



Notice of meeting of

Local Development Framework Working Group

- To:** Councillors Steve Galloway (Chair), Potter (Vice-Chair), Ayre, D'Agorne, Merrett, Moore, Reid, Simpson-Laing, R Watson and Watt
- Date:** Tuesday, 3 June 2008
- Time:** 4.00 pm
- Venue:** The Guildhall

AGENDA

1. **Declarations of Interest**

At this point, members are asked to declare any personal or prejudicial interests they may have in the business on this agenda.

2. **Minutes** (Pages 3 - 4)

To approve and sign the minutes of the meeting of the Local Development Framework Working Group held on 13 May 2008.

3. **Public Participation**

At this point in the meeting, members of the public who have registered their wish to speak, regarding an item on the agenda or an issue within the remit of the Working Group, may do so. The deadline for registering is 5.00 pm on Monday 2 June 2008.

4. **City of York Retail Study 2008** (Pages 5 - 42)

Consultants GVA Grimley were instructed in June 2007 by City of York Council to undertake a citywide Retail Study for York. This

report summarises the key findings and recommendations of the retail study for consideration by Members.

5. Local Development Framework: York City Centre Area Action Plan Issues and Options (Pages 43 - 48)

This report requests that the Members of the LDF Working Group recommend to the Council's Executive that they approve the emerging York City Centre Area Action Plan (AAP), subject to the recommendations of the Group, for consultation. The intention, subject to Members' approval, is for the Issues and Options for the City Centre Area Action Plan DPD to be published for public consultation in July.

(PLEASE NOTE: The Issues and Options document attached at Annex A and Summary of Issues and Options document at Annex B are only available on the Council's website or on request. A copy has been placed in the Member's Library.)

6. Any other business which the Chair considers urgent under the Local Government Act 1972.

Democracy Officer:

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- Review existing policies and assist in the development of new ones, as necessary; and
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City of York Council

Committee Minutes

MEETING	LOCAL DEVELOPMENT FRAMEWORK WORKING GROUP
DATE	13 MAY 2008
PRESENT	COUNCILLORS REID (CHAIR), SIMPSON-LAING (VICE-CHAIR), AYRE, D'AGORNE, MERRETT, MOORE, R WATSON, WATT, ALEXANDER (SUBSTITUTE) AND JAMIESON-BALL (SUBSTITUTE)
APOLOGIES	COUNCILLORS HORTON AND WALLER

43. DECLARATIONS OF INTEREST

Members were invited to declare at this point in the meeting any personal or prejudicial interests they might have in the business on the agenda.

Cllr Simpson-Laing declared a personal non prejudicial interest in Agenda Item 4 (York Northeast Area Action Plan - Minute 46 refers) as she lived in the consultation area.

44. MINUTES

RESOLVED: That the minutes of the last meeting held on 4 March 2008 be approved and signed as a correct record.

45. PUBLIC PARTICIPATION

It was reported that there had been no registrations to speak under the Council's Public Participation scheme.

46. YORK NORTHWEST AREA ACTION PLAN - PROGRESS REPORT, INCORPORATING ISSUES AND OPTIONS CONSULTATION SUMMARY

Members considered a report which reviewed progress to date on the York Northwest Area Action Plan (AAP), and gave an overview of comments and headline results arising from consultation on the Issues and Options Report between November 2007 and January 2008. Members were asked to note the progress to date and the use of the consultation findings to inform the preparation of the Preferred Options. Members were further asked to agree the approach and programme for the preparation of the Preferred Options, which were also set out in this report.

Members received a presentation which covered the following points:

- Progress on the LDF, including the Core Strategy, Key Allocations and City Centre AAP, Evidence Base, Transport and Stakeholder Activity
- Issues and Options Consultation
- Vision and Objectives
- Key Themes, including Employment, Housing, Social Infrastructure, Culture and Tourism, Transport, Open Space
- Next Steps, including timescales, information analysis, developing conceptual options and the preferred options report

Members made the following comments:

- It was an important opportunity to review the success of the consultation process and what did and did not work.
- Future consultations could include having more local meetings, finding ways to reach hard to reach groups and ways of improving the consultation questionnaire return rate.
- The location of a rail halt at the bottom of the York Business Park should be considered as part of further transport work for the area.
- No specific consultation had taken place with residents in the Rawcliffe/Clifton area on the cycling / foot bridge option over the river. Officers reported that the implications of this bridge would be addressed in the transport options in the next stage of consultation as part of the Green Infrastructure/Transport options.
- There would need to be clear implications of each of the transport options when they go out for consultation.
- A range of options including the option of the tram-train should be brought back to Members before consultation.

RESOLVED:

- (i) *That the comments received on the Issues and Options documents be noted and their consideration in informing the Preferred Options stage for the Area Action Plan be supported;*
- (ii) *That the progress made to date on production of the Area Action Plan be noted and the approach for the development of the Preferred Options stage of work be agreed.*
- (iii) *That officers be thanked for all the work done during the consultation process on the Issues and Options report.*

REASON: To ensure that the Area Action Plan could be progressed to the next stage of work, in accordance with the Local Development Scheme.
To ensure that Members views were included in the generation of Preferred Options put forward.

Cllr A Reid, Chair

[The meeting started at 4.35 pm and finished at 5.40 pm].



Meeting of Local Development Framework
Working Group

3rd June 2008

Report of the Director of City Strategy

City of York Retail Study 2008

Summary

1. Consultants GVA Grimley were instructed in June 2007 by City of York Council to undertake a citywide Retail Study for York. The purpose of the study was to provide a context for retail policies and proposals within the forthcoming Local Development Framework (LDF) for York, with particular reference to the amount of floorspace that needs to be allocated for future retail development and the broad recommended strategy with which to implement this. This report summarises the key findings and recommendations of the retail study for consideration by Members of the LDF WG. Copies of the full Retail Study have been placed in the Members library and individual copies can be provided on request prior to the meeting.
2. The headline findings are that York City Centre is essentially healthy and performing well but there are a number of weaknesses that need to be addressed such as lack of convenience offer in the city centre, lack of new and refurbished department store offer and small format units not suited to modern retailing requirements. York City centre is drawing a declining share of overall retail spend within its catchment area. At the time of the 2001 Retail Study (CB Hillier Parker) York City Centre captured 37% of all available expenditure on comparison goods (non-food) within the catchment. This share had dropped to 31% by 2004 (York Retail Study, Roger Tym & Partner, 2004) and has now dropped further to 28%. The study concludes that this is due to increasing competition from other centres in the sub-region such as Leeds, Harrogate and Hull and competing out of centre locations in York such as Monks Cross and Clifton Moor. The study concludes there is a threat of further decline in market share in a 'do-nothing' approach.
3. The study forecasts that there is capacity for significant additional retail floorspace in York in the period up to 2029. In terms of food retail the amount of additional floorspace supportable by 2012 is 3,146 sq m, rising to 5,034 sq m net by 2017, 7,036 sq m net by 2022 and 10,015 sq m net by 2029. To put this figure in context the capacity figure equates to around four food stores the size of Morrison's in Acomb by 2017. In terms of non-food retail there is capacity for 9,245 sq m net of additional floorspace by 2012, rising to 31,361 sq m net by 2017, 56,254 sq m net by 2022 and 95,742 sq m net by 2029 based on York retaining its current market share of 28% of the available

spend in the catchment area. The study concludes that it is possible for York to 'claw back' some of the lost market share and to achieve a 34% market share depending on the location, scale and quality of new development. This would increase the amount of additional floorspace to between 10,418 sq m net by 2012 and 106,927 sq m net by 2029.

4. The study then considers the best locations for meeting this additional demand. It concludes that Castle Piccadilly is the key development site in York City Centre and development of the site should be encouraged over the LDF period and viewed as first priority for major retail development in York. The study concludes that further expansion of the city centre retail offer will be needed based on the capacity projections. It considers other opportunities for development in the city centre but concludes that there are limited large-scale opportunities beyond smaller in-fill development and refurbishment of existing space. The study concludes that York is compact and constrained from expansion and that alternative sites outside the existing city centre boundary should be considered. The study considers that whilst York Central is currently 'out of centre' in national retail policy terms it is identified as a major regeneration opportunity in close proximity to York City Centre and the core shopping area. On the basis of enhanced linkages and integration with the existing city centre and core shopping area the study concludes that retail development here would be more appropriate in policy terms than out of centre locations further removed from the city centre. The appropriateness of scale would be a crucial consideration to safeguard the vitality and viability of the city centre and to promote linked trips rather than a separate retail destination.

Background and Key Findings

Policy Framework

5. National planning policy guidance provides the framework for developing LDF shopping policies, which are tailored to the specific circumstances of York. The overarching policy thrust set out in Planning Policy Statement 6 (PPS6): Planning for Town Centres (March 2005, CLG) is to sustain and enhance the vitality and viability of existing centres, wherever possible, and to plan positively for new development within them, having regard to the roles and needs of the catchments.
6. The Regional Spatial Strategy (RSS) is due to be finalised in May 2008 and will maintain current regional planning policy which focuses future retail development in existing centres, and advises that no further out of centre regional and sub regional shopping centres or expansion of existing shopping parks should be permitted.
7. The current City of York Development Control Local Plan reiterates national planning policy, endorsing the sequential approach to site selection and identifies York City Centre as the primary focus for development and future growth in the city, prioritising its role as a sub-regional centre. The plan places emphasis on enhancing the range and diversity of retailing in the city

centre, promoting additional food retailing and preserving the small, independent shops within the city.

8. The Council is currently working on the Preferred Options for the Core Strategy and is due to go out to consultation in Autumn 2008. The Core Strategy will also guide the production of other LDF documents including the Allocations DPD and two Area Action Plans (AAPs), York Northwest and City Centre, the latter including both the Castle Piccadilly and Hungate sites. All these documents require a sound evidence base and there is therefore a need to update and expand upon the previous retail study which only assessed the city centre, which was produced for the Council by Roger Tym and Partners in 2004 and is used for the basis of policy decisions in the City of York Council Draft Local Plan (April 2005).

National Retail and Leisure Trends

9. Income and expenditure have shown strong growth over the last 20 years with retail expenditure growing faster than incomes. Households are now much more mobile than they were and therefore their choices of where to shop and the distances they can travel are much greater. Increased mobility and affluence have favoured larger centres over smaller centres and there has been a continued polarisation towards larger centres. The competition for market share has never been greater and investment in town/city centres is crucial to maintain and improve performance in the shadow of growing centres in the wider sub-regions.
10. Retailing in the larger centres and the more attractive smaller centres is changing and becoming more of a quasi leisure experience. Leisure spending is continuing to outstrip that of retail. Quality restaurants, coffee shops, cafes and bars, as well as health and fitness centres and leisure facilities in centres are therefore important to attract shoppers and encourage longer stays and higher spending.
11. The study concludes that these national trends are reflected in York, which is in an excellent position to take advantage of the growth in population, affluence and tourism expenditure experienced in recent years. Nevertheless, York also faces significant challenges to maintain and grow market share in the face of growing competition. Within the remainder of the study the extent of the need and demand for new development and where this could be most appropriately be met in order for York to protect its retail position and to take advantage of these wider retail trends is reviewed.

Sub-regional Context

12. The assessment of each of the competing centres identifies the main retail offer and associated floorspace provision, and the extent to which this is likely to change and influence shopping patterns in the sub-region. The household telephone survey (area illustrated on Plan 1, Annex 1) highlights the main centres that compete with York in terms of spend within York's retail

catchment. These include Doncaster, Harrogate, Hull and Leeds. The total expenditure leaked to these centres is illustrated on Plan 2, appended.

13. York City Centre draws about £402m of comparison goods expenditure (20.6%) from within the survey area (Zones 1-20). After York, Harrogate attracts the largest proportion of available expenditure, £132.3m (6.8%). Harrogate's trade draw is more than twice as much as the next most popular shopping destination – Northallerton with £64.8m, representing a 3.3% market share. Despite the dominant role of Leeds as a shopping destination in the region, the centre only attracts £61.5m (3.2%) given its location beyond the survey area boundary. It is clear that York is experiencing difficulty in maintaining an influence in the catchment area overlapping with Leeds (Zone 8).
14. The vitality rank of each competing centre has been derived from Javelin (Venuescore 2006). This provides an up to date ranking of UK shopping venues across a number of key indicators – scale, market positioning, fashionability and age positioning of the retail offer. It is evident from table 1.1 that Leeds and Hull are York's strongest competitors in terms of rank position. York has a rank position of 26, the third highest amongst the competing centres after Leeds and Hull with rank positions of 6 and 10 respectively. In terms of retail floorspace, Leeds is again the most dominant centre with a retail floorspace of approximately 201,600 sq m gross, which is 46% more than 138,426 sq m gross in York (Table 1.2). These figures include all retail and town centre uses.

Table 1.1: Retail Ranking

Retail Ranking		
Centre	Javelin Venuescore 2006	Javelin Venuescore 2005
Leeds	6	6
Hull	10	12
York	26	27
Middlesborough	36	54
Doncaster	60	60
Harrogate	73	75
Selby	377	327
Northallerton	401	345
Goole	453	477
Ripon	633	672
<i>Source: Javelin Venuescore</i>		

Table 1.2: Retail Floorspace

Retail Floorspace	
Centre	Sq m gross
Leeds	201,600
Doncaster	151,431
Hull	144,000
York	138,426
Middlesbrough	126,348

Harrogate	91,045
Darlington	91,045
Northallerton	42,735
Ripon	Na
Selby	Na
Goole	Na
<i>Source: Goad PROMIS</i>	

15. Low retail yields are one indication of a good performing centre and on this indicator York's 5.5% retail yield, on a par with Harrogate, is second only to Leeds at 4.75%. The strength of Leeds and York is further demonstrated by the number of retailers looking for new space in both centres. Not only does Leeds have the most requirements among the competing centres, but also it was ranked first in the UK when 200 requirements were recorded in April 2007. York also has a high level of retail demand with 125 requirements registered, achieving a national ranking of 27 and significantly outperforming all other competing centres in the region.
16. The analysis above reviews York's current performance in the retail network. The study also reviews developments in the pipeline in competing centres to assess the likely increased draw capacity of the centres that may compound trade leakage and impact on York's performance. It is clear that Leeds intends to add significantly to its already large amount of retail floorspace. Around 128,000 sq m of additional floorspace may be delivered in 5 separate schemes in the pipeline including the Trinity Square scheme, the re-development of the West Riding House Centre and the Eastgate scheme. This amounts to more than a 60% increase in retail floorspace and the refurbishment of approximately 31,000 sq m. This will significantly enhance the retail offer in Leeds and is likely to increase the trade draw from the York catchment area particularly in Zones 7 and 8.
17. Hull also has significant retail developments in the pipeline that could deliver an additional 75,000 sq m gross of town centre floorspace (including retail and leisure) including the shopping centre at the St Stephens Ferensway site and the refurbishment and extension of the Princess Quay Centre. This equates to a 25-35% increase in retail floorspace and will have implications for shopping patterns in zones 4, 5, 6 & 13 and trade draw from York from these zones. Without any new development, York's market share in this 'overlapping' catchment area could erode. There are also schemes in the pipeline in Darlington (19,000 sq m of additional floorspace) and Harrogate (10,000 sq m additional floorspace). These developments highlight the challenge facing York over the LDF period in terms of increased competition in the region and potential fall in market share as expenditure leakage is increased.
18. Unlike many centres, York has a unique cultural and heritage offer, which will assist in its attractiveness and differentiated retail, and leisure offer. There is a risk however, that a 'do nothing' approach to York's retail strategy could jeopardise the centre's position in the retail hierarchy, especially in light of the large scale retail developments that are coming through the pipeline in

competing centres. York City Centre needs to strike a balance over the LDF period to enhance mainstream and higher end comparison retail offer whilst protecting the historic built environment and range of independent and specialist retailing. Competition to York City Centre from other out of centre shopping locations within the City of York Local Authority Area is covered later in the report.

Comparative Analysis – Historic Centres

19. The study also considers key comparators to York city centre including Oxford, Cambridge, Bath and Norwich in terms of their retail and tourist centre roles. Table 1.3 shows key indicators for the centres.

Table 1.3: Comparative Centres, Key Indicators

Centre	Town Centre Floorspace	Retail Rank	Yield (%)	Rent (£ per sq m)	Requirements
Bath	115,000	21	5.00	2,583	161
Cambridge	120,000	78	5.25	2,583	178
Exeter	116,000	34	5.50	2,153	135
Norwich	207,000	7	5.50	2,260	100
Oxford	75,000	49	4.00	2,852	200
York	138,000	26	5.50	2,153	125

*Source: Promis Live, Javeline Venuescore 2006, V.O.A & Colliers
Floorspace is total gross floorspace as defined by PROMIS.*

20. With 138,000 sq m of town centre floorspace York is the second largest of the comparative centres after Norwich. Norwich has 50% more floorspace than York, which is a significant difference. The scale of floorspace provision does not reflect each centre's position in the national Javelin rank of town centres, which is largely, based on the presence of major multiple retailers. Norwich has the highest rank at 7th in the country. Norwich has climbed two places in the rankings since 2005 as a consequence of the Chapelfields centre which is anchored by a new House of Fraser department store. Bath is also ranked above York at 21 and has climbed 6 places up the rankings since 2005. York is ranked above Cambridge, Exeter and Oxford.
21. The presence of department store operators provides a good indication of the quality and extent of retail offer and the wider appeal of each centre as a shopping destination. Table 1.4 sets out the department stores present in each centre.

Table 1.4: Department Store Representation

Centre	Department Stores
York	Fenwick's / WP Browns / Debenhams / Marks and Spencers / BHS
Norwich	Debenhams / BHS / Co-op / House of Fraser / John Lewis / Marks and Spencer / Jarrolds

Bath	BHS / House of Fraser (Jollys) / Marks and Spencer
Exeter	Dingles/ BHS / Debenhams / Marks and Spencer
Cambridge	Debenhams / John Lewis / Marks and Spencer
Oxford	Debenhams / BHS / Boswells / Marks and Spencer

22. It is evident that Cambridge and Norwich have the broadest range and quality of department store offer; Cambridge benefits from a new John Lewis store in the Grand Arcade schemes and Norwich has a new House of Fraser store in the new Chapelfields centre. In terms of quality York is more comparable with Bath and Oxford although has a broader choice with Fenwicks and Browns occupying reasonably good units. Debenhams is represented but occupies a cramped central store with limited product range.
23. The representation of independent retailers is crucial to the tourist role and function of the centre. Table 1.5 shows the split between independent and multiple retailers in each of the centres. It is evident that Bath has the highest proportion of independent retailers closely followed by York; this indicator demonstrates the strength of the visitor attraction in respect of the niche-retailing offer.

Table 1.5: Independent/Multiple Retailer split by Centre

Centre	Independents %	Multiple %
York	51	49
Norwich	48	52
Bath	54	46
Exeter	48	52
Cambridge	44	56
Oxford	31	69

Source: Experian Goad Category Reports

24. Town/city centre developments recently completed or committed are a good indicator of the strength of the centre. The study shows that each comparable centre, except York, has undergone recent major retail development extensions or has significant viable schemes in the pipeline being taken forward. In Bath the re-development of the Southgate Centre is under construction, which will comprise 37,500 sq m of retail floorspace, 20,000 sq m of which will be additional floorspace. This centre will be open for trading later in 2008 anchored by a Debenhams department store. The major scheme in Cambridge is the new 42,000 sq m shopping centre at the Grand Arcade that is currently under construction. The new John Lewis department store opened in November 2007 and the remainder of the scheme is scheduled for completion in Spring 2008.
25. In Exeter the Princesshay scheme is now open and trading and includes a Debenhams store and 62 shopping units. The development gives an additional 18,000 sq m gross retail space to the centre. Pre-application

discussions are underway for the 46,000 sq m Paris Street scheme that could provide major retail and leisure facilities. The retail development pipeline in Norwich has been dominated for some time by the Chapelfield Centre, which opened in September 2005 on the former Nestle factory site in the south west of the city centre. The scheme measuring 538,000 sq ft gross (50,000 sq m gross) is anchored by House of Fraser and includes a strong line up of fashion multiples. Pre-application discussions are underway for the Westgate development that could deliver 10,000 sq m of retail floorspace on ground floor with residential above. In Oxford the Westgate centre has been granted full permission. This 70,000 sq m shopping centre scheme will include a John Lewis anchor and will bring an additional 48,000 sq m gross of retail floorspace to Oxford city centre.

26. Table 1.6 sets out a summary of how York is performing relative to these comparable centres in terms of the strengths and the potential weaknesses/threats.

Table 1.6: York City Centre’s performance relative to comparative centres

York city centre Strengths/Opportunities	York city centre Weaknesses/Threats
<ul style="list-style-type: none"> • High floorspace, 2nd after Norwich; • Javelin rank higher than Cambridge, Exeter and Oxford but opportunity to enhance rank position. It is certain that Cambridge, Exeter and Oxford will improve their position in the rankings following recent and committed developments; • Strong proportion of independent retailers demonstrating their importance and strength to the tourist economy; • York’s tourism Strategy is well advanced and continues to develop ensuring a comprehensive approach to the sector over the LDF period. 	<ul style="list-style-type: none"> • Joint highest Retail Yield (therefore weakest) with Exeter and Norwich; • Prime Zone A rent joint lowest with Exeter; • Retailer requirements low compared to other centres. This is likely to be related to lack of space and development opportunities coming forward; • Reasonable number of department stores but older in format and design compared to quality new and refurbished department stores in Cambridge, Norwich, Exeter, Oxford and Bath; • Major town centre retail schemes have recently been completed in Norwich, Cambridge and Exeter whilst a new scheme is under construction in Bath and consent has been granted in Oxford. All have strong department store anchors.

York City Centre Health Check

27. The Retail Study includes a detailed qualitative analysis of York, which is set out in section 6 of the main Retail Study. This assessment indicates that the centre is healthy and performing well. Table 1.7 summarises the key

strengths and weaknesses, which demonstrate the opportunities and threats to York over the forthcoming LDF period.

Table 1.7: SWOT Analysis – Vitality and Viability of York City Centre

York City Centre Strengths/Opportunities	York City Centre Weaknesses/Threats
<ul style="list-style-type: none"> • Number of comparison retailers above the national average / proportion of floorspace occupied by comparison retailers above the national average; • Proportion of units occupied by leisure service operators is above the national average; • Proportion of vacant units is below the national average; • Strong independent and niche retailing sector; • The city centre has a number of distinct retail areas offering a different range and choice of shop and character; • Prime retail rents have increased year on year; • Good selection of markets supplementing the retail offer; • The number and range of restaurants, pubs and wine bars has improved in recent years and Fossgate has developed as a quality leisure destination; • The centre has an excellent environment, attractive historic buildings, strong tourist attractors and a mix of national multiple retail areas and characteristic independent niche shopping areas; • York performs well in the retailer demand UK rankings – although the space to accommodate them is currently unavailable; • York's catchment area has a strong proportion of higher socio-economic groups (A/B category) but is not currently achieving the same shopper profile. Clear opportunities to claw back these shoppers, enhance market share and increase shopping expenditure. 	<ul style="list-style-type: none"> • Convenience/food store provision in the city centre is weak both in terms of number and floorspace; • Retail yields have remained steady with a marginal increase in the last 2 years. This reflects growing investment uncertainty and a weaker return on rental levels; • Good range of department store operator, although Debenhams occupies a cramped and outdated store, other competing and comparable centres have new and refurbished department store offer; • Many national multiple retailers are accommodated in small units not ideally suited to modern retailing requirements; • Micklegate is a peripheral and vulnerable secondary retailing area within rising vacancy rates; • Due to unit format and lack of space a number of operators have opted for out of town locations, particularly at Monks Cross and Clifton Moor. Ideally this trend should be stemmed; • Many respondents to the in-centre survey stated that York was not their first choice shopping destination (42.8%) because of the poor department store offer, poor range of comparison retailers and poor range of shops; • York suffers from traffic congestion on key radials and the outer ring road; • York's comparison goods shopper market share has declined from 37% in 2001, to 31% in 2004 and to 28% in 2007 – largely a consequence of major schemes coming on line in competing centres in the sub-

	<p>region and also competition from out of centre locations within York itself. There is a threat of further decline in market share in a 'do nothing' scenario;</p> <ul style="list-style-type: none"> York city centre does not capture the full proportion of higher income groups available in the catchment area.
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28. The study concludes that the greatest threat to York is growing competition in the wider sub-region and lack of space to offer to higher quality, variety and department store operators to ensure that the city centre can compete effectively. In order for York to maintain its role in the retail hierarchy and enhance expenditure in the catchment area, it is crucial that new modern retail space is created to attract a broader range and quality of multiple retailers to trade alongside the already strong independent sector. The difficulty is, however, that whilst the historic centre is one of York's strengths, it also presents barriers to expansion and the introduction of modern units. The lack of space in the city centre has already encouraged a number of retailers to locate in out of centre locations.

District Centre Health Checks

29. The study provides a detailed qualitative assessment of the two district centres in the City of York: Acomb and Haxby.

Acomb District Centre

30. Acomb District Centre comprises 100 units incorporating a wide range of uses as set out in table 1.8. The main multiple retailers are Boots, Morrison's and Superdrug.

Table 1.8: Retail Composition by Unit type in Acomb District Centre

Retail Category	No. Units	% Units
Comparison	27	27
Convenience	13	13
Service	49	49
Vacant	6	6
Miscellaneous	5	5
TOTAL	100	100

Source: GVA Grimley site visit August 2007.

31. Acomb has a good convenience provision including two bakers, two greengrocers, a butcher and a Morrison's supermarket and has a good comparison offer for a centre of its size with 27 units. The provision of service units in Acomb is strong. There are 49 service units including cafes, banks, dry cleaners, post office and hairdressers. Such services are essential to maintain the vitality and viability of smaller centres. Vacancy levels are low at

6% compared to the national average of 10.75% and indicate that the centre is performing well and there is strong retailer confidence.

32. The study concludes that Acomb's role in the retail network is as a shopping centre and service provider for a wide area outside York city centre. This role is unlikely to change in the near future. The study recommends that preservation of Council policies to discourage out of centre retail development will help to protect existing centres and channel all growth into the established centres, consolidating the district centres such as Acomb and making them more viable places to shop and locate business/retailing premises.
33. In order to review the market share and catchment area of Acomb the study has used the results of the household telephone survey. Acomb is located in zone 2 of the catchment area and it is evident from the analysis that it performs the role of a local shopping destination with a small market share throughout the survey area and in this core zone. The centre influences non-food shopping patterns to a small extent in zones 1,2,3,4,9 & 12 although apart from zone 2 (the centre's location zone) the market share is below 0.4%.
34. It is evident from the analysis that Acomb is more dominant on the catchment area in respect of food shopping which reinforces its role as a local everyday shopping facility. The centre, anchored by a modern Morrison's food store, has an influence on food shopping patterns in zones 2,7,9 and 11 although its core catchment is largely in zone 2 (the centre's location zone) where it takes 18.1% of the market share for convenience goods. Even within its location zone (zone 2) other major out of centre food stores are having a strong influence on food shopping patterns. Within zone 2 Tesco at Askham Bar takes 28% of the market share, Tesco at Clifton Moor 13%, Asda 4% and Sainsbury's at Fossbank 3%. The study recommends that the market share of Acomb for convenience goods should be monitored and taken into consideration when considering new food store proposals in the catchment area.

Haxby District Centre

35. Haxby is a small district centre with only 58 units, eight of which are convenience retailers (13.8%) including a butcher, bakers and three small supermarkets – Somerfield, Jack Fultons Frozen Foods and the Co-Op. 11 units (19%) comprise comparison units and include several niche retailers. This provides Haxby with a small but specialist range of comparison shops, which attract people from beyond its local catchment. 65.5% of the units are service units, which indicates its role as a local convenience and service provider. Vacancy levels in the centre are low.

Table 1.9: Retail Composition by Unit type in Haxby District Centre

Retail Category	No. Units	% Units
Comparison	11	18.97
Convenience	8	13.79
Service	38	65.52
Vacant	1	1.72
Miscellaneous	0	0
TOTAL	58	100

Source: GVA Grimley site visit August 2007.

36. Haxby is located in zone 3 of the survey area and it is evident from the analysis that like Acomb it performs the role of a local shopping destination with a near negligible market share throughout the survey area and in this core zone in terms of comparison goods. Haxby is marginally more dominant on the catchment area in respect of food shopping which reinforces its role as a local, everyday shopping facility. The centre has an influence on food shopping patterns in zones 1,3,11 and 14 although the core catchment is constrained to zone 3 where its market share for food is 2.7%. Within zone 3 27% of the market share is captured by Tesco at Clifton Moor and 27% by Asda, a further 8% is taken by both Sainsbury's at Monks Cross and Sainsbury's Fossbank store. It is clear that the major out of centre food stores are having a strong influence on food shopping patterns, and like Acomb, the market share of Haxby for convenience goods should be monitored and taken into consideration when considering new food store proposals in the catchment area.
37. The study concludes that Acomb and Haxby are the only two district centres in York's current retail hierarchy. Haxby is significantly smaller than Acomb in term of its scale and range of retail and service offer. The role and scale of the centres is reflected in the respective catchment areas with Acomb having a stronger influence than Haxby on shopping patterns in the catchment area. Strong out of centre retail development has certainly had an influence in curtailing each convenience and comparison goods catchment areas and should be monitored carefully when new proposals are being considered.

Local Service Centres

38. The study provides a qualitative assessment of the local service centres in the city. Detailed site visits; audits and health checks were undertaken of the 6 local service centres (illustrated on Plan 3, Annex 1). Elsewhere in the City of York area there are a number of neighbourhood shopping parades and other smaller villages. Whilst these have not been addressed in detail in this study a review of their catchments and relative facilities based on a 400m/800m walk in catchment has been undertaken. Evidently the facilities in the neighbourhood parades and smaller villages are significantly more restricted than the local service centres but they do serve an important role for smaller catchments. As part of the LDF work background evidence work is being produced in terms of sustainable neighbourhoods and accessibility to services.

Bishopthorpe

39. The study concludes that Bishopthorpe is the largest and best performing centre in terms of retail and service representation. It has a good anchor food store supplemented with smaller independents and a bank and post office. Overall the study considers that this centre is of a sufficient scale with a good mix of uses to serve the everyday small-scale requirements of the local walk-in catchment.

Copmanthorpe

40. The study concludes that Copmanthorpe is the 2nd largest centre. It has a good food store anchor as well as a pharmacy and a post office and there are no vacant units. Overall the centre is considered to be of a sufficient scale with a good mix of uses to serve the everyday small-scale requirements of the local walk-in catchment.

Dunnington

41. Dunnington is ranked 4th in the benchmarking exercise and of a similar scale to Bishopthorpe and Copmanthorpe is performing well to provide the necessary everyday services to the local walk-in catchment.

Strensall

42. Strensall is ranked joint 2nd with Copmanthorpe in the benchmarking exercise. The centre has a good food store anchor, a post office and pharmacy and other supplementary convenience and service uses. The centre does not have a bank and the centre is dispersed into distinct areas. Overall the centre is of a sufficient scale with a good mix of uses to serve everyday needs.

Upper and Nether Poppleton

43. The centre is ranked 5th and is significantly smaller than the four centres ranked above. With only 8 units there is a small Co-Op, pharmacy, post office and no vacant units. There is no bank and few other service and shopping facilities, although there are a few community facilities such as a dentists, doctors and library. The walk-in catchment would need to travel further a field for most convenience goods shopping requirements.

Wheldrake

44. The centre is anchored by a Costcutter convenience store that incorporates a post office. Other uses in the centre include a pub, hairdressers and doctor's surgery. Wheldrake is the smallest and least diverse centre. The centre has a small Co-Op but with a limited product range and a post office but there is no bank, pharmacy or other important service and shopping facilities. This centre serves its walk-in catchment the least effectively out of the six local service centres assessed.

Shopping Distribution/Gap Analysis

45. National policy guidance encourages consumer choice, social inclusion and accessibility to a range of main town centre uses. PPS6 states that local authorities should ensure that there is a more even distribution of town centre uses, and that people's everyday needs are met at the local level. Based on the study's assessment of York City Centre, the District Centres of Acomb and Haxby, the six local service centres and a review of the distribution of village centres and out of centre food stores the consultants have undertaken a desk-based mapping exercise and sustainability gap analysis review.
46. Plan 4 (Annex 1) illustrates the distribution of York city centre, the district centres, local service centres, village centres and major out of centre food stores within the local authority area. Using 400m and 800m walk in radius illustrations it is possible to map existing provision and gaps in provision across the area. The exercise clearly identifies some gaps in provision although it should be noted that there are many rural areas in York with no major population/residential areas. York city centre is served by the city centre Marks and Spencer food store and the two edge of centre food stores – Sainsbury's Foss bank and the new Morrison's store at Foss Islands. Convenience provision is limited in the city centre and the study recommends that this provision should be enhanced over the forthcoming LDF period.
47. To the west of the authority area, within the identified urban areas residents have access to the Morrison's food store in Acomb, other smaller convenience stores in Acomb district centre and the small Co-Op in Upper Poppleton. Given the current distribution the study recommends that an improvement to food store provision in Acomb and/or Upper and Nether Poppleton would be preferable in policy and sustainability terms over the Tesco stores at Askham Bar and Clifton Moor. These stores currently take the majority of the market share from the catchments zones to the west of the city.
48. The northern half of the local authority area is mainly served by the existing major out of centre food stores including Tesco at Clifton Moor and Asda and Sainsburys at Monks Cross, however, these are further than a five minute drive time for the majority of the urban area further north. The village centres to the north of the city such as Haxby, Wigginton, Strensall and Skelton are served by relatively small food stores and local residents are likely to drive further than 5 minutes to the larger out of centre stores. The study recommends that priority should be given to enhancing food store provision in Haxby and Wigginton and/or Strensall in advance of the out of centre stores to ensure a more sustainable distribution of facilities.
49. The study concludes that the South east of the City of York area is the least well served in terms of food store provision, although this is a rural area with fewer urban areas. Villages such as Wheldrake and Elvington have very limited provision and are likely to have to drive some distance to obtain the necessary range of convenience goods. This area would appear to be in the greatest need of convenience goods enhancement.

50. The study concludes that York City Centre should maintain its status at the regional and local level. The district centres of Acomb and Haxby are performing well at the present time and perform important roles in the retail hierarchy offering a range of essential everyday retail and service facilities for the local catchments. Beyond the network of other local and village centres the study concludes that there is likely to be a need for additional convenience goods retailing and service facilities at York Northwest. The study recommends the provision of new local shopping provision on both sites (York Central & British Sugar) although this would require further assessment when the mix of uses on the site is finalised. The study concludes that Clifton Moor and Monks Cross perform strong comparison goods roles although it strongly recommends against allocating them as centres within the retail hierarchy and any development proposals should be considered against the key policy tests set out in PPS6.

Out of Centre Retail Provision

51. The study includes a qualitative review of out of centre retail provision to recognise the distribution of retail floorspace currently competing with the network of centres and to inform the assessment of the need for new retail floorspace in York.

Comparison Goods Retailing

52. Clifton Moor (circa 44,000 sq m net) is one of the largest retail parks in the country. Clifton Moor comprises largely bulky goods and electrical retailers. The large Tesco Extra store also adds to the attraction of the shopping destination. The performance and catchment area of Clifton Moor has been analysed drawing on the results of the household telephone survey. Plan 5 (Annex 1) illustrates the comparison goods catchment area of Clifton Moor. As you would expect, Clifton Moor obtains the strongest market shares in the more bulky goods categories including 'furniture, floor coverings and household textiles', 'DIY/Decorating, 'domestic appliances' and 'electrical entertainment'. Compared to Monks Cross, Clifton Moor dominates the four bulky goods categories whilst Monks Cross dominates in the clothing and footwear category. Neither location is very strong in the personal/luxury goods category.

53. Monks Cross Shopping Park (circa 27,250 sq m net) is a modern scheme with an attractive line up of high street retailers along with some more traditional retail warehouses. The adjoining Asda and Marks and Spencer Simply Food add to the attraction of the Shopping Park. It is clear from the household survey results that Monks Cross dominates in the clothing and footwear category given the strong representation of such retailers. Its influence on the bulky goods categories is significantly lower. The comparison goods catchment area of Monks Cross is illustrated on Plan 6 (Annex 1).

54. As recognised in previous sections to this report, it is evident that York City Centre has experienced a decline in its comparison goods market share from

37% in 2001 to 31% in 2004 and 28% in 2007. This is partly a consequence of centres in the wider sub-region strengthening their retail offer through new developments and qualitative improvements but partly due to the expansion and consolidation of out of centre retail destinations in the City of York – notably Monks Cross and Clifton Moor. It is clear from the household survey results that York City Centre is losing significant market share in the clothing and footwear category to Monks Cross, whilst Clifton Moor is taking large proportions from the bulky goods categories. York City Centre has the strongest market shares in the personal and luxury goods categories. The study has reviewed the comparison goods market share for each of the three destinations within zones 1-3 (the inner catchment area comprising the City of York UA area) and within the full catchment area (zones 1-20). From Table 2.0 it is clear that whilst York City Centre remains the dominant comparison goods shopping destination, Monks Cross and Clifton Moor take significant proportions of the expenditure, which has contributed to the declining market share of York City Centre.

Table 2.0: Comparison Goods Market Share of York City Centre, Monks Cross and Clifton Moor

Destination	Zones 1-20	Zones 1-3
York City Centre	21% (£402m)	47% (£250m)
Monks Cross	5% (£94m)	8.4% (£44m)
Clifton Moor	9% (£171m)	20% (£106m)
<i>Source: Household Telephone Survey, 2007</i>		

55. Elsewhere in the city there are a number of freestanding retail warehouses such as Homebase at Foss bank and retail warehouses situated around Foss Islands Road/Layerthorpe. Foss Islands Retail Park has a 7,200 sq m Morrison's store and a retail warehouse scheme comprising circa 11,000 sq m net of bulky goods floorspace is under construction. There is a large modern B&Q warehouse located on Hull Road and a number of retail warehouses such as The Range, Rogers Carpets and Argos are located around Monks Cross.
56. McArthur Glen's Designer Outlet is located 3 miles to the south of the city. It has a floorspace of circ 23,200 sq m net and has approximately 120 units with a range of high-end retailers. There are also a number of eating and drinking units. The influence of the Designer Outlet on the overall catchment area is significantly smaller than that identified for Monks Cross and Clifton Moor. Based on experience elsewhere in the UK the study concludes that this is not unusual as Factory Outlets perform the role of occasional 'day out' shopping and leisure destinations and their catchment area is generally significantly more extensive than mainstream destinations. It is therefore likely that the household telephone survey under estimates the performance of factory outlet destinations, as shoppers do not view them as their regular or normal shopping destination.

Convenience Goods Retailing

57. York has six major out of centre food stores, three of which are located to the north of the city, two on the inner ring road and the Tesco Extra at Askham Bar located to the south of the City of York area. The two 24 hour Tesco Extra stores and the new Morrison's store have a strong convenience and comparison goods product range and ancillary facilities, whilst the retail offer at the two Sainsbury's stores is marginally more limited and do not trade 24 hours. The locations and sizes of these food stores are illustrated on plan 7 (Annex 1). The study concludes that York is well provided for in terms of major out of centre food stores with all key operators present. Their performance is discussed further in the following sections.

Retail Capacity Projections

58. The study estimates the current performance of York City Centre, out of centre retail provision and the district centres as the basis for forecasting the need for further retail floorspace to the period to 2029 incorporating the interim years of 2012, 2017, 2022 and 2029. The study uses a conventional and widely accepted methodology consistent with best practice, using a telephone survey covering 1,800 households in the overall catchment area to identify shopping habits of households for both convenience and comparison goods.

59. The study tests two population growth scenarios for the York UA area (Zones 1-3): a low growth scenario, which assumes a growth in population of 15% by 2029 and a high growth scenario which assumes a growth of 17% over the same time period. Overall the population of the survey area is currently 698,396. It is forecast to grow to 731,555 by 2017, 749,449 by 2022 and 774,499 by 2029. Overall population is forecast to grow by 8.5% between 2007 and 2029 within the whole survey area (zones 1-20).

Convenience Goods Capacity Projections

60. The capacity assessment has factored in identified food store commitments, notably the new Morrison's store at Foss Islands Road, which opened for trading in October 2007 – after the household telephone survey had taken place. The Sainsbury's store at Foss Bank also has consent for a redeveloped and extended store, which is included in the capacity projections.

61. Based on population and expenditure growth and the detailed analysis of existing floorspace the study concludes that there is capacity to support further convenience goods floorspace in the city in the first half of the forthcoming LDF period, even following the opening of the Morrison's store late in 2007. Table 2.1 shows that based on an average sales density of £10,000 per sq m net there is forecast capacity for 3,146 sq m net by 2012, growing to 5,034 sq m net by 2017, 7,035 sq m net by 2022 and 10, 015 sq m net by 2029, based on the low growth population scenario.

Table 2.1: Convenience Goods Baseline Capacity Projections (sq m net)

Area	2012 sq m net	2017 sq m net	2022 sq m net	2029 sq m net
Total City of York Low Growth Scenario 15%	3,146	5,034	7,036	10,015
Total City of York High Growth Population Scenario	3,245	5,238	7,353	10,503

62. The study concludes that York city centre has very little convenience goods provision beyond the Marks and Spencer Simply Food and they recommend that the Council should encourage the enhancement of this sector within the city centre in the form of a small format unit to cater for city centre residents, tourists, visitors and lunchtime trade. They also recommend that the Council should be cautious in terms of any new major out of centre food store proposals given the impact on the city centre and the network of other centres throughout the City of York. The strong network of major out of centre food superstores is already absorbing almost all of the available convenience goods expenditure in the catchment area. It is clear that the 6 major out of centre food store operators are performing strongly and additional floorspace could absorb the surplus expenditure available in the catchment area. Any food store proposal in an edge of centre or out of centre location must demonstrate that they meet the following requirements set out in PPS6: -

- The need for development;
- That the development is of an appropriate scale;
- That there are no more central sites for the development;
- That there are no unacceptable impacts on existing centres;
- That locations are accessible.

Comparison Goods Capacity Projections

63. Plan 8 (Annex 1) illustrates the extent of the city centre's influence throughout the survey area highlighting variations in market share. It is evident that the influence of York extends across most of the survey area apart from zones 17, 18, 19 & 20. Within the whole survey area, York City centre draws 21% of total available comparison goods expenditure (£402.4m). Zones 1-16 of the survey area are consistent with the survey area used in previous retail studies and it is therefore possible to compare any change in the influence of York city centre within its catchment area. It is clear from the analysis that the city centre captures 28% of comparison goods expenditure within zones 1-16 compared to 31% in 2004 and 37% in 2001. York is retaining a lower amount of expenditure (£406.4m in 2004 / £393.6m in 2007) despite total available expenditure increasing in zones 1-16 between 2004 and 2007. This indicates that the influence of York city centre

has declined over the last 3 years as a consequence of major development in competing centres, the consolidation of out of centre destinations and the lack of development in York city centre. It should also be noted that the growth in Internet spending has increased substantially over the last 3 years taking a proportion of the growing expenditure.

64. On the basis of current market shares the study estimates that the city centre draws £402.4m from within the survey area for comparison goods. Using the in-centre survey undertaken in York city centre the study has been able to estimate the proportion of shoppers in the city centre travelling from beyond the survey area. The origin of all shoppers travelling to York city centre from beyond the survey area is illustrated on plan 9 (Annex 1). The assessment calculates a 34% inflow of comparison goods expenditure from beyond the survey area.
65. Based upon this assessment it is evident that there will be capacity to support further comparison goods floorspace in the City of York area by virtue of growth in population and available expenditure. The study estimates that based on current market shares, there would be theoretical capacity to support an additional 9,245 sq m net by 2012, 31,361 sq m net by 2017, 56,524 sq m net by 2022 and 95,742 sq m net by 2029.
66. Residual capacity identified to support additional retail floorspace over the forthcoming LDF period is set out in table 2.2. It should be noted that these are conservative estimates based on current market share, which has declined in recent years. A key issue is whether the Council should accept that decline or want to claw back some of the market share lost. The study also tests more optimistic growth scenarios based on claiming back lost market share and implications for development and this is discussed later in the report. The figures set out in table 2.1 represent capacity arising in the City of York local authority area and not just in York city centre. The location of new development should be subject to the sequential test. In line with government policy it will be necessary to direct global capacity into the city centre in the first instance.

Table 2.2: Comparison Goods Baseline Capacity Projections (sq m net)

Area	2012 sq m net	2017 sq m net	2022 sq m net	2029 sq m net
Total City of York Low Growth Scenario 15%	9,245	31,361	56,254	95,742
Total City of York High Growth Population Scenario	9,725	32,407	57,967	98,58

Strategic Options and Recommendations

Development Opportunity Sites

67. Part of the brief for the retail study was to advise the Council on the most appropriate strategy to implement identified capacity, including potential phasing based on the sequential approach. The study has identified a number of sites/areas in and around the city centre that have the potential to accommodate development or redevelopment which would contribute to meeting York's long term shopping and other needs. The study recommends that the overall objectives over the LDF period should be to:

- Enhance city centre food store provision;
- Enhance the evening economy;
- Introduce space for higher order and quality retailers;
- Maintain the range of independent and specialist retailers;
- Protect the city's identity and embrace the historic fabric and built environment; and
- Ensure that any new development is of an appropriate scale and design to complement the existing city centre.

The development sites that were agreed with officers and reviewed as part of this study are:

Castle Piccadilly

68. The study considers that Castle Piccadilly is the key development opportunity in York city centre which has the sufficient site area to implement an appropriate scale of development required to provide modern retail units anchored by a department store operator. Development proposals by Land Securities demonstrated the commercial viability of circa 24,000 sq m net of retail floorspace, which is below the identified capacity for the City of York area – i.e. 31,361 sq m net by 2017 (in the low population growth scenario). The actual capacity of the site will however be determined by the need to protect the special character and setting of this area. Looking at the capacity forecasts to the period to 2017 and beyond the study concludes that a more significant expansion of the city centre retail offer will be needed. A department store anchored scheme at Castle Piccadilly would have significant benefits for the city centre. The study recommends that the site should continue to be encouraged over the LDF period and viewed as first preference for major retail development in the City.

Hungate

69. Hungate (phase 1 is currently under construction) is largely an office and residential development. The retail element will be ancillary (6,392 sq m) and whilst the development will bring significant benefits to the city centre it will not meet the need for major comparison goods retailing.

York Northwest/York Central

70. York Central is approximately 470m from the core shopping area. The York Northwest Area Action Plan Issues and Options (November 2007) represents the first stage in the production of the AAP which will guide and control development of this area. The Issues and Options document raises the issue of retail provision, stating that in order to create a community with a low ecological footprint and which is desirable to live in it will be necessary to provide retail and service facilities but looks to the retail study to inform the appropriate scale and type of provision. A review of opportunities for retail development on York Central/York Northwest is considered later in this report.

Other development sites in the Core Shopping Area

71. The study considers a number of smaller sites scattered throughout the core shopping area. The study considers that Stonebow House is an appropriate location for redevelopment to provide a mixed-use retail, office and residential development. The Telephone Exchange lies adjacent to Stonebow House and would form a natural extension to the site; although the study concludes that technical difficulties in relocating telephone equipment usually makes redevelopment an unviable option. A number across the UK however, have come forward for redevelopment and the site should remain a potential redevelopment site over the LDF period.

72. Fossgate is an attractive street leading away from the core shopping area. Fossgate is a strategic route providing a link between the Castle Piccadilly site, Hungate and Colliergate and should be maintained and enhanced over the LDF period. Policy could facilitate the enhancement of the leisure evening economy taking advantage of the revised Use Classes order enabling local authorities to control undesirable uses such as fast food takeaways. There is little opportunity for major comparison goods retail development on Fossgate but could instead add to the vibrancy and diversity in York city centre.

73. The study concludes that there is little opportunity for major comparison retail development in the Goodramgate area but recommends that redevelopment and infill development could create modern retail units more attractive to new and higher quality retailers. This area could also benefit from an anchor small food store operator, which will help maintain pedestrian footfall and meet the requirements of tourists and visitors in this area.

74. The study concludes that the city's riverside frontages do not lend themselves to large-scale redevelopment. However the centre's extensive river networks are a major asset, which is currently under-used within the urban area, and there is significant potential to enhance the riverside areas to the benefit of York city centre as a whole. Specific opportunity areas include the frontage on the River Ouse running parallel to Spurriergate and Coney Street and the frontage directly opposite on the western side of the river. Land west of the river Ouse incorporates a relatively large area. The site does however

incorporate two churches, a newly developed hotel and an existing hotel on the riverfront. A proposed bridge link over the River Ouse is designated in the existing Local Plan, which would provide the necessary connectivity to the core shopping area. Even with Compulsory Purchase Powers the study considers that the site is unviable to deliver a major comparison retail development given restrictions to the built environment. There is however considerable opportunities to open up the river frontage and introduce leisure/restaurant activity.

75. The study concludes that the forthcoming LDF should continue to clarify between different retail locations throughout the city centre using the definitions outlined in PPS6. The study concludes that the existing defined primary frontages (as defined in the City of York Draft Local Plan, 2005) are appropriate although there are currently no secondary shopping frontages designated. Such a designation, it concludes, can assist in protecting the vitality and viability of more secondary retail areas and using the new Use Classes Order can maintain the mix of uses and prevent against undesirable uses. The study recommends that streets such as Fossgate, Goodramgate and Micklegate would benefit from a greater level of policy management over the LDF period. The consideration of policy issues such as the designation of primary and secondary retail areas will be considered through the City Centre AAP and the Core Strategy Preferred Options.

Retail/City Centre Strategy and Phasing to 2029

76. The challenge will be for York to bring forward key development opportunity sites in the city centre to enhance the mainstream/higher end/quality comparison retail provision whilst maintaining and protecting the niche specialist retailing element. The threat of no new development is a further decline in market share over the next few years. The study has undertaken further scenario testing to review capacity for additional floorspace based on new development coming forward and York consequently enhancing its market share. The extent to which the Council should seek to 'claw back' lost spend in its catchment area is a policy choice to be made through the LDF process. The study recommends that the objective could be to enhance the market share to levels experienced in previous years i.e. 37% in 2001, 31% in 2004 (now 28%). Table 2.3 sets out the capacity assessments based on a 31% and 34% market share. The study concludes that the highest level of 37% experienced in 2001 would be difficult to achieve given major development proposals coming forward in competing centres.

Table 2.3: Comparison goods Capacity Forecasts for City of York (sq m net): Lower Population Growth

Market Share (Zones 1-16)	2012	2017	2022	2029
28%	9,245	31,361	56,254	95,742
31%	9,562	32,768	58,859	100,190
34%	10,418	35,127	62,907	106,927

77. It is evident that based on new retail development of a sufficient scale and quality York could enhance its market share. Despite strong and growing competition in the wider sub-region the study considers it possible for York to achieve a 34% market share depending on location, scale and quality of development. Again the implementation of this capacity should be subject to the sequential test. The appropriate level of market share for which York should aim to claw back to enhance its position in the retail hierarchy is a policy issue which will be considered through the Core Strategy Preferred Options.
78. The sites that the study recommends as the most appropriate for large-scale retail development over the forthcoming LDF period are Castle Piccadilly and York Central. Hungate is a good strategic city centre site but the focus of development will largely be on offices and residential. Smaller scale city centre sites form good in-fill development opportunities but many would comprise the recycling of existing space. Whilst York Central is currently out of centre in PPS6 terms it is identified as a major regeneration opportunity in close proximity to York city centre and the core shopping area. On the basis of enhanced linkages and integration with the existing city centre and core shopping area the study concludes that major retail development here would be more appropriate in policy terms than out of centre locations further removed from the city centre. The study recommends that through continued and careful policy formulation this could be the scale of strategic retail development required to enhance York's market share and halt the increasing levels of leakage from the catchment area. The appropriateness of scale would, however, be a crucial consideration to safeguard the vitality and viability of York city centre and to promote linked trips rather than creating a separate 'stand alone' retail destination.
79. Retail development of this scale could be supported on an existing market share (28%) by 2017, although the study considers a new quality scheme would enhance market share and generate further growth to support more floorspace. On the basis of the implementation of retail development on Castle Piccadilly in the region of 24,000 sq m net and an increase in market share to 34%, the figures demonstrate additional surplus capacity for around 10,880 sq m net of comparison retail floorspace in the period to 2017. The study recommends that Castle Piccadilly should be the first priority major development opportunity in the city centre and should be given priority in the early part of the LDF i.e. to 2017 given its sequential preference. The study also recommends that whilst it is a priority site for development it should not hold up development elsewhere given strong forecast growth up to and beyond 2017 (62, 907 sq m net by 2022, and 106,927 sq m net by 2029 based on 34% market share).
80. The study concludes that York city centre is compact and constrained from expansion by the historic built environment. As further development opportunities are limited within the existing city centre boundary it is clear that alternative sites should be considered in accordance with PPS6. On this basis the study considers that York Central is an appropriate location to accommodate comparison and convenience floorspace provided that there is

no adverse impact on the vitality and viability and that through the LDF process its linkages and connections with the city centre are improved. An appropriately planned development with high quality retailers would be appealing to the catchment population that may choose to go elsewhere to shop for such goods and is clearly preferable to further out of centre provision. The study concludes that the objective for York Central should be a complementary rather than a competing retail offer and should encourage an increase in visitor/shopper numbers and ensure linked trips between York Central and York City Centre rather than creating a separate destination.

81. The study recommends that development proposals be undertaken in a phased approach in order to safeguard the role and vitality of the existing core central shopping area. The strategy should ensure that capacity is, in the first instance, directed towards the existing core central shopping area to underpin and enhance the vitality and viability of shopping provision. The consideration of a possible extension to the existing city centre boundary to include part of the York Central site has not been assessed within this study, as this is a wider policy issue that would be determined through the LDF process.

Study Recommendations

82. The study recommends that the Council should aim to:

- Increase the supply of modern retail units in York city centre to meet the qualitative and quantitative need for a greater range and mix of quality comparison goods retail units;
- Enhance department store representation particularly in light of new schemes coming forward in competing centres in the wider sub-region;
- The overall aim should be to halt the declining market share experienced in recent years and claw back comparison goods trade leaking to competing shopping destinations;
- The Council should identify and allocate opportunities to redevelop and modernise existing retail and building stock within the Core Shopping area and prioritise the development of Castle Piccadilly – the sequentially preferable development opportunity. An improved department store offer should be directed towards the core shopping area in the first instance;
- Given the extent of capacity for additional comparison goods floorspace the Council should consider policy options for retail development beyond the city centre on the York Central site
- Retail development on York Central should not form a competing shopping destination and should instead comprise a complementary retail offer
- The Council should not re-designate existing out of centre shopping facilities within the shopping hierarchy. Proposals in respect of existing out

of centre shopping destinations should be assessed against national policy guidance (PPS6);

- The Council should consider a criteria based policy to assess retail proposals against incorporating the key tests of need, impact, scale, the sequential test and accessibility;
- The assessment has identified strong capacity for additional convenience goods floorspace and the study considers this should be directed in the first instance to York city centre, the district and local service centres and York Northwest depending on the mix of development and wider policy endorsement;
- The Council should continue to monitor the performance of the city centre and in particular pedestrian footfall and market share over the forthcoming LDF period;
- Policy should aim to enhance river frontages and maximise opportunities to enhance the environment, café and restaurant culture and shops, enhancing linkages with existing retail frontages. Policy/site allocations could designate areas for improvement along the river frontage;
- The Council should seek to allocate a local/district centre/s on the York Northwest site, although it will be necessary for the proposals to demonstrate the extent of need based on office and residential development and to consider impact on existing centres;
- The Council should not encourage additional local/district centres at the current time, beyond York Northwest although this should continue to be monitored over the LDF period in light of possible new residential developments. Acomb and Haxby district centres are performing well at the current time and their performance should continue to be monitored. Both would benefit from enhanced food store offer;
- The core shopping area boundary is appropriate at the current time, although the potential extension area could include areas between the Core Shopping Area and Hungate (i.e. Stonebow House and the Telephone Exchange) and the area east of Castle Piccadilly. This may help to stimulate development and assist in well integrated comprehensive development;
- The Council should consider the introduction of secondary shopping frontages and the new Use Classes Order to assist in protecting their vitality, particularly on streets such as Micklegate, Fossgate and Walmgate and to prevent against undesirable uses such as fast food takeaways; and
- Policies should continue to encourage investment in city centre enhancement schemes to ensure it remains attractive to local shoppers and tourists. The quality of the environment is crucial to complement the historic environment and its attraction to visitors.

Consultation

83. The study brief was circulated to officers in Economic Development and the City Centre Chief Executive to ensure that the study covered all relevant retail issues for York. Officers are now seeking Members comments on the outcomes of the Study and the Study recommendations. If the outcomes of the study are agreed by Members the recommendations will be taken forward and used to formulate policies for the LDF documents including the Core Strategy, Allocations DPD and the City Centre and York Northwest Area Action Plans.

Options

84. There are two options: -

- To approve the recommendations of the Retail Study and its use as a key evidence base study to support the LDF, or
- To defer the approval of Retail Study and seek further amendments.

Analysis

85. The City of York Retail Study forms part of the key evidence base to support the vitality and viability of the city centre and district and local centres in York's retail hierarchy and in the wider sub-region and to create and protect sustainable neighbourhoods through access to local shopping facilities. The study will be used to feed into a wide range of policy documents for the LDF.

Corporate Priorities

86. The Retail Study accords with the following corporate priorities:

- Improve the actual and perceived condition and appearance of the city's streets, housing estates and publicly accessible spaces;
- Improve the economic prosperity of the people of York with a focus on minimising income differentials

Implications

87. The following implications have been assessed:

- **Financial** - The study work was carried out within the City Development budget.
- **Human Resources (HR)** - None
- **Equalities** - None
- **Legal** - None

- **Crime and Disorder** - None
- **Information Technology (IT)** – None
- **Property** - None
- **Other** - None

Risk Management

88. In compliance with the Councils risk management strategy, there are no risks associated with the recommendations of this report.

Recommendations

That Members agree:

89. To publish, subject to the recommendations of this Working Group, The City of York Retail Study as part of the LDF Evidence Base.

Reason: To inform decisions on the policy options for retail for York as part of the LDF.

90. To delegate to the Director of City Strategy, in consultation with the Executive Member for City Strategy and the Shadow Executive Member, the making of any other necessary changes arising from the recommendation of the LDF Working Group, prior to its publication as part of the LDF Evidence Base

Reason: So that any recommended changes can be incorporated into the Retail Study prior to its publication.

Contact Details

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Bill Woolley
Director of City Strategy
City Strategy
01904 55 1330

**Report
Approved**



Date 19/05/08

Specialist Implications Officer(s) : None

Wards Affected:

All

For further information please contact the author of the report

Background Papers

1. PPS6: Planning for Town Centres (March 2005)
2. City of York Draft Local Plan incorporating the fourth set of changes: Development Control Local Plan, City of York Council (April 2005)
3. City of York Council Retail Study 2008, GVA Grimley

Annexes to the Committee Report:

Annex 1: Plans

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ANNEX 1 – PLANS

Plan 1 – Study Area

Plan 2 – Comparison goods leakage to competing centres

Plan 3 – City of York retail hierarchy

Plan 4 – Local shopping gap analysis

Plan 5 – Clifton Moor comparison goods market share

Plan 6 – Monks Cross comparison goods market share

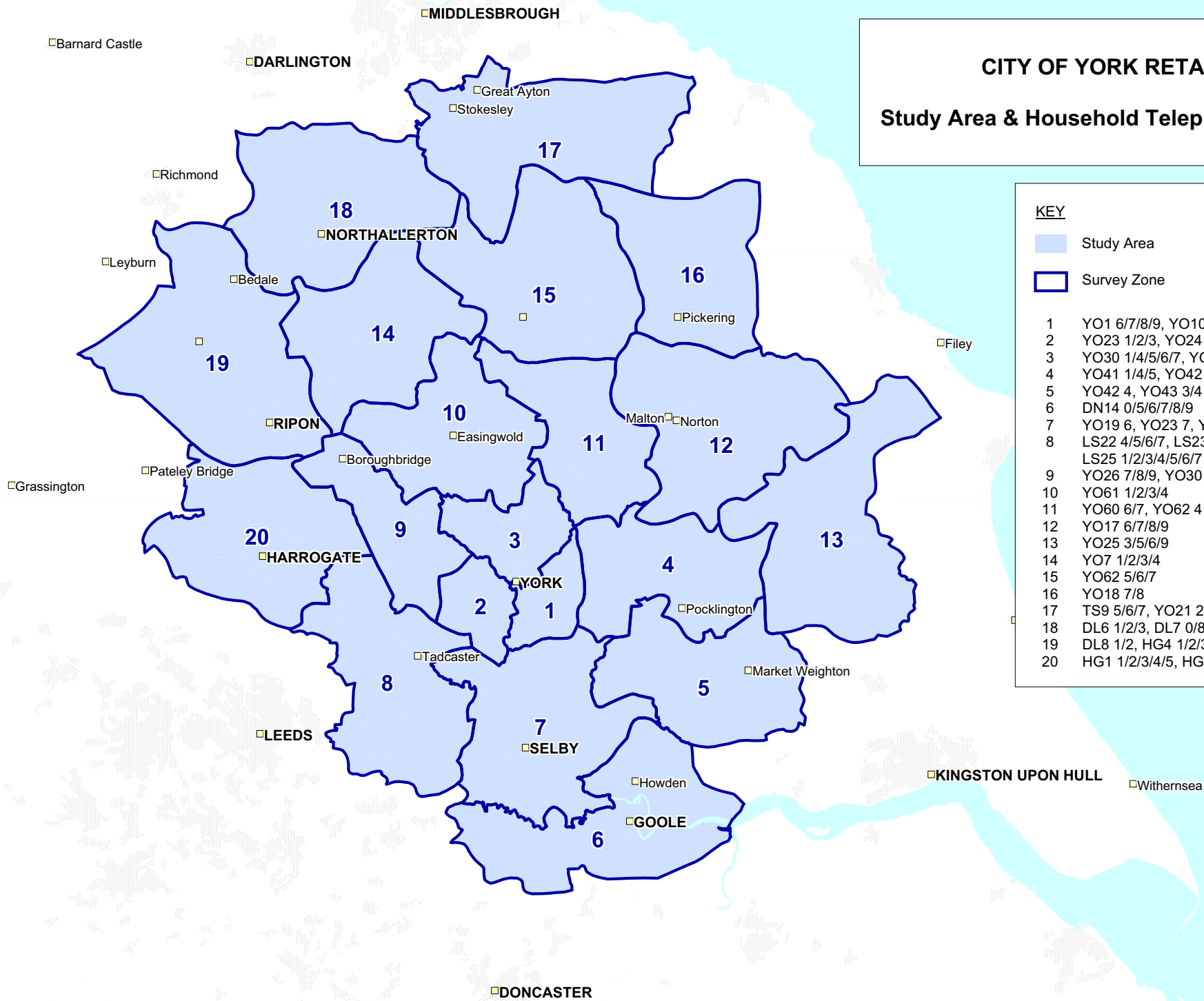
Plan 7 – Existing foodstore provision

Plan 8 – York comparison good market share

Plan 9 – Shopper catchment (in centre survey)

CITY OF YORK RETAIL STUDY

Study Area & Household Telephone Survey Zones



KEY

Study Area

Survey Zone

- 1 YO1 6/7/8/9, YO10 3/4/5, YO19 4/5
- 2 YO23 1/2/3, YO24 1/2/3/4, YO26 4/5/6
- 3 YO30 1/4/5/6/7, YO31 0/1/7/8/9, YO32 2/3/4/5/9
- 4 YO41 1/4/5, YO42 1/2
- 5 YO42 4, YO43 3/4
- 6 DN14 0/5/6/7/8/9
- 7 YO19 6, YO23 7, YO8 3/4/5/6/8/9
- 8 LS22 4/5/6/7, LS23 6/7, LS24 8/9, LS25 1/2/3/4/5/6/7
- 9 YO26 7/8/9, YO30 2, YO51 9
- 10 YO61 1/2/3/4
- 11 YO60 6/7, YO62 4
- 12 YO17 6/7/8/9
- 13 YO25 3/5/6/9
- 14 YO7 1/2/3/4
- 15 YO62 5/6/7
- 16 YO18 7/8
- 17 TS9 5/6/7, YO21 2
- 18 DL6 1/2/3, DL7 0/8/9
- 19 DL8 1/2, HG4 1/2/3/4/5
- 20 HG1 1/2/3/4/5, HG2 0/7/8/9, HG3 1/2/3, HG5 0/8/9,

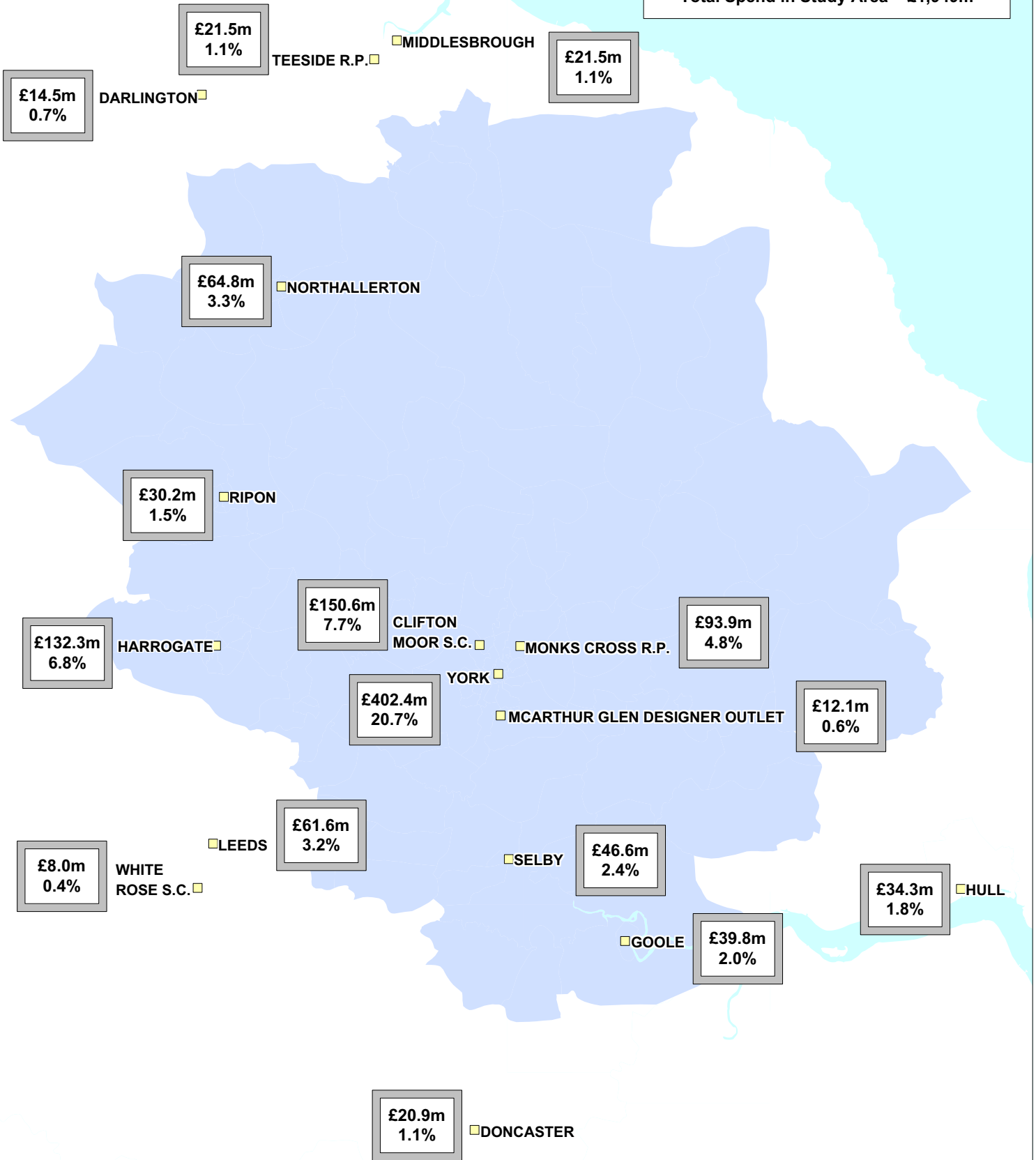


Map reproduced from GBPro 200 GB (2005 edition). © Collins Bartholomew Ltd (2005). Postcode Boundary Data: © 2006 Royal Mail. [Date Produced 17.08.2007]

CITY OF YORK RETAIL STUDY

**Comparison Goods Expenditure
Flows to Competing Centres**

Total Spend in Study Area = £1,949m

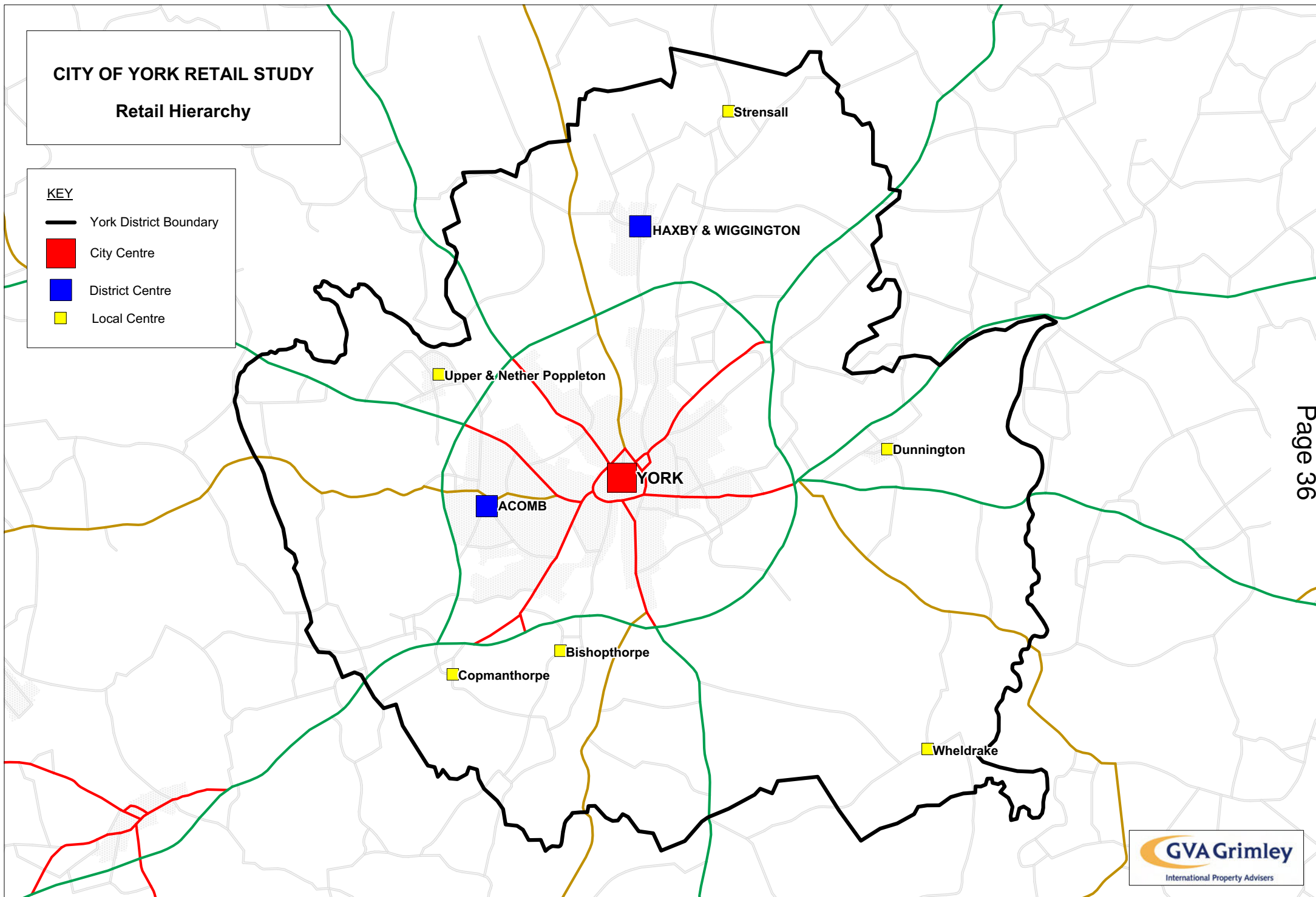


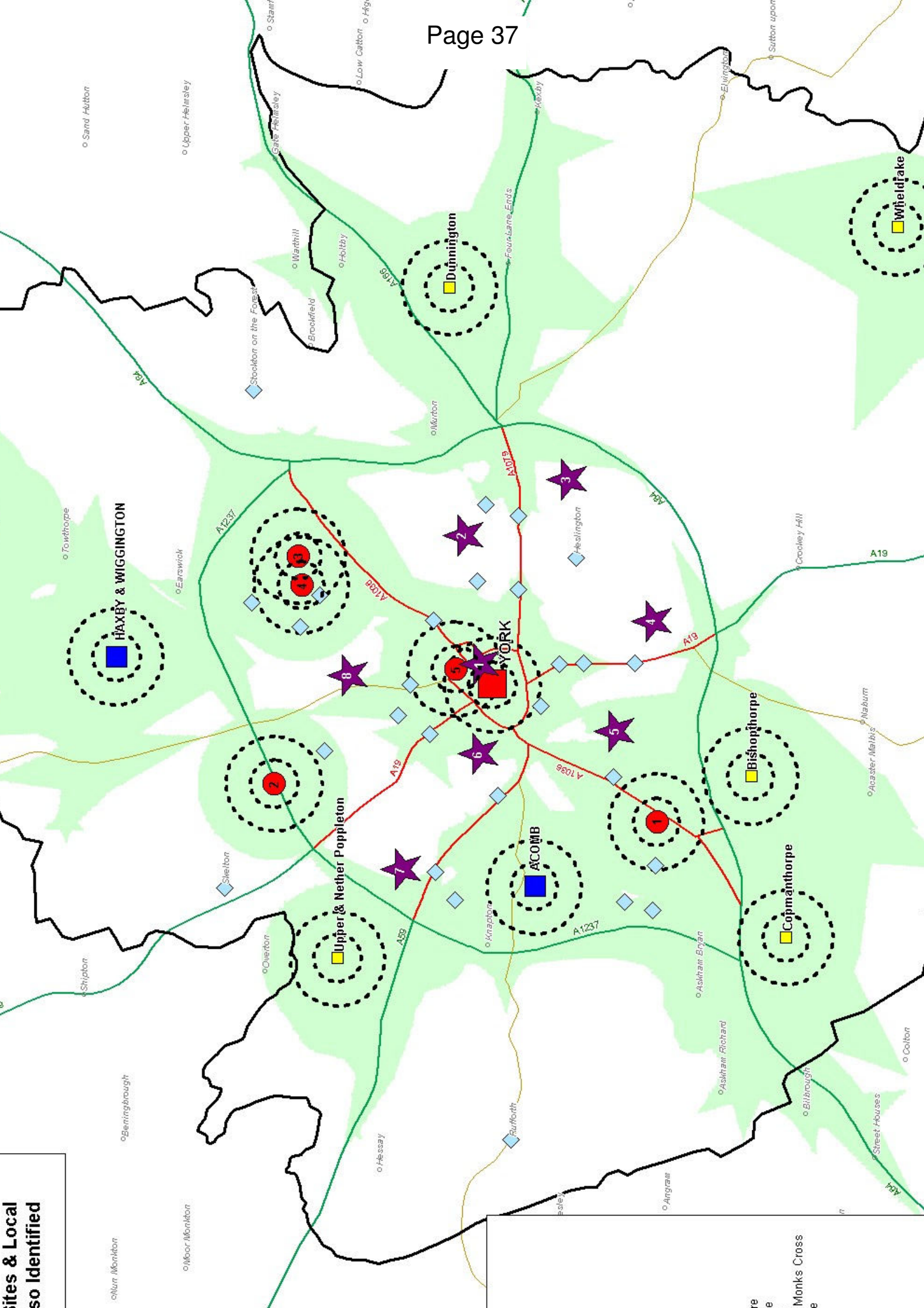
CITY OF YORK RETAIL STUDY

Retail Hierarchy

KEY

- York District Boundary
- City Centre
- District Centre
- Local Centre



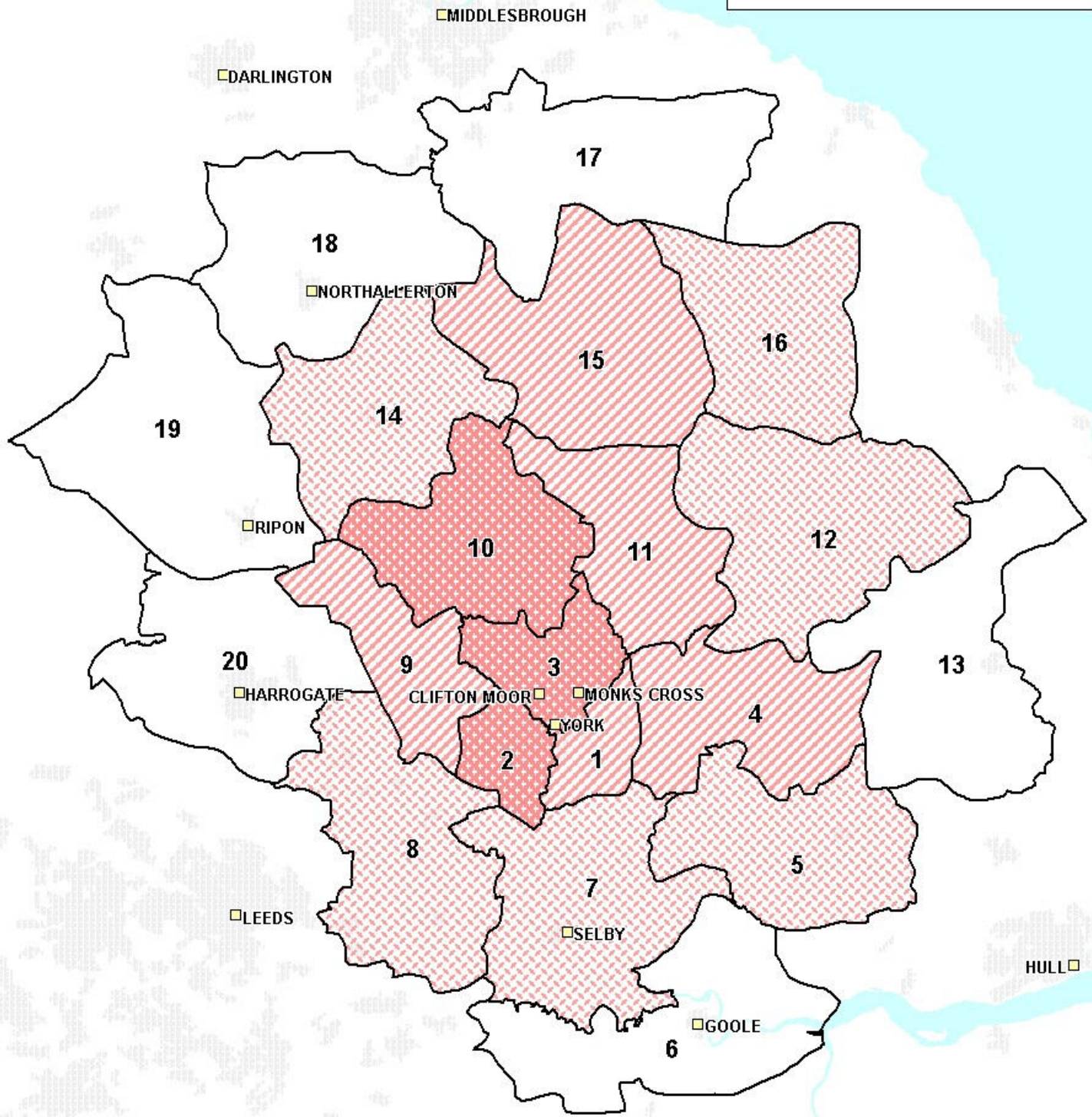


Sites & Localities Identified

Monks Cross

CITY OF YORK RETAIL STUDY

Clifton Moore Comparison Goods Market Share



KEY

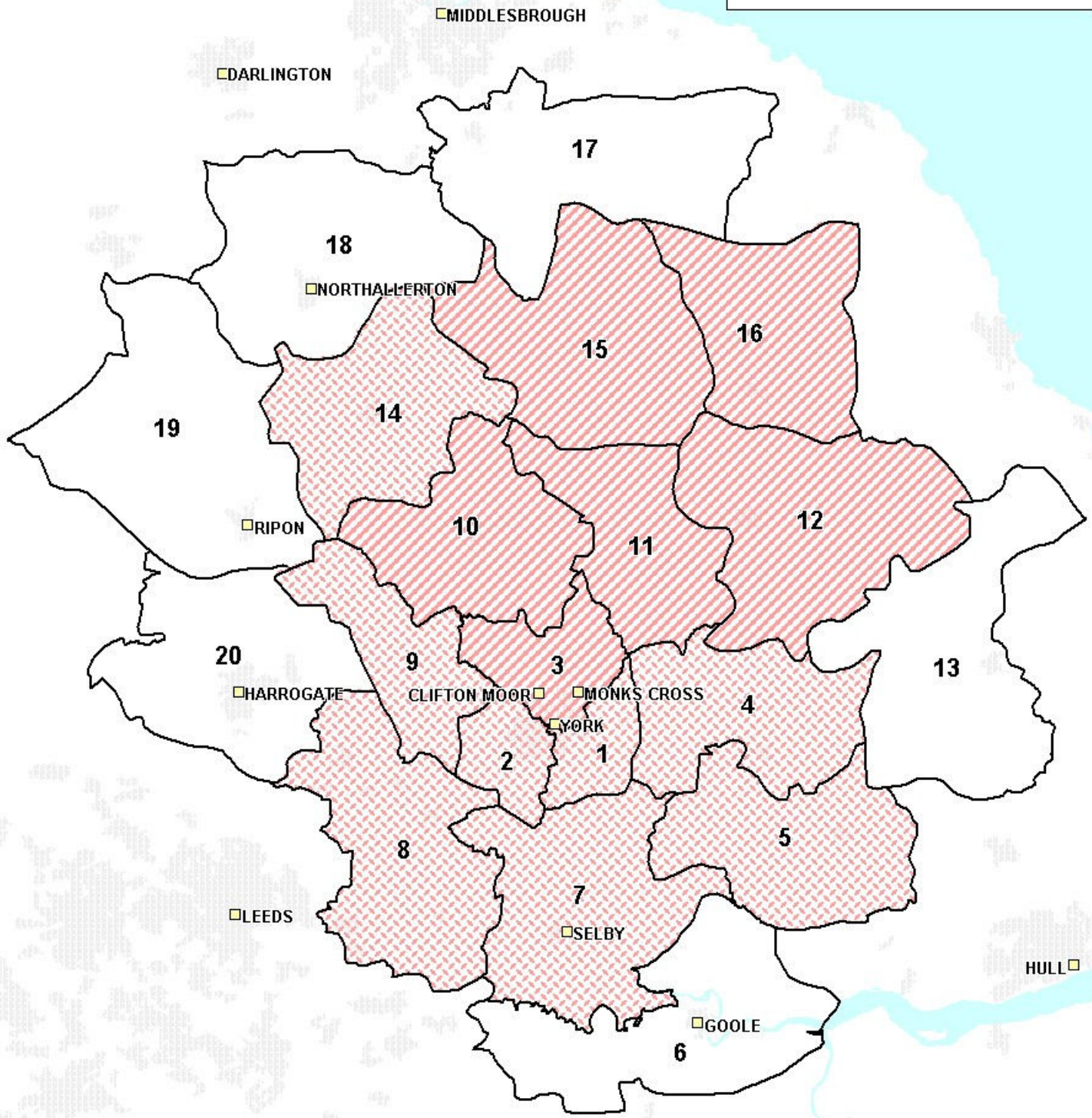
Comparison Goods Market Share (%)

	2 - 9.9
	10 - 19.9
	20 - 29.9
	30 - 39.9
	40 - 49.9
	50 - 59.9



CITY OF YORK RETAIL STUDY

**Monks Cross Comparison
Goods Market Share**



KEY

Comparison Goods Market Share (%)

	2 - 9.9
	10 - 19.9
	20 - 29.9
	30 - 39.9
	40 - 49.9
	50 - 59.9



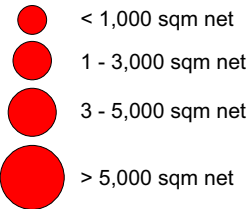
CITY OF YORK RETAIL STUDY

Existing Foodstore Provision

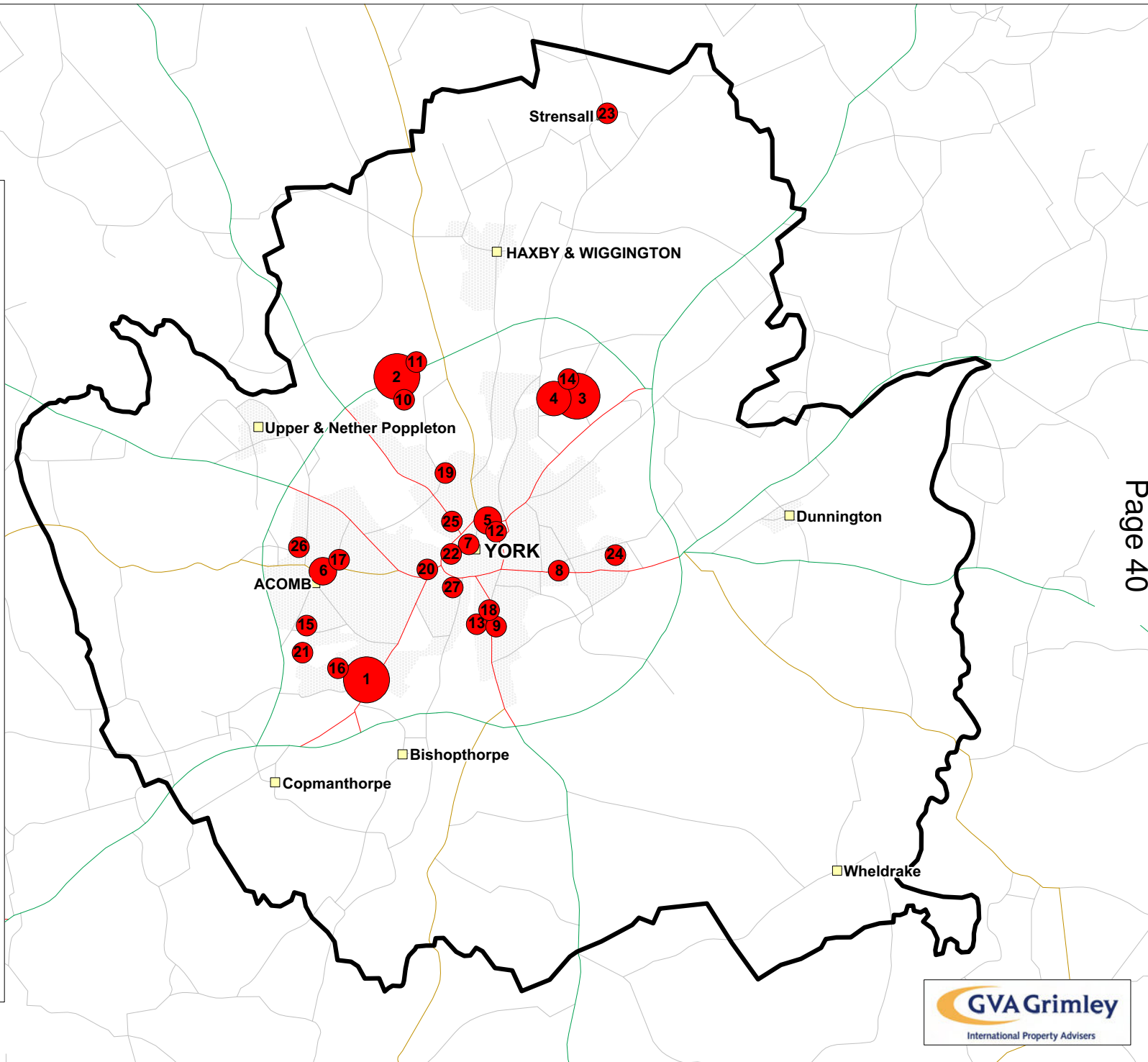
KEY

— York District Boundary

Foodstores

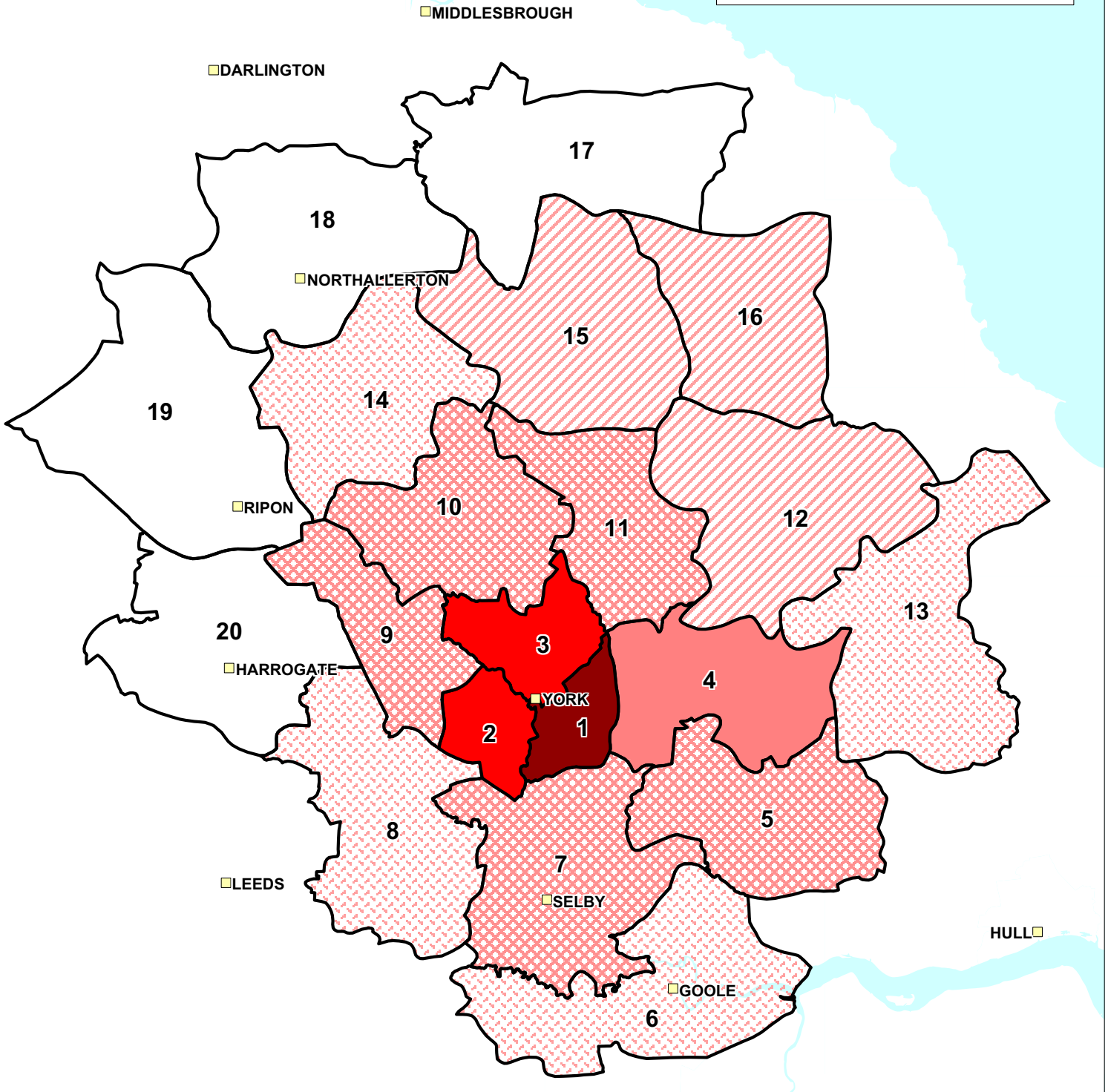


- 1 Tesco Extra, Askham Bar Centre
- 2 Tesco Extra, Clifton Moor Centre
- 3 Asda, Jockey Lane, Huntington
- 4 Sainsbury, Pigeoncote Ind Est, Monks Cross
- 5 Sainsbury, Fossbank, Monkgate
- 6 Morrisons, Front Street, Acomb
- 7 Marks & Spencer, 9 The Pavement
- 8 Kwik Save, Hull Road
- 9 Aldi, Fulford Road
- 10 Kwik Save, Oakdale Rd, Clifton Common
- 11 Netto, Clifton Moor Centre
- 12 Netto, Layerthorpe
- 13 Iceland, Fulford Road
- 14 Simply Food, Monks Cross
- 15 Somerfield, Beagle Ridge Dr, Foxwood Lane
- 16 Jacksons, Moorcroft Rd, Woodthorpe
- 17 Farmfoods, Front St, Acomb
- 18 Jacksons, Fulford Road
- 19 Jacksons, Burton Stone Lane
- 20 Jacksons, Blossom Street
- 21 Tesco Express, Acomb Wood Shopping C.
- 22 Budgens, Micklegate
- 23 Tesco Express, The Village, Strensall
- 24 Jacksons, Farndale Ave, Osbaldwick
- 25 Jacksons Clifton House, Bootham
- 26 Jacksons, Beckfield Lane, Acomb
- 27 Jacksons, Scarcroft Road



CITY OF YORK RETAIL STUDY

York Comparison Goods Market Share



KEY

Comparison Goods Market Share (%)


[Dotted pattern]	2 - 9.9
[Diagonal lines]	10 - 19.9
[Cross-hatch pattern]	20 - 29.9
[Light red]	30 - 39.9
[Red]	40 - 49.9
[Dark red]	50 - 59.9




CITY OF YORK RETAIL STUDY

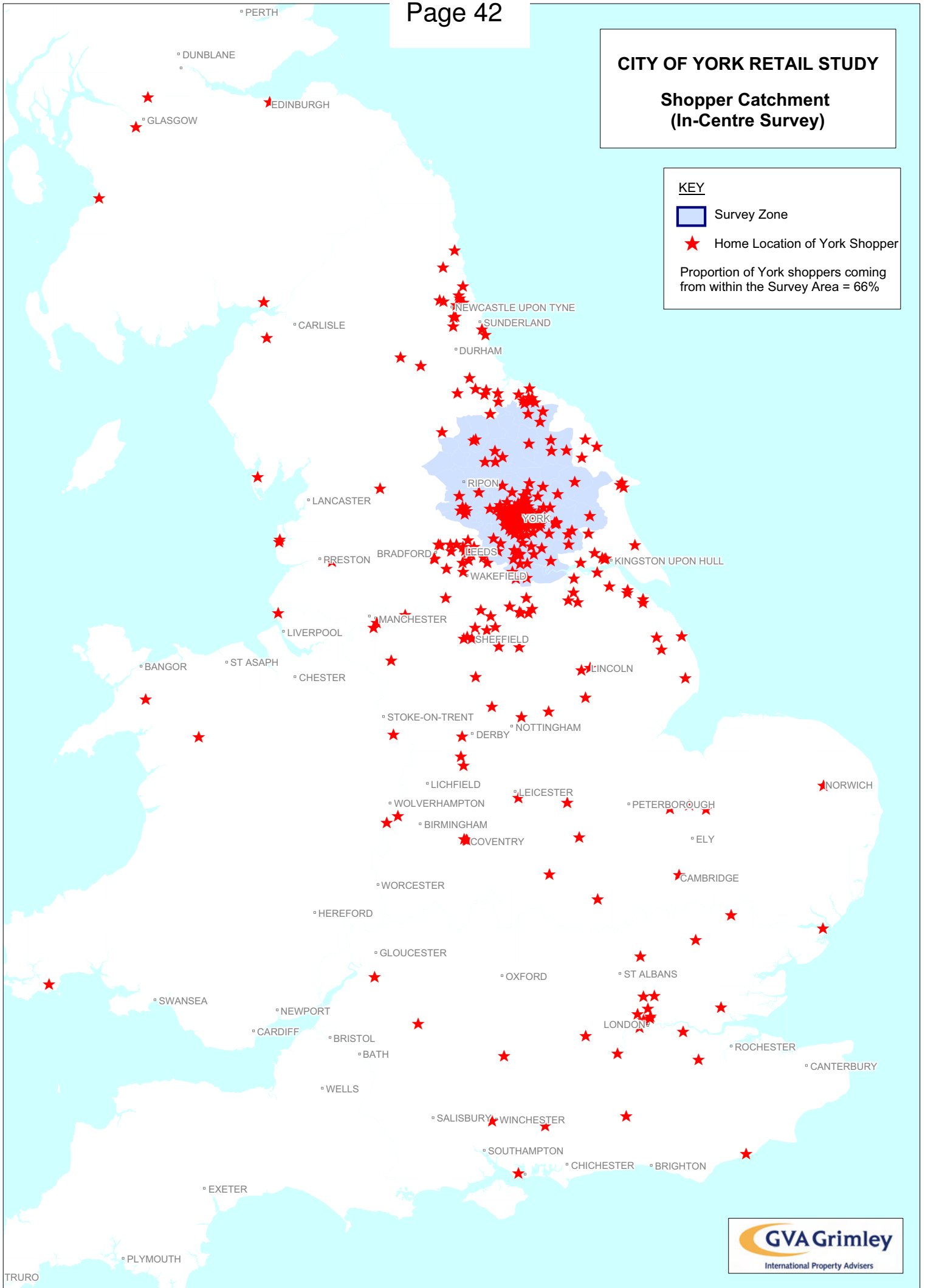
Shopper Catchment (In-Centre Survey)

KEY

 Survey Zone

 Home Location of York Shopper

Proportion of York shoppers coming from within the Survey Area = 66%





Local Development Framework Working Group

3rd June 2008

Report of the Director of City Strategy

Local Development Framework: York City Centre Area Action Plan Issues and Options

Summary

1. The purpose of this report is to request that the Members of the LDF Working Group recommend to the Council's Executive that they approve the emerging York City Centre Area Action Plan (AAP), subject to the recommendations of the Group, for consultation (the Issues and Options document is attached at Annex A and Summary of Issues and Options document at Annex B). The intention, subject to Members' approval, is for the Issues and Options for the City Centre Area Action Plan DPD to be published for public consultation in July.

Background

2. As Members will recall, the purpose of the City Centre Area Action Plan is to provide a vision and identify key issues for the city centre over the next 20 years. It is the first time a review of the city centre has pulled all the various issues together under one comprehensive plan and, when it progresses to adoption, it will provide the basis for projects to deliver new development opportunities and public realm enhancement, and control inappropriate development.
3. Work began on the AAP in September 2007. A report was presented to LDF Working Group on 18 December 2007 in order to describe progress on the AAP, to obtain guidance on the direction of the issues and options document. The Working Group approved the recommendation that Officers produce a draft Issues and Options report for public consultation, based on key issues relevant to the city centre and potential Action Areas, and that this be reported back to the Group. Member comments have been taken into account in drafting the document.
4. In producing the draft Issues and Options document, the City Development team have involved Officers from across the Council. Officer Workshops were held on 11 October 2007 and 10 March 2008, which allowed Officers to state their own aspirations and ideas for the city centre, and gave them the opportunity to explain how these fitted within wider strategies of CYC. These

workshops have been backed up by regular meetings with small groups and individuals and regular reporting and feedback of Officer comments.

5. It was agreed that the draft should be positive about the advantages of the city centre and the opportunities that exist to enhance it further. It includes facts and background information (spatial portrait) as well as context maps to illustrate the big issues for the city centre.
6. The plan revolves around three 'key themes' – economic vitality, historic environment and community life. These are highlighted as the key functions of the city centre and contributors to its success. A vision for each key theme is set out at the start of the document followed by more detailed explanation of the issues. A series of questions for people to consider are posed along with options to deal with the issues. The Plan also includes context maps and numerous photographs and illustrations to help demonstrate the assets and opportunities in the city centre.
7. Key Theme 1 Economic Vitality considers all aspects of the city centre economy and contains options for improving its diversity and prosperity. It considers how we might develop the economy over the next 20 years through retail, tourism, the evening economy, offices, as well as explaining the role of the universities, and access and transport issues.
8. Key Theme 2 Historic Environment contains options for ensuring successful management of the Historic Core Conservation Area, good design and an improved public realm. It covers issues such as managing the historic environment, improving public spaces and pedestrian routes, future options for Newgate Market, possible changes to the footstreets and opportunities for greening the city centre.
9. Key Theme 3 Community Life includes issues and options to increase the number of community services and facilities, enhance cultural and evening activities, and improve equality and access to housing.
10. The Issues and Options consultation is the first opportunity to receive public comment, and it has been the intention from early on to make the plan interesting to the reader through use of good graphics - an aspect that Members endorsed when ideas were first presented to the LDF Working Group in December 2007. This has now taken shape - through relevant photos, maps and vision sketches, as well as colour coding of themes and issues.
11. The draft AAP includes a section with five proposed 'Opportunity Areas'. All of the areas are based on existing Council objectives and the AAP emphasises that they have the potential to go a long way towards delivering key elements of the vision for the city centre. The five areas include:
 - Castle Piccadilly – a retail-led mixed use development, with opportunities to create a first class public realm and enhance the

Foss riverside, based on the 2006 Planning Brief and Allocations DPD.

- The Cultural Quarter – enhancements to the Minster-NRM corridor, based on the ongoing work of Learning, Culture and Children's Services and York @ Large.
- Gateway Streets – enhancement of 'peripheral' streets based on the ongoing work of Economic Development Unit.
- City Spaces – public realm enhancement of key streets and spaces based on cross Directorate work on the 'Songlines' Lottery fund bid and taking into account aspirations set out in the Council's Community Strategy.
- Riversides – enhancing this key asset, with particular focus on the area between Ouse and Lendal bridges to realise the long-term objective to create a walkway on the south bank.

12. Summary character statements for each of the character areas within the conservation area are included as an appendix to the Issues and Options document. These have been produced by BDP Architects. Public comment can then be fed into the preparation of the full Appraisal document. This approach has been agreed with English Heritage.
13. A Summary Issues & Options is included (Annex B to this report) for easy reference, and a short publicity leaflet and press release will also be produced at the time of public consultation.

Sustainability Appraisal (SA)

14. When producing LDFs local authorities are required to consider, at each stage of production, the impacts that their proposals are likely to have on sustainable development. This is done through undertaking a joint strategic environmental assessment and sustainability appraisal of the document in accordance with EU Directives and the Planning and Compulsory Purchase Act.
15. A Scoping Report has been completed and a Sustainability Statement will be produced to accompany the City Centre AAP Issues and Options once this document has been approved by Members. This will provide an overview of sustainability matters raised at the Issues and Options stage, and will provide a reference for those wishing to comment on the Issues and Options by highlighting the economic, social and environmental implications for sustainable development of the proposed development options.

Consultation

16. A draft of the document has been consulted on widely within the Council and the comments received have been fully considered and incorporated into this Issues and Options report.

17. The proposed external consultation will comply with the Council's Statement of Community Involvement and will run for a minimum of six weeks. This will include press releases, information on the Council's website and distribution of the document to public buildings and to relevant parties. The Council's City Development team will attend meetings of interested groups - including the Retail Forum, Property Forum and Conservation Area Advisory Panel and will hold stakeholder workshops as appropriate. A Consultation Strategy is being produced which will set out the precise consultation methodology to be used, and this will be agreed by the Director of City Strategy in consultation with the Executive Member and Shadow Executive Member for City Strategy.

Options

18. Members have the following options to consider in relation to the City Centre Area Action Plan DPD Issues and Options Document, including the Summary document :

Option 1: To approve the document, subject to the recommendations of the LDF Working Group, for consultation purposes;

Option 2: To seek amendments to the document through recommendations of the Executive; or

Option 3: To defer the document and request further work from Officers.

Analysis

19. It is important that the City Centre Area Action Plan DPD is progressed broadly in accordance with the timetable set out in the Council's Local Development Scheme. As the Issues and Options stage of the Area Action Plan DPD is the beginning of a process which is timetabled to take three years to complete, it is important to meet the LDS in order to avoid delays later in the process.
20. The outcome of this Issues and Options report will feed into the next stage of the City Centre Area Action Plan and, therefore, any delay to this document will impact on the timetable.

Corporate Priorities

21. The City Centre Area Action Plan DPD accords with the following corporate priorities to:
 - Reduce the environmental impact of council activities and encourage, empower and promote others to do the same
 - Improve the economic prosperity of the people of York with a focus on minimising income differentials

- Improve the actual and perceived condition and appearance of the city's streets, housing estates and publicly accessible spaces
- Increase the use of public and other environmentally friendly modes of transport
- Improve the quality and availability of decent affordable homes in the city
- Improve the health and lifestyles of the people who live in York, in particular among groups whose levels of health are the poorest.

Implications

22. The following implications have been assessed:

- **Financial** - The cost of preparing the City Centre Area Action Plan DPD will be met through current budgets provided for the LDF. Apart from a few vision sketches, no external plan planning consultancy or design team has been used in the production of this draft AAP, and expenditure has been wholly contained within the City Development Team budget.
- **Human Resources (HR)** - None
- **Equalities** - None
- **Legal** - None
- **Crime and Disorder** - None
- **Information Technology (IT)** - None
- **Property** – The AAP identifies Opportunity Areas for discussion based on development and enhancement, including land and buildings in the Council's ownership.
- **Other** - None

Risk Management

23. In compliance with the Council's risk management strategy, there are no risks associated with the recommendations of this report.

Recommendations

24. That Members recommend the Executive to:

- i) approve the Draft Issues and Options document and Summary of Issues and Options for public consultation, subject to any changes recommended at the LDF Working Group;

Reason: So that the City Centre Area Action Plan DPD can be progressed to its next stage of development as highlighted in the Council's Local Development Scheme.

- ii) delegate to the Director of City Strategy in consultation with the Executive Member and Shadow Executive Member for City Strategy the making of any incidental changes to both the draft document and Summary of Issues and Options document that are necessary as a result of the recommendations of the LDF Working Group.

Reason: So that changes recommended as a result of discussions at this meeting can be made and the report can progress through to the Executive.

- iii) delegate to the Director of City Strategy in consultation with the Executive Member and Shadow Executive Member for City Strategy the approval of the Sustainability Statement to accompany the Issues and Options document consultation.

Reason: So that the report and accompanying document can progress through to the Executive.

- iv) delegate to the Director of City Strategy in consultation with the Executive Member and Shadow Executive Member for City Strategy the approval of a Consultation Strategy and promotional material.

Reason: To ensure that the proposed methods of consultation are satisfactory to members.

Contact Details

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City Development
City Strategy
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Chief Officer Responsible for the report:
Bill Woolley
Director of City Strategy
City Strategy
01904 55 1330

Report Approved **Date** 20/05/08

Specialist Implication Officers: None

Wards Affected: Guildhall, Fishergate, Micklegate and Heworth **All**

For further information please contact the author of the report

Background Papers: None

Annexes (due to their size these are only available on the Council website or on request):

- Annex A: City Centre Area Action Plan Issues and Options
- Annex B: City Centre Area Action Plan Summary of Issues and Options