
<td>8.4</td>
<td>0.9%</td>
<td></td>
</tr>
<tr>
<td>Conisbrough</td>
<td>8.1</td>
<td>0.8%</td>
<td></td>
</tr>
<tr>
<td>Edlington</td>
<td>6.6</td>
<td>0.7%</td>
<td></td>
</tr>
<tr>
<td>Edenthorpe</td>
<td>5.3</td>
<td>0.5%</td>
<td></td>
</tr>
<tr>
<td><strong>Retail Parks and Other Out of Centre Destinations</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>York Road Retail Park Area, Doncaster (Danum/York Road/Arkwright/Centurion/Spotbrough Road Retail Parks and freestanding stores)</td>
<td>43.8</td>
<td>4.5%</td>
<td>8.6%*</td>
</tr>
<tr>
<td>Wheatley Retail and Shopping Park, Thorne Road, Doncaster</td>
<td>36.4</td>
<td>3.7%</td>
<td>2.3%</td>
</tr>
<tr>
<td>B&amp;Q, White Rose Way, Doncaster</td>
<td>20.6</td>
<td>2.1%</td>
<td>5.3%</td>
</tr>
<tr>
<td>Lakeside Village Outlet, White Rose Way, Doncaster</td>
<td>19.2</td>
<td>1.9%</td>
<td>1.2%</td>
</tr>
<tr>
<td>Other Retail Parks and Out-of-Centre Stores, Doncaster</td>
<td>4.3</td>
<td>0.4%</td>
<td>1.2%</td>
</tr>
</tbody>
</table>

Source: Tables 5 and 6 at Appendix 6 and the 2012 Study.

6.14 Collectively, Doncaster’s main out-of-centre comparison goods destinations listed in Table 6.6 attract around £124.3 million (12.6%) of comparison goods expenditure from the primary catchment area, just under a quarter (24%) of that spent in Doncaster town centre. Competition from out-of-centre destinations in Doncaster is therefore substantial.

6.15 Aside from Doncaster town centre, all of the defined centres in the borough are much less significant in comparison retail terms than the five aforementioned retail parks/out-of-centre stores, reflecting their more limited function for this type of retail activity.

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*26 Referenced as Danum retail park - but includes other retail warehouse in the York Road Area.*
6.16 The latest household survey results indicate that the comparison goods market share of Doncaster town centre has increased since 2012, from 41.9% amongst residents of the primary catchment area to 52.8% in 2015.

6.17 Whilst the change to the extent of zone 6 in the current study is likely to have inflated the market share of Doncaster town centre slightly in comparison to the 2012 study, we expect this increase to be minor. Rather, we consider that the increase in market share is a result of a strengthening comparison retail offer within Doncaster town centre over this period, specifically within the Frenchgate Centre, combined with national changes in spending across the different types of comparison goods.

6.18 Spending on clothes and shoes, which form the focus of the comparison shopping provision in Doncaster town centre, now accounts for approximately 29% of the total comparison goods spending of the primary catchment area residents compared to 24% at 2012. In contrast, the proportion of spending on bulky comparison goods such as household appliances and DIY products, which are more typically sold from retail parks, has decreased. These changes, combined with the strengthened clothing and fashion retail offer in the Frenchgate Centre, are likely to contribute to the stronger performance of Doncaster town centre in the most recent household telephone survey.

6.19 However, this recent rise in the market share of Doncaster town centre should be read in the context of the findings of our 2010 Accessible Retail Report, ‘Case Studies into the Impact of Out-of-Centre Retailing on Town Centres’. The report identified that Doncaster experienced a long period of out-of-centre development over the period 1983-2006 at the expense of town centre investment, with subsequent analysis identifying a decline in town centre market share, particularly in the more ‘bulky’ goods categories. However, following substantial investment in the town centre – namely the opening of the Frenchgate Centre extension in 2006 – the town centre has since clawed back its lost market share.

Main Leakage Destinations for Comparison Goods Shopping

6.20 Table 6.7 summarises the main comparison goods shopping destinations outside of the borough for residents of the borough’s primary catchment area and their estimated comparison goods spending at these locations, which is referred to as ‘leakage’, as identified in column ‘Doncaster Borough PCA Total’ of Table 6 at Appendix 6.

27 Derived from Table 12 at Appendix 3 of the 2012 study.
28 Table 4B at Appendix 6
29 Table 2 at Appendix 3 of the 2012 study.
Table 6.7 Main Destinations for Comparison Goods Expenditure Outside of Doncaster Borough PCA

<table>
<thead>
<tr>
<th>Main Comparison Goods Shopping Leakage Destinations</th>
<th>Comparison Goods Expenditure ‘Leakage’ (£m)</th>
<th>Market Share (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Defined Centres</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sheffield City Centre</td>
<td>19.5</td>
<td>2.0%</td>
</tr>
<tr>
<td>Rotherham Town Centre</td>
<td>12.2</td>
<td>1.2%</td>
</tr>
<tr>
<td>Leeds City Centre</td>
<td>11.6</td>
<td>1.2%</td>
</tr>
<tr>
<td>Scunthorpe Town Centre</td>
<td>8.5</td>
<td>0.9%</td>
</tr>
<tr>
<td>Pontefract Town Centre</td>
<td>7.4</td>
<td>0.8%</td>
</tr>
<tr>
<td><strong>Retail Parks and Other Out of Centre Destinations</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Meadowhall Shopping Centre, Sheffield</td>
<td>55.8</td>
<td>5.7%</td>
</tr>
<tr>
<td>Parkgate Shopping Park, Stadium Way, Rotherham</td>
<td>28.2</td>
<td>2.9%</td>
</tr>
<tr>
<td>Cortonwood Retail Park, Brampton, Bamsley</td>
<td>20.6</td>
<td>2.1%</td>
</tr>
</tbody>
</table>

Source: Tables 5 and 6 at Appendix 6.

6.21 The principal leakage destination for comparison goods spending is the Meadowhall Shopping Centre in Sheffield, which attracts an estimated £55.8 million from the primary catchment area, equating to a market share of 5.7%. Meadowhall Shopping Centre is therefore the second most popular comparison goods shopping destination for residents of the primary catchment area, behind Doncaster town centre. Parkgate Shopping Park in Rotherham is also a principal shopping destination for residents of the primary catchment area and attracts £28.2 million of comparison goods expenditure leakage, followed by Cortonwood Retail Park in Brampton (£20.6 million) and Sheffield City Centre (£19.5 million). All four of these destinations – three of which are out-of-centre – are more popular for comparison goods shopping than any of the borough’s defined centres, with the exception of Doncaster town centre.

Inflow of Comparison Goods Expenditure from Outside the PCA

6.22 Shopping facilities within Doncaster’s primary catchment area also draw comparison goods expenditure from residents outside of the primary catchment area (but within the secondary catchment area – zones 7, and 9 to 11 – as detailed at the beginning of this section), which is referred to as ‘inflow’. The greatest inflows are to the Doncaster town centre, which attract a total £66.7 million of expenditure from residents outside of the primary catchment area, in Zones 7 (Goole), 9 (Epworth), 10 (Retford) and 11 (Maltby/Carlton), accounting for 14.4% of residents total spending on comparison goods.

6.23 Doncaster Town centre is the second most popular shopping destinations for residents of Zones 7 (Goole), 9 (Epworth), 10 (Retford), behind Goole, Scunthorpe and Retford town centres,
respectively. In Zone 11 (Maltby/Carlton), Doncaster town centre is the third most popular comparison goods shopping destination, after Worksop town centre and Meadowhall Shopping Centre. Doncaster town centre is therefore an important comparison goods shopping destination for these residents, which is expected given they are located within Doncaster’s catchment area.

### Table 6.8 Main Comparison Goods Expenditure Inflow to Destinations within Doncaster Borough PCA from the Secondary Catchment Area

<table>
<thead>
<tr>
<th>Main Comparison Goods Expenditure Inflow to Destinations within Doncaster Borough PCA</th>
<th>Comparison Goods Expenditure 2015 (£m)</th>
<th>Market Share 2015 (%)</th>
<th>Market Share 2012 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doncaster Town Centre</td>
<td>66.7</td>
<td>14.4%</td>
<td>11.4%</td>
</tr>
<tr>
<td>Lakeside Village Outlet, White Rose Way, Doncaster</td>
<td>10.5</td>
<td>2.3%</td>
<td>2.9%</td>
</tr>
<tr>
<td>B&amp;Q, White Rose Way, Doncaster</td>
<td>2.1</td>
<td>0.4%</td>
<td>1.4%</td>
</tr>
<tr>
<td>Danum/York Road/Arkwright Retail Parks, Doncaster</td>
<td>2.9</td>
<td>0.6%</td>
<td>0.9%</td>
</tr>
<tr>
<td>Other Destinations in the PCA</td>
<td>7.0</td>
<td>1.5%</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total Inflow to Destinations in PCA Total</strong></td>
<td><strong>89.2</strong></td>
<td><strong>19.3%</strong></td>
<td>-</td>
</tr>
</tbody>
</table>

Source: Tables 5 and 6 at Appendix 6 and the 2012 Study.

6.24 The household survey results further indicate that the inflow to Doncaster town centre from the secondary catchment area zones has increased since 2012, when inflow to Doncaster town centre accounted for 11.4% of the secondary catchment area residents total spending on comparison goods\(^30\), compared to the current 14.4% shown in Table 6.8 above.

### Comparison Goods Expenditure Retention

#### Overall Retention Rate

6.25 Table 6.9 shows that, of the primary catchment area’s residents total £985.9 million expenditure on comparison goods, 77.6% is spent in stores and centres within the primary catchment area, which is known as the “retention rate”. The remaining 22.4% of the total expenditure currently leaks to stores located outside of the primary catchment area.

6.26 This is a high rate of comparison goods expenditure retention, particularly given the proximity of the borough to Meadowhall Shopping Centre and indicates that the comparison goods offer in the borough is meeting many residents’ needs. We would consider that, given the presence of competing facilities, particularly Meadowhall, the scope to improve this level of retention to any significant degree is limited.

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\(^{30}\) Derived from Table 12 at Appendix 3 of the 2012 study.
Table 6.9 Comparison Goods Expenditure Spent in Stores and Centres within the PCA

<table>
<thead>
<tr>
<th>Comparison Goods Destinations</th>
<th>Comparison Goods Expenditure (£m)</th>
<th>Market Share (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Destinations within Doncaster Borough PCA</td>
<td>764.7</td>
<td>77.6%</td>
</tr>
<tr>
<td>All Destinations outside Doncaster Borough PCA</td>
<td>221.2</td>
<td>22.4%</td>
</tr>
<tr>
<td><strong>Overall Total</strong></td>
<td><strong>985.9</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

Source: Tables 5 and 6 at Appendix 6.

Retention Rate by Zone

6.27 Examination of the retention rate by zone – which is the proportion of expenditure on comparison goods available to residents in a specific zone that is spent in centres and stores located within the primary catchment area – enables us to identify whether there are any zones suffering from a localised deficiency in the comparison goods provision and those zones where the local offer is meeting residents’ needs.

6.28 Within the individual primary catchment area zones, the retention rate (the “retention rate by zone”) is highest in Zone 1 (Doncaster) and Zone 2 (Hatfield / Doncaster North, at 90.8% and 92.2%, respectively (see row ‘Doncaster Borough Primary Catchment Area Total’ in Table 5 at Appendix 6). The retention rate by zone is a more modest 78.8% and 71.4% in Zone 3 (Bawtry/Tickhill) and Zone 6 (Adwick le Street), respectively. The retention rate by zone is a lower 63.0% and 62.4% in Zone 8 (Thorne) and Zone 4 (Mexborough/Conisborough), respectively.

6.29 Residents of Zones 3 and 4 are located within easy reach of the Meadowhall Shopping Centre as well as Rotherham and Sheffield. Expenditure leakage to nearby facilities outside of the primary catchment area is therefore inevitable. Similarly, residents in Zone 6 (Adwick le Street) are within easy travelling distance of Pontefract and Leeds, and Scunthorpe is relatively close by for residents of Zone 8 (Thorne).

Local Retention Rate

6.30 The ‘local’ retention rate is the proportion of the total expenditure of residents in a specific zone on comparison goods, which is spent in centres and stores located within that zone and provides an indication as to whether there are any localised deficiencies in retail provision. Table 6.10 summarises the local retention rate for each of the primary catchment area zones and is highest for Zone 1, which encompasses Doncaster, at 85.4%. In other words, over 85% of comparison goods expenditure which is available to residents in Zone 1 is spent at destinations in zone 1 (which includes Doncaster town centre, Wheatley Retail Park and Lakeside Village Outlet).
The local comparison goods retention rates are much lower in all of the other zones within the primary catchment area. The comparison retail provision in all of these zones is relatively limited, even in the two defined town centres of Mexborough and Thorne, and therefore lower levels of expenditure retention are to be expected. Residents undertake their comparison goods shopping at larger comparison retail destinations nearby, primarily Doncaster town centre, followed by the town’s retail parks, Meadowhall, Parkgate Shopping Park in Rotherham and Cortonwood Retail Park in Brampton.

Table 6.10 Local Comparison Goods Retention Rates for PCA zones

<table>
<thead>
<tr>
<th>Zone</th>
<th>Local Retention Rate (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 (Doncaster)</td>
<td>85.4</td>
</tr>
<tr>
<td>2 (Hatfield/Doncaster North)</td>
<td>6.4</td>
</tr>
<tr>
<td>3 (Bawtry/Tickhill)</td>
<td>10.1</td>
</tr>
<tr>
<td>4 (Mexborough/Conisbrough)</td>
<td>18.3</td>
</tr>
<tr>
<td>6 (Adwick le Street)</td>
<td>11.4</td>
</tr>
<tr>
<td>8 (Thorne)</td>
<td>16.9</td>
</tr>
</tbody>
</table>

Source: Table 5 at Appendix 6.

Comparison Goods Market Shares

Below, we provide an analysis of the comparison goods market shares achieved by each of the three town centres in the borough: namely, Doncaster, Mexborough and Thorne, along with the Meadowhall Shopping Centre, which is the most significant comparison retail destination outside of the borough for residents of the primary catchment area, as summarised in Table 6.11.

Table 6.11 Comparison Goods Market Shares of Doncaster, Mexborough and Thorne Town Centres

<table>
<thead>
<tr>
<th>Destination</th>
<th>Zone 1</th>
<th>Zone 2</th>
<th>Zone 3</th>
<th>Zone 4</th>
<th>Zone 6</th>
<th>Zone 8</th>
</tr>
</thead>
<tbody>
<tr>
<td>Doncaster Town Centre</td>
<td>69.4%</td>
<td>65.1%</td>
<td>53.6%</td>
<td>36.4%</td>
<td>49.1%</td>
<td>32.3%</td>
</tr>
<tr>
<td>Mexborough Town Centre</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>4.5%</td>
<td>0.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Thorne Town Centre</td>
<td>0.1%</td>
<td>0.6%</td>
<td>0.0%</td>
<td>0.0%</td>
<td>0.1%</td>
<td>15.3%</td>
</tr>
<tr>
<td>Meadowhall Shopping Centre</td>
<td>4.1%</td>
<td>2.7%</td>
<td>10.2%</td>
<td>9.0%</td>
<td>3.8%</td>
<td>3.8%</td>
</tr>
</tbody>
</table>

Source: Table 5 at Appendix 6.
Doncaster Town Centre

6.33 Doncaster town centre attracts between 49% and 69% of the comparison goods expenditure of residents in four of the six zones in the primary catchment area (Zones 1, 2, 3 and 6), and around a third of that in the remaining two zones (Zones 4 and 8), confirming that Doncaster fulfils an extensive role within the primary catchment area in terms of comparison retailing.

Mexborough Town Centre

6.34 Mexborough town centre achieves a maximum comparison goods market share of just 4.5% in its own zone (Zone 4) and does not attract a market share in any of the other five zones in the primary catchment area. This evidence confirms that whilst Mexborough is the second largest town centre in the borough, its role as a comparison goods destination is extremely localised, albeit in accordance with its intended role.

Thorne Town Centre

6.35 Thorne town centre achieves its highest comparison goods market share of 15.3% in its own zone (Zone 8), but does not achieve a material market share in any of the remaining five zones in the primary catchment area. This evidence indicates that the attraction of Thorne in terms of comparison goods retailing is very localised, which is in accordance with its intended role.

Meadowhall Shopping Centre

6.36 Meadowhall Shopping Centre attracts around a tenth of the comparison goods expenditure from both Zone 3 and Zone 4, which are the two closest zones to Meadowhall. Elsewhere within the primary catchment area, Meadowhall achieves a market share of 3% to 4%, confirming that the influence of Meadowhall within Doncaster is limited to the western part of the borough.

Current Patterns of Spending on Convenience Goods

Main destinations in Doncaster Borough for Food and Grocery Shopping

6.37 Table 6.12 below summarises the estimated convenience goods turnovers of the main foodstores located within the borough, drawn from the residents of the primary catchment area (zones 1 to 4, 6 and 8), which are set out in column 'Doncaster Borough PCA Total' of Table 5 at Appendix 7.

6.38 Table 6.12 shows that, amongst the primary catchment area resident’s, the most popular individual destinations for food and grocery shopping within the borough are:
the Asda store at Dome Leisure Park which has a convenience goods turnover of around £66.7 million and a market share of 9.1%;

the Tesco Extra store at Woodfield Plantation in Doncaster, which has a convenience goods turnover of £49.8 million convenience turnover and a market share of 6.8%; and

the next most popular individual destinations for convenience shopping in Doncaster Borough are: the Asda store in Carcroft; Tesco in Edenthorpe; Morrisons on York Road, Aldi on Bamsley Road and Sainsbury's on Thome Road, all in Doncaster; and Asda in Rossington, which each attract in excess of £20 million of convenience goods expenditure from the primary catchment area residents. A further five individual facilities in the study area - the Asda stores at Wheatley Shopping Centre, Conisbrough and Edlington, Morrisons in Arnhorpe and Lidl in Mexborough - also achieve a convenience retail turnover in excess of £10 million.

None of the main foodstores in Doncaster, Mexborough or Thorne town centres achieve a convenience retail turnover in excess of £10 million. The main foodstores in Doncaster town centre – Sainsbury’s, Tesco (prior to its closure) and Marks & Spencer - together with other stores in Doncaster town centre collectively achieve a convenience retail turnover of £44.7 million and a market share of 6.1%; taken as a whole, Doncaster town centre is only the third most popular destination within the borough for spending on convenience goods. The role of Doncaster town centre as a convenience retail destination has declined since 2010, when Doncaster town centre achieved a market share of 16.6% (Doncaster town centre achieved a market share of 9.1% in 2012).

Following the recent closure of the Tesco store in Doncaster town centre – which post-dated the household survey – the convenience retail turnover of Doncaster town centre is likely to have reduced, as we do not expect that shoppers using the former Tesco store will necessarily use the other town centre facilities instead.

The dominance of out-of-centre foodstores in Doncaster is evident. Spending in the six main out-of-centre foodstores in Doncaster (Asda at Dome Leisure Park, Tesco Extra at Woodfield Plantation, Morrisons on York Road, Aldi on Bamsley Road, Sainsbury’s at Thome Road and Asda at Wheatley Retail Park) amounts to £217 million, almost five times that spent in Doncaster town centre as a whole (£44.7 million). In the 2012 update, spending in the six main out-of-centre destinations amounted to around 3.5 times that in Doncaster town centre, indicating that shoppers are increasingly shopping in out-of-centre foodstores rather than destinations in Doncaster town centre. The closure of the Tesco store in Doncaster town centre is likely to have exacerbated this shift in spending away from Doncaster town centre.
## Table 6.12 Main Destinations for Convenience Goods Expenditure within the PCA

<table>
<thead>
<tr>
<th>Main Food and Grocery Shopping Destinations within Doncaster Borough PCA</th>
<th>Convenience Goods Expenditure (£m)</th>
<th>Market Share (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Doncaster Town Centre</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sainsbury’s, Frenchgate Centre</td>
<td>8.7</td>
<td>1.2%</td>
</tr>
<tr>
<td>Tesco, Church View</td>
<td>9.1</td>
<td>1.2%</td>
</tr>
<tr>
<td>Marks &amp; Spencer, Baxtergate</td>
<td>5.6</td>
<td>0.8%</td>
</tr>
<tr>
<td>Other Stores</td>
<td>21.3</td>
<td>2.9%</td>
</tr>
<tr>
<td><strong>Doncaster Town Centre Total</strong></td>
<td><strong>44.7</strong></td>
<td><strong>6.1%</strong></td>
</tr>
<tr>
<td><strong>Mexborough Town Centre</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tesco Metro, York Square</td>
<td>9.2</td>
<td>1.3%</td>
</tr>
<tr>
<td>Other Stores</td>
<td>2.4</td>
<td>0.3%</td>
</tr>
<tr>
<td><strong>Mexborough Town Centre Total</strong></td>
<td><strong>11.6</strong></td>
<td><strong>1.6%</strong></td>
</tr>
<tr>
<td><strong>Thorne Town Centre</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sainsbury’s, King Street</td>
<td>9.7</td>
<td>1.3%</td>
</tr>
<tr>
<td>Other Stores</td>
<td>2.0</td>
<td>0.3%</td>
</tr>
<tr>
<td><strong>Thorne Town Centre Total</strong></td>
<td><strong>11.6</strong></td>
<td><strong>1.6%</strong></td>
</tr>
<tr>
<td><strong>Other Stores in Doncaster Borough PCA</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Within Doncaster</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Asda, Dome Leisure Park, Bawtry Road</td>
<td>66.7</td>
<td>9.1%</td>
</tr>
<tr>
<td>Tesco Extra, Woodfield Plantation</td>
<td>49.8</td>
<td>6.8%</td>
</tr>
<tr>
<td>Asda, High Street, Carcroft</td>
<td>41.4</td>
<td>5.7%</td>
</tr>
<tr>
<td>Tesco, Thorne Road, Edenthorpe</td>
<td>40.2</td>
<td>5.5%</td>
</tr>
<tr>
<td>Morrisons, York Road</td>
<td>31.5</td>
<td>4.3%</td>
</tr>
<tr>
<td>Aldi, Barnsley Road</td>
<td>28.4</td>
<td>3.9%</td>
</tr>
<tr>
<td>Sainsbury’s, Thorne Road</td>
<td>24.8</td>
<td>3.4%</td>
</tr>
<tr>
<td>Asda, Grange Lane, Rossington</td>
<td>21.1</td>
<td>2.9%</td>
</tr>
<tr>
<td>Asda, Wheatley Retail Park, Wheatley Hall Road</td>
<td>15.8</td>
<td>2.2%</td>
</tr>
<tr>
<td><strong>Outside Doncaster Borough</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tesco Extra, Biscay Way, Wath upon Dearne</td>
<td>23.4</td>
<td>3.2%</td>
</tr>
</tbody>
</table>

Source: Tables 4 and 5 at Appendix 7.

### Main Leakage Destinations for Convenience Goods Shopping

6.42 Inevitably, there is a degree of ‘leakage’ of convenience goods spending to destinations outside the primary catchment area, as for some residents these facilities will be closer located than stores within the primary catchment area itself. The main leakage destinations are in Rotherham, which collectively attract a total £32.4 million of convenience goods spending from the primary catchment area residents, primarily from residents of Zone 4.
(Mexborough / Conisbrough), who are located in close proximity to Rotherham. The Tesco store in Hemsworth and facilities in Pontefract are also main leakage destination, reflecting the proximity of these destinations to residents of Zone 6 (Adwick le Street) in particular. Similarly, the Tesco Extra in Scunthorpe is a popular food shopping destination for residents in nearby Zone 8 (Thorne).

**Inflow of Comparison Goods Expenditure from Outside the PCA**

6.43 Convenience retail facilities within Doncaster's primary catchment area also draw expenditure from residents outside of the primary catchment area, which is referred to as ‘inflow’. The greatest inflows are to the Tesco Extra store in Woodfield Plantation and the Asda store at Dome Leisure Park in Doncaster, which are primarily drawn from Zone 11 (Maltby / Carlton) and Zone 10 (Retford), respectively; Zones 10 and 11 encompass a mostly rural area with limited retail provision in the northern part of the zones in closest proximity to Doncaster.

**Convenience Goods Expenditure Retention**

**Overall Retention Rate**

6.44 Of the primary catchment area’s residents total £732.3 million expenditure on convenience goods, 86.4% is spent in stores and centres within the primary catchment area, which is known as the “retention rate”. The remaining 13.6% of the total expenditure currently leaks to stores located outside of the primary catchment area.

**Local Retention Rate**

6.45 The ‘local’ convenience goods retention rate – the proportion of expenditure on convenience goods available to residents in a specific zone which is spent in centres and stores located within that zone – indicates whether there are any localised deficiencies in convenience goods provision.

6.46 The local retention is highest for Zone 1 (Doncaster) at 82.5%, followed by Zone 4 (Mexborough / Conisbrough) at 59.7%, confirming that most convenience shopping is undertaken on a relatively localised basis in Zone 1 and Zone 4. However, the lower local retention rates achieved in Zones 2, 3, 6 and 8 (45.0%, 40.2%, 34.5% and 28.9%, respectively) indicate that many residents in the other primary catchment area zones travel further to undertake their convenience shopping.

6.47 Zones 2 (Hatfield / Doncaster North), 3 (Bawtry / Tickhill) and 6 (Adwick le Street) encompass largely rural areas that contain no defined town centres. Whilst an Asda superstore is located in Carcroft in Zone 6, there are no other large foodstores in the zone. Many residents therefore
travel to other facilities nearby to undertake their food and grocery shopping, primarily in Doncaster, which are located within easy travelling distance from Zones 2, 3 and 6. Whilst the convenience retail provision in these zones is relatively limited, there are no town centres located within any these zones and residents are served by existing facilities in the surrounding area.

6.48 Zone 8 (Thorne) encompasses Thorne town centre, which contains a Sainsbury’s supermarket (1,200 square metres net) as well as other small-scale convenience retail provision. The Sainsbury’s store provides the largest foodstore in Zone 8, and the convenience retail offer in the zone is therefore limited. A significant amount of Zone 8 residents therefore travel to larger foodstores nearby to meet their convenience shopping needs - principally the Tesco store in Edenthorpe; the Sainsbury’s at Thorne Road in Doncaster and other Doncaster stores; the Tesco Extra in Scunthorpe; and other stores in Scunthorpe and Goole - indicating an under-provision of foodstores in the Thorne area. This local deficiency would be addressed by the commitment for a new superstore at Capitol Park in Thorne - although this is in an out-of-centre location and therefore, if it were implemented, there would be little scope for the town centre to benefit - and potentially, the proposed Lidl store in Thorne town centre if the scheme is permitted by the council.

Summary of Current Patterns of Retail Spending

Comparison Goods Spending

- A high level of residents’ expenditure on comparison retail goods is spent in destinations within the borough (78%), indicating that the range and quality of the borough’s comparison offer is currently meeting their needs. Leakage to destinations outside of the borough is inevitable, but relatively modest given Doncaster’s proximity to the Meadowhall Shopping Centre and Sheffield city centre - both regional shopping destinations - as well as Parkgate Shopping Park in Rotherham.

- The main comparison retail destination within the borough - Doncaster town centre - attracts over half of all residents spending in stores on comparison goods. Doncaster also attracts significant spending from residents in neighbouring areas to the east and south of the borough. The centre has substantially increased its market share since the previous retail study, both within and beyond the borough, which we attribute primarily to the improved offer and performance of the Frenchgate Centre. These important pieces of evidence confirm Doncaster’s sub-regional role in terms of comparison retailing and suggest that the centre has strengthened its position since the previous retail study. However, we emphasise that the rise in market share is not reflective of the performance of the town centre beyond the Frenchgate Centre. Evidence from the health check...
reveals a spatial imbalance in the vitality and viability of the centre, with high levels of vacancy, falling footfall and poor performance outside of the Frenchgate Centre.

- After Doncaster town centre, the most significant destinations for comparison shopping are retail parks and other out-of-centre destinations. The most popular destination is the Meadowhall Shopping Centre; followed by the York Road Retail Park Area and Wheatley Retail Park, both in Doncaster; and Parkgate Shopping Park in Rotherham. Resident spending in the main out-of-centre comparison goods destinations both within and outside of the borough is substantial and amounts to almost half (47%) that spent in Doncaster town centre, of which half is spent in out-of-centre destinations in the borough.

- Aside from Doncaster town centre, none of the defined centres in the borough, including Mexborough and Thorne town centres, are particularly significant in comparison retail terms. Mexborough and Thorne town centres attract no significant trade draw beyond their own zones, indicating that the attraction of these centres is very localised roles in terms of comparison goods retailing in accordance with their intended role.

### Convenience Goods Spending

- A high level of residents’ expenditure on convenience goods is spent in destinations within the borough (86%). Convenience shopping is generally undertaken on a more localised basis than comparison shopping and the limited expenditure leakage to destinations outside of the borough reflects the proximity of such destinations to residents in the periphery of the borough.

- The most popular individual destinations for food and grocery shopping are Asda at Dome Leisure Park, Tesco Extra at Woodfield Plantation, Asda in Carcroft and Tesco in Edenthorpe.

- The main foodstores in Doncaster town centre – Sainsbury’s, Tesco (prior to its closure) and Marks & Spencer – together with other convenience retail destinations in Doncaster town centre collectively achieve a market share of just 6.1% Doncaster town centre as a whole is only the third most popular destination within the borough for spending on convenience goods. The dominance of out-of-centre foodstores in the borough is evident, with spending in the six main out-of-centre foodstores in Doncaster amounting to almost five times that spent in Doncaster town centre. The role of Doncaster town centre as a convenience retail destination is therefore limited and has declined since 2010, an issue exacerbated by the recent closure of Tesco.

- The only part of the borough where we consider there to be a localised deficiency in convenience goods provision is in Zone 8. Whilst residents in Zone 8 are served by the Sainsbury’s store in Thorne town centre, this store is relatively small scale and there are no
large food superstores elsewhere in the town. The local deficiency would be addressed by the commitment for a new superstore at Capitol Park in Thorne. However, this store is in an out-of-centre location and as detailed in Section 7, Tesco pulled out as the confirmed operator for the scheme in January 2015.

- Priority should therefore be given to enhancing the local convenience offer and consumer choice through the provision of an additional main food store within Thorne town centre. We would expect that, if the emerging proposal for a Lidl store in Thorne town centre were to come forward, this would assist in meeting the identified lack of provision in this part of the borough.
7. **Assessment of Retail Expenditure Capacity**

7.1 In this section we set out our assessment of the growth in retail expenditure which is expected to come forward in the study area over the plan period, and translate this expenditure growth into a requirement for new comparison and convenience goods retail floorspace. Our quantitative assessment follows a conventional step-by-step methodology, drawing upon the results of the household survey to understand existing flows of expenditure available within the study area to the main retail destinations within the borough and wider sub-region. The main stages in this assessment are as follows:

- Calculate the total amount of convenience and comparison goods expenditure which is available within each of the zones in the study area.
- Allocate the available projected expenditure to the convenience and comparison goods shopping destinations, on the basis of the household telephone survey of shopping patterns so as to provide estimates on current sales and forecasts of future sales.
- Compare the total expenditure attracted to each shopping destination with current retail floorspace to assess sales densities/performance in each shopping destination.

**Data Inputs**

**Study Area**

7.2 The study area for the assessment of quantitative retail capacity is the same as for the household survey as described at the beginning of Section 6 and shown in the plan at Appendix 5.

**Existing and Forecast Population**

7.3 The population in each of study zones in the 2015 base year and each of the forecast years is set out in the Table 1A at Appendices 6 and 7.

7.4 The most recently available Office for National Statistics based population estimates and projections for each of the survey zones in the 2015 base year and each of the forecast years were sourced from Experian via its Micromarketer Online database. Experian forecast that the population of the study area will increase from 564,503 in 2015 to 592,581 in 2032, a growth of 28,078 persons or 5.0%.

31 The Experian population data are based on trend-line projections from the 2011 census results and are calibrated to local authority targets based on the most recently available government population data (Office for National Statistics mid-year projections).
Available Expenditure

7.5 Estimates of per person expenditure on comparison and convenience goods in 2013 (in 2013 prices) were sourced from Experian via Micromarketer Online and are set out in Table 1A at Appendices 6 and 7.

Growth Rates

7.6 The per person expenditure data were then rolled forward to the base year and each of the forecast years using estimated growth rates for spending on comparison and convenience retail goods sourced from Experian\(^{32}\) and summarised in Table 7.1.

Table 7.1 – Retail Expenditure per Person Growth Rates

<table>
<thead>
<tr>
<th>Period</th>
<th>Comparison Goods Per Person Expenditure Growth</th>
<th>Convenience Goods Per Person Expenditure Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>% per annum</td>
<td>% per annum</td>
</tr>
<tr>
<td>2013-2015</td>
<td>5.0%</td>
<td>0.0%</td>
</tr>
<tr>
<td>2015-2020</td>
<td>3.1%</td>
<td>0.5%</td>
</tr>
<tr>
<td>2020-2025</td>
<td>3.2%</td>
<td>0.7%</td>
</tr>
<tr>
<td>2025-2030</td>
<td>3.3%</td>
<td>0.7%</td>
</tr>
<tr>
<td>2030-2032</td>
<td>3.4%</td>
<td>0.7%</td>
</tr>
</tbody>
</table>

Source: Retail Planner Briefing Note 12.1 (Experian, October 2014).

Allowance for Spending on Special Forms of Trading

7.7 We have made a deduction from the total comparison and convenience retail expenditure per person to account for spending on special forms of trading\(^{33}\) (SFT), such as internet shopping, as well as outdoor markets and catalogue or TV/interactive shopping. The deductions for spending on special forms of trading are based on the estimates provided by Experian\(^{34}\) as summarised for each of the forecast periods in Table 7.2.

7.8 Spending on special forms of trading is projected to increase over the study period. It should however be noted that the current Experian projections identify that longer-term growth in non-store (i.e. internet) based sales are less strong than historically predicted, particularly for

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\(^{32}\) Retail Planner Briefing Note 12.1 (Experian, October 2014)

\(^{33}\) Experian define SFT as expenditure that does not take place in shops, such as that via mail order houses, door to door salesmen and stalls and markets. It also includes spending using digital TV and over the Internet.

\(^{34}\) Retail Planner Briefing Note 12.1 (Experian, October 2014, Appendix 3). For both convenience and comparison goods SFT, we use ‘adjusted’ SFT figures which take into account goods which have been ordered online but picked from physical outlets of the stores.
convenience goods due to current logistical difficulties in servicing customer demand online (some convenience retailers are beginning to open ‘dark’ stores\(^{35}\) to meet demand).

### Table 7.2 – Proportion of Expenditure Spent on Special Forms of Trading

<table>
<thead>
<tr>
<th>Year</th>
<th>Proportion of comparison Goods Expenditure Spent on SFT</th>
<th>Proportion of convenience Goods Expenditure Spent on SFT</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015</td>
<td>12.5%</td>
<td>2.8%</td>
</tr>
<tr>
<td>2020</td>
<td>15.7%</td>
<td>4.0%</td>
</tr>
<tr>
<td>2025</td>
<td>15.9%</td>
<td>4.9%</td>
</tr>
<tr>
<td>2030</td>
<td>15.6%</td>
<td>5.4%</td>
</tr>
<tr>
<td>2032</td>
<td>15.5%</td>
<td>5.7%</td>
</tr>
</tbody>
</table>

Source: Retail Planner Briefing Note 12.1 (Experian, October 2014).

### Total Expenditure

7.9 The total expenditure of residents within the study area, excluding spending on special forms of trading, is set out in Table 3 at Appendix 6 for comparison goods and Table 3 at Appendix 7 for convenience goods. The total expenditure pot is derived from the products of the total population in each zone (Tables 1A at Appendices 6 and 7) and the per capita expenditure, excluding special forms of trading, on comparison and convenience retail goods (Tables 2B at Appendices 6 and 7, respectively). It can be seen from the tables that:

- comparison goods spending (excluding special forms of trading) will increase from £1,448m in 2015 to £2,516m in 2032, a growth of £1,068m or 73.8%; and
- convenience goods spending (excluding special forms of trading) will increase from £1,054m in 2015 to £1,199m in 2032, a growth of £144m or 13.7%.

### Existing Retail Spending Patterns

7.10 We use the household survey findings to establish current patterns of retail spending and the current retention rate, as described in Section 6 of our report. The current pattern of expenditure and the current retention rate for comparison goods is as set out in Table 6 at Appendix 6, with the retention rate for comparison goods being 77.6% within the primary catchment area and a 19.3% within the secondary catchment area. For convenience goods, the pattern of expenditure and the current retention rate is as set out in Table 5 at Appendix 7, which reveals a convenience goods retention rate of 86.4% within the primary catchment area and 7.3% within the SCA.

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\(^{35}\) Dark Stores are large warehouses with interiors laid out like supermarkets so staff can walk around to compile orders (use class B8 warehouse and distribution use rather than use class A1 retail). They are not open to the general public.
As explained in Section 6, the expenditure retention rate within the primary catchment area in both the comparison and convenience sectors is already relatively high. Further improvement would require a substantial enhancement of the quantity and quality of the borough’s comparison retail facilities in order to boost the overall attractiveness of its retail offer in relation to the competing retail locations elsewhere in the sub-region, which is unlikely to be achievable given the existing competition for retail expenditure which exists surrounding the survey area. For the purposes of our assessment, we assume that the overall levels of comparison and convenience goods expenditure retention (as summarised above) will remain unchanged over the course of the study period.

Allowance for Growth in Floorspace Efficiency

We make an allowance for growth in floorspace efficiency (growth in the turnover of existing retailers within their existing floorspace, also referred to as sales density) as a further ‘claim’ on the growth in retained expenditure. Floorspace efficiency growth rates were sourced from the Experian’s Retail Planner Briefing Note 12.1 Addendum and are summarised in Table 7.3. Please note that we have assumed a convenience sales density growth rate of 0.0% for the period 2015 to 2020, rather than negative rate identified by Experian.

Table 7.3 – Sales Density Growth Rates

<table>
<thead>
<tr>
<th>Period</th>
<th>Comparison Goods Floorspace Efficiency Sales Density Growth % per annum</th>
<th>Convenience Goods Sales Density Growth % per annum</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015-2020</td>
<td>2.1%</td>
<td>-0.2%</td>
</tr>
<tr>
<td>2020-2025</td>
<td>2.2%</td>
<td>0.0%</td>
</tr>
<tr>
<td>2025-2030</td>
<td>2.2%</td>
<td>0.1%</td>
</tr>
<tr>
<td>2030-2032</td>
<td>2.2%</td>
<td>0.1%</td>
</tr>
</tbody>
</table>

Source: Retail Planner Briefing Note 12.1 Addendum (Experian, October 2014).

Allowance for Planning Commitments

The next step is to allow for the future turnover requirements of ‘commitments’ for new comparison and convenience retail floorspace, which are developments for new retail floorspace which benefit from planning permission but have not yet been implemented.

A schedule of the committed retail developments for comparison and convenience floorspace in the primary catchment area is provided in Table 7.4 below. Our assessment of the comparison and convenience goods turnover of each of the commitments that will be derived from residents of catchment area is set out in Table 7 at Appendix 6 and Table 6 at Appendix 7, respectively. In each instance we have made an assessment of how much of the turnover of the commitment will be derived from residents in the survey area. Table 7.4 shows
that there is over 18,000 square metres net ‘committed’ comparison goods floorspace and 12,200 square metres net ‘committed’ convenience goods floorspace.

7.15 Planning permission was granted in April 2014 for the development of a 6,247 square metres gross Asda store in Denaby Main (reference: 13/01239/4FULM). However, Asda is no longer taking the scheme forward; therefore, it has not been included in our assessment of retail expenditure capacity.

Table 7.4 Committed Retail Developments in the PCA

<table>
<thead>
<tr>
<th>Details of Proposal</th>
<th>Planning Application Ref.</th>
<th>Status at May 2015</th>
<th>Gross Retail Floorspace (sq.m)</th>
<th>Net Sales Area Floorspace Comp. (sq.m)</th>
<th>Conv. (sq.m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A1 retail as part of development of mixed-use Civic and Cultural Quarter, Doncaster</td>
<td>08/02535/OU T</td>
<td>Awaiting reserved matters</td>
<td>13,627</td>
<td>10,903</td>
<td>0</td>
</tr>
<tr>
<td>Foodstore, Station Road, Mexborough</td>
<td>11/03131/OU TM</td>
<td>Resolution to approve subject to S106</td>
<td>4,913</td>
<td>973</td>
<td>1,955</td>
</tr>
<tr>
<td>Mixed use development including a foodstore and retail units, Manthgate, Doncaster</td>
<td>11/02769/OU TM</td>
<td>Awaiting reserved matters</td>
<td>11,650</td>
<td>3,394</td>
<td>4,311</td>
</tr>
<tr>
<td>Mixed use redevelopment including a foodstore and ancillary retail, former Rossington Colliery, New Rossington</td>
<td>12/01107/OU TA</td>
<td>Not started</td>
<td>2,495</td>
<td>427</td>
<td>1,195</td>
</tr>
<tr>
<td>Supermarket, Corner Garage and Car Auction Site, Market Place, Bawtry, Doncaster</td>
<td>13/01228/OU TM</td>
<td>Awaiting reserved matters</td>
<td>2,070</td>
<td>266</td>
<td>1,079</td>
</tr>
<tr>
<td>Aldi foodstore, Anthorn Street, Wheatley, Doncaster</td>
<td>13/01786/FUL M</td>
<td>Under Construction</td>
<td>1,140</td>
<td>206</td>
<td>535</td>
</tr>
<tr>
<td>Redevelopment for an M&amp;S Foodhall and Next store, Wheatley Retail Park, Wheatley, Doncaster</td>
<td>14/00335/FUL M</td>
<td>Under Construction</td>
<td>2,746</td>
<td>963</td>
<td>709</td>
</tr>
<tr>
<td>Mixed use development including a foodstore, as well as hotel, leisure and employment uses, Capitol Park, Thorne</td>
<td>14/01957/RE M</td>
<td>Tesco pulled out as operator in January 2015</td>
<td>4,180</td>
<td>715</td>
<td>2,002</td>
</tr>
<tr>
<td>Aldi foodstore, Church Street, Armthorpe, Doncaster</td>
<td>14/00799/FUL M</td>
<td>Not started</td>
<td>900</td>
<td>163</td>
<td>422</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>-</td>
<td>-</td>
<td>41,475</td>
<td>18,010</td>
<td>12,208</td>
</tr>
</tbody>
</table>

Source: Doncaster council/planning application material (see Table 7 at Appendix 6).

Allowance for Under- or Over-trading in the Base Year

Foodstore Performance

7.16 Next, we consider the current trading performance of existing foodstores relative to their ‘benchmark’ level (the company average trading performance). For the 27 largest foodstores within the primary catchment area, we have compared the survey-based turnover estimates
with the ‘benchmark’ turnover levels, as shown in Table 7 at Appendix 7. The benchmark turnover for each store was calculated using company average sales density figures sourced from Verdict.

7.17 Our analysis indicates that of the two main foodstores in Doncaster town centre (Sainsbury’s at the Frenchgate Centre and the Marks & Spencer foodhall) are trading substantially below their company average benchmarks. The now closed Tesco store was also substantially underperforming compared to the company average benchmark. Whilst some of the spending in the Tesco store is now likely to have been diverted to the Sainsbury’s and Marks & Spencer stores in the town centre, we expect that trade will also have been diverted to out-of-centre stores nearby, such as Morrisons store on York Road in Doncaster, the Asda store at Wheatley Retail Park and the Tesco Extra store in Woodfield Plantation/Balby. We therefore expect that the trading position of the remaining two main foodstores in Doncaster town centre is likely to remain one of underperformance.

7.18 Our analysis also indicates that the Tesco Metro store in Mexborough was also substantially underperforming compared to its company average benchmark prior to its closure, whilst the Sainsbury’s store in Thorne town centre is trading broadly in accordance with expectations.

7.19 Outside of Doncaster’s three main centres, 14 of the 22 main foodstores in the primary catchment area are trading substantially above their respective company average benchmark (Asda stores at Dome Leisure Park, Rossington, Wheatley Shopping Centre, Conisbrough, Edlington and Carcroft; Tesco Extra at Woodfield Plantation and a Tesco Express in Amthorpe; Lidl stores at Balby Road in Doncaster, Leger Way Retail Park and in Mexborough; Morrisons in Amthorpe; Aldi stores in Harworth and at Bamsley Road in Doncaster). One further store is trading slightly above its company benchmarks (Asda in Dunscroft) and the Tesco in Edenthorpe is trading in line with the company average level.

7.20 Our analysis indicates that the remaining six main foodstores in the primary catchment area are all trading below their company average benchmarks (Sainsbury’s at Thorne Road, and Morrisons store at First Point and at York Road, all in Doncaster, as well as Aldi in Harworth, Tesco Extra in Wath upon Deame, and Asda in Moorthorpe / South Emsall). It should be noted, however, that three of these stores (Aldi in Harworth, Tesco Extra in Wath upon Deame, and Asda in Moorthorpe / South Emsall) are all located close to the edge of the catchment area and are therefore likely to benefit from trade drawn from outside of the catchment area.

7.21 The overall position across the primary catchment area as a whole is one of £15.2 million of over-trading above company average benchmarks, which we consider is an indicator of quantitative and qualitative need for additional convenience floorspace provision in the borough. We consider that the £15.2 million of over-trading across the borough could be
regarded as ‘expenditure capacity’ available to support additional convenience floorspace. We therefore make an allowance for this over-trading to be counted towards capacity in our retail capacity assessment.

7.22 Nevertheless, the weak performance of the main foodstores in Doncaster and Mexborough town centres – in stark contrast to the performance of the majority of stores elsewhere in the primary catchment area – highlights the importance of ensuring that any new convenience retail provision is directed to locations that support, rather than provide further competition to, the borough’s three main centres. There is no National Planning Policy Framework policy support for the diversion of trade from sequentially preferable central locations to new provision which is out-of-centre and is likely to lead to further loss of trade and wider benefits including linked shopping trips and footfall within the defined centres.

7.23 It should be noted that we have only assessed the trading performance of the main foodstores within the primary catchment area, and have not included smaller or independent traders in our analysis. Whereas published information in relation to benchmark sales densities for the major foodstore operators is available, there are no published data on sales densities for independent foodstores. The 27 largest foodstores within the primary catchment area collectively account for some 79 per cent of the catchment area residents’ convenience goods expenditure within the primary catchment area, and so our analysis provides a good indication of the overall trading position of existing foodstores within the primary catchment area.

Expenditure Available to Support New Floorspace

7.24 In all of our retail capacity ‘scenario tests’, in Tables 8A and 8B at Appendix 6 for comparison goods and in Tables 8A and 8B at Appendix 7 for convenience goods (and discussed below), we set out the residual expenditure pot potentially available for new retail floorspace for comparison and convenience floorspace, allowing for all of the claims on the growth in retained expenditure (growth over time on special forms of trading, growth in floorspace efficiency and commitments).

7.25 We then convert the residual expenditure to a floorspace requirement expressed as a net sales area. We have divided the residual expenditure by an average sales density for comparison goods of £5,000 per square metres36 sales area in 2015, which represents a typical sales density achieved by comparison retail operators. In relation to convenience goods, we have divided the residual expenditure by an average sales density of £10,061 per square metres sales area in 2015, which is the average sales density of the top ten food and grocery

36 The Top 10 available sales densities for Comparison goods retailers
retailers in the UK sourced from Verdict and Mintel’s 2014 UK Retail Rankings report. Finally, we convert the sales area requirement to a gross floorspace requirement using a net to gross ratio of 70% for comparison goods and 65% for convenience goods.

**Comparison Goods Capacity Projections**

7.26 Two comparison retail capacity scenarios for the borough were tested as set out in Tables 8A to 8B at Appendix 6, respectively, as follows:

- **SCENARIO A (All Commitments):** In this scenario, we assume the current level of expenditure retention in the primary catchment area (77.6%) will remain unchanged over the course of the study period to 2032, but from the total forecast growth in expenditure we deduct all existing planning commitments (as shown in the penultimate column of Table 7.4, above).

- **SCENARIO B (Commitments Under Construction Only):** In this scenario, we only make allowance for the expenditure claims of only those planning commitments already under construction. This is considered to represent a robust ‘alternative’ scenario as we understand that there are uncertainties over the likelihood of implementation of a number of the identified commitments.

7.27 The comparison retail capacity arising under each scenario is summarised in Table 7.5 below in terms of net sales area floorspace.

<table>
<thead>
<tr>
<th>Table 7.5 - Doncaster Borough Comparison Retail Capacity</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Scenario</strong></td>
</tr>
<tr>
<td>A Including All Commitments</td>
</tr>
<tr>
<td>B Including Commitments Under Construction Only</td>
</tr>
</tbody>
</table>

Source: Tables 8A and 8B at Appendix 6.

7.28 Table 7.5 above shows that the quantitative need for additional comparison retail floorspace is negative under Scenario A in the period up to 2025. This means that the growth in retained expenditure is not sufficient to support prior ‘claims’ on that growth, namely growth in special forms of trading, an improvement in sales densities of existing centres and stores and the turnover requirements of the planning commitments for new comparison retail floorspace. If this scenario were to be followed, there would be no requirement to plan for new comparison goods floorspace prior to 2025. In the longer term period up to 2030, there is a positive capacity requirement for up to 6,600 square metres of comparison sales area floorspace in the borough, rising to 12,300 by 2032.
However, it is possible that not all of the commitments for new retail floorspace in the borough will come forward. Much of the committed comparison retail floorspace in the borough is within proposed foodstores. As discussed in Section 3 (Retail and Leisure Trends), foodstore operators are increasingly focused on redevelopment and refurbishment of existing stores rather than on new superstore development in response to weaker spending on convenience goods and the transfer of trade online (for example, Tesco pulled out of the committed scheme for a store at the Capitol Park site in Thorne in January 2015). Moreover, only three of the nine schemes benefit from confirmed operators (the proposed Aldi foodstores in Wheatley and Amthorpe, and the M&S Foodhall and Next stores at Wheatley Retail Park).

Thus, as a sensitivity test, in Scenario B, we consider the future retail capacity taking into account only those commitments that are already under construction. Under Scenario B, there is a positive residual capacity for approximately 15,200 square metres of additional comparison sales area floorspace across the borough in the period to 2025, rising to 27,900 square metres by 2030 and 33,700 square metres over the period to 2032.

So, therefore, we suggest that the council should work towards a requirement for up to 6,600 square metres of additional comparison sales area floorspace in the period to 2030 rising to 12,300 square metres in the period up to 2032. The council should direct this new floorspace to town centre locations - in accordance with the thrust of national planning policy - in the first instance. There may also be a need to allocate a proportion of the overall identified capacity requirement to meet the needs of new residential communities, and we return to discuss this as part of our recommendations in Section 9.

However, should any of the existing planning commitments not come forward, the requirement for additional comparison sales area floorspace in the borough could be substantially higher than the baseline figure. It will therefore be essential for the council to monitor the progress of committed developments and identify where schemes will not be delivered, and the extent to which any changes in the status of existing commitments will impact on the qualitative need for new comparison floorspace within the borough.

On this basis, the capacity requirements set out in Scenario A represent the minimum amount of comparison goods floorspace which the council should plan for, and the capacity requirements set out in Scenario B represent the maximum extent which the council should plan for.

Convenience Goods Capacity Projections

Two convenience retail capacity scenarios for Doncaster have been tested as set out in Tables 8A and 8B at Appendix 7, respectively, as follows:
SCENARIO A (All Commitments): In this scenario, we assume the current level of expenditure retention in the primary catchment area (86.4%) will remain unchanged over the course of the plan period to 2032, but from the total forecast growth in expenditure we deduct all existing planning commitments (as per the final column of Table 7.4, above).

SCENARIO B (Commitments Under Construction Only): In this scenario, we only make allowance for the expenditure claims of only those planning commitments already under construction. This is considered to represent a robust ‘alternative’ scenario as we understand that there are uncertainties over the likelihood of implementation of a number of the identified commitments.

The convenience retail capacity arising under each of the two scenarios is summarised in Table 7.6 below in terms of net sales area floorspace.

Table 7.6 - Doncaster Borough Convenience Retail Capacity

<table>
<thead>
<tr>
<th>Scenario</th>
<th>2020 sq.m (net)</th>
<th>2025 sq.m (net)</th>
<th>2030 sq.m (net)</th>
<th>2032 sq.m (net)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A Including All Commitments</td>
<td>-10,200</td>
<td>-7,600</td>
<td>-5,300</td>
<td>-4,300</td>
</tr>
<tr>
<td>B Including Commitments Under Construction Only</td>
<td>2,500</td>
<td>5,000</td>
<td>7,300</td>
<td>8,300</td>
</tr>
</tbody>
</table>

Source: Tables 8A and 8B at Appendix 7.

Table 7.6 above shows that the quantitative need for additional convenience retail floorspace is negative under Scenario A over the council’s plan period. This means that the growth in retained expenditure is not sufficient to support prior ‘claims’ on that growth, namely growth in special forms of trading, an improvement in sales densities of existing centres and stores and the turnover requirements of the planning commitments for new convenience retail floorspace.

Should the convenience goods planning commitments listed in Table 7.4 not come forward, there will be a requirement for the council to plan for new convenience goods floorspace. As stated above, there are a number of significant changes taking place, particularly within the convenience sector, as operators review their requirements for new stores in light of consumers’ changing shopping patterns. Should the commitments not come forward, the council will be required to plan for up to 8,300 square metres net additional convenience goods retail floorspace over the period to 2032, and this figure should accordingly represent the upper amount of floorspace the council should plan for. The short-term requirement for additional convenience goods floorspace (up to 2,500 square metres net by 2020) is relatively limited.
7.38 Such is the extent of the planning commitments which are currently ‘live’ in the borough, it is essential for the council to monitor the progress of committed developments and identify where schemes will not be delivered, and ensure regular assessments of retail capacity are undertaken throughout the plan period and have regard to the latest position in respect of the commitments.

**Summary of Retail Expenditure Capacity**

- This study identifies a requirement for **up to 12,300 square metres** net comparison goods floorspace in the period up to 2032, assuming that all of the existing commitments which have been identified in this study are implemented.

- However, we understand that it is possible that a number of the existing ‘commitments’ will not be implemented. If we assume that only those two existing commitments that are already under construction are implemented then the quantitative requirement increases to **up to 33,700 square metres** of net comparison floorspace arising in the period up to 2032.

- It should be affirmed that this level of capacity provides no justification for further out-of-centre floorspace in Doncaster. Informed by information provided by the council, we have identified a substantial number opportunity sites in Doncaster town centre in Section 4 of this study which would be expected to be able to accommodate the quantitative needs which this study has identified.

- Furthermore, there is no qualitative need for new retail warehousing as the existing provision is already extensive, as this study has set out.

- Should all of the convenience goods floorspace for which planning permission exists come forward, we identified that there **is no quantitative requirement** for the council to plan for any additional convenience goods floorspace in the borough, as these existing commitments will ‘claim’ all future growth in convenience goods spending.

- If all ‘commitments’ except those currently under construction are excluded, we identified a quantitative need for **up to 8,300 square metres** net convenience floorspace in the borough arising in the period up to 2032.

- The uncertainty over the implementation of a number of planning permissions for new retail floorspace in the borough provides the council with an important opportunity to redirect provision to town centre opportunities.

- Our qualitative assessment has identified that:
  - Additional convenience goods facilities are required in the town centres of Doncaster, Mexborough and Thorne. In the case of Doncaster and Mexborough, these are
required to replace the qualitative gaps in provision which have arisen as a consequence of the closure of the Tesco stores.

o Additional convenience goods facilities are also required in Thorne town centre, to assist in ‘claw back’ of expenditure leakage to destinations outside the study area.
8. **Leisure Needs Assessment**

8.1 In this section, we consider the scope to accommodate additional floorspace for commercial leisure uses in the borough. Our assessment necessarily focuses on qualitative considerations, informed by an audit of existing provision and by data collected from our household telephone survey of March 2015.

8.2 Our assessment additionally considers quantitative requirements in accordance with the National Planning Policy Framework, which advises that when assessing the need for additional leisure floorspace, Local planning authorities should take account of both quantitative and qualitative considerations. However, the approach taken by consultants to the assessment of quantitative need in the leisure sector is less well developed than in the retail sector. Furthermore, property development in the leisure sector has historically been very market-led.

8.3 Nevertheless, Experian provides information on leisure services spending in a number of the leisure categories. Using these data, combined with the findings our health check assessments, household survey and a review of existing leisure facilities in the borough, we have been able to undertake a broad assessment of need in the commercial leisure sector.

**Current Patterns of Spending on Leisure Services and Cultural Activities**

8.4 As detailed at the beginning of Section 6 the household survey questionnaire also sought to identify patterns of spending on various types of leisure and cultural services. The most popular destinations for these different activities for residents of each survey zone are set out in Table 8.1 and are described below.
Table 8.1 Most Popular Destinations for Expenditure on Leisure Services

<table>
<thead>
<tr>
<th>Zone</th>
<th>Cafes &amp; Restaurants (Daytime)</th>
<th>Cafés &amp; Restaurants (Evening)</th>
<th>Pubs, Bars &amp; Clubs</th>
<th>Cinema</th>
<th>Family Entertainment</th>
<th>Bingo, Casino &amp; Bookmaker</th>
<th>Health &amp; Fitness</th>
<th>Theatre, Museums &amp; Art Galleries</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Doncaster</td>
<td>Doncaster</td>
<td>Doncaster</td>
<td>Vue Cinema, Doncaster Dome Leisure Park</td>
<td>Doncaster Dome Leisure Park</td>
<td>Edlington Community Sports Village</td>
<td>Doncaster</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Doncaster</td>
<td>Doncaster</td>
<td>Doncaster</td>
<td>Vue Cinema, Doncaster Dome Leisure Park</td>
<td>Doncaster Dome Leisure Park</td>
<td>Gala Bingo, Wheatley Hall Road, Doncaster</td>
<td>Amthorpe Leisure Centre / Thorne</td>
<td>Doncaster</td>
</tr>
<tr>
<td>3</td>
<td>Doncaster</td>
<td>Bawtry</td>
<td></td>
<td>Vue Cinema, Doncaster Dome Leisure Park</td>
<td>Doncaster Dome Leisure Park</td>
<td>Gala Bingo, Wheatley Hall Road, Doncaster</td>
<td>Doncaster Dome Leisure Centre</td>
<td>Sheffield</td>
</tr>
<tr>
<td>4</td>
<td>Doncaster</td>
<td>Doncaster</td>
<td>Doncaster</td>
<td>Vue Cinema, Doncaster Dome Leisure Park</td>
<td>Doncaster Dome Leisure Park</td>
<td>Sheffield</td>
<td>Deame Valley Leisure Centre, Mexborough</td>
<td>Sheffield</td>
</tr>
<tr>
<td>6</td>
<td>Doncaster</td>
<td>Doncaster</td>
<td></td>
<td>Cineworld, Xscape, Castleford</td>
<td>Askem Leisure Centre</td>
<td>Sheffield</td>
<td>Adwick Leisure Complex</td>
<td>Doncaster</td>
</tr>
<tr>
<td>8</td>
<td>Thorne / Thorne</td>
<td>Thorne</td>
<td></td>
<td>Vue Cinema, Doncaster Dome Leisure Park</td>
<td>Doncaster Dome Leisure Park</td>
<td>Gala Bingo / Mecca Bingo, Doncaster</td>
<td>Doncaster Dome Leisure Centre</td>
<td>Thorne / Thorne Leisure Centre</td>
</tr>
</tbody>
</table>

Source: NEMS household telephone survey, March 2012

Restaurants and cafés

8.5 A total of 38.7% of respondents within the primary catchment area eat out at cafes or restaurants in the daytime and 55.0% eat out at restaurants in the evening. For these respondents, the most popular destination for eating out is Doncaster town centre (55.5%), followed by Sheffield city centre (5.0%) and Bawtry (4.7%).

8.6 Doncaster town centre is the most popular destination for visits to restaurants and cafés for residents of five of the primary catchment area survey zones (Zones 1 – 4, and 6). The most popular destination for residents of Zone 8 (Thorne) is Thorne town centre. Visits to restaurants and cafés outside the borough are relatively limited.

Pubs, bars and nightclubs

8.7 A total of 42.7% of primary catchment area residents regularly visit pubs and clubs. Amongst these respondents, Doncaster town centre (44.0%) is the most popular destination for pubs, bars and nightclubs, followed by Bawtry (3.9%) and Rotherham (3.8%).
Doncaster town centre is the most popular destination for visits to pubs and bars from residents of five of the six primary catchment area zones (Zones 1 – 4, and 6). In Zone 8, both Doncaster and Thorne were the joint most popular destinations for visits to pubs, bars and nightclubs.

Cinemas

A total of 41.9% of respondents within the primary catchment area visit the cinema. Of these, the majority (59.6%) most regularly visit the Vue Cinema at Doncaster Dome Leisure Park, followed by the Cineworld at Xscape in Castlefield (17.2%) and the Vue cinema at the Meadowhall Centre in Sheffield (11.2%). All of the most popular destinations for visiting the cinema are therefore out of centre.

Family entertainment centres (i.e. ten pin bowling, skating etc)

A total of 22.2% of primary catchment area residents visit family entertainment venues such as 10-pin bowling and ice-skating rinks. Doncaster Superbowl (27.8%) and Doncaster Dome Leisure Centre (27.8%) are the most popular individual destinations followed by Xscape in Castleford (5.1%) and Rotherham Superbowl (4.5%). The most popular family entertainment venues are therefore also all out of centre.

Theatres, Museums and Art Galleries

A total of 27.7% of primary catchment area respondents visit arts and cultural facilities, such as theatres, museums and art galleries. Some 19.7% of these residents most regularly visit facilities in Sheffield city centre, 18.0% most regularly visit Cast theatre in Doncaster, and 16.8% cited Doncaster town centre as a whole. A further 10.7% visit facilities in London, 6.3% visit the Lyceum Theatre in Sheffield, and 6.3% visit Leeds city centre.

Bingo/casinos/bookmakers

A total of 27.7% of respondents within the primary catchment area play bingo or visit the bookmakers or casino. Some 34.5% of these residents most regularly visit the Gala Bingo at Wheatley Hall Road in Doncaster, 21.0% visit facilities in Sheffield, 9.6% most regularly visit facilities in Edlington, 6.4% play online, 6.2% visit the Mecca Bingo on East Laith Gate in Doncaster town centre, and 5.8% cited Doncaster town centre as a whole.

Health and fitness centres

The survey indicates that 23.8% of residents within the primary catchment area regularly use health and fitness facilities, such as the gym, leisure centres, and swimming pools. Doncaster Dome Leisure Centre is the most popular destination (12.1%), followed by Dearne Valley Leisure Centre (10.4%), facilities in Doncaster town centre (10.1%), Adwick Leisure Complex on
Welfare Road in Doncaster (7.7%), Rossington Community Sports Village (6.7%), Wath-upon-Deame Leisure Centre (5.4%) and Armthorpe Leisure Centre (5.2%).

Summary of Findings by Centre

Doncaster Town Centre

8.14 The findings of the household survey indicate a relatively strong performance of Doncaster town centre in both the ‘cafés’ and restaurants’ and ‘pubs, bars and clubs’ categories. Whilst we consider that the number and variety of restaurants in Doncaster town centre is limited for a centre of its size and status, the town centre nevertheless provides the main focus for such provision within the borough, and Doncaster is able to retain expenditure within the town centre as well as attract expenditure from the wider area in these categories.

8.15 The role of Doncaster town centre in the ‘cinema’, ‘family entertainment’, ‘bingo, casino and bookmakers’, and ‘health and fitness’ categories is much more limited, reflecting the lack of provision of many of these facilities in the town centre. Doncaster town centre performs relatively well in respect of visits to the theatre, museums and art galleries, particularly given its proximity to the wider range of cultural and arts destinations in Sheffield.

8.16 As we have identified elsewhere in this report, the next phase of the Civic and Cultural Quarter development is anticipated to include the provision of new leisure facilities, including a multiplex cinema and a range of restaurant uses. The provision of such facilities will play an important role in enhancing the vitality and viability of the town centre and ‘clawing back’ expenditure which is currently being lost to out-of-centre destinations in Doncaster, as well as to other centres and locations further afield.

Mexborough Town Centre

8.17 Mexborough town centre noticeably under-performs in both the ‘cafés’ and restaurants’ and ‘pubs, bars and clubs’ categories, where the most localised patterns of trips might normally be expected. Of those respondents within the Mexborough zone (Zone 4) who undertake these activities, just 5.4% stated that they most regularly visit Mexborough for eating out and only 8.6% most regularly visit pubs and bars in Mexborough. As such, the town centre is not a particular popular destination for visiting restaurants and bars, with local residents preferring to travel to Doncaster or Sheffield to eat out.

8.18 In addition to Mexborough, the Mexborough zone encompasses a number of surrounding settlements, including Wath upon Deame, Conisbrough, Swinton, Thursncoe, Goldthorpe and the western fringe of the Doncaster urban area. However, Mexborough fulfills a wider role within the Deame Valley and we consider that whilst the number of pubs, bars and cafes in
Mexborough is reasonable, restaurant provision is limited. Health and fitness provision in the centre is also limited. The role of the town centre in providing leisure facilities such as cinemas and family entertainment, and cultural facilities like theatres, concerts, art galleries and museums, is very limited, which is expected for a centre of Mexborough size and status, and there is likely to be little scope/demand for enhancement of these.

**Thorne Town Centre**

8.19 The household survey findings demonstrate that Thorne town centre is the most popular destination for visits to restaurants and cafés of within its own zone (Zone 8), as well as visits to pubs and bars. Of those respondents within the Zone 8 who undertake these activities, 25.8% stated that they most regularly visit Thorne for eating out and 32.2% most regularly visit pubs and bars in Thorne; this is a significantly stronger performance than Mexborough therefore. The highly localised patterns of visits that are normally expected in the bars, clubs and pubs category are therefore present in Thorne.

**Existing and Forecast Expenditure on Leisure Services**

8.20 This section should be read in conjunction with the quantitative leisure capacity calculations which are set out at Tables 1 to 3 of Appendix 8.

8.21 Estimates of per person expenditure on five different categories of leisure services defined by Experian – cinemas; theatres, concerts and shows; recreational and sporting services; restaurants and cafés meals; and alcoholic drinks away from the home in 2013 (in 2013 prices) – were sourced from Experian via Micromarketer Online and are set out in Table 2A at Appendix 8. The overall expenditure per person on leisure services amongst residents of the primary catchment area is substantially below the UK average, with per person spending on cinemas, live entertainment and recreational and sporting services is around two-thirds the UK average, and spending on restaurant and café meals only around three-quarters of the UK average. Per person expenditure in only one of the five leisure service categories considered – spending on alcoholic drinks away from the home – is broadly in line with the UK average.

8.22 The per person expenditure data for each leisure services category were then rolled forward to the base year and each of the forecast years using estimated growth rates for spending on leisure services sourced from Experian and summarised in Table 8.2. It is emphasised, however, that this expenditure growth is for spending of leisure service as a whole, which also includes spending on ‘games of chance’, such as betting and bingo, accommodation

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37 Includes spending on spectator sports, participant sports and leisure classes, subscriptions to sports clubs and the hire of sporting and recreational equipment.
38 Retail Planner Briefing Note 12.1, Experian, October 2014
services such as hotels, and personal services such as hairdressers. Although the growth rates are not specific to individual categories of leisure services, they give an indication of the scale of growth in the leisure sector and the potential need for additional commercial leisure floorspace in the borough.

Table 8.2 Leisure Services Expenditure per Person Growth Rates

<table>
<thead>
<tr>
<th>Period</th>
<th>Growth Rate per annum</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013 – 2014</td>
<td>0.0%</td>
</tr>
<tr>
<td>2014 – 2015</td>
<td>2.1%</td>
</tr>
<tr>
<td>2015 – 2016</td>
<td>2.8%</td>
</tr>
<tr>
<td>2016 – 2032</td>
<td>1.3%</td>
</tr>
</tbody>
</table>

Source: Retail Planner Briefing Note 12.1 (Experian, October 2014).

8.23 The total expenditure on the five different leisure services categories in the 2015 base year and the forecast years is derived from the products of the total population in each zone (Table 1 at Appendix 8) and the per capita expenditure on leisure services (Table 2 at Appendix 8) and is as set out in Table 3 at Appendix 8 and summarised in Table 8.3 below.

Table 8.3 Leisure Services Spend of Residents of the PCA at 2015

<table>
<thead>
<tr>
<th>Leisure Services Category</th>
<th>Total Expenditure (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2015</td>
</tr>
<tr>
<td>Cinemas</td>
<td>4.7</td>
</tr>
<tr>
<td>Theatres, concerts and shows</td>
<td>8.1</td>
</tr>
<tr>
<td>Recreational and sporting services</td>
<td>26.0</td>
</tr>
<tr>
<td>Restaurants and cafés meals</td>
<td>154.5</td>
</tr>
<tr>
<td>Alcoholic drinks (away from home)</td>
<td>94.6</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>287.9</strong></td>
</tr>
</tbody>
</table>

Source: Table 3 at Appendix 8.

8.24 In total, £287.9 million of expenditure across the five categories of leisure services is available to residents of the primary catchment area in 2015. Spending on restaurant and café meals accounts for over half (54%) of the total across the five leisure services categories. Spending on drinks in restaurants and cafés as well as pubs, bars and clubs and accounts for 32% of spending across the five leisure services categories. Recreational and sporting services is the third highest category, followed by live entertainment and cinemas, with these accounting for 9%, 3% and 2% of spending across the five leisure services categories, respectively.

8.25 Table 8.3 shows substantial growth in leisure expenditure arising in the study period, amounting to a total of £91.4 million across the five categories of leisure services.
Assessment of Commercial Leisure Needs

Food and Drink Establishments

Qualitative Needs

8.26 Within the borough, the majority of restaurants and cafes can be found in Doncaster town centre and, to a lesser extent, Bawtry, Thorne and Hatfield. However, our health check of Doncaster town centre found that the diversity of its food and drink offer is relatively limited, and geared more towards pubs, bars and nightclubs rather than cafes and restaurants. For a centre of its size, we consider that the number and variety of eating establishments in Doncaster town centre, and particularly multiple and family orientated restaurants such as Pizza Express and Nando’s, is very limited given its role as the primary destination for eating out in the borough. The attraction of such operators to the town centre would further diversify the offer in the town centre, which is too heavily orientated towards drinking establishments at present.

8.27 Whilst the performance of Thorne town centre was found to be relatively strong in relation to both eating and drinking establishments, we identified a deficiency in the restaurant provision in Mexborough town centre. We consider that Mexborough has potential to be an important destination for food and drink within the Dearne Valley area, given its wider role for shopping and services within this area. Additional restaurant provision in Mexborough town centre would also help diversify its evening economy and support the vitality and viability of the town.

Quantitative Needs

8.28 Tables 4A and 4B at Appendix 8 set out our indicative quantitative assessment of expenditure capacity for spending on restaurant and café meals and on alcoholic drinks (away from the home), respectively. Table 4A at Appendix 8 shows the growth in retained expenditure on restaurant and café meals within the primary catchment area, assuming the current level of expenditure retention in the survey area on eating out (81.5%) will remain unchanged over the course of the plan period to 2032. Table 4B at Appendix 8 shows the growth in retained expenditure on alcoholic drinks (away from home) within the primary catchment area, assuming the current level of expenditure retention in the survey area on pubs, bars and nightclubs, (86.1%) will remain unchanged over the course of the plan period to 2032.

8.29 On this basis, the total residual expenditure arising within the primary catchment area in the study period up to 2032 is £39.9 million for restaurant and café meals, and £25.9 million for alcoholic drinks away from home.
8.30 These indicative capacity figures should however be treated with caution, most notably because:

- the growth in spending is based on Experian’s overall forecast growth rates for spending on leisure services; the growth rates for individual leisure sub-categories, such as spending in restaurants or pubs could be significantly different;
- the assumed retention rate for our assessment of capacity for spending on alcoholic drinks (away from home) is based on the pattern of visitation to pubs, bars and nightclubs identified from the household survey. However, significant spending on alcoholic drinks away from the home will also occur in restaurants. We consider that a rise in the retention rate for spending on eating out could also be achieved through an improvement in the quantity and quality of the borough’s restaurant offer;
- spending on non-alcoholic drinks, for which no data is available, is not taken into account; and
- not all of the growth in spending on food and drink will be available to support new cafes, restaurants, pubs and bars, as part will be absorbed by existing operators to allow them to grow their businesses. However, there is a dearth of published advice on what proportion of expenditure growth in the food and drink sector should be ring-fenced for existing operators.

8.31 Nevertheless, our indicative assessment suggests a significant growth in spending on eating and drinking out within the primary catchment area over the study period, which could support the provision of a range of new eating and drinking establishments, such as restaurants, cafes and dining pubs.

Cinemas

8.32 The figure at Appendix 9 maps the locations of cinemas and family entertainment destinations within the borough and surrounding area, and shows that there is only one cinema located within the borough – the Vue cinema at the Dome Leisure Park. Outside the borough, there are a number of cinemas located in the urban areas surrounding Doncaster, including at Xscape in Castleford; a number of cinemas in Scunthorpe; and a cluster of cinemas in the higher order centre of Sheffield, including the independent Showroom cinema in Sheffield city centre, a Cineworld multiplex at Broughton Lane and a Vue cinema at Meadowhall Shopping Centre. The results of the household survey indicate that residents in the borough are willing to travel to visit independent cinemas.

8.33 We also identified in our health checks that the lack of a cinema in Doncaster town centre represents a fundamental gap in the wider town centre offer, and the centre would benefit
significantly from such a facility to help diversify its offer, increase footfall, facilitate linked trips, and help promote an enhanced evening economy. Such a facility is therefore considered important to the long-term vitality and viability of the town centre.

8.34 Cinema operators make decisions on where to open new facilities based on ‘screen density’ – that is, the existing cinema screen provision within appropriate drive-time isochrones, taking account of population levels (or the number of screens available per 100,000 people). The latest information that we have access to indicates that the average travel time to a cinema is around 18 minutes (as defined by Caviar). Hence, we have analysed cinema provision within an 18-minute drive-time of Doncaster town centre; the only centre in the borough which we consider offers the development potential for a multiplex cinema. The findings are set out in Table 8.4.

### Table 8.4 Cinema Screen Density Within an 18-minute Drive-time of Doncaster Town Centre

<table>
<thead>
<tr>
<th>Cinemas Within 18 Minute Drive-time</th>
<th>Screens Within 18 Minute Drive-time</th>
<th>Population Within 18 Minute Drive-time</th>
<th>Screen Density (i.e. screens per 100,000 people)</th>
<th>Yorkshire Average Screen Density</th>
<th>UK Average Screen Density</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>11</td>
<td>357,800</td>
<td>3.1</td>
<td>5.3</td>
<td>6.1</td>
</tr>
</tbody>
</table>

Source: Experian via Micromarketer Online and UK Film Council’s ‘Statistical Yearbook 2014’.

8.35 The figure at Appendix 9 shows that there is only one cinema within the 18 minute drive-time – the Vue cinema at Doncaster Leisure Park which we identified as having an extremely popular trade draw from across the primary catchment area. All of the alternative cinemas surrounding the borough are located some distance beyond an 18-minute drive-time from Doncaster town centre.

8.36 Data from Experian indicates that within this 18-minute drive-time catchment there is a population of 357,800 persons, and a total of 11 cinema screens (at Vue at Doncaster Leisure Park). This is equivalent to 3.1 screens per 100,000 people, which is above the average for Yorkshire (5.3 screens per 100,000 people) and the UK average (6.1 screens per 100,000 people). This suggests an under-supply of cinema provision in the 18-minute drive time catchment and that the provision of an additional commercial cinema facility in the borough would be desirable. Any new cinema provision should be directed to Doncaster town centre as the highest-order centre, the most accessible location in the borough, and the location for where a qualitative need for additional provision is most apparent.

8.37 As detailed in Section 4, we understand that there is potential interest from cinema operators in locating in Doncaster’s town centre, and it is understood that a full planning application for a new multiplex cinema along with three leisure units in the Civic and Cultural Quarter is expected to be submitted shortly. Should this application progress, it is considered that this would represent a suitable location for a new cinema development, which would fit in with
the council’s wider aspirations for the development of this area, and would provide a strong ‘anchor’ to assist in driving footfall towards the southern and eastern parts of the town centre, rather than its current concentration within and in the vicinity of the Frenchgate Centre.

**Family Entertainment Facilities**

8.38 The figure at **Appendix 9** shows the locations of family entertainment destinations within the borough and the surrounding area. Apart from the cinema at Doncaster Leisure Park, there are only two other family entertainment venues located within the borough: the Dome Leisure Centre (locally known as Doncaster Dome) and Tenpin Doncaster (formerly Doncaster Superbowl), which are both located within the out-of-centre Doncaster Leisure Park. The Dome Leisure Centre encompasses a variety of family leisure provision, including the Lagoons swimming complex – comprising seven interlinked pools, flume water rides and a children’s area – together with an ice-skating rink and a soft play centre. Doncaster Leisure Park therefore provides the primary focus for family entertainment facilities in the borough.

8.39 Outside the borough, the nearest facilities are at:

- Xscape in Castleford, which includes a snow-dome, ten pin bowling, trampoline park, climbing walls, skate park, laser tag, an aerial assault course, soft play park, adventure golf and a family arcade;
- Rotherham Superbowl;
- MFA Bowl in Scunthorpe;
- Valley Centertainment Leisure Park in Sheffield; and
- Hollywood Bowl in Sheffield.

8.40 All these are located some distance from Doncaster town centre (and over the average 18-minute travel time to a cinema), as indicated by the figure at **Appendix 9**.

8.41 In view of the above, there is a clear need to attract more family entertainment facilities and family friendly uses (e.g. playgrounds / play centres and swimming baths) to diversify the town centre leisure offer and improve accessibility to such facilities, especially for families. More targeted market testing would be required to ascertain whether operators of 10-pin bowling or other large-scale family entertainment venues would consider locating in Doncaster town centre, given the strong offer already available at Dome Leisure Park. However, operators of other smaller family entertainment facilities, such as a climbing wall, laser tag or skate park, may potentially be interested in locating in Doncaster as part of the new Civic and Cultural Quarter as its development gathers momentum.
Bingo, Casinos and Bookmakers

8.42 There are three multiple bingo halls in the borough – Gala Bingo at the Wheatley Retail Park in Doncaster, a Mecca Bingo on East Laith Gate within Doncaster town centre, and Empire Bingo (part of Majestic Bingo Clubs) in Mexborough town centre. Residents in the borough therefore have access to a range of facilities of this nature. There are no casino venues in the borough, with the closest facilities located in Sheffield. There are a range of bookmaker facilities throughout the borough, with the largest concentration, as would be expected, in Doncaster town centre.

8.43 As a proportion of total leisure spend, these types of facilities do not attract significant amounts of patronage, and usage of some facilities has been in decline in recent years on a national basis. On this basis, we consider that there is no qualitative requirement for the provision of a new major bingo facility in the borough.

Hotels

8.44 There are a range of factors and key criteria that will drive interest and delivery of hotel investment in Doncaster. Development will depend on whether or not developer/operator criteria can be met, but more importantly the overall strength and growth prospects of the local hotel market (e.g. the commercial proposition). Prior to discussing the hotel opportunities which may exist in Doncaster town centre, it is important to understand the key investment criteria of the major hotel operators. The general operator requirements are summarised below.

Market Overview

- **Boutique Hotels**: Traditionally, operators in this sector of the market have been small boutique chains that are independently operated. However, many of the largest hotel groups have entered the sector, including InterContinental Hotels Group (Hotel Indigo), Starwood Hotels and Resorts (Aloft) and Hilton (Canopy). Over recent years there has been a developing trend towards niche markets, in particular the recent emergence of ‘boutique’, ‘designer’, ‘townhouse’, or even ‘life-style’ hotels. These hotels are small and personal (typically no more than 50 bedrooms) and focus on design, service and excellent food and beverage but do not generally provide other facilities such as meeting rooms or health and fitness. Most boutique hotel operators require sites in historic, university towns and ‘up and coming’ locations or central locations in major cities.

- **Budget and Limited Service Hotels**: These are hotels are ideal for attracting a good mix of family leisure, local business and overnight meetings. They do not necessarily require prime city centre locations but generally want prominent sites close to key transport hubs.
offering easy access and a strong visibility profile. Limited service brands tend to have similar facilities associated with the three-star full service hotels (i.e. food and beverage, meeting space, air-conditions, satellite TV) and yet offer a modern, branded, consistent product at very competitive pricing. This sector has consequently become exceptionally popular with both leisure and corporate users. In addition, their national coverage and central reservation systems enable high recognition and ease of booking thus making them extremely powerful brands. Their size and scale and slimmed down service enables them to achieve economies of scale and cost efficiency. Recent years have also witnessed a growth in the budget boutique sector, which provide a streamlined offer akin to budget hotels, but with a focus on high quality and design. Brands include CitizenM and Moxy by Marriott.

- Three and Four Star Hotels: These hotels usually provide high quality bedroom facilities, large conference suits, quality bars and catering and some form of leisure or health spa facilities. They tend to target the national and international business and conference trade and the short breaks leisure market. Such hotels need a strong base of corporate demand (including conferencing) as well as established leisure/tourism drivers to provide the balance of demand. The leading operators usually target key gateway locations, large metropolitan cities, international airports or large coastal resorts with an established conference industry. Strategic motorway locations are also considered and can be appealing to operators with a strong conference brand. A number have also been developed from former country houses and operate in the golf resort market.

Typical Site Requirements

8.45 Most of the major hotel operators have criteria that they normally require in terms of identifying sites for new hotel development. Different hotel groups have varying site requirements, but generally for most of the leading groups, the site must have:

- a minimum residential population of 50,000-100,000 (but generally 250,000 to 500,000 for major four and five-star metropolitan chains), although this is less important for hotels located at strategic motorway / road locations;
- good access from main routes/public transport and high visibility;
- convenience to business demand generators;
- respectable adjacent land uses and a reasonably attractive environment;
- town centre budget hotels typically require a site area of up to 0.9 acres for a central site (with car parking), assuming three storeys and 1.5-2.5 acres for out-of-town sites;
- a three-star hotel typically requires 1-3 acres and a four-star needs at least one acre in town and up to 6 acres out of town. Requirements do, however, vary significantly;
operators are increasingly attracted to mixed-use developments – both city centre and out-of-town sites;

- the cost (value) of the land must match the economics of the development; and
- the increase in development costs is driving a number of changes in the sector – including the move towards larger hotels and the tailoring of the hotel product to the site.

**Doncaster Assessment**

8.46 The main existing hotel accommodation located in and within approximately 5 kilometres of around Doncaster town centre is summarised in Table 8.5.

**Table 8.5 Main Existing Hotel Provision in Doncaster**

<table>
<thead>
<tr>
<th>Hotel Name</th>
<th>Brand</th>
<th>Grade</th>
<th>Number of Rooms</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Doncaster Town Centre</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Premier Inn Doncaster Central</td>
<td>Premier Inn</td>
<td>3 star</td>
<td>138</td>
</tr>
<tr>
<td>Danum Hotel</td>
<td>Independent</td>
<td>3 star</td>
<td>64</td>
</tr>
<tr>
<td>Regent Hotel Doncaster</td>
<td>Independent</td>
<td>3 star</td>
<td>52</td>
</tr>
<tr>
<td><strong>Outside of Doncaster Town Centre</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Earl of Doncaster Hotel</td>
<td>Independent</td>
<td>4 star</td>
<td>55</td>
</tr>
<tr>
<td>Grand St Leger Hotel</td>
<td>Independent</td>
<td>3 star</td>
<td>20</td>
</tr>
<tr>
<td>Restover Lodge Hotel Doncaster</td>
<td>Independent</td>
<td>Budget</td>
<td>63</td>
</tr>
<tr>
<td>Premier Inn, Doncaster Dome</td>
<td>Premier Inn</td>
<td>3 star</td>
<td>47</td>
</tr>
<tr>
<td>Park Inn by Radisson</td>
<td>Radisson</td>
<td>3 star</td>
<td>85</td>
</tr>
<tr>
<td>Premier Inn, Lakeside</td>
<td>Premier Inn</td>
<td>3 star</td>
<td>42</td>
</tr>
<tr>
<td>Travelodge, Lakeside</td>
<td>Travelodge</td>
<td>Not known</td>
<td>Not known</td>
</tr>
<tr>
<td>Holiday Inn Express, First Point Business Park</td>
<td>Holiday Inn</td>
<td>3 star</td>
<td>94</td>
</tr>
<tr>
<td>The Wheatley Hotel</td>
<td>Independent</td>
<td>3 star</td>
<td>12</td>
</tr>
<tr>
<td>Holiday Inn Doncaster A1(M), Jct 36</td>
<td>Holiday Inn</td>
<td>3 star</td>
<td>102</td>
</tr>
<tr>
<td>Campanile, Bawtry Road</td>
<td>Campanile</td>
<td>2 star</td>
<td>49</td>
</tr>
</tbody>
</table>

Source: Bilfinger GVA

8.47 As Table 8.5 highlights, hotel provision in Doncaster town centre is extremely limited for a centre of Doncaster’s size and status, with only three hotels located in the town centre. Beyond the town centre (but within approximately 5 kilometres), there is good representation of representation of branded and independently-operated hotels within Doncaster. Six of the major hotel brands are present in the town (Premier Inn, Travelodge, Holiday Inn, Radisson and Campanile). The offer provides a reasonable range in terms of the quality of the provision,
from budget independent hotels and the 2 star Campanile to the upper 3 star branded hotels and the 4 star Earl of Doncaster hotel. Outside of Doncaster town centre, much of the hotel provision and particularly the branded hotels are located in the south and south east of Doncaster, in proximity to Doncaster Racecourse, Lakeside and First Point Business Park.

8.48 A number of hotel developments are in the pipeline in Doncaster town centre, including the 56 bedroom hotel above the Frenchgate Centre, which was recently granted planning permission (reference: 14/02593/FULM). The Frenchgate Centre is hoping to attract a budget hotel chain to the proposed scheme. Hotel uses are also permitted as part of the Civic and Cultural Quarter development (reference 08/02535). The planned hotel developments in Doncaster town centre will substantially increase the choice and quantity of hotel accommodation in the town centre, and potentially provide a branded budget option.

8.49 It is considered that it would be difficult for the council to proactively allocate further sites in the local plan specifically for hotel uses given the outstanding permissions for hotel development in the centre and the significant variance in locational and operational requirements (e.g. in-centre and out-of-town employment park models). Any new hotel provision is ultimately likely to be operator-driven and market testing will be required to ascertain the level of demand for further hotel development in the town centre. If further demand is identified, the range of sites in Doncaster could provide an opportunity for hotel uses to be delivered as part of a mixed-use scheme, particularly those in proximity to the railway station. A flexible mixed-use allocation would be important to enable a commercially-deliverable scheme to be achieved.

**Summary of Need for Leisure Uses**

- There is a quantitative and qualitative need for new commercial leisure facilities in Doncaster town centre, including restaurants and cafés, a new cinema, and family entertainment facilities, such as a climbing wall, skate park or soft play centre. Such improvements would help to diversify the town centre offer and evening economy and help to establish the centre as a family leisure destination.

- There is a qualitative need for new restaurant and café uses to diversify the offer and broaden the evening economy in both Mexborough and Thorne town centres.

- There is potential for further hotel development in Doncaster town centre, which could be met through the implementation of the extant planning permission at the Frenchgate Centre, as well as further provision as part of the next phase of the Civic Cultural Quarter development.
9. **Summary of Findings and Recommendations**

**Introduction**

9.1 In this section of our report we set out the principal findings from the various lines of research and analysis that informed our study, along with our recommendations in terms of meeting identified needs.

**Qualitative Retail Needs**

**Doncaster Town Centre**

- Our health check assessment of Doncaster town centre has identified that the absence of a main food shopping destination in Doncaster town centre represents a key qualitative deficiency in the town centre offer. There is an under representation of national multiple foodstore operators in the centre and further foodstore provision should generally be considered positively.

**Mexborough Town Centre**

- Our health check assessment of Mexborough town centre has identified a qualitative requirement for a mainstream supermarket offering a full range of food and grocery products in Mexborough. Development of the former United Carpets site off Station Road for a foodstore offers an opportunity to provide a main food shopping destination within easy reach of the town centre and support linked trips with town centre locations.

**Thorne Town Centre**

- Our health check assessment of Thorne town centre identified a qualitative need for further supermarket provision in Thorne to improve local consumer choice and reduce the need for residents to travel to destinations further afield.

**Quantitative Retail Needs**

9.2 We consider that the indicative floorspace requirements we have identified in this study - and summarised below - should be treated as the starting point for the determination of planning applications for new retail and commercial leisure floorspace in the borough. However, the floorspace requirements that we have identified should be treated as indicative guidelines and are not intended to be a ‘cap’ on appropriately-located new development. Any
proposals that come forward should be assessed against the planning policy framework provided by the National Planning Policy Framework and the development plan.

**Comparison Retail Sector**

9.3 As identified in Section 7, we identified a requirement for up to 12,300 square metres net floorspace in the period up to 2032, assuming that all of the existing commitments are implemented, or 33,700 square metres net by 2032 if all ‘commitments’ except those currently under construction are excluded.

9.4 Accordingly, we recommend that the council should plan for a quantitative requirement for additional comparison floorspace in the borough within the ranges set out in Table 9.1. We recommend that the council closely monitor the progress of the committed schemes to identify as early as possible where schemes will not be delivered. The Council should review quantitative floorspace requirements regularly throughout the Plan period.

**Table 9.1 – Doncaster Borough Comparison Retail Capacity**

<table>
<thead>
<tr>
<th></th>
<th>2025 sq.m (net)</th>
<th>2030 sq.m (net)</th>
<th>2032 sq.m (net)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum Requirement (all existing commitments are implemented)</td>
<td>-6,200</td>
<td>6,600</td>
<td>12,300</td>
</tr>
<tr>
<td>Maximum Requirement (‘under construction’ commitments only)</td>
<td>15,200</td>
<td>27,900</td>
<td>33,700</td>
</tr>
</tbody>
</table>

Source: Tables 8A and 8B at Appendix 6.

**Distribution of Floorspace Requirements across the Borough**

9.5 The council should direct new floorspace to town centre locations in the first instance – in accordance with national planning policy. The focus of the comparison goods requirement should be on Doncaster town centre, with a smaller allocation to support the development of Mexborough and Thorne town centres. We also consider that a small amount of comparison floorspace should be allocated to support the development of existing and/or new district and local centres in the borough.

9.6 This distribution reflects the council’s ambitions to develop Doncaster town centre as a shopping destination of regional importance. The provision of additional floorspace will allow the town centre to maintain and expand its current influence within the region, in the face of increasing competition from out of centre locations in the borough. It will also deliver improved shopping facilities which meet the requirements of the borough’s growing population which is expected to come forward over the course of the Local Plan period. Based on the identified capacity requirements it is expected that the further new comparison
goods floorspace will be developed in the latter half of the plan period to 2032, although this should not preclude appropriate in-centre development coming forward before this time should a suitable development opportunity arise.

9.7 The quantitative and qualitative need for new comparison goods retail floorspace in Mexborough and Thorne is more limited, but incremental enhancements of the retail offer within both of the centres should be supported, provided that proposals are of an appropriate scale. We would not expect there to be significant market demand for large quanta of comparison goods floorspace in either centre, and it is evident from our health check analysis that both of these centres that they primarily fulfil a convenience and service function. Nevertheless, there is scope for the offer of both centres to be enhanced in order to allow for local shopping needs to be adequately met.

9.8 On this basis, we have indicatively allocated 75% of the comparison goods floorspace requirement for the borough to Doncaster town centre, 10% to Mexborough town centre, 10% to Thorne town centre, and the remaining 5% to other existing/new centres in the borough. Table 9.4 shows the cumulative distribution of comparison goods floorspace in the borough for each of the forecast years periods based on this allocation.

9.9 It is emphasised that this distribution is indicative only and should the comparison goods floorspace requirements identified for each centre not come forward over the plan period, then the council should direct the floorspace requirements to Doncaster town centre in the next instance. Moreover, the indicative distribution in Table 9.4 should not preclude appropriate in-centre development coming forward in Doncaster, Mexborough or Thorne town centres should a suitable development opportunity arise.

**Table 9.4 Distribution of Comparison Goods Floorspace between Centres in Doncaster Borough**

<table>
<thead>
<tr>
<th>Centre</th>
<th>% of Floorspace</th>
<th>2025</th>
<th>2030</th>
<th>2032</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Min</td>
<td>Max</td>
<td>Min</td>
</tr>
<tr>
<td>Doncaster</td>
<td>75</td>
<td>-4,650</td>
<td>11,400</td>
<td>4,950</td>
</tr>
<tr>
<td>Mexborough</td>
<td>10</td>
<td>-620</td>
<td>1,520</td>
<td>660</td>
</tr>
<tr>
<td>Thorne</td>
<td>10</td>
<td>-620</td>
<td>1,520</td>
<td>660</td>
</tr>
<tr>
<td>Existing/new district and local centres</td>
<td>5</td>
<td>-310</td>
<td>760</td>
<td>330</td>
</tr>
<tr>
<td>Total</td>
<td>100</td>
<td>-6,200</td>
<td>15,200</td>
<td>6,600</td>
</tr>
</tbody>
</table>

Source: Tables 8A and 8B at Appendix 6.
Convenience Retail Sector

9.10 In Section 7, we identified that, should all of the convenience goods floorspace for which planning permission exist come forward, there is no requirement for the council to plan for any additional convenience goods floorspace in the borough, as these existing commitments will ‘claim’ all future growth in convenience goods spending. However, as with our comparison retail capacity assessment, we consider it possible that a number of the existing ‘commitments’ will not be implemented. If we assume that only those two existing commitments that are already under construction are implemented there is a quantitative need for up to 8,300 square metres of net convenience floorspace in the borough arising in the period up to 2032.

9.11 Accordingly, we recommend that the council should plan for a quantitative need for additional convenience floorspace in the borough within the ranges set out in Table 9.2. Again, the council should closely monitor the progress of the committed schemes to identify where schemes will not be delivered and review the quantitative requirements for new convenience floorspace regularly throughout the Plan period.

Table 9.2 Doncaster Borough Convenience Retail Capacity

<table>
<thead>
<tr>
<th></th>
<th>2025 sq.m (net)</th>
<th>2030 sq.m (net)</th>
<th>2032 sq.m (net)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum Requirement (all existing commitments are implemented)</td>
<td>-7,600</td>
<td>-5,300</td>
<td>-4,300</td>
</tr>
<tr>
<td>Maximum Requirement (‘under construction’ commitments only)</td>
<td>5,000</td>
<td>7,300</td>
<td>8,300</td>
</tr>
</tbody>
</table>

Source: Tables 8A and 8B at Appendix 7.

Distribution of Floorspace Requirements across the Borough

9.12 The above quantitative needs for additional convenience retail floorspace in the borough should be supported by the provision of new supermarkets/superstores within existing centres to meet the identified qualitative needs we have identified as detailed above.

9.13 We do not consider there to be merit in identifying precise disaggregation of the identified floorspace requirements between the borough’s main centres. However, the identified capacity set out above under the ‘under construction commitments only’ scenario is considered sufficient to deliver on the qualitative recommendations for new convenience goods floorspace which this study has identified, which could indicatively be split as follows:

- Doncaster town centre foodstore – up to approximately 4,000 square metres net convenience sales;
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Mexborough and Thorne town centres – one new foodstore of between 1,000 and 1,500 square metres net convenience floorspace in each centre; and

enhancements to existing day-to-day shopping in existing and planned new local centres – approximately 1,300 square metres in total.

9.14 In the event that all of the planned commitments for new convenience retail floorspace come forward, this would not prevent appropriate town centre schemes coming forward, as there is no requirement under the National Planning Policy Framework for ‘need’ to be demonstrated. However, in practice, if all of the commitments for new floorspace are implemented, there would potentially be a reduced market appetite for town centre foodstore schemes, as potential operators would have been able to have satisfied their trading requirements in the area through developments elsewhere. For this reason, it is recommended that any further applications for out-of-centre convenience goods retail floorspace in the borough are resisted.

9.15 The capacity requirement for Mexborough town centre does not include the vacant Tesco Metro store in the town centre, as this store was trading at the time the household telephone survey was being undertaken. The capacity requirement for Thorne town centre would be satisfied by the proposed Lidl supermarket to the north of the town centre, should the council grant planning permission for this development.

Need for Leisure Uses

9.16 The findings of the household survey demonstrate the relatively strong performance of Doncaster town centre in the ‘pubs, bars and clubs’ category, as well as the ‘restaurants and cafés’ category. However, our health check assessment identified that the diversity of the leisure offer in the town centre is limited for a centre of Doncaster’s size and status, with a heavy reliance on drinking establishments and a lack of multiple and family-orientated restaurants. We consider that there is a qualitative need to increase the quantity and variety of restaurant and café provision in Doncaster town centre to improve consumer choice, increase dwell-time in the centre and diversify its evening economy. The provision of enhanced facilities of this nature will likely need to be allied to other forms of leisure development, for example a new cinema-led scheme, in order to represent attractive propositions for operators.

9.17 Mexborough town centre also under-performs in the ‘restaurants and cafés’ category with only one restaurant located in the town centre. The findings of our health check identified a need to diversify the mix of uses in Mexborough town centre to encompass more service and leisure uses and support the continued vitality and viability of the centre. We consider that there is a need for additional restaurant provision in the centre to support the growth of an
evening economy in the centre, although it is recognised this will be of a considerably more limited scale. The performance of Thorne town centre was found to be stronger than Mexborough in relation to both eating and drinking establishments. However, an improved restaurant offer would also assist in attracting visitors to the centre and increasing dwell times.

9.18 Across the borough there is considerable growth in spending expected to come forward, with a growth of £25.6 million in ‘restaurants and cafes’ expected by 2025, and £5.2m expected in ‘pubs and bars’. This growth should be directed towards enhancement of facilities in the borough’s town, district and local centres in order to support their vitality and viability and diversify their retail offer. ‘Restaurants and cafes’ are both considered as ‘town centre’ uses under the National Planning Policy Framework and therefore proposals for development outside of defined town centres will need to satisfy the requirements of national and development plan policy.

9.19 The same approach should be applied to development of ‘pubs and bars’, although purely in terms of qualitative need, we do not consider there to be an immediate requirement for further developments of this nature. Public houses can also play important roles in the vitality and viability of local centres, and proposals for enhancement of provision at centres in all levels of the borough’s retail hierarchy should therefore be considered on their individual merits. Some of the growth in spending in this category can also be met by provision within new district/local centres which are expected to come forward in the borough over the course of the plan period.

9.20 Our assessment has also identified a key qualitative requirement for cinema provision in Doncaster town centre. When considering average number of cinema screens per person within an appropriately-defined catchment area, it is clear that there is an under provision of this type of commercial leisure provision in the borough. The borough currently only has one multiplex cinema facility, and its out-of-centre location means that it does not contribute to the vitality and viability of any centre, and there is clear scope to introduce a competing multiplex cinema facility in Doncaster town centre to enhance competition in the borough as a whole, complementing and enhancing the recent development which has taken place in the Civic and Cultural Quarter, including the new theatre and live music facilities.

9.21 Whilst the potential to attract another major bowling or ice-skating facility appears to be more limited, Doncaster town centre may be viewed more favourably as a potential location for additional leisure provision by operators of other small-scale leisure facilities, such as a climbing wall or skate park, and it is recommended that proposals for developments of this nature should be considered favourably where they would contribute to the wider vitality and viability of the town centre.
The key priority location for accommodating the identified commercial leisure needs is, therefore, Doncaster town centre. Capturing a sizeable proportion of the forecast growth in expenditure, as well as clawing back expenditure currently lost to leisure destinations outside the borough, through the provision of a new cinema and a wider and more appealing choice of restaurants and cafés will be important to the future health of Doncaster town centre. An improved leisure offer in Doncaster would support the diversification of the evening economy in the centre, as well as enhance access to such facilities for residents across the borough. The delivery of a new cinema facility in the Civic and Cultural Quarter would also support our wider recommendations in respect of the vitality and viability of Doncaster town centre, which currently suffers from a lack of footfall / strong ‘anchors’ in the southern side of its town centre (i.e. away from the environs of the Frenchgate Centre and markets). We consider that enhancement of the commercial leisure sector represents the biggest opportunity for the strengthening of the vitality and viability of Doncaster town centre over the course of the plan period.

It should be remembered, however, that the commercial leisure sector is dynamic, changing and operator-led, and we have not undertaken any commercial viability assessment or market testing as part of our needs assessment. How growth in spending on leisure services is expended locally depends very much on what opportunities the market supplies; current spending patterns can only provide a guide to what might happen in the future. If an investor feels capable of attracting customers by diverting spending from other facilities, the planning system does not seek to prevent additional development, provided such development meets the tests in the National Planning Policy Framework.

Proposals for enhancement of commercial leisure facilities within the town centres of Mexborough and Thorne should be considered on individual merits and be of a scale appropriate to the role and function of the centre.

**Strategic Approach to Protect and Enhance Town Centre Vitality and Viability**

In order for the town centres in the borough to maintain and enhance their competitiveness, vitality and viability over the plan period, a clear strategic approach is necessary to guide the development of each town centre. Below we set out our recommendations for the strategic development of the three principal centres in the borough (Doncaster, Mexborough and Thorne), which draws on the key issues within each centre which our analysis has identified. We then set out our recommendations in relation to out-of-centre retail and leisure development in Doncaster.
Doncaster town centre

Integration of the Frenchgate Centre with the rest of Doncaster town centre

- Improving connectivity across the town centre should be a key priority of the council’s investment programme, in particular to better integrate the Frenchgate Centre with the rest of the town centre, which will enable the rest of the town centre to tap into the growing success of the Frenchgate Centre. With the major national multiples focused in the Frenchgate Centre and its immediate vicinity, alternative areas of the town centre should offer something different to provide a reason for shoppers to venture away from the Frenchgate Centre and Primary Shopping Frontages.

- The focus should be on creating a high quality environment and a sense of ‘place’, which encourages and attracts people to visit, spend time and stop for lunch or a coffee. This could be achieved through an emphasis on the town centre’s distinctive heritage assets and local independent offer, alongside measures such as public realm improvements (e.g. public art / sculptures), improved sign-posting, promotion and branding of an area, town centre events, and potentially the creation of a public square.

- Whilst connectivity between the Frenchgate Centre and bus railway stations is virtually seamless, the linkages between the stations and the other parts of the town centre are much weaker. This means that, by default, users of the centre will enter the town centre via Frenchgate. If the quality of the retail and leisure offer outside the Frenchgate is not sufficiently strong, there is no reason for many users of the centre to go beyond the Frenchgate Centre and its immediate area. As part of any improvements to the wider town centre offer, there is a need to strengthen functional and physical linkages between the station and the town centre, including improved signposting, multi-functional spaces, and pedestrian priority crossing measures, into the town centre when approached via Trafford Way / West Laith Gate / St Sepulchre Gate.

Market Place

- Doncaster’s market is one of the largest in the north of England and continues to play an important role in the vitality and viability of Doncaster town centre, and this should continue to be supported over the course of the plan period.

- Baxter Gate plays an important role in drawing visitors from St Sepulchre Gate / the Frenchgate Centre towards the Market Place and so it is important that the core retail function of this area is protected. Applications for changes of use away from A1 retail use should be resisted.
The market area should be supported and enhanced through diversification of its offer, promotional activity and special events – fortnightly or monthly farmers’ markets for example – which help to generate footfall and attract new customers.

Allied to our recommendation for promoting development which provides a strong sense of ‘place’, the market place and surrounding streets offer significant potential to be promoted as an independent quarter within the centre. The markets provide a hub for independent trading, and Market Place and neighbouring Nether Hall Road are already an independent stronghold. High quality public realm and linkages to the primary shopping frontages to help attract people to the area and away from the primary shopping frontages will be an important element of any strategy to encourage independent retailing. Other suggested measures the council can take to support independent retailing in this area are:

- specifically targeting high quality independent retailers and food/drink establishments;
- the application of frontage policies to focus the mix of uses on retail and leisure (focusing on A1, A3 and A4 uses and restricting A2 and A5 uses); and
- promoting the provision of good quality smaller units where required to accommodate smaller businesses.

**Waterdale**

- In the short term, the council should work with St. Modwen to secure functional improvements to the Waterdale Centre that improve its aesthetic appearance and retail mix. Encouragement should be given to short-term lets, the introduction of pop-up shops, and so on.

- In the medium to longer-term, the aspiration for this area should be redevelopment to provide a strong retail anchor. The Waterdale area and the Waterdale Centre provides the main link between the central shopping area and Doncaster’s emerging Civic and Cultural Quarter, meaning that the Waterdale area has an extremely important role to play in encouraging strong pedestrian flows between the Civic and Cultural Quarter and the primary shopping area. The current offer in the Waterdale centre does not provide this.

- The key opportunity for this area is considered to be the development of a foodstore, potentially as part of a higher-density, mixed use development, which would provide a sufficiently strong anchor store to draw footfall south from the primary shopping area (via an enhanced Duke Street) and meet the qualitative gap which has arisen for provision of this nature following the closure of the Tesco store.

- Any redevelopment of the site should provide clear through-linkages to the Civic and Cultural Quarter to the immediate south.
Colonnades

- The long-term success of the Colonnades, which is a council-owned asset, is the implementation of a programme of upgrading and modernising of the centre so as to safeguard the retention of its key anchor tenants and ensure the future vitality and viability of the centre. Improved entrances/external upgrades/rebranding of the shopping centre to modernise its external appearance and improve links to the street are considered to be essential.

Nether Hall Road/Copley Road Area

- Nether Hall Road is currently designated as a ‘Commercial Fringe Policy Area’ in the UDP and as such does not form part of the primary shopping area in Doncaster town centre. However, Nether Hall Road has significant representation of retail and service uses, and with a strong independent restaurant offer this part of the town centre is beginning to successfully develop its own ‘identity’. It provides an important part of the daytime and evening offer in Doncaster, and the current policy designation fails to promote this area as a potentially key part of the wider town centre retail offer. We recommend that the council support the enhancement and protection of this area of the town centre as a destination for independent restaurants and other retail and service uses, although we do not consider there to be merit in extending the primary shopping area.

- Copley Road, in contrast, has a high level of vacancy and appears to function more as a local centre for the surrounding residential area. Given the peripheral location of the retail units with respect to the town centre and proximity of existing residential uses, we suggest that the council could support changes to residential uses in parts of the Copley Road to secure the reoccupation of vacant units and contraction of the number of commercial units in this area to a sustainable level.

Civic and Cultural Quarter

9.26 The continued development of the Civic and Cultural Quarter is a key priority for the council and provides a major opportunity to substantially improve the commercial leisure offer of Doncaster town centre. This area represents the most suitable opportunity for the development of a cinema-led commercial leisure scheme.

- The development of a cinema at this location also provides the opportunity to attract ‘family dining’ restaurant operators to the centre, which typically require the presence of a complementary use such as a cinema in order to trade viably. We expect that the restaurant units will attract the type of mid-range branded operators currently missing from the centre, broadening the range and quality of restaurants available in the centre as well
as increasing the overall quantity of provision. Together with the cinema, the new restaurant provision should also provide the centre with a family-friendly daytime and evening leisure destination.

- We also consider that this area, and the wider Waterdale area, offers the potential to attract other smaller scale family orientated leisure facilities, such as a climbing wall, soft play centre or skate park, which would further help to diversify the town centre leisure offer.

Mexborough Town Centre

9.27 For Mexborough town centre, the priority should be to consolidate and strengthen the existing offer whilst encouraging the provision of an appropriately scaled food store which can facilitate linked trips and support the vitality and viability of the rest of the town centre. The former United Carpets site at Station Road / Greens Way has planning permission for a retail foodstore, although there is some uncertainty as to whether this development will progress. Should the permission be implemented, it is considered this will satisfy the need for additional convenience goods retailing in the town.

9.28 In the event that planning permission for this development lapses, it is considered that this site forms the prime opportunity for enhancement of the retail offer on a well-connected site. Any future development should incorporate a convenience store of an appropriate scale which enables both day-to-day and bulk food shopping trips to be met. The redevelopment of this site is also important as a key gateway site when arriving into Mexborough by rail, given its proximity to the railway station.

9.29 The re-letting of the former Tesco Metro store could potentially have an important influence over the vitality and viability of the wider town centre in the coming years, and it is recommended that the council take a proactive role with Tesco and commercial property agents in encouraging the attraction of a store with a comparable ‘anchor’ role.

Thorne Town Centre

9.30 Within Thorne town centre, we also expect the broad strategic approach to be one of consolidation of the existing retail offer and improvements to the physical appearance of the town centre, rather than planning for significant outward expansion of floorspace.

9.31 Lidl has submitted a planning application to construct a new foodstore at Darley Road / Field Road on the edge of the town centre to the north of the existing Sainsbury’s foodstore. Whilst it is for the council to consider the planning merits of a new supermarket at this location, it would be expected to enhance expenditure retention, promote consumer choice and support
linked trips with town centre locations. Should the council be minded to approve any application on this site, it is recommended that measures to enhance linkages with the rest of the centre form part of any planning obligations which are attached to the permission.

9.32 There is also scope to enhance the Market Square area as the ‘historic heart’ of the town centre, giving it a renewed focus as a hub for community, local shopping and services activities, such as cafes and restaurants. This will however require significant investment in addressing prominent vacant units in the Market Square, and complementary works such as upgrades to shopfronts and public realm, in order to create better conditions to encourage investment in the centre by potential businesses.

Out of Centre Retail Development

9.33 We identified the quantity and strength of out-of-centre retailing in Doncaster as a key issue for the town centre with the increasing presence of traditionally high street retailers in out-of-centre locations a particular concern.

9.34 Pressure for further out-of-centre development in Doncaster is on-going. In the last few years a number of store extensions and new foodstore developments in out of centre locations have taken place, including a new Morrisons at First Point, Lidl in Mexborough and most recently, an M&S Foodhall store at Wheatley Retail Park. Planning permission remains extant for the development of an out-of-centre Aldi store in Wheatley and a superstore at Capitol Park in Thorne. New retail development has occurred at Thorne Road, Centurion and Leger Way Retail Parks over the last few years, and a new larger Next store at Wheatley Retail Park is currently under construction.

9.35 Whilst Doncaster town centre has strengthened its comparison retail offer within the Frenchgate Centre since 2012, the vitality and viability of the town centre away from the primary shopping frontages has been identified as an area of concern in our health check assessment.

9.36 In the convenience sector, the dominance of out-of-centre foodstores within the borough and reduced convenience shopping function of Doncaster town centre was highlighted by the findings of the household survey. As competition from out-of-centre destinations has increased, we have seen a fall in convenience goods spending in Doncaster town centre. The closure of the Tesco store in Doncaster town centre and future planning commitments for out-of-centre foodstores will have further impacted upon the town centre’s convenience goods market share.

9.37 Given the limited capacity for new convenience floorspace over the study period, and the qualitative requirement and site opportunities for the development of a new foodstore in
Doncaster town centre, there is no need or justification for further out of centre foodstore provision over the emerging Local Plan period. The identified deficiencies in convenience retail provision outside of Doncaster would be met by the commitment for a new foodstore on the edge-of-centre United Carpets site in Mexborough, and by the proposed edge-of-centre Lidl store in Thorne, if permitted by the council. Further out-of-centre foodstore development is likely to limit the potential to deliver a new foodstore in Doncaster town centre and undermine the future vitality and vitality of the town centre, and therefore should be resisted.

9.38 Whilst we identified a more substantial requirement for new comparison retail floorspace within the borough over the study period, this requirement should be directed to Doncaster town centre in accordance with national planning policy to support the future vitality and viability of the centre. There are ample site opportunities within the town centre to accommodate identified needs as identified in Section 4. Further out-of-centre comparison retail in Doncaster should therefore be resisted.

9.39 At existing out-of-centre retail parks, the council should establish robust development management policies to effectively manage the existing mix of comparison retail uses by preventing further ‘drift’ towards open A1 retail use. Permissions for sub-division of retail units and variation of conditions to allow broader ranges of goods to be sold from what have historically been ‘bulky goods’ retail units can, cumulatively, have significant potential to undermine the vitality of the town centre, and should therefore be resisted.

**Hierarchy of Centres**

9.40 We recommend that the current designations of Doncaster town centre as the sub-regional centre, and Mexborough and Thorne as town centres be maintained. In the absence of any current guidance of the definition of a town, district or local centre, we refer to the definitions set out in the now-defunct Planning Policy Statement 4 - which comprised the national planning policy on retail and town centre matters until its replacement by the National Planning Policy Framework – as follows:

- **Town centres** will ‘usually be the second level of centres after city centres… ‘and in rural areas ‘they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas.’

- **District centres** ‘will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.’
- **Local centres** include a range of small shops of a local nature, and typically ‘...might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway...’

9.41 Mexborough and Thorne are both market towns and serve a wider role as important service centres for their surrounding rural catchments, and therefore function as town centres following the above definitions.

9.42 The appropriate status of the new centre proposed as part of the Unity scheme (formerly known as the DN7 Initiative) within the retail hierarchy (i.e. whether the centre should be defined as a district or local centre) should be assessed once the planned scale of development and mix of uses in the centre is known. As there is no current national guidance of the definition of a district or local centres, we recommend that the definitions provided in the defunct Planning Policy Statement 4 as summarised above should be used as a basis for determining the appropriate status for the new Unity centre.

**Planning for New District and Local Centres**

9.43 Any future expansion of existing centres or new centres that are planned to meet identified needs – including the proposed new Unity centre – will need to serve local needs only, rather than function as retail destinations in their own right. Provision beyond that required to meet the day-to-day shopping and service needs of local residents could compete with and undermine the vitality and viability of the existing network of centres in the borough. In this context, it is therefore important that the council:

- establishes the potential quantitative needs likely to be generated by proposed new residential provision; and
- constructs appropriate policy framework so as to ensure that new provision solely serves local needs.

9.44 The expenditure capacity arising from a planned strategic housing site allocation can be established by calculating the resident population (based on average household size) and applying an appropriate expenditure (per capita) figure. The overall ‘headline’ capacity figure should however be treated with caution as it effectively assumes that 100% of all expenditure arising from a planned residential scheme would be available to solely support a new local centre.

9.45 Whilst it is possible to identify the amount of class A1 convenience and comparison floorspace, it is difficult to quantify the need for (class A1) retail service uses such as hairdressers, pharmacies and dry cleaners (amongst others) given the lack of expenditure data available. In addition to retail and service uses, a new local retail centre may also
include class A2 premises (banks etc), class A3/A5 outlets (i.e. takeaway outlet), possibly a doctor's surgery and dentist (depending on PCT requirements), or bookmakers (class sui generis).

9.46 On this basis, it is recommended that the council should consider the following when constructing future site-specific policies for new local centres as part of new large/strategic residential developments.

- **Convenience and Comparison Floorspace**: the maximum class A1 convenience and comparison floorspace within the scheme should be specified (we have set out an indicative ‘cap’ on comparison goods floorspace within new local centres at 5% of the total comparison goods capacity requirement).

- **Range of Uses**: the range of uses (classes A1 - A5, D1 etc) which would create a viable local centre offer should be set out.

- **Maximum Unit Size**: the maximum floorspace (square metres gross) size for an individual unit should be specified so as to ensure that large units are not created.

- **Phasing**: policy should set out the amount of residential development which should be constructed prior to commencement of trading so as to ensure that the district / local centre does not come forward in advance or isolation of the residential it is intended to serve.
## Glossary of Terms

<p>| <strong>Business improvement district</strong> | A defined area within which businesses pay an additional tax (or levy) in order to fund projects within the district’s boundaries. The business improvement district is often funded primarily through the levy but can also draw on other public and private funding streams. |
| <strong>Catchment area</strong> | The catchment area of the borough is the area from which the borough attracts visitors or customers. |
| <strong>Comparison retail</strong> | Relates to items not obtained on a frequent basis; these include clothing, footwear, household and recreational goods. |
| <strong>Convenience retail</strong> | Relates to everyday essential items including confectionary, food, drinks, newspapers and magazines. |
| <strong>Development plan document</strong> | These are prepared by local planning authorities and outline their key development goals of the local development framework. Development plan documents include the core strategy and, where needed, area action plans. There will also be an adopted proposals map which illustrates the spatial extent of policies that must be prepared and maintained to accompany all DPDs. |
| <strong>Financial services</strong> | Building societies, building supplies and services, business goods and services, employment and careers, financial services, legal services, other business services, printing and copying, property services and retail banks. |
| <strong>Leisure services</strong> | Bars and wine bars, bingo and amusements, cafes, casinos and betting offices, cinemas, theatres and concert halls, clubs, discos, dance and night clubs, fast food and takeaway, hotels and guest houses, public houses, restaurants, and sports and leisure facilities. |
| <strong>Local development framework</strong> | A collection of planning documents prepared by a local planning authority to outline how they will manage development and land use in your area. |
| <strong>Professional/business services</strong> | Banking, financial management, estate agents, accountants, call centres, market and PR companies. |
| <strong>Primary catchment area</strong> | The primary catchment area of the borough is the main area from which the borough attracts visitors or customers and broadly corresponds to the administrative area of the borough. |
| <strong>Primary shopping area</strong> | Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages that are contiguous and closely related to the primary shopping frontage). The extent of the Primary Shopping Area should be defined on the Proposals Map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the Primary Shopping Area, therefore the town centre may not extend beyond the Primary Shopping Area. |
| <strong>Prime pitch</strong> | That part of the retail area of a town centre or retail mall where pedestrian flows are greatest, competition for representation is greatest and rents are noticeably higher than elsewhere. |
| <strong>Qualitative</strong> | Data that approximates or characterises but does not measure the attributes, characteristics, properties, etc. Qualitative data describes whereas quantitative data defines. |
| <strong>Quantitative</strong> | Data that can be quantified and verified, and is amenable to statistical manipulation. Quantitative data defines whereas qualitative data describes. |</p>
<table>
<thead>
<tr>
<th>Secondary catchment area</th>
<th>The secondary catchment area of the borough comprises those areas outside of the primary catchment area / borough from which the borough attracts a significant proportion of visitors or customers.</th>
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</thead>
<tbody>
<tr>
<td>Special forms of trading</td>
<td>SFT is defined as expenditure not directed to traditional floor space such as the internet, mail order, part plan and vending machines and other non-store activity such as market and road side stalls.</td>
</tr>
<tr>
<td>Town centre uses</td>
<td>Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).</td>
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