Greater Nottingham Centres Study

Final Report

ON BEHALF OF BROXTOWE, GEDLING, NOTTINGHAM AND RUSHCLIFFE COUNCILS

June 2024

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0. Executive Summary

Overview

0.1 Nexus Planning was instructed by the Greater Nottingham partner authorities comprising Broxtowe Borough Council, Gedling Borough Council, Nottingham City Council and Rushcliffe Borough Council in October 2023 to undertake a new Greater Nottingham Centres Study (‘the Study’) in respect of the defined centres and out of centre provision across the four authority areas.

0.2 The existing hierarchy of the defined centres is currently provided by the Greater Nottingham Aligned Core Strategies (adopted 2014) with refinements in the Part 2 Local Plans. The four authorities are now preparing the Greater Nottingham Strategic Plan, which comprises ‘Part 1’ of the Local Plan for each Council.

0.3 Working alongside BAS Consultancy, a market leading economic development consultancy helping to improve towns and cities, and Nexus Analytics, the Study and the supporting documents provided within the appendices, aim to unravel the key matters which are currently moulding the centres, and help to provide policy advice to ensure the Councils are appropriately planning for the future of their residents. Understanding what the public and stakeholders want and need in their centres, along with an appreciation of the specific socio-demographics of the catchments of the centres is key in being able to do this effectively.

Commercial Market Overview

0.4 The Study has sought to review the current trends effecting the UK commercial market and specifically town centres, and has considered how these trends have impacted the centres within Greater Nottingham.

0.5 Nottingham city centre itself has been the subject of substantial change in recent years.

0.6 The most significant change has been the redevelopment of the former Broadmarsh Shopping Centre. Demolition and construction works relating to this project are well underway, and the city centre has already seen the development of a new Central Library and Nottingham College City Hub, a bus station and car park, and major public realm improvements.

0.7 Future plans for the Broadmarsh site involve the retention of the shopping centre's structural frame for independent retail, food and drink businesses, community spaces, and a Community Diagnostic Centre. A forthcoming site-wide masterplan will inform a future planning application for 1,000 new homes, 46,000 sq.m of commercial and office floorspace, and public greenspace. These works have the potential to transform the southern part of the city centre.

0.8 A number of high-profile national multiples have closed stores in the city centre (including Debenhams, Topshop and Wilko), and the demand for retail premises has generally lessened. Furthermore, online competition also impacts on the need to visit larger centres to purchase fashion goods and big ticket items.

0.9 However, Nottingham remains a shopping venue of regional importance and, as such, remains a key location for the majority of bricks and mortar retailers. Its resilience is also underpinned by its strong leisure and evening economy.

0.10 The town centres across Greater Nottingham (Arnold, Beeston and Bulwell) and the district centre of West Bridgford (which is the principal centre within Rushcliffe and performs a town centre role) vary in scale and qualitative offer, principally driven by their surrounding demographics and the wider spatial position in the sub-region. The town centres (including West Bridgford) provide a wider range of both convenience and comparison retailers which, below the city centre, also provide opportunities for residents to meet their retail needs including in some cases, their fashion retailing needs. Given this, the town centres have also been impacted upon by the wider commercial market, and have in particular, witnessed closures from operators such as Wilko and financial services including banks. However, the town centres have benefitted from their strong convenience offer and the importance of foodstores anchoring centres, alongside a wider commercial leisure offer. Recently, there has also been an indication of a positive sign of investor and retailer confidence in the reoccupation of the former Wilko unit in Arnold by B&M.

0.11 Given changes in the retail sector, it will be important for the city centre, the town centres and the larger district centres within Greater Nottingham to provide a greater experiential offer to attract activity and encourage visitors to stay for longer periods. The independent retail and food and drink sectors are likely to be particularly important in this regard. There may also be a benefit in actively managing centres to assist with their general maintenance and to help allow for greater differentiation between different centres' respective offers.

Overview of Planning Policy

0.12 The Study has also included a full review of the existing adopted planning policy at both the national and local level.

0.13 There are a number of recurring themes identified throughout the planning policy review which will be important to consider in the context of future development for main town centre uses within the Greater Nottingham area, including:

- **Supporting flexibility in town centres** – town centre accommodation needs to be adaptable to a number of uses to address future needs. This presents both opportunities and challenges for Greater Nottingham's defined centres. The previous orthodoxy of protecting A1 retail uses within Primary Shopping Areas may unwittingly be restricting the ability of town centres to diversify and develop distinctive identities and associated offer to consumers. Whilst supporting flexibility is therefore key, there must still be an overarching concentration of retail uses within defined centres, given the draw and attraction of such uses and their assistance in helping to support the vitality and viability of centres overall.
- **Encouraging a mix of town centre uses** – town centres are increasingly diverse with the emergence of a greater proportion of leisure, food and drink uses. There is also an identified need to concentrate multi-functional public services in town centre locations to realise agglomeration benefits. However, town centres face rapidly increasing competition from retail parks and higher order centres as well as online shopping. The integration of commercial and residential uses within town centres is important to their overall vibrancy, to encourage footfall within centres throughout the day and evening. This includes access to high quality public transport.
- **The hierarchy of centres** – the role of each defined centre within Greater Nottingham needs to be clearly articulated to provide it with a distinct and recognisable identity appropriate to its role. It will be important to identify the unique attributes of each defined centre during the production of the Strategic Plan and new Local Plans.

Socio Demographics

0.14 In order to fully understand the socio-economic and demographic nature of the principal centres, and the impact that the demographic profile of each centre's catchment may be having on the centre's health but also its function and offer, Nexus Analytics have undertaken an assessment of key demographic indictors. The purpose of the analysis provided in this section is to assist in the formulation of policy recommendations, through identifying the strengths and weaknesses of the provision within the 20-minute catchment.

0.15 These indicators include a review of projected head of household change by age between 2021 and 2040, understanding household tenures and economic activity status. Further detail in respect of each of the individual centre's demographics is provided within the healthchecks.

0.16 Given the wide range of services and facilities available within a city centre, it is unsurprising that Nottingham city centre performed the best against the 20-minute neighbourhood criteria. It was found that there was a range of education, health and retail services in the centre to meet the needs of local residents. There is also a healthy mix of homes and job opportunities available.

0.17 Transport choices were identified as a particular strength, as the city centre benefits from a centrally located train station, a tram system and extensive pedestrianised areas. Only in terms of greenspace was it found that the city centre was not meeting aspirations in both quantitative and qualitative terms, and that future interventions should focus on provision of more, high-quality green space. However, it is also acknowledged that the Broadmarsh proposals will significantly enhance the overarching greenspace provision within the city centre, which will go some way towards addressing the deficiency identified.

0.18 The principal centres of Beeston, Arnold, Bulwell and West Bridgford were also found to generally perform well, although with some variations identified between centres. Beeston met the majority of the criteria for a 20-minute neighbourhood, although it notably lacked a range of education facilities in its catchment area. Transport was identified as a particular issue in Arnold, as it is the only centre which lacks access to the Nottingham Express Transit tram service or a train station.

Stakeholder Consultation

0.19 The healthcheck assessments which form an important element of this Study are supplemented by the Centre Recommendation Reports produced by BAS Consultancy for the principal centres within each of the four authority areas. This is provided at Appendix 2. The work undertaken by BAS Consultancy provides further guidance, particularly in respect of additional recommendations on high street viability.

0.20 Although the wider Study has assessed the vitality and viability of all defined centres within the Greater Nottingham area, the Councils requested that the Recommendations Report undertaken by BAS Consultancy focuses on Nottingham city centre, the town centres of Arnold and Beeston and the district centre of West Bridgford. In each case, the four centres are the principal defined centres in each of the respective four authority areas and as noted above, in the case of West Bridgford, the centre is performing a town centre role in any event.

Vitality and Viability

0.21 Paragraph 90 of the NPPF indicates that planning policies should promote the long-term vitality and viability of town centres by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries. The same paragraph also states that town centres should accommodate a suitable mix of uses (including housing) and provide for development that reflects a centre's distinctive character.

0.22 Paragraph 006 of the Town Centres PPG identifies a range of indicators that should be assessed over time in order to establish the health of a town centre.

0.23 New healthcheck assessments have been undertaken for the city, town, district and local centres identified at Policy 6 of the Aligned Core Strategies. We have also undertaken a review of the offer of the Centres of Neighbourhood Importance and present our findings in a matrix.

0.24 Overall, the Study has identified that Nottingham city centre is considered to be vital and viable, benefitting from robust daytime and night-time economies that befit its status as a regional centre, excellent accessibility and a high level of environmental quality. The number of regeneration opportunity sites across the city centre and the positive signs of both public and private sector investment, means that there are substantial positive indicators for Nottingham's future.

0.25 Nottingham city centre is also somewhat lacking in green/open space, although there is tree planting in the pedestrianised areas. The forthcoming Broadmarsh proposals are anticipated to alleviate this issue in the south through the inclusion of a new football pitch-sized 'Green Heart' public space, which lies at the centre of the redeveloped site but further strategies elsewhere in the city centre to improve the provision of greenspace should be considered, and opportunities to encourage open spaces should be explored wherever possible. Such strategies should also consider better wayfinding opportunities to encourage visitors to explore the wider city centre.

0.26 In terms of the town centres in Greater Nottingham, the Study has identified that they vary in offer and scale but perform important roles in providing for the majority of day-to-day functions for local residents. Arnold, Beeston, Bulwell and West Bridgford each provide large format convenience operators, alongside a wide range of other retail, leisure and service uses. They are accessible by a range of public transport modes and benefit from a good catchment area, which makes them suitable for a range of main town centre uses.

0.27 The town centres have also been subject to the ongoing market trends, and as a result, they have witnessed some key closures of larger operators, including the Wilko stores in Arnold, Beeston and Bulwell (although it is noted that the former Wilko store in Arnold has already been reoccupied by B&M and therefore, there may be positive signs of future investment in the other vacant units in the short term) and other smaller closures across the centres more generally. However, in each case, there is a good sign of general 'churn' with former vacant units having been occupied by alternative operators.

0.28 The district and local centres in Greater Nottingham vary considerably in scale and offer but generally provide a good mix of retail, leisure, service and other main town centre uses to principally meet the day-to-day needs of the local catchment.

0.29 In the context of the district centres, the offer is more diverse with a higher number of commercial operators which provide a range of functions, including a more diverse comparison offer. The local centres are smaller in scale, meeting a much more localised catchment in terms of small scale convenience provision, some leisure uses and retail services.

0.30 This Study has also assessed the current provision of out of centre retail and leisure provision and how this has evolved over time. It is clear that retail parks and warehouses have a place in the wider context of facilities within Greater Nottingham, and particularly in terms of providing larger format space for operators who could not otherwise meet their business model requirements within the defined centres.

Policy Recommendations

0.31 The concluding section of the Study seeks to provide an overview of the recommendations for the defined centres, both on a centre-by-centre basis but also in terms of the overarching policy objectives which we consider should form an important role within the Local Plan Review.

0.32 Following approval by Broxtowe, Gedling and Rushcliffe Borough and Nottingham City Councils, the Greater Nottingham Planning Partnership consulted on the Preferred Approach for the Greater Nottingham Strategic Plan between the 4 January 2023 and 14 February 2023.

0.33 The Greater Nottingham Strategic Plan will comprise Part 1 of each authority's Local Plan, replacing their Aligned Core Strategies. The Greater Nottingham Strategic Plan will contain strategic policies identifying the amount and distribution of development and infrastructure. Following adoption of the Greater Nottingham Strategic Plan each individual authority will commence reviews of Part 2 of their Local Plans. Reviewed Part 2 Local Plans will identify non-strategic sites and detailed policies that deliver the strategic policies in the Greater Nottingham Strategic Plan.

0.34 We believe that it is important for the forthcoming policies within the Strategic Plan to clearly identify that the larger defined centres should continue to be the focus for comparison goods retail and that there is a need to direct such operators towards the centre in order for it to remain relevant and appropriately serve residents' needs. We also consider it important that future planning policy seeks to support the growth of the key centres through the improvement of facilities, public realm and space to be able to attract residents to meet and interact but also to provide inclusive centres which draw in visitors of all ages and from all backgrounds. This means providing a mix of operators, a variety of uses and providing, where appropriate, affordable town centre living.

0.35 More generally, it will be important for the emerging plan to clearly set out the importance of the sequential and impact tests and explain the local circumstances which frame how they will be applied in practice. The sequential and impact tests will need to be applied in a robust manner so as to reduce the vacancy rate across the defined centres and support centres that are fit for purpose going forward. Whilst non-retail uses will be an important component of the mix of land uses in principal centres moving forward, there is still a requirement to accommodate new retailers and additional retail floorspace within defined centres wherever possible.

0.36 Overall, however, the centres within Greater Nottingham are performing relatively well against the UK averages, and the offer of retail, leisure and service floorspace is generally meeting residents needs well. There are also opportunities to create more pedestrian-friendly areas within the centres to help support more community events and other informal activities throughout the year.

0.37 Town centre policies will therefore need to promote diverse centres, which encourage a mix of main town centre uses. Tracking the implications of Permitted Development Rights, and particularly the change of use from commercial to residential uses will be important, to ensure that the centres' focus is still around the retail and leisure offer so residents can meet their daily needs. This will also help to avoid the loss of expenditure from the centres to other larger competing destinations and encourage sustainable shopping and leisure patterns within the suburbs of Greater Nottingham.

0.38 We provide policy recommendations in respect of the respective tiers contained within the recommended hierarchy. The principal change within the hierarchy is the elevation of West Bridgford from the district centre tier to town centre tier. Our recommendation is based on the findings set out as part of the socio demographic analysis, the stakeholder feedback and in particular, the findings of the healthcheck work undertaken by Nexus. Overall, we are of the view that West Bridgford provides a very good level of retail, leisure, service and other town centre uses which draw in trade from a catchment area which is considered to be wider than that which would typically be related to a district centre.

0.39 The final part of the Study also provides specific policy recommendations in respect of the primary shopping areas (where relevant) and town centre boundaries for the defined centres, along with local impact thresholds for the tiers of centres in the hierarchy.

1. Introduction

Instruction and Purpose

1.1 Nexus Planning was instructed by the Greater Nottingham partner authorities comprising Broxtowe Borough Council, Gedling Borough Council, Nottingham City Council and Rushcliffe Borough Council in October 2023 to undertake a new Greater Nottingham Centres Study ('the Study') in respect of the defined centres and out of centre provision across the four authority areas.

1.2 The existing hierarchy of the defined centres is currently provided by the Greater Nottingham Aligned Core Strategies (adopted 2014) with refinements in the Part 2 Local Plans. The four authorities are now preparing the Greater Nottingham Strategic Plan, which comprises 'Part 1' of the Local Plan for each Council.

1.3 Following approval by Broxtowe, Gedling and Rushcliffe Borough and Nottingham City Councils, the Greater Nottingham Planning Partnership consulted on the Preferred Approach for the Greater Nottingham Strategic Plan between the 4 January 2023 and 14 February 2023.

1.4 The Greater Nottingham Strategic Plan will comprise Part 1 of each authority's Local Plan, replacing their Aligned Core Strategies. The Greater Nottingham Strategic Plan will contain strategic policies identifying the amount and distribution of development and infrastructure. Following adoption of the Greater Nottingham Strategic Plan, each individual authority will commence reviews of their respective Part 2 Local Plans. Reviewed Part 2 Local Plans will identify non-strategic sites and detailed policies that deliver the strategic policies in the Greater Nottingham Strategic Plan.

1.5 As such, the principal purpose of the commission is to provide a Study to form a key part of the evidence base and to inform policies and strategies to be included within the Regulation 19 Version of the Strategic Plan. The Study focuses on strategic policy issues affecting the Greater Nottingham centres, and seeks to establish recommendations which can be used to address the identified trends, in order to protect the long-term vitality and viability of the centres.

1.6 This Study provides an opportunity for the partner Councils to take stock of the recent changes in the Use Classes Order, Permitted Development Rights and general retail and leisure climate, and seek to plan for the longer-term health of their centres to ensure that they continue to meet residents' needs.

1.7 Working alongside BAS Consultancy, a market leading economic development consultancy helping to improve towns and cities, and Nexus Analytics, the Study and the supporting documents provided within the appendices, aim to unravel the key matters which are currently moulding the centres, and help to provide policy advice to ensure the Councils are appropriately planning for the future of their residents. Understanding what the public and stakeholders want and need in their centres, along with an appreciation of the specific socio-demographics of the catchments of the centres is key in being able to do this effectively.

1.8 The original specification as provided by the partner authorities was for the project team to provide appropriate evidence to support the Strategic Plan and centre revitalisation projects, having regard to the National Planning Policy Framework ('NPPF') and other relevant national planning policy guidance.

1.9 In particular, the Study includes the assessment and review of the following:

- Identify whether the current overall hierarchy of retail centres is appropriate and fit for purpose in the context of current and future retail trends.

- An assessment of the Greater Nottingham Centres to cover two elements:
  - Detailed analysis of the City Centre, Town Centres and District Centres; and
  - General trend analysis for the Greater Nottingham Centres.
- Review of the local impact assessment thresholds implemented in each of the authority areas to assess whether any amendments are required;
- Consideration of the impact of the housing growth proposed on retail and associated uses;
- An understanding of local stakeholder and business views, to help understand the strengths, weaknesses, opportunities and threats to the Greater Nottingham centres; and
- A review of the existing designated frontages, primary shopping areas and town centre boundaries of the defined centres within Greater Nottingham.

Context to the Study

1.10 National planning policy provides guidance to local authorities to ensure that not only should defined centres appropriately meet the needs of residents within the authority area, but that there are sufficient facilities located in sustainable locations to ensure that there is fair access for all. Indeed, paragraph 90 of the National Planning Policy Framework (the 'NPPF') indicates that planning policies and decisions should support the role that town centres play at the heart of local communities, by taking a positive approach to their growth, management and adaptation.

1.11 The adopted Aligned Core Strategies Part 1 Local Plan identifies a need to support the current defined centres within the four authority areas. Policy 6 of the Aligned Core Strategy sets out the hierarchy of centres, with Nottingham city centre at the top, the three town centres of Arnold, Beeston and Bulwell on the second tier and then the seven district centres on the tier below. The Policy goes on to provide guidance which seeks to maintain and enhance the defined centres and encourage main town centre uses into the centres in the first place, which is also appropriate in scale and nature to the role and function of the centres.

1.12 In this context, and as we demonstrate in detail below, the four authority areas and Greater Nottingham as a whole, is currently served by a range of defined centres, which form the current tiered hierarchy below the city centre. The centres are in most cases performing a key role in meeting residents' day to day needs, but some are also providing an additional diverse offer which encourages additional visits, increases dwell times, and a general desire to spend time in those centres.

1.13 The Study seeks to explore this further, through detailed market research, stakeholder consultation and on-site research. The work establishes the current performance and offer of centres, whether these meet residents' requirements having regard to the specific socio-demographics of the catchments, and provides the Councils with recommendations in terms of future planning policy and key action plans to help support the ongoing viability of these centres.

Structure of Report

1.14 Our report firstly provides an overview of prevailing retail and leisure trends, before then going on to consider the planning policy context for the Study. We then summarise the key findings from the stakeholder consultation, analytical research and healthchecks, before considering the overarching policy recommendations for the Study. We also provide an overview of the out of centre provision within the four authority areas.

1.15 The remainder of the report is focussed around our assessment of retail and leisure needs, and provides overarching recommendations in order to assist with the formulation of planning policy and help support and guide the future of the defined centres within Greater Nottingham.

1.16 Accordingly, our report is structured as follows:

- Section 2 provides an overview of the current and emerging retail leisure trends, and how these trends are impacting the Greater Nottingham centres;
- Section 3 provides an overview of the current adopted local plan policies of relevance to this Study;
- Section 4 provides a summary of the socio-demographic review and 20 minute neighbourhood analysis undertaken in respect of the city centre and three town centres;
- Section 5 summarises the findings from BAS' stakeholder consultation and market reports for the four centres of Nottingham city centre and Arnold, Beeston and West Bridgford centres, being the principal centres in each of the four authority areas;
- Section 6 provides an overview of Nexus' healthchecks, including the city, town, district, local and neighbourhood centres;
- Section 7 summarises the four local authorities' large scale out of centre provision; and
- Section 8 provides our overarching summaries and policy recommendations.

2. Current and Emerging Retail and Leisure Trends

2.1 In order to provide a context for this Study and to help identify the sectors that are more likely to be the subject of additional development proposals, we set out a summary of current retail and leisure trends below. In reading the summary, it should be noted that the retail and leisure sectors are dynamic and, whilst online shopping and economic conditions have impacted on the high street, new retailers and formats continue to evolve to meet shoppers' needs.

2.2 The below commentary should therefore be taken as a 'snapshot' in respect of current market conditions; it will be necessary to judge future development proposals for main town centre uses with reference to the prevailing circumstances at the time of a proposal's determination. Whilst the impact of Covid-19 on the retail and leisure sectors has lessened in 2022 and 2023, the trading outlook remains challenging due to inflationary pressures and significant increases in the cost of living. We reflect further on the current economic outlook below.

Economic Conditions

2.3 The UK economy was impacted significantly by the Covid-19 pandemic in 2020 and 2021, and by restrictions on movement and behaviour which sought to mitigate its impact. This uncertain background caused retail and leisure expenditure (and business investment) to decline. Household spending fell by over 20% quarter-on-quarter in the second quarter of 2020 following the imposition of national lockdown measures. This is the largest quarterly contraction on record. Retail sales volumes also suffered double-digit falls in April 2020 as all but essential stores closed during the height of the lockdown.

2.4 However, following the gradual reopening of businesses over the summer of 2020, the economy returned to growth, with this gathering momentum as a greater number of sectors reopened, including hospitality and leisure services. A resurgence in the number of cases of Covid-19 then resulted in the Government reinstating a nationwide lockdown in early 2021. The general economic outlook in 2022 and 2023 has continued to be of concern given very significant increases in the rate of inflation and the general cost of living.

2.5 In February 2024, Experian published its Retail Planner Briefing Note 21 ('ERPBN21'), which identifies anticipated future growth in the retail and leisure sectors and considers likely changes in bricks and mortar retail floorspace and online sales.

2.6 ERPBN21 anticipates that retail spending has been squeezed in 2022 and 2023 as a consequence of inflationary pressure and increases in the cost of living. Page 5 of ERPBN21 provides the following summary of the economic outlook:

'Looking ahead, spending growth over the course of 2024 remains affected by the lingering effects of the cost-of-living crisis, as though inflation is slowing towards target, high interest rates continue to constrain household budgets, particularly those with mortgage debt. A high tax burden is also acting as a dampener on discretionary income. Rising real pay growth and continued strength in the labour market should still allow for a less negative year than 2023.'

2.7 It is clear that the Covid-19 pandemic has accelerated the shift to online retailing with a consequent reduction in bricks and mortar retail floorspace. As a consequence, the proportion of expenditure committed via special forms of trading (i.e. internet and mail order sales) has increased.

2.8 More generally, as a result of relatively modest growth forecasts and the shift to online retailing, Experian forecasts that there will be a reduction in the stock of retail floorspace over the next few years.

2.9 In terms of inflation, Office for National Statistics data[1] indicates that the rate of inflation (as measured by the consumer price index) increased from 0.8% at April 2020 to 1.5% at April 2021, before then increasing significantly to 9.0% at April 2022. The rate of inflation appears to have peaked at 11.1% in October 2022 and has reduced significantly to 6.7% at August 2023. Retail has been an industry under significant stress, as many retailers find themselves squeezed between rising costs and the increasing volume of sales over the internet. Such difficulties have, of course, been exacerbated by the Covid-19 pandemic and the cost of living crisis associated with rising energy prices and inflation.

2.10 There will still be the need and demand for physical stores, despite the increase in shopping online. This is particularly the case for convenience goods sales given that online shopping orders are typically picked from the shelves of physical stores. In respect of comparison goods, there is a need for the offer to become more 'experiential' to encourage shoppers onto the high street, and to ensure that shopping is viewed as a pleasurable pastime. The shopping experience needs to evolve and diversify both to attract footfall and convert increased activity into sales. Independents clearly have an important role to play in adding interest and in providing differentiation between shopping venues.

2.11 In considering the current strength of the retail and leisure sectors, it is important to recognise that different types of retailer have been the subject of different fortunes.

2.12 Non-essential retailers haven been impacted by enforced 'lockdown' closures in 2020 and 2021. However, dispensing chemists traded more strongly from March 2020, and their sales continued to be above pre-pandemic levels into 2022 and early 2023. Foodstores also generally traded consistently above their pre-pandemic levels. This was initially due to a degree of stockpiling of grocery goods, but some ongoing boost in sales was evident due to the ongoing prevalence of working from home. Furniture and homeware retailers also generally benefitted from people spending more time in their homes and wanting to improve their own environment. However, in light of increasing inflation and changes to working patterns throughout 2022, it is understood that there has now been a shift away from this pattern.[2]

Available Expenditure and the Impact of the Internet

2.13 Experian expenditure data and growth forecasts confirm that the pandemic has resulted in turbulent short term changes in per capita convenience and comparison goods expenditure. In this regard, ERPBN21 identifies that per capita convenience goods expenditure decreased by 5.8% in 2022 with a further reduction of 3.0% in 2023. This follows a previous reduction of 1.7% in 2021. Before this, in 2020, per capita convenience goods expenditure increased by 8.6%. The strong level of growth at 2020 is largely attributable to consumers spending more on such goods as a result of lockdown measures. Limited annual per capita expenditure growth (relative to that which has been achieved historically) is anticipated to return across the medium to long term.

2.14 As the below Table 2.1 shows, the position in respect of annual per capita comparison goods expenditure has been changeable in the past few years. Whilst annual per capita comparison goods growth of 8.1% was recorded in 2021, this followed a reduction of 7.9% in 2020. Forecast per capita comparison goods expenditure increases over the medium and longer term are positive but still below the level apparent at the turn of the millennium.

[1] ONS 'Consumer price inflation tables' dataset, July 2023.
[2] Article headlined 'Retail sales in Great Britain rise despite cost of living crisis', The Guardian, 19 August 2022.

Table 2.1: Experian's Identified and Forecast UK Convenience and Comparison Goods Per Capita Expenditure Growth

Volume Growth per Head (%)	2018	2019	2020	2021	2022	2023	2024	2025	2026-29	2031-40
Convenience goods	-0.2	-1.0	8.6	-1.7	-5.8	-3.0	-0.5	-0.2	0.0	0.1
Comparison goods	0.4	2.9	-7.9	8.1	-3.3	-3.3	-1.2	2.7	3.1	2.8

Source: Figure 1a and Figure 1b of Experian Retail Planner Briefing Note 21

2.15 Whilst the above figures identify a level of growth which is significantly below that which has historically been achieved, the situation for high street stores is exacerbated through the increasing amount of expenditure which is committed through special forms of trading[3] and, in particular, through online sales.

2.16 The below Table 2.2 sets out Experian's identified and forecast level of special forms of trading as a proportion of overall convenience and comparison goods expenditure. Experian estimates that special forms of trading will account for just under four out of every ten pounds spent on comparison goods and almost a quarter of convenience goods expenditure at 2034.

Table 2.2: Experian's Identified and Forecast Market Share of Non-Store Retail Sales for Convenience and Comparison Goods Sectors

Volume Growth Per Head (%)	2018	2019	2020	2021	2022	2023	2024	2029	2034	2039
Convenience goods	10.8	12.9	17.1	19.2	16.4	15.8	17.3	21.2	23.3	24.6
Comparison goods	21.8	25.0	39.2	37.9	31.5	30.4	32.5	36.5	38.5	39.7

Source: Figure 5 of Experian Retail Planner Briefing Note 21

2.17 The ongoing popularity of internet shopping continues to have clear implications in respect of the viability of some 'bricks and mortar' retailers. However, it is important to note that changes in how people shop also bring about some opportunities for retailers trading from the high street. In particular, many stores sell online but fulfil orders from regular stores rather than warehouses[4], with purchases therefore helping to sustain tangible retail floorspace. As a consequence, Experian also provides an 'adjusted' estimate of special forms of trading, which relates to expenditure which is not available to actual stores. These figures are provided in Table 2.3 below. The figures demonstrate the high proportion of online sales which are fulfilled from physical stores, and therefore the 14importance of retaining this offer on our high streets.

Table 2.3: Experian's Identified and Forecast Adjusted Market Share of Non-Store Retail Sales for Convenience and Comparison Goods Sectors

Volume Growth Per Head (%)	2018	2019	2020	2021	2022	2023	2024	2029	2034	2039
Convenience goods	3.2	3.9	5.1	5.8	4.9	4.7	5.2	6.3	7.0	7.4
Comparison goods	16.3	18.8	29.4	28.5	23.6	22.8	24.3	27.4	28.8	29.7

Source: Figure 5 of Experian Retail Planner Briefing Note 21

Convenience Goods

2.18 Recent socio-economic conditions have led to significant shifts in convenience goods retailing, which have resulted in the 'big four' supermarket operators' market share being cut. Indeed, analysis from Kantar has identified that the

[3] Including internet sales, mail order, stalls and markets, door-to-door and telephone sales.
[4] This is particularly the case with food shopping and speciality comparison goods purchases, where retailers often try to tap into a wider market through an online presence.

traditional 'big four' supermarket operators are no longer such, with Aldi's market share overtaking that of Morrisons as of December 2023.

2.19 Mintel[5] finds that the decline of the food superstore is well established and that this can be attributed to two matters.

2.20 Firstly, people are undertaking food shopping in different ways. More people are living in town and city centres, and are generally purchasing their own home at a later age than was previously the case.[6] Mintel indicates that such people are more likely to undertake food shopping on an 'as needs' basis and are more likely to eat out or use takeaways. As such, they are less likely to have need to undertake a weekly 'main food shop'.

2.21 Secondly, the current uncertainty in the economy has made discount foodstore operators (namely Aldi and Lidl) a more attractive proposition, and many such foodstores are thriving given that shoppers are currently having to be 'money savvy'. Discounters have also made efforts to try to compete more directly with the 'big four' supermarket operators, with larger stores, greater ranges of goods, fresh foods, and premium products becoming increasingly prevalent. It is evident that the likes of Aldi and Lidl are no longer 'hard discounters' in quite the same way they once were, as they now fulfil a wider range of customers' needs by offering a greater range of products. The move towards the middle ground has allowed discounters to secure market share from both superstores and smaller convenience stores. In addition, we note that discount retailers are often happy to trade alongside more upmarket convenience goods retailers (such as M&S Foodhall) as, collectively, the two stores can meet a comprehensive range of grocery shopping needs.

2.22 The shifts in the sector are illustrated with reference to changes in retailers' market share in recent years, as shown in Table 2.4.

Table 2.4: Market Share of Convenience Goods Operators

Operator	December 2016	December 2017	December 2018	December 2019	December 2020	December 2021	December 2022	December 2023
Tesco	28.4%	28.1%	27.8%	27.4%	27.3%	27.9%	27.5%	27.6%
Sainsbury's	16.5%	16.5%	16.1%	16.0%	15.9%	15.7%	15.5%	15.8%
Asda	15.3%	15.3%	15.2%	14.8%	14.3%	14.2%	14.0%	13.6%
Morrisons	10.8%	10.8%	10.6%	10.3%	10.4%	10.1%	9.1%	8.8%
Aldi	6.2%	6.8%	7.4%	7.8%	7.4%	7.7%	9.1%	9.3%
Co-op	6.3%	5.8%	5.9%	6.1%	6.0%	5.8%	5.6%	5.4%
Lidl	4.6%	5.0%	5.3%	5.9%	6.1%	6.3%	7.2%	7.7%
Waitrose	5.1%	5.2%	5.0%	5.0%	5.0%	5.1%	4.7%	4.6%
Iceland	2.2%	2.2%	2.2%	2.3%	2.5%	2.4%	2.5%	2.4%
Symbols & Independent	1.8%	1.7%	1.5%	1.6%	1.7%	1.6%	1.4%	1.4%
Other Outlets	1.7%	1.6%	1.7%	1.6%	1.8%	1.8%	1.8%	1.8%
Ocado	1.1%	1.1%	1.2%	1.3%	1.6%	1.7%	1.7%	1.7%

Source: KANTAR Grocery Market Share. Figures shown are for the final reporting period in each calendar year

[5] 'UK Retail Rankings', Mintel, April 2018.
[6] Article headlined 'Average UK first-time buyer is now older than 30, says Halifax', The Guardian, January 2022.

2.23 The past few years has seen the closure of a number of unprofitable grocery stores (from small convenience stores to large superstores) and the continuation of Aldi and Lidl's expansion programme. Aldi announced in September 2023 that it intends to open another 500 stores in the coming years.[7] Lidl intends to open a further 250 stores across the UK.[8] Whilst the traditional 'big four' remain more cautious in respect of new openings, a limited number of proposals for mid-sized foodstores are currently being promoted by these operators in areas where there is a growing population, or an obvious shortfall in existing provision. These stores are often of a scale that is broadly comparable to that provided by Aldi and Lidl, which allows customers to shop in a convenient and efficient manner.

Comparison Goods

2.24 The comparison goods sector is currently being squeezed by a number of factors, including increasing operator costs and a reduction in discretionary spending as a result of increases in the cost of living.

2.25 Whilst the sector is continually evolving and there are a number of retailers performing well (including JD Sports, Next, Primark, and Zara), recent headlines have focused on failing retailers and store closures. High profile retailers that have struggled include Debenhams, which announced the closure of all 124 stores in December 2020[9], and the Arcadia Group, which owned Topshop, Topman and Dorothy Perkins. Arcadia Group announced the closure of around 500 stores in February 2021.[10] Furthermore, Intu Properties, one of Britain's biggest shopping centre owners, fell into administration in June 2020 after failing to secure an agreement with its creditors.[11] More recently, Wilko entered into administration in August 2023 and ceased trading shortly after, and The Body Shop announced the closure of 75 stores at the end of February 2024, after falling into administration.

2.26 Whilst the loss of the some of the above names will have significant repercussions for certain towns (particularly those that have lost one or more of Debenhams, Marks & Spencer, or House of Fraser from their high street), some well-known retailers have failed to 'move with the times' and update their offer, accommodation, and online presence. This is partly a consequence of retailers struggling to reinvest in their business when margins are tight (or non-existent).

2.27 Many operators have also rationalised their portfolio with the aim of serving the UK by concentrating on larger centres, supplemented by a strong online presence. It will be interesting to see whether any permanent change in respect of working from home may act to counterbalance this 'polarisation' trend, given the prospect of fewer commuters travelling to larger centres and greater numbers of people spending the working day in and around their home. The impact on larger centres may be to reduce footfall, particularly within the week, and result in the shift in expenditure being directed to the smaller town, district, and local centres. Whilst this will be a positive for the smaller centres, larger centres may suffer as a result.

2.28 Whilst structural changes have had a material impact on the vitality and viability of many UK high streets, there are some beneficiaries. Notwithstanding Wilko's recent problems, some 'discount variety' operators – such as B&M Bargains, Home Bargains and Poundland – have taken advantage of lower rents and reoccupied a number of medium to large retail units (as is the case in some of Greater Nottingham's centres). However, as evidenced by recent events, the discount variety market may be approaching capacity.

[7] Article headlined 'Aldi claims it is increasingly shoppers' main supermarket for weekly shop', The Guardian, 8 September 2023.
[8] As set out in the press release headlined 'Lidl continues to search to secure sites for new stores', 24 April 2023 (https://corporate.lidl.co.uk/media-centre/pressreleases/2023/lidl-continues-search-to-secure-sites-for-new-stores).
[9] Article headlined 'Debenhams set to close putting 12,000 jobs at risk', BBC, 1 December 2020.
[10] Article headlined 'After Topshop owner Arcadia's demise, what now for UK clothes shopping?' The Guardian, 13 February 2021.
[11] Article headlined 'Shopping centre owner Intu collapses into administration', The Guardian, 26 June 2020.

Leisure and Food & Drink

2.29 The greater availability of high street units appears to have helped stoke an entrepreneurial spirit in recent years, with a number of centres beginning to benefit from a greater focus on independent retailers and also modern markets, which are frequently focused around food and drink operators.

2.30 More generally, the food and drink sector was buoyed pre-pandemic by the success of mid-market national multiples, which expanded quickly across the UK. However, this market has become saturated in many locations and a number of high profile operators have been in financial difficulty. Given the problems suffered by such operators, the market has become more cautious and mid-market operators are picking new sites carefully as a result. Instead, we have seen a number of independent operators flourish, both before and throughout the pandemic, and a desire for customers to choose local operators over larger regional and national brands.

2.31 A further significant recent high street success story has been the resurgence of the town centre leisure sector, which has resulted in new cinemas being developed close to the shopping core and the emergence of 'competitive socialising' concepts, which include bowling, crazy golf, table tennis, darts, axe-throwing, escape rooms and other seemingly niche pursuits.

2.32 Cinema openings have been on the up in the early part of this century (until the Covid-19 pandemic) and 'boutique' cinema operators – including Curzon, Everyman, and The Light – are able to operate from smaller sites in town centres (partly as a consequence of digital technology). Town centre cinema development has successfully underpinned wider mixed-use developments, as food and drink operators are typically keen to locate in close proximity to benefit from spin-off custom. New, innovative leisure operators have been particularly beneficial both in re-using existing difficult to let premises, and in driving the evening economy.

2.33 More generally, the gym market continues to perform well, with there now being around 7,200 health and fitness clubs across the UK, which are estimated to have a total turnover of approximately £2bn.[12] Around one in every seven Britons has a gym membership. Budget gyms are currently particularly popular, with operators such as Pure Gym, the Gym Group, and easyGym utilising a format that is based on low costs and high volume.

The Night-Time Economy

2.34 The term night-time economy is used to describe a wide range of activities that (typically) take place after 5 pm. This could range from a trip to the theatre or cinema, to a family meal, to a night out at a club. A successful night-time economy generally caters for a wide range of demographics and interests.

2.35 Creating a safe, vibrant and well-balanced evening and night-time offer is a challenge that can dramatically improve the overall health of a town centre and boost the economy. This must also be supported by safe night-time public transport choices to further support the economy.

2.36 The Association of Town and City Management ('ATCM') has identified a number of themes to help improve the attraction and operation of the night-time economy, which are summarised as follows:

- **Alive After Five** – This relates to revisions to trading hours to better suit customers' shopping needs and availability. A Retail Trading Hours Study commissioned by ATCM found that sales between 5 pm and 8 pm are typically 50% greater than those between 9 am and 11am. Revising trading hours to open and close later could increase sales by around 10% to 12%.

[12] 'Number of health clubs in Europe in 2020, by country' dataset, Statistica, 27 October 2022.

- **Late Night Transport** – The lack of frequent, efficient and safe public transport late at night, or at least the perception of this being the case, could be having a detrimental effect on night-time economy and social scene. One way of increasing night-time visitor numbers is to promote late-night travel provision and its publicity.
- **Purple Flag** – This is an accreditation scheme which recognises excellence in the management of town and city centres at night. Obtaining Purple Flag accreditation demonstrates that a town's night-time economy offers clean and safe environments, great bars and clubs, a variety of arts and cultural attractions, and excellent transport links.
- **Evening Economy Ambassadors** – The ambassadors improve the evening and night-time experience in a town centre by liaising between visitors, police, door staff, licensees, and transport operators.
- **Light Night** – This is an initiative where town or city centres stays open after dark for people to enjoy local shops and services within a wider cultural event involving music, art and, most importantly, through the lighting up of buildings and light-based art installations.

2.37 The above list is not exhaustive, and the development of a bespoke evening economy strategy can help prioritise and deliver events and initiatives which draw on a town centre's strengths and address weaknesses.

Planning Reform on the High Street

2.38 One of the most impactful planning reforms in recent times has been the consolidation of a number of separate Use Classes under a single Class E 'Commercial, Business and Service' use. This update to the Town and Country Planning (Use Classes) Order 1987 (the 'UCO') came into effect in September 2020. The new Use Class combines shops, restaurants, offices, gyms and nurseries (amongst other uses) such that planning permission is no longer required to switch uses.

2.39 Furthermore, in March 2021, an update was made to the General Permitted Development) (England) Order 2015. This allows for the change of use from Class E properties to residential from August 2021 (extending a right that had previously been restricted to office uses). An application to the determining authority for 'prior approval' is required for limited consideration of impacts relating to transport, contamination, flood risk, noise, light, and neighbourhood amenity. Further limitations apply in Conservation Areas and for nurseries, as well as in areas covered by 'Article 4 directions' where permitted development rights are extinguished.

2.40 On 20 July 2021, paragraph 53 of a new iteration of the National Planning Policy Framework ('NPPF') set out limitations on the use of Article 4 directions. The revised national policy seeks to qualify the areas in which it is justified to introduce Article 4 directions, limiting local authorities' ability to control development.

2.41 The changes in the application of Article 4 directions were first put forward in the January 2021 consultation for draft revisions to the NPPF. However, the actual policy provision differs from the initial consultation in a couple of key areas. Paragraph 53 of the previous NPPF of July 2021 recognised that the loss of the 'essential core of a primary shopping area' could result in wholly unacceptable adverse impacts on an area's vitality and viability. This was the Government's first acknowledgement of the potential for the permitted development rights to undermine the health of centres in the NPPF. The updated text also introduced a requirement for 'robust evidence' to support the removal of development rights. The most recent iteration of the NPPF, published in December 2023, retains these changes.

2.42 This can be seen as generally good news for local authorities concerned about the erosion of retail and service uses, and the need to protect vulnerable centres from potentially poor quality residential development. Protection of the vitality and viability of a high street or town centre against the adverse impacts of change of use is now established as justification for issuing an Article 4 direction.

2.43 In addition to the above, the Levelling-up and Regeneration Act 2023 (LURA) received Royal Assent on 26 October 2023. The Secretary of State for Levelling Up, Housing and Communities, Rt Hon Michael Gove MP, has stated that the new Act:

'…will deliver revitalised high streets and town centres. A faster and less bureaucratic planning system with developers held to account… Communities taking back control of their future with new powers to shape their local area. And our long-term levelling up missions enshrined in law.'

2.44 Most of the provisions of the LURA that pertain to development management and plan-making have no appointed commencement date as yet, given the need for secondary legislation to enact these measures. Notwithstanding, the Act is expected to have a number of important implications for the future of town centres and high streets, including:

- **High Street Rental Auction Process:** Subject to forthcoming regulations to be made by the Secretary of State, the LURA grants local authorities the power to hold rental auctions in respect of 'persistently vacant' commercial premises located on high streets and in defined town centres. The process will require landlords to let these properties to new tenants such as local businesses or community groups. The objective of this measure is to reduce the number of vacant properties and ensure that short to medium-term meanwhile uses can help drive footfall on the high street.

- **Locally-led Urban Development Corporations:** The Act introduces a new power for a local authority, or two or more local authorities acting jointly, to propose to the Secretary of State that s/he designate an area of land as an urban development area and establish a development corporation to lead regeneration in that area. Oversight of these urban development areas and corporations will be the responsibility of the relevant local authority or authorities, rather than central government, with the details of how specific functions will be exercised to be set out in future Regulations by the Secretary of State. Locally-controlled development corporations have the potential to be a powerful tool for the transformation of struggling town centres, having wide-ranging planning and development management powers that can effect large-scale change.

- **Supplementary Plans:** Local planning authorities will be given the ability to prepare Supplementary Plans to address site-specific needs or opportunities which require a new planning framework to be prepared quickly (such as a new regeneration opportunity) or to set out design codes for a specific site or area. Unlike the older Supplementary Planning Documents (SPDs) which they replace, Supplementary Plans will have the weight of the development plan. The LURA allows for the Secretary of State to make Regulations in respect of the preparation, withdrawal or revision of Supplementary Plans. The possible benefits of Supplementary Plans include more speed and certainty for developers of major town centre regeneration projects, with key aspects, such as policies for design, being afforded the same weight as the development plan.

- **Amendments to Legislation on Compulsory Purchase Orders (CPOs):** The LURA amends the existing Town and Country Planning Act 1990 to clarify that local authorities may use their power to acquire land by CPO for the purposes of 'regeneration'. It also modernises and streamlines the current CPO system by, for example, making explicit allowance for online publicity in the Acquisition of Land Act 1981, extending the period within which CPO powers can be exercised, and granting Inspectors the ability to choose the appropriate procedure to confirm a CPO. These amendments recognise the potential for CPOs to stimulate regeneration in town centres that suffer from concentrations of long-term vacancies within various land ownerships.

- **Changes relating to Pavement Licensing**: The LURA will make permanent the temporary changes to the pavement licensing system introduced by the Business and Planning Act 2020 in response to the Covid-19 pandemic. This will enable high street hospitality businesses to acquire fast-track pavement licences permitting the placement of removeable furniture along adjacent highways to allow for food and drink to be sold and served outdoors year-round.

Out-of-Centre Retailing

2.45 Another key format of retailing (and provision of leisure uses) are out of centre retail warehouse destinations. Whilst local authorities need to retain control over out of centre provision from a planning perspective, such provision does play an important part in providing space for operators who may not be able to viably trade from in-centre locations. Such uses include 'bulky' retail operators, including DIY stores, electrical goods retailers, furniture stores and so on.

2.46 In their UK Retail Warehousing August 2023 Spotlight Report, Savills note that: **'from a retailer's point of view, there are definitely reasons to be cheerful. Generally, it appears that higher input and operating costs have, to some degree, been successfully passed onto the shopper. Added to this are some areas where costs are lower (such as business rates and rents).'** In terms of the nature of the operators, it is the value orientated brands which continue to top the charts of the most acquisitive retail and leisure operators.

2.47 In this regard, Savills note that the retailers with a focus on essential product categories that have continued to drive footfall to out of centre schemes, which remain at near parity with the levels seen pre-Covid. Furthermore, operators which focus on essential products have dominated the new openings, including Aldi and Lidl, Home Bargains, B&M Retail and leisure operators such as PureGym, Greggs and Starbucks.

2.48 In addition to the above, most out-of-centre shopping locations retain their apparent significant competitive advantages over town centres and high streets in terms of their supply of larger format modern outlets, their lower occupancy costs, extensive free parking and easy and convenient access to the surrounding highways and key arterial routes. This is still an attractive proposition for those retailers that are still seeking space in the current market, but the implications of the attraction of out of centre facilities on defined centres, needs to be monitored carefully.

Implications for the Greater Nottingham Area

2.49 The above trends have significant implications for the Greater Nottingham area.

2.50 Nottingham city centre itself has been the subject of substantial change in recent years. A number of high profile national multiples have closed stores (including Debenhams, Topshop and Wilko), and the demand for retail premises has generally lessened. Furthermore, online competition also impacts on the need to visit larger centres to purchase fashion goods and big ticket items.

2.51 However, Nottingham remains a shopping venue of regional importance and, as such, remains a key location for the majority of bricks and mortar retailers. Its resilience is also underpinned by its strong leisure and evening economy.

2.52 Nottingham has expanded its cultural offer over this period, and its evening economy has also been assisted by a boom in 'competitive socialising' venues. Such venues typically have a significant floorspace requirement and collectively occupy a significant quantum of floorspace in key city centre leisure destinations including The Cornerhouse which includes axe throwing, bowling, adventure golf and Roxy Ballroom.

2.53 Notwithstanding this, it is important to recognise that in recent years Nottingham's leisure economy has been significantly impacted by the Covid-19 pandemic, both in terms of trading restrictions and in respect of a greater propensity to work from home. Leisure operators are also being squeezed by inflationary pressures which mean that costs have increased whilst the amount of discretionary expenditure at patrons' disposal has decreased.

2.54 The present economic environment is a challenging one for leisure operators. As such, leisure uses have not been able to make up the shortfall in demand from retail operators in recent years. Accordingly, as we go on to explain in greater detail in Section 5 of this report, the city centre has experienced an increase in its vacancy rate as a result.

2.55 Due to the significant increase in the residential population, the role of the city centre is evolving in respect of meeting day-to-day shopping needs. In terms of the grocery sector, Nottingham city centre is generally served by convenience stores with only a small number of supermarkets centrally located. In general, the level of provision has not kept pace with city centre population growth and we note that Lidl's website[13] identifies a requirement for additional stores in Basford, Beeston (relocation), Central Nottingham, Chilwell (relocation), Edwalton, Fairham, Gedling Village, Lady Bay, Mapperley, Sneinton and Strelley. Whilst it is highly unlikely that Lidl would commit to bringing forward new stores in all of these areas simultaneously, the scope of Lidl's outstanding requirements in the wider area is symptomatic of the difficulties associated in assembling larger sites in tight urban environments and the need to compete with other land uses (including residential) when acquiring land.

2.56 Key requirements in smaller centres are varied and are considered in greater depth in subsequent sections of this report. As evidenced by Lidl's requirement list, smaller centres and suburban areas remain of interest to grocery operators and there is a clear need to ensure that vacant retail floorspace is repurposed and that defined centres drive activity throughout the day and into the evening.

2.57 The town centres across Greater Nottingham (Arnold, Beeston and Bulwell) and the district centre of West Bridgford (which is the principal centre within Rushcliffe and performs a town centre role) vary in scale and qualitative offer, principally driven by their surrounding demographics and the wider spatial position in the sub-region. The town centres (including West Bridgford) provide a wider range of both convenience and comparison retailers which, below the city centre, also provide opportunities for residents to meet their retail needs including in some cases, their fashion retailing needs. Given this, the town centres have also been impacted upon by the wider commercial market, and have in particular, witnessed closures from operators such as Wilko and financial services including banks. However, the town centres have benefitted from their strong convenience offer and the importance of foodstores anchoring centres, alongside a wider commercial leisure offer. Recently, there has also been an indication of a positive sign of investor and retailer confidence in the reoccupation of the former Wilko unit in Arnold by B&M.

2.58 Given changes in the retail sector, it will be important for the city centre, the town centres and the larger district centres within Greater Nottingham to provide a greater experiential offer to attract activity and encourage visitors to stay for longer periods. The independent retail and food and drink sectors are likely to be particularly important in this regard. There may also be a benefit in actively managing centres to assist with their general maintenance and to help allow for greater differentiation between different centres' respective offers.

2.59 There is a need for flexibility in planning for town centres, so they can adapt to future needs and accommodate a wider range of uses. This is particularly important following the Covid-19 pandemic to help sustain the recovery of high streets and to ensure that they meet local needs in a sustainable manner. Greater Nottingham's district

[13] https://www.realestate-lidl.co.uk/new-store-site-requirements, consulted on 28 January 2024.

centres are not sustained through an influx of office workers, and any longer-term trend to working from home may provide ongoing potential for residents to use nearby centres during the week and particularly at lunchtime.

2.60 As we go on to explore in greater detail in this report, future retail and centres planning policy should be sufficiently flexible to allow for an appropriate range of town centre uses beyond retail, and surplus retail stock should be repurposed or redeveloped to support new residential, leisure and community uses.

3. Planning Policy Context

3.1 In order to shape the direction of this Study, it is helpful to understand relevant retail and town centre planning policy at a national and local level. As such, we first summarise national planning policy of relevance before considering relevant development plan policy as set out in the four authorities' local plans. We also consider changes to the Use Classes Order and the application of permitted development rights to town centre uses.

National Planning Policy Framework

3.2 The most recent iteration of the NPPF was published in December 2023. The NPPF reflects the fact that the traditional role of town centres has been somewhat undermined by structural changes in the retail sector, and that there may be a need to plan for a more diverse range of uses going forward.

3.3 A summary of the relevant NPPF policies is provided below.

Plan-Making

3.4 Paragraph 20 of the NPPF indicates that development plans should set out an overall strategy for the pattern, scale and design quality of development, including policies to deliver retail, leisure and other commercial development. Paragraph 31 states that the preparation and review of all policies should be underpinned by relevant and up-to-date evidence. This should be proportionate and take into account relevant market signals.

Building a Strong, Competitive Economy

3.5 Paragraph 85 of the NPPF indicates that planning policies and decisions should help create the conditions in which businesses can invest, expand and adapt. Significant weight should be placed on the need to support economic growth and productivity, taking into account both local business needs and wider opportunities for development.

Ensuring the Vitality of Town Centres

3.6 Paragraph 90 specifically relates to planning for town centres. It states that:

'Planning policies should:

a. **define a network and hierarchy of town centres and promote their long-term vitality and viability – by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;**
b. **define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;**
c. **retain and enhance existing markets and, where appropriate, re-introduce or create new ones;**
d. **allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;**
e. **where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and**
f. **recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.'**

3.7 In addition, it is notable that the NPPF Annex 2 Glossary fails to make any reference to the designation of primary and secondary frontages, which was removed from the 2012 version. It is evident that the general intention is to provide for more flexibility and that primary and secondary frontages will only be appropriate when robustly justified.

3.8 Paragraph 94 of the NPPF indicates that it is appropriate to identify thresholds for the scale of edge of centre and out of centre retail and leisure development that should be the subject of an impact assessment. Any such threshold policy applies only to the impact test. It is the case that most planning applications for main town centre uses that are not in an existing centre and not in accordance with an up-to-date development plan will generally be the subject of the sequential test.

Promoting Healthy and Safe Communities

3.9 Paragraph 97 seeks to support the social, recreational and cultural facilities and services the community needs. As such, the policy text notes that planning policies and decisions should:

- plan positively for the provision and use of shared spaces, community facilities (such as local shops, meeting places, sports venues, open space, cultural buildings, public houses and places of worship), and other local services to enhance the sustainability of communities and residential environments;
- take into account and support the delivery of local strategies to improve health, social and cultural well-being for all sections of the community;
- guard against the unnecessary loss of valued facilities and services, particularly where this would reduce the community's ability to meet its day-to-day needs;
- ensure that established shops, facilities and services are able to develop and modernise, and are retained for the benefit of the community; and
- ensure an integrated approach to considering the location of housing, economic uses and community facilities and services.

Ensuring the Vitality of Town Centres Planning Practice Guidance

3.10 The Town Centres and Retail Planning Practice Guidance ('the Town Centres PPG') was published in July 2019 and thereafter updated in September 2020. It provides additional direction in respect of how retail and town centre planning policy should be applied in respect of plan-making and decision taking. The Town Centres PPG affirms the Government's aspiration to support town centres in order to generate employment, promote beneficial competition and create attractive, diverse places where people want to live, work and visit. The guidance covers all defined centres within the defined hierarchy.

3.11 Paragraph 004 of the Town Centres PPG indicates that a local planning authority's strategy for their town centres should include:

- The realistic role, function and hierarchy of town centres over the plan period. Given the uncertainty in forecasting long-term retail trends and consumer behaviour, this assessment may need to focus on a limited period (such as the next five years), but will also need to take the lifetime of the plan into account and be regularly reviewed.
- The vision for the future of each town centre, including the most appropriate mix of uses to enhance overall vitality and viability.
- The ability of the town centre to accommodate the scale of assessed need for main town centre uses, and associated need for expansion, consolidation, restructuring or to enable new development or the redevelopment of under-utilised space.

- How existing land can be used more effectively – for example, the scope to group particular uses such as retail, restaurant and leisure activities into hubs or for converting airspace above shops.
- Opportunities for improvements to the accessibility and wider quality of town centre locations, including improvements to transport links in and around town centres, and enhancement of the public realm.
- What complementary strategies are necessary or appropriate to enhance the town centre and help deliver the vision for its future, and how these can be planned and delivered. For example, this may include consideration of how parking charges and enforcement can be made proportionate.
- The role that different stakeholders can play in delivering the vision. If appropriate, it can help establish the level of cross-boundary/strategic working or information sharing required between both public and private sector groups.
- Appropriate policies to address environmental issues facing town centres, including opportunities to conserve and enhance the historic environment.

3.12 This particular Study seeks to provide a sub-regional-wide centre strategy, which will provide recommendations in respect of the formation of planning policy, an overall context to the determination of planning applications for such uses and will help inform the Councils' consideration of specific strategies and regeneration initiatives. As such, many of the above detailed requirements could be addressed in greater detail by future centre-specific commissions and in the later stages of the local plan formulation process.

3.13 Paragraph 006 of the Town Centres PPG also identifies a series of key indicators of relevance in assessing the health of a centre over time. We provide detail of these indicators later in the Study.

Use Classes Order

3.14 Significant changes to the Use Classes Order have been enacted through the Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020, which came into force on 1 September 2020.

3.15 The amendments include the revocation of Parts A and D, and the introduction of three new Use Classes, these being Classes E, F1 and F2. The Government's objective is that the changes will support the revival of the high street and allow for greater flexibility in changing uses within town centres without the need for planning permission.

3.16 In addition to the three new Use Classes, the amendments also result in some changes in respect of uses classified as sui generis. In summary, the changes comprise:

- Use Class E – Commercial, business and service uses;
- Use Class F – Local community and learning; and
- Sui Generis – 'in a class of its own'.

3.17 The introduction of Class E is significant and places a wide range of uses including retail, food, financial services, gyms, healthcare, nurseries, offices and light industry into a single Use Class. Unless restrictive planning conditions preclude otherwise the ability to move within the Use Class E without planning permission, allows centres to evolve in a flexible manner.

3.18 However, as ever, the provisions of the Use Classes Order are not linked to any spatial considerations. As such, the expanded Use Class E applies equally to both town centres and out of centre locations, and there may be consequences in providing for additional flexibility across Class E both inside and outside of town centres. Accordingly, it may be necessary for the Councils to apply restrictive conditions to certain forms of development in order to restrict the authorised use to that which has been justified in the application submission. This will help ensure that unacceptable impacts do not arise from future Class E development.

Local Planning Policy Context

Aligned Core Strategies (Local Plan Part 1)

3.19 The Aligned Core Strategies was adopted in September 2014, and sets out the strategic planning policies and development principles for Nottingham City Council, Broxtowe Borough Council and Gedling Borough Council. Rushcliffe Borough Council adopted a separate Core Strategy independently (December 2014), which is in general alignment with the others.

3.20 Each Council separately produced its own Part 2 Local Plan which provides local-orientated site allocations and development management policies as discussed below in Table 3.1.

Table 3.1: Relevant Polices from the Aligned Core Strategies

Policy Reference	Key Policy Topic	Policy Summary
Policy 5	Nottingham City Centre	The City Centre will be promoted as the region's principal shopping, leisure and cultural destination, through: • Maintaining a prosperous, compact and accessible retail centre. • Supporting development of offices and businesses and supporting related uses such as new hotels. • Creating an inclusive and safe City Centre. • Making the City Centre the focus of public transport and sustainable transport modes. • Creating a network and hierarchy of safe pedestrian routes. • Supporting City Centre living initiatives. • Preserving and enhancing the rich historic, cultural and high quality built environment.
Policy 6	Role of Town and Local Centres	Settlement Hierarchy: • <u>City centre</u> – Nottingham City Centre • <u>Town Centres</u> – Arnold, Beeston, Bulwell • <u>District Centres</u> – Bingham, Carlton Square, Clifton, Eastwood, Hyson Green, Kimberley, Stapleford, Sherwood and West Bridgford. • <u>Local Centres</u> – Burton Joyce, Calverton, Carlton Hill, Cotgrave, East Leake, Gedling Colliery/ Chase Farm, Gedling Village, Keyworth (The Square), Keyworth (The Wolds), Mapperley Plains, Netherfield, Ravenshead, Alfreton Road, Aspley Lane, Beckhampton Road, Bracebridge Drive, Bramcote Lane, Bridgeway Centre, Carrington, Mansfield Road, Nuthall Road, Radcliffe on Trent, Robin Hood Chase, Ruddington, Sneinton Dale and Strelley Road • <u>Centres of Neighbourhood Importance</u> – Defined within Local Plan Part 2

Policy Reference	Key Policy Topic	Policy Summary
		This policy identifies an area for a new Centre of Neighbourhood Importance to serve the new sustainable community at the Waterside Regeneration Zone and a local centre at Gedling Colliery/Chase Farm. The Policy then goes on to list a series of centres which considered to be in need of enhancement or to be underperforming. It states that the vitality and viability of all centres will be maintained and enhanced, including widening the range of uses (whilst maintaining a strong retail character), environmental enhancements and improvements to access, which should all take account of equality issues.
Policy 7	Regeneration	Regeneration will be focused in the following locations and sites: a) Eastside Regeneration Zone b) Southside Regeneration Zone c) Waterside Regeneration Zone d) The Boots campus and adjacent Severn Trent land e) Gedling Colliery/Chase Farm f) Stanton Tip, Hempshill Vale g) Former Cotgrave Colliery h) Former RAF Newton **i)** Local initiatives will be supported in other areas of recognised regeneration need.
Policy 12	Local Services and Healthy Lifestyles	The Policy indicates that new, extended or improved community facilities will be supported where they meet a local need. In particular, where there is an evidenced need, new or improved community facilities should be provided to support major new residential development.
Policy 13	Culture, Tourism and Sport	Further provision of culture, tourism and sporting facilities will be supported in line with the following approach: a) major new cultural and tourism facilities of national or regional importance will be located in or adjoining Nottingham City Centre; b) new cultural and tourism facilities of more local importance will be located in or adjoining town or district centres, or existing facilities will be improved; b) major new sporting facilities of national or regional importance will be encouraged, especially where this complements the strengths of existing facilities located in the south east of the main built up area of Nottingham; and c) where appropriate, existing cultural, tourism and sporting facilities will be protected and their further development will be supported.

3.21 As mentioned above, Rushcliffe Borough Council adopted a separate Core Strategy independently (December 2014). Policies 6 and 7 and 12 and 13 of the aligned Core Strategy align with their respective policies within Rushcliffe Core Strategy.

3.22 Broxtowe Borough, Gedling Borough, Nottingham City and Rushcliffe Borough Councils are currently undertaking a review of the Aligned Core Strategies. This will result in the production of the Greater Nottingham Strategic Plan. A consultation was held during January and February 2023, and comments are now being considered by the Councils in advance of preparing the Publication Version of the Strategic Plan in 2024.

Broxtowe Borough Council

3.23 The development plan of Broxtowe Borough Council includes:

- The Core Strategy – Part 1 Local Plan (adopted July 2014)
- Part 2 Local Plan (adopted October 2019)

3.24 Table 3.2 provides the other policies of relevance from the Broxtowe Local Plan Part 2.

Table 3.2. Relevant Polices from Broxtowe Borough Council's Local Plan Part 2

Policy Reference	Key Policy Topic	Policy Summary
Policy 10	Town Centre and District Centre Uses	Sets out that ground floor units within centre boundaries should comprise A1 or other 'main town centre' uses. Upper floors should comprise 'main town centre' uses.
Policy 11	The Square Beeston	The policy sets out allocation requirements for The Square, Beeston, including 132 dwellings, a cinema and other leisure uses such as food and drink outlets.
Policy 12	Edge-of-Centre A1 Retail in Eastwood	The policy indicates that permission will be granted for limited alterations and extensions to the edge-of centre A1 retail area currently in use as a Morrisons Supermarket.
Policy 13	Proposals for Main Town Centre Uses in Edge-of-Centre and Out-of-Centre Locations	The policy notes that permission will be granted for retail, leisure, office or food and drink uses in edge-of-centre and out-of-centre locations providing; a) It does not result in a unit of 500 square metres gross floorspace or more; and b) It is in an area of deficiency and meets local needs, including that generated by major new housing development; and c) Such a use does not result in a significant adverse impact on the vitality and viability of any nearby centre taking account of both extant permissions and the cumulative effect of previous increases in floorspace in edge-of-centre and out-of-centre locations. Impact assessments will be required for all edge-of-centre and out-of-centre retail, leisure, office or food and drink uses of 2,500 square metres gross or more.
Policy 14	Centre of Neighbourhood Importance (Chilwell Road / High Road)	Within the Centre of Neighbourhood Importance, permission will be granted for main town centre uses or housing provided that such a use does not meet the listed criterion.

Policy Reference	Key Policy Topic	Policy Summary
Policy 18	Shopfronts, Signage and Security Measures	Proposals for shopfronts, signage and security measures will be granted permission/consent where they meet the listed criterion.
Policy 25	Culture, Tourism and Sport	Development proposals will be encouraged that: 1. Make specific provision for sports pitches that are suitable for a wide age range of users, in particular children's sport. 2. Enhance the tourism offer in association with D H Lawrence or the industrial/ pharmaceutical heritage of the Borough.

Gedling Borough Council

3.25 The development plan of Gedling Borough City Council comprises:

- The Core Strategy – Part 1 Local Plan (adopted July 2014)
- Local Planning Document – Part 2 Local Plan (adopted July 2018)

3.26 Table 3.3 provides the other policies of relevance from the Gedling Local Plan Part 2.

Table 3.3. Relevant Polices from Gedling Borough Council's Local Plan Part 2

Policy Reference	Key Policy Topic	Policy Summary
Policy LPD 49	Retail Hierarchy and Town Centre Boundaries	The following network and hierarchy of town centres is promoted: <u>Town Centres</u> • Arnold <u>Local Centres</u> • Burton Joyce • Calverton • Carlton Hill • Carlton Square • Gedling Colliery site • Gedling Village • Mapperley Plains • Netherfield • Ravenshead
Policy LPD 50	Development within Town and Local Centres	Supports development proposals within the Town and Local Centres provided it meets the listed requirements covering percentages of use classes (A2 - 15%, A3 - 10%, A4 - 10%, A5 - 10%, Other - 10%), groupings, design, residential impact and parking.
Policy LPD 51	Upper Floors	Supports the change of use of upper floors in Town and Local Centres and small parades of shops for any purpose provided it does not conflict with rear servicing, and considers residential amenity and parking.

Policy Reference	Key Policy Topic	Policy Summary
Policy LPD 52	Impact Assessment Threshold	Development proposals for A1 uses of 500 sq metres or more (gross) and not within a Town or Local Centre should be supported by an Impact Assessment.
Policy LPD 53	Markets	Planning permission will be granted for development proposals that result in the enhancement of existing markets or the creation of new markets within town and local centres provided they meet the listed requirements.
Policy LPD 54	Development within Small Parades	Planning permission will be granted for development proposals within and adjacent to parades of three or more existing retail units without the need to demonstrate compliance with the sequential test where they meet the listed requirements covering use class, floor area and design.
Policy LPD 55	Security Shutters	Proposals for externally mounted shutters will be granted permission/consent where that they meet the listed criterion.
Policy LPD 56	Protection of Community Facilities	Planning permission for development proposals that would result in the loss of existing community facilities will not be granted unless alternative provision exists or will be provided (within close proximity) and it is no longer economically viable, feasible or practicable to retain the existing community use.

3.27 It is worth noting that the preparation of the Local Planning Document (Part 2 Local Plan for Gedling) changed the status of Carlton Hill from a district to a local centre.

Nottingham City Council

3.28 The development plan of Nottingham City Council comprises:

- The Core Strategy – Part 1 Local Plan (adopted July 2014)
- Land and Planning Policies – Local Plan Part 2 (adopted January 2020)

3.29 Table 3.4 provides the other policies of relevance from the Nottingham Local Plan Part 2.

Table 3.4 Relevant Polices from Nottingham City Council's Local Plan Part 2

Policy Reference	Key Policy Topic	Policy Summary
Policy SH1	Major Retail and Leisure Developments within the City Centre's Primary Shopping Area	Planning permission will be granted for a significant increase in the retail and leisure floorspace within the City Centre's Primary Shopping Area as shown on the accompanying Policies Map, initially to focus on the intu Broadmarsh Centre and intu Victoria Centre, alongside consolidation and enhancement elsewhere.

Policy Reference	Key Policy Topic	Policy Summary
Policy SH2	Development within Primary Frontages	Planning permission for retail (Class A1) development within the Primary Frontages will be granted where it meets the listed criterion. Planning permission for developments other than retail (Class A1) within the Primary Frontages will be granted where the predominantly retail function and character of the frontage would not be harmed, and the vitality and viability of the Centre would be maintained or enhanced.
Policy SH3	Development within Secondary Frontages	Within Secondary Frontages, planning permission will be granted for retail (Class A1) development and other main town centre uses which make a positive contribution to the vitality and viability of the Centre and help to strengthen its attraction as a retail, commercial, leisure and cultural destination.
Policy SH4	Development of Main Town Centre Uses in Edge of Centre and Out of Centre Locations	Planning permission for development of main town centre uses in edge of centre and out of centre locations will be subject to the sequential test for site selection. Proposals will be required to satisfactorily demonstrate that there are no sequentially preferable sites available. An Impact Assessment will be required for retail (Class A1) applications incorporating 1,000 square metres or greater of new (gross) floorspace on the edge of or outside an existing Centre, or 2,500 square metres for all other main town centre uses. Proposals which would result in significant adverse impact on in- centre investment or Centre vitality and viability within the catchment area of the proposal will not be supported*. Proposals for main town centre uses in edge of centre and out of centre locations will also be considered against the following criteria: a. whether the proposal is for small scale retail provision in an area of deficiency and it can be robustly demonstrated that it will serve local convenience or service requirements, including that generated by major new development. In determining the proposal, consideration will be given to the extent and nature of the local catchment, proximity to existing shopping facilities and local accessibility; b. whether the proposal has regard to the balance and mix of existing uses in the immediate area; c. whether the proposal helps to reinforce positive attributes and individual identity of the immediate area;

Policy Reference	Key Policy Topic	Policy Summary
		d. whether the proposal maximises any potential for the sensitive and sustainable reuse of sites and existing buildings where they make a positive contribution to the character and appearance of the area, whether individually and/or as part of a group, and/or securing the removal of unattractive and poor quality buildings that detract from it; e) whether the development would assist in enabling the wider redevelopment of brownfield sites for a variety of uses; e. whether the proposal is consistent with the Core Strategy and reduces the need to travel, especially by private car.
Policy SH5	Independent Retail Clusters	Within the defined Independent Retail Clusters, planning permission will be granted for Retail (Class A1) development and other main town centre uses where it meets the listed criteria.
Policy SH6	Food and Drink Uses and High Occupancy Licensed Premises / Entertainment Venues within the City Centre	Within the City Centre, planning permission will be granted for development involving food and drink uses (Use Class A3, A4 and A5), and / or high occupancy (500 people / 500 square metres or greater) licensed premises / entertainment venues (A4 and Sui Generis uses) where it does not harm the character, function, vitality and viability of the area in which it is located.
Policy SH7	Centres of Neighbourhood Importance (CONIs)	Planning permission for development in CONIs will be granted where both the retail function and the local character of the CONI are not undermined, and the vitality and viability of the CONI is maintained or enhanced.
Policy SH8	Markets	Planning permission will be granted for the establishment of new markets or the relocation, remodelling and / or enhancement of existing markets within existing centres where they would create or maintain an attractive and competitive retail offer beneficial to local shopping provision that reinforces the individual character of existing Centres and would support their overall vitality and viability.

3.30 The Eastside Supplementary Planning Document sets out a vision for the future development of the Eastside Area and aims to promote a balance of development across the area. This includes guidance for two Local Plan Part 2 allocations (SR54 and SR55).

3.31 Nottingham City Council has also produced a vision for the City Centre in their Time and Place Plan (June 2014), which aims to maximise the potential of the City Centre. The Plan identifies the distinctive ‘quarters’ within the Centre which are to be created in order to carry forward long term improvements to the city centre:

- the Castle Quarter: a focus for tourism and restaurants;

- the Royal Quarter: which includes a number of civic buildings;
- the Creative Quarter: an innovative business location;
- the Canal Quarter: a location for businesses and entertainment; and
- the Retail Core: identified as a separate area and containing the main High Street shopping area.

Rushcliffe Borough Council

3.32 The development plan of Rushcliffe Borough Council comprises:

- The Core Strategy – Part 1 Local Plan (adopted December 2014)
- Land and Planning Policies – Local Plan Part 2 (adopted October 2019)

3.33 Table 3.5 provides the other policies of relevance from the Rushcliffe Local Plan Part 2.

Table 3.5. Relevant retail polices from Rushcliffe Borough Council's Local Plan Part 2.

Policy Reference	Key Policy Topic	Policy Summary
Land and Planning Policies Document – Local Plan Part 2		
Policy 25	Development within District Centres and Local Centres	Main town centre uses (retail, office, entertainment, cultural and leisure) will be permitted within the District Centres and Local Centres, provided they are designed at a scale and character which reflects the role, function and distinctive qualities of the centre. Ground floor development within primary frontages will be permitted where it does not result in A1 uses forming less than 60% of the total units, non-retail uses exceeding 20% of the total units, A5 use not exceeding 10% of the total units. Within the secondary frontages, all ground floor retail, leisure, cultural and business uses will be permitted provided it does not result in non-retail uses exceeding 40% of the total units; and it does not result in A5 uses exceeding 20% of the total units.
Policy 26	Development within Centres of Neighbourhood Importance	This policy defined the Centres of Neighbourhood Importance and states that permission will be granted for ground floor development proposals provided they don't impact the vitality, viability or character of the centre, they don't result in unacceptable groupings of non-retail units and A5 use doesn't exceed 30% of the total units.
Policy 27	Main Town Centre Uses Outside District Centres or Local Centres	Development, for main town centre uses outside of the defined District and Local Centres and Centres of Neighbourhood Importance will only be permitted if, following a Sequential Assessment, it could be demonstrated that the development could not be accommodated within a suitable and available centre or edge of centre location having demonstrated appropriate flexibility in the format and scale of development proposed.

Policy Reference	Key Policy Topic	Policy Summary
Policy 30	Protection of Community Facilities	Planning permission for development proposals that would result in the loss of existing community facilities will not be granted unless alternative provision exists or will be provided (within close proximity) and it is no longer economically viable, feasible or practicable to retain the existing community use.
Policy 31	Sustainable Tourism and Leisure	The Council will maximise the potential of tourism and leisure in the Borough and increase opportunities for residents and visitors. New tourist attractions and accommodation will be directed towards district centres where it can make use of existing infrastructure.

Implications for the Greater Nottingham Area

3.34 There are a number of recurring themes identified throughout the above review which will be important to consider in the context of future development for main town centre uses within the Greater Nottingham area, including:

- **Supporting flexibility in town centres** – town centre accommodation needs to be adaptable to a number of uses to address future needs. This presents both opportunities and challenges for Greater Nottingham's defined centres. The previous orthodoxy of protecting A1 retail uses within Primary Shopping Areas may unwittingly be restricting the ability of town centres to diversify and develop distinctive identities and associated offer to consumers. Whilst supporting flexibility is therefore key, there must still be an overarching concentration of retail uses within defined centres, given the draw and attraction of such uses and their assistance in helping to support the vitality and viability of centres overall.
- **Encouraging a mix of town centre uses** – town centres are increasingly diverse with the emergence of a greater proportion of leisure, food and drink uses. There is also an identified need to concentrate multi-functional public services in town centre locations to realise agglomeration benefits. However, town centres face rapidly increasing competition from retail parks and higher order centres as well as online shopping. The integration of commercial and residential uses within town centres is important to their overall vibrancy, to encourage footfall within centres throughout the day and evening. This includes access to high quality public transport.
- **The hierarchy of centres** – the role of each defined centre within Greater Nottingham needs to be clearly articulated to provide it with a distinct and recognisable identity appropriate to its role. It will be important to identify the unique attributes of each defined centre during the production of the Strategic Plan and new Local Plans.

4. Socio-demographic Review and 20 Minute Neighbourhoods

Introduction

4.1 In order to fully understand the socio-economic and demographic nature of the principal centres, and the impact that the demographic profile of each centre's catchment may be having on the centre's health but also its function and offer, Nexus Analytics have undertaken an assessment of key demographic indictors. The purpose of the analysis provided in this section is to assist in the formulation of policy recommendations, through identifying the strengths and weaknesses of the provision within the 20-minute catchment.

4.2 These indicators include a review of projected head of household change by age between 2021 and 2040, understanding household tenures and economic activity status. Further detail in respect of each of the individual centre's demographics is provided within the healthchecks, and a summary is provided below.

4.3 Though writing on the 20-minute neighbourhood is extensive, there is no one singularly recognised definition in terms of what makes a 20-minute neighbourhood. However, the Town and Country Planning Association's (TCPA) 20-Minute Neighbourhoods Guide, produced in 2021, does identify eight characteristics it considers to be key, these being:

- Diverse and affordable homes;
- Well-connected path, streets and spaces;
- Schools at the heart of communities;
- Good green spaces in the right places;
- Local food production;
- Keeping jobs and money local;
- Community health and wellbeing facilities; and
- A place for all ages.

4.4 As such, in our analysis, we have adhered to this definition, and assessed the success of Nottingham city centre and the four principal centres of Arnold, Beeston, Bulwell and West Bridgford, in regard to each of the characteristics identified above.

4.5 For each centre, we have defined a catchment area based on a 20-minute walking distance from the centre boundaries. We have then plotted various services and facilities to understand how they are spatially distributed throughout each centre. This is then combined with desktop research and observations from the healthchecks to understand how each centre has met the criteria of a 20-minute neighbourhood.

Overarching Summary

4.6 Given the wide range of services and facilities available within a city centre, it is unsurprising that Nottingham city centre performed the best against the 20-minute neighbourhood criteria. It was found that there was a range of education, health and retail services in the centre to meet the needs of local residents. There is also a healthy mix of homes and job opportunities available.

4.7 Transport choices were identified as a particular strength, as the city centre benefits from a centrally located train station, a tram system and extensive pedestrianised areas. Only in terms of greenspace was it found that the city centre was not meeting aspirations in both quantitative and qualitative terms, and that future interventions should focus on provision of more, high-quality green space. However, it is also acknowledged that the Broadmarsh proposals will significantly enhance the overarching greenspace provision within the city centre, which will go some way towards addressing the deficiency identified.

4.8 The principal centres of Beeston, Arnold, Bulwell and West Bridgford were also found to generally perform well, although with some variations identified between centres. Beeston met the majority of the criteria for a 20-minute neighbourhood, although it notably lacked a range of education facilities in its catchment area. Transport was identified as a particular issue in Arnold, as it is the only centre which lacks access to the Nottingham Express Transit tram service or a train station.

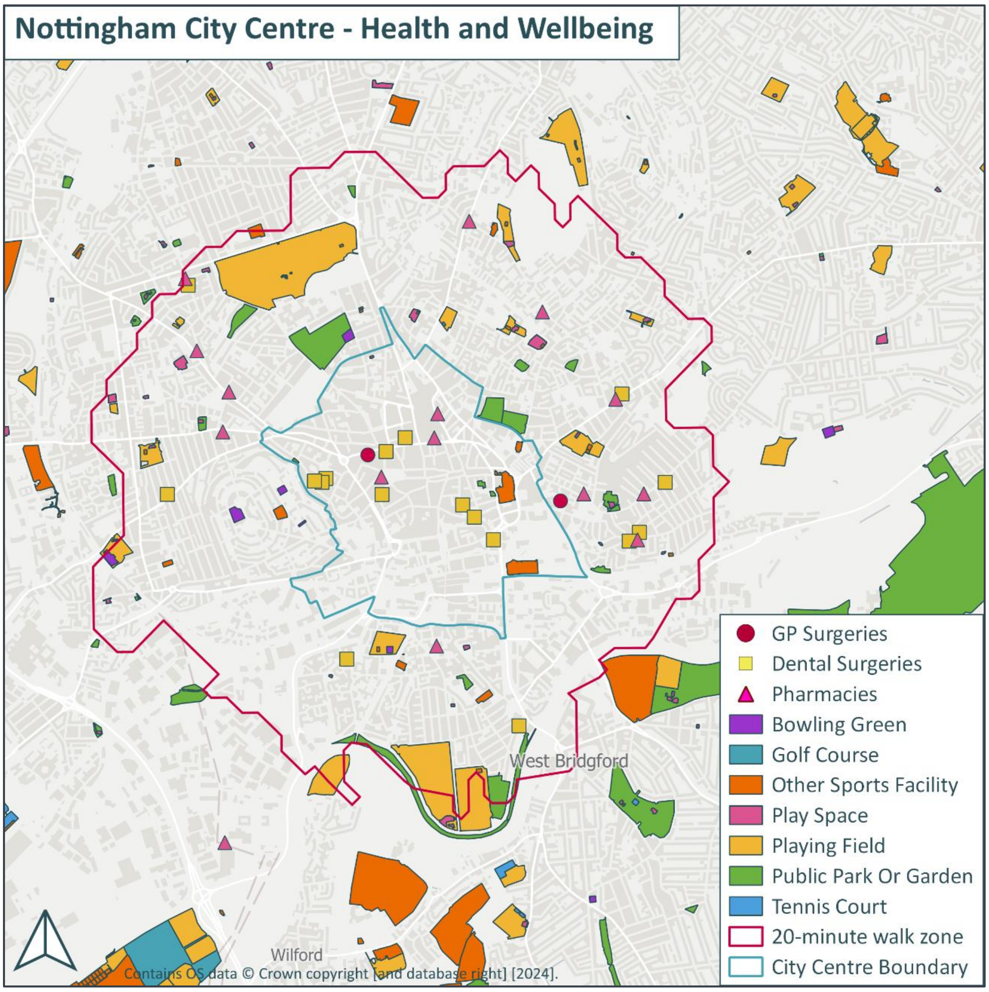
City and Town Centre Overview

Nottingham City Centre

4.9 This analysis provided at Appendix 1 has presented an overview of the demographics of Nottingham city centre and provided an overview of the centre in relation to the concept of the 20-minute neighbourhood. Figure 4.1 below provides an overview of the key facilities within the 20-minute neighbourhood catchment of Nottingham.

4.10 Nottingham city centre, and its associated 20-minute walking catchment area, experiences generally high levels of deprivation, and the overarching annual resident expenditure on retail and leisure goods and services appears to be below national averages.

Figure 4.1: Nottingham City Centre Key Facilities



4.11 However, our analysis of the facilities available within Nottingham city centre demonstrates that the centre is generally well-equipped to meet the aspirations of a 20-minute neighbourhood. Across nearly all categories, it was found that the city centre includes the features of a 20-minute neighbourhood as defined by the TCPA.

4.12 Only in the category of good greenspaces was the city centre found to be lacking, as the level of green space provision is limited and the quality of spaces available is generally low. Provision of more, high-quality greenspace could, therefore, be the focus of future interventions. We do note however that greenspace forms an important part of the Broadmarsh redevelopment proposals within the city centre, and the 'Green Heart' will contribute significantly to enhancing the overarching offer within the centre.

Arnold Town Centre

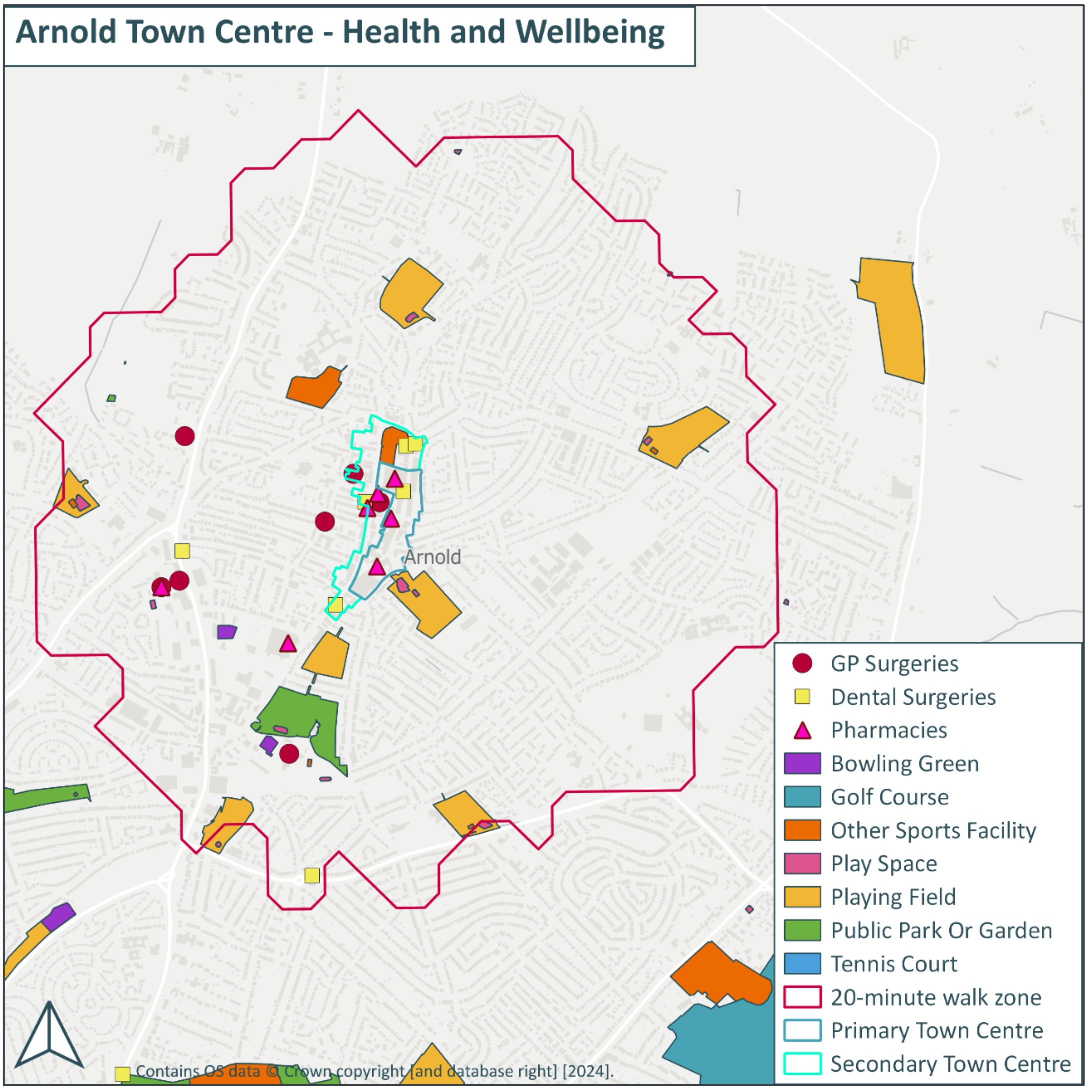
4.13 As shown in detail at Appendix 1 and based on the data available, retail expenditure in Arnold is generally lower than national levels, particularly in regard to leisure spending despite there being available options. Additionally, deprivation levels in the town centre and to the west of the catchment area is relatively high, although there are a number of LSOA's with low levels around the area.

4.14 When evaluating Arnold against the TCPA's categories for a healthy 20-minute neighbourhood, we can see that Arnold performs well in providing a variation in house prices and tenure, a number of primary and secondary schools, opportunities to acquire local produce and resources for residents to maintain high levels of health and wellbeing.

4.15 However, Arnold falls short in that there are a lack of transport links within the town centre and the catchment area surrounding it.

4.16 Figure 4.2 below provides the 20-minute catchment of Arnold town centre and the key facilities contained within and just outside of it.

Figure 4.2: Arnold Town Centre Key Facilities



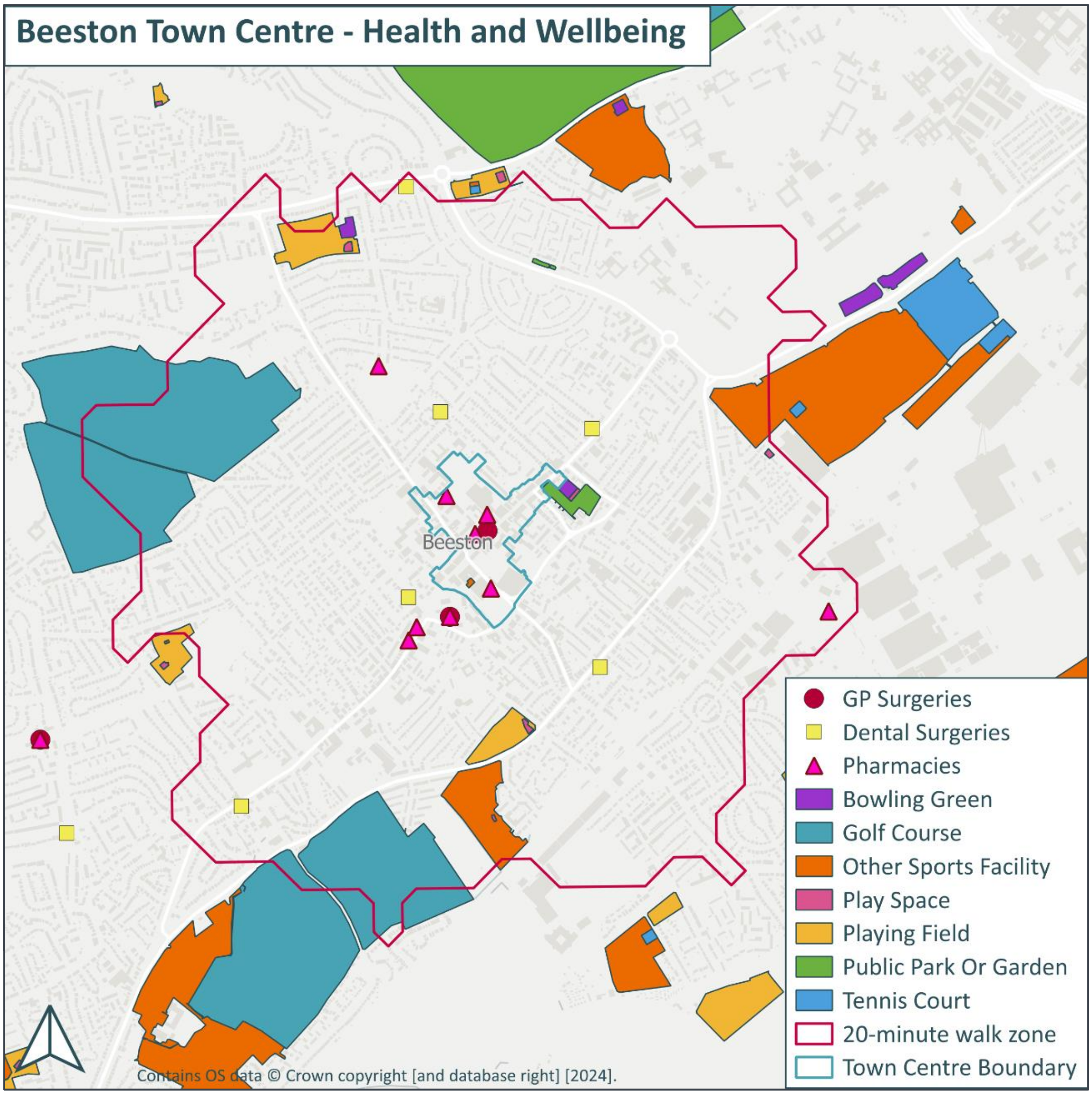
Beeston Town Centre

4.17 The analysis provided at Appendix 1 demonstrates that although comparison and convenience spending amongst Beeston residents is low, residents living in the town centre and within the 20-minute catchment area have a relatively high leisure spend. Additionally, a majority of the LSOA's in this area score high in the indices of multiple deprivation - indicating low levels of deprivation.

4.18 In terms of meeting the TCPA'S 20-minute neighbourhood objectives, the centre and its catchment area perform well. In particular, the area has a diverse range of house tenure and prices, a range of transport options, multiple opportunities to acquire local produce and an ample provision of care homes to support the older population.

4.19 Figure 4.3 below provides the 20-minute catchment of Beeston town centre and the key facilities contained within and just outside of it.

Figure 4.3: Beeston Town Centre Key Facilities



4.20 However, the centre falls short in the provision of green and wellbeing spaces within the area's boundary - though provision of both is ample outside of the catchment area. Additionally, although there are many primary schools in and around the town centre, secondary schools and childcare facilities are few and located further than the 20-minute catchment area surrounding the town centre.

Bulwell Town Centre

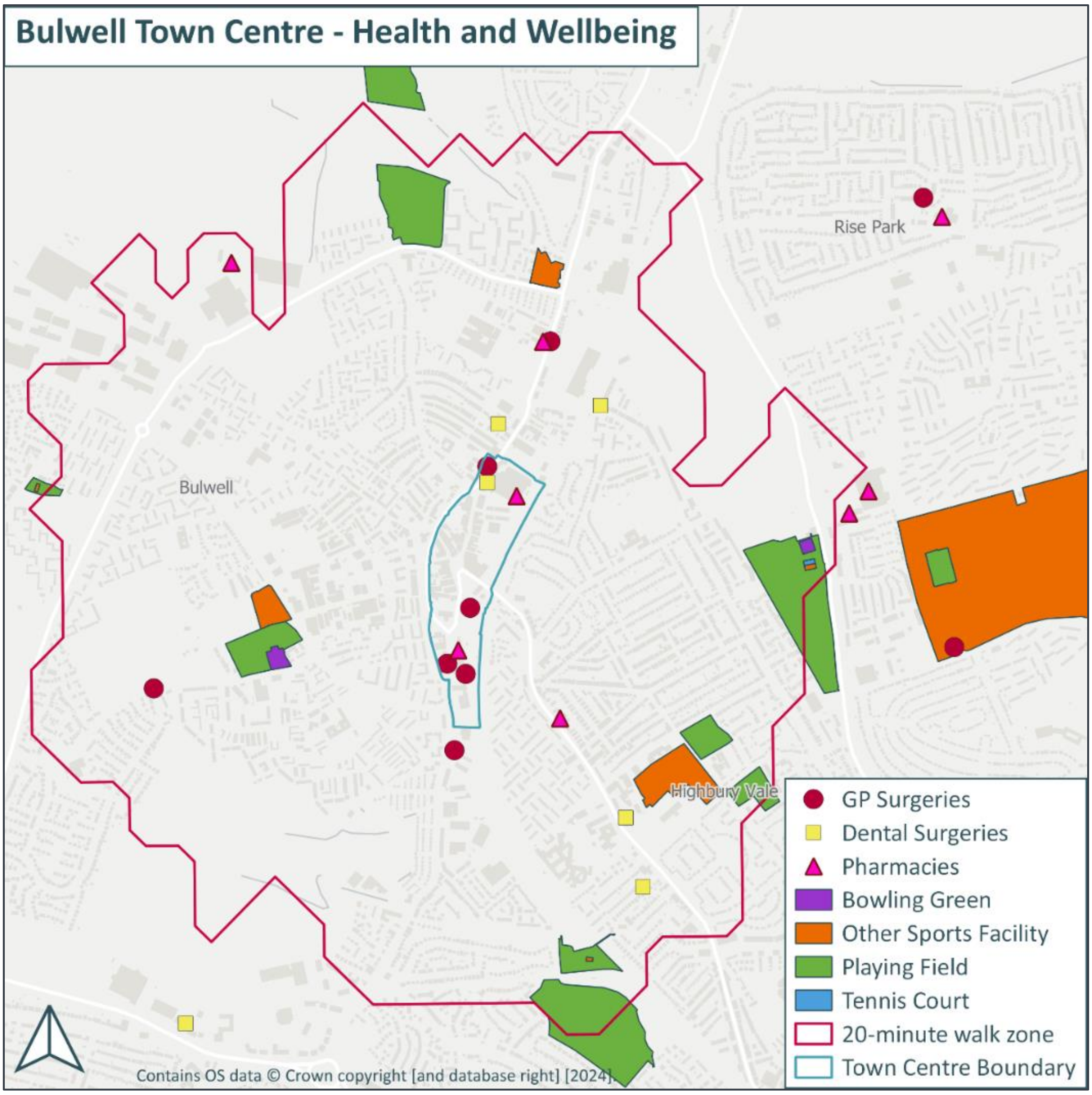
4.21 Retail expenditure in Bulwell is low when compared to the national averages, particularly spending on comparison goods and leisure. Also, LSOA's in Bulwell are experiencing high levels of deprivation, particularly those located in the west of the catchment area, where many are amongst the most deprived nationally.

4.22 Bulwell performs well in many of the TCPA 20-minute neighbourhood objectives. This is because Bulwell is incredibly well-connected in comparison to the areas surrounding. In particular, there is a good overall provision of educational facilities, there is a frequent market selling a large range of goods and resources for health and wellbeing are numerous.

4.23 However, in relation to the wider objectives, Bulwell has limited variation in house prices across the LSOA's in the catchment area and there are a lack of greenspaces (particularly public parks and gardens) and allotments for the growing of local food.

4.24 Figure 4.4 below provides the 20-minute catchment of Bulwell town centre and the key facilities contained within and just outside of it.

Figure 4.4: Bulwell Town Centre Key Facilities



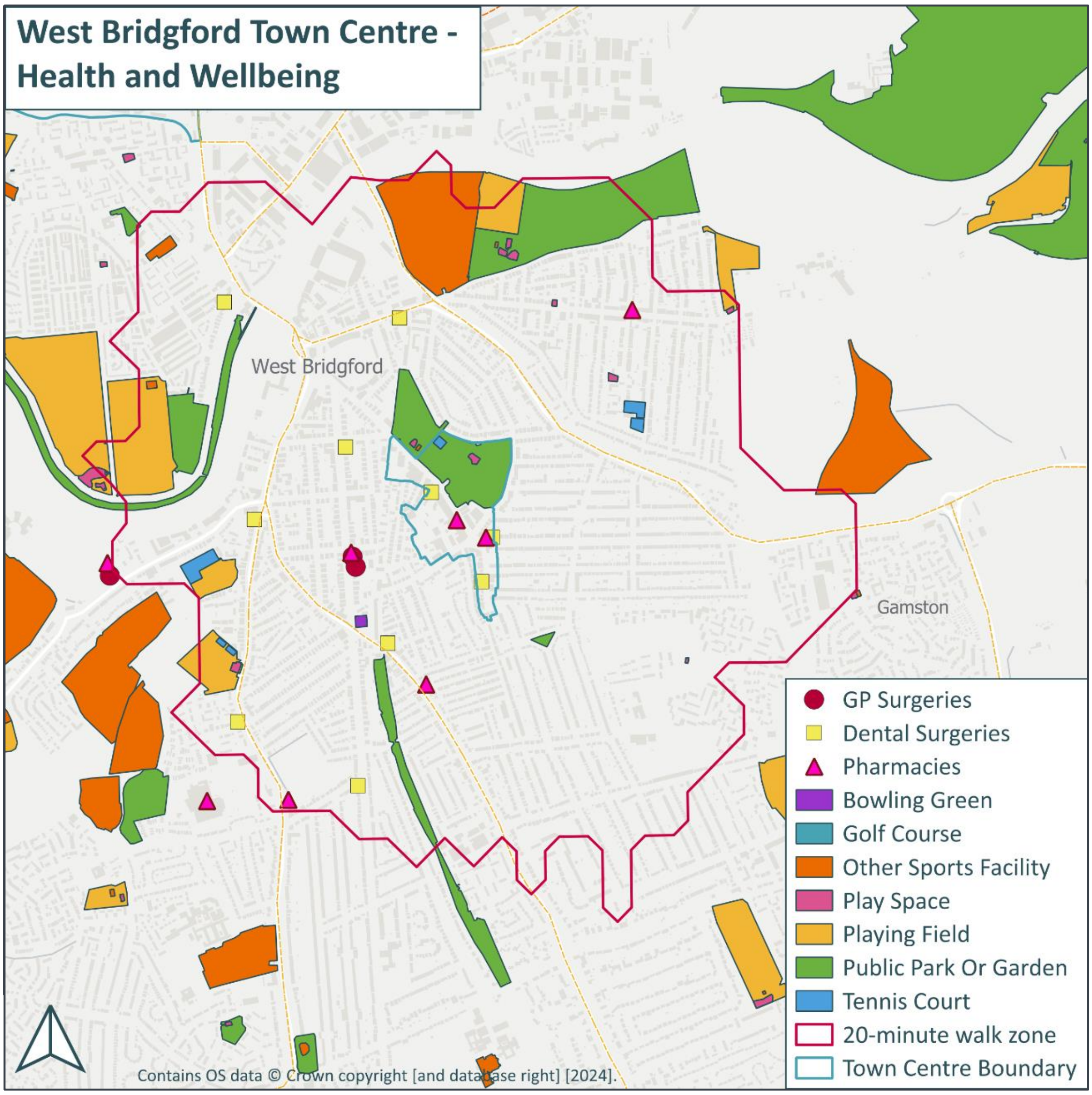
West Bridgford District Centre

4.25 Retail expenditure in West Bridgford is relatively high, with its residents spending more, particularly on leisure goods and services. Additionally, most of the LSOAs within the catchment area are amongst the least deprived nationally.

4.26 Measuring against the TCPA 20-minute neighbourhood objectives, West Bridgford performs well. This is due to the fact that houses within the catchment area are diverse, educational facilities at early years and primary school level are ample, there are several green spaces and allotments and there is a generally good supply of health and wellbeing facilities.

4.27 Figure 4.5 below provides the 20-minute catchment of West Bridgford town centre and the key facilities contained within and just outside of it.

Figure 4.5: West Bridgford Key Facilities



4.28 In line with these objectives, however, West Bridgford is not as well-connected by public transport as other towns surrounding Nottingham City Centre. There is also a lack of secondary schools within the catchment area.

Review of Key Facilities and Infrastructure

4.29 Table 4.1 below provides a summary of key community facilities and infrastructure that can be found at each centre analysed above. The Table demonstrates that both Beeston and Bulwell have all of the key facilities accessible within the 20-minute neighbourhood catchment, with West Bridgford missing a railway station and Arnold missing a railway station and proximity to the National Cycle Network.

4.30 These facilities have been identified as those that are considered most likely to support linked trips into the centres, such as schools, medical facilities and green spaces, as well as those which play a key role in anchoring a centre, including convenience stores and supermarkets. These facilities are therefore considered to play a key role in supporting the function of a centre. Further detail of these facilities is provided on the supporting maps provided above and at Appendix 1, which map these key facilities in the context of the city and town centres and an 800 metre catchment buffer.

Table 4.1: Key Facilities and Infrastructure in the town centres

	Primary schools	Nurseries	GP surgeries	Post offices	Convenience stores	Supermarkets	Railway stations	National Cycle Network	Green spaces
Arnold									
Beeston									
Bulwell									
West Bridgford									

5. Stakeholder Consultation – BAS

Introduction

5.1 The healthcheck assessments undertaken by Nexus Planning (covered in the following section) are supplemented by the Centre Recommendation Reports produced by BAS Consultancy for the principal centres within each of the four authority areas. This is provided at Appendix 2. The work undertaken by BAS Consultancy provides further guidance, particularly in respect of additional recommendations on high street viability.

5.2 Although the wider Study has assessed the vitality and viability of all defined centres within the Greater Nottingham area, the Councils requested that the Recommendations Report undertaken by BAS Consultancy focuses on Nottingham city centre, the town centres of Arnold and Beeston and the district centre of West Bridgford. In each case, the four centres are the principal defined centres in each of the respective four authority areas and as noted above, in the case of West Bridgford, the centre is performing a town centre role in any event.

5.3 The agreed methodology for each of the four centres was to undertake:

- Desk-based research;
- An assessment of 25 key factors of town centre vitality and viability; and
- A town centre stakeholder workshop.

25 Factors of Vitality and Viability

5.4 BAS Consultancy's work is underpinned by an assessment of these centres against the Institute for Place Management's ('IPM') 25 factors of vitality and viability. The 25 factors of vitality and viability, which include retail offer, vision and strategy, place management, appearance and accessibility among others, are assessed by IPM as being the variables that have the greatest impact on place transformation, and which are under the greatest control of the people in the locality. All 25 factors are listed in the Centres Reports at Appendix 2 and provided in Table 5.1 below.

Table 5.1: Top 25 Priorities for Intervention

IMP 25 Factors for Intervention	
Activity	Networks & Partnerships
Retail Offer	Attractiveness (i.e. investment potential)
Vision & Strategy	Markets
Customer Experience	Recreational Space
Appearance	Barriers to New Businesses
Place Management	Safety / Crime
Necessities (e.g. parking)	Liveability
Anchors	Place Adaptability
Non-Retail Offer	Accessibility
Merchandise	Development Plans
Walking	Functionality
Place Marketing	Innovation
Diversity of Offer	

5.5 Each centre was assessed against these factors in a site visit by BAS, adjusting for times of day, weather conditions and other factors to make the assessment. The visits also included a limited number of informal interviews with business owners to gather qualitative evidence on their experience of running a business in the centre, the economic trajectory of the centre, and information about local governance networks, town centre management and so on. Table 5.2 provides the score for each of the centres assessment by BAS.

Table 5.2: Viability Scores for each centre as defined by BAS Consultancy

City/Town Centre	Total Score
Nottingham city centre	99
Arnold centre	67
Beeston centre	86
West Bridgford centre	84

5.6 As BAS sets out within the wider reports for each of the centres at Appendix 2, whilst the above summary of data is of some interest, there are some limitations to the methodology, which means comparing scores for each can be problematic, given that larger centres tend to score more highly on the viability assessment due to the presence of more of the factors that make for a more viable centre. This is apparent in the above table, with Nottingham scoring higher than the other three principal centres.

5.7 However, all highly scoring centres need attention in certain areas, and the individual rankings for each of the 25 viability factors in a centre must be understood more clearly to invite focus and investment in the right places. As BAS set out, put another way, there may be more to do in Arnold than in Beeston to create a vital and viable centre, but each place requires its own action plan and vision, and a means of delivery.

5.8 In addition to Nexus' consideration of the vitality and viability of the centres, BAS Consultancy also undertook a more detailed review of four of the key principal centres within the authority area, providing a review against IPM's 25 Factors of vitality and viability and recommendations in respect of the future action plans for the centres. We provide BAS' overarching conclusions in respect of the four centres below.

Nottingham City Centre

5.9 Nottingham has a vibrant and energetic city centre and it remains busy during the day and into the evening. Its culture and heritage is much in evidence in its buildings, streets and caves but those layers of history complement a dynamic and future-focused city.

5.10 The development of Broadmarsh as a new shopping centre did not occur and this was viewed by many as a turning point in the story of the city: an opportunity to think more carefully about the sort of city Nottingham could become. The masterplan and wider strategy that emerged demonstrated the potential for a centre that is verdant, low carbon, and that prioritises wellbeing and social interaction.

5.11 Nottingham is famed for its shopping, sport and nightlife, and relative to other places, these attractions remain central to the city offer. However, as with all places, there is a need to redefine the city to meet changing needs and to reflect this new vision via the city brand. This process requires the buy-in of the city's institutions and cannot be achieved by the City Council alone. Additionally, it should resonate with the people of Nottingham to create grassroots civic pride, authenticity and mission.

5.12 Nottingham's city centre will transform in the years to come, as the advantages of devolution in the East Midlands are realised. Strong governance, inclusive place partnerships and clear vision are vital in times of change, and Nottingham City Council has demonstrated a commitment to developing these.

Arnold Town Centre

5.13 Arnold is a predominantly mid-century town centre with a clear convenience function that it performs well for local people. A commitment to developing a masterplan for the town centre is to be welcomed since many of the challenges of the centre have their solution in design, layout, infrastructure and appearance.

5.14 Arnold's leisure and cultural offer are impressive for a town centre of this size and although shopping provides a solid base on which to develop, there is a clear opportunity to integrate some of these uses out into the public realm. This requires a strategic partnership of Arnold's institutions to develop a vision that embeds culture and leisure in the town centre to meet place-based outcomes – a growing economy, health challenges, reduced crime, youth engagement and social connection.

5.15 The centre is clearly celebrated by many and does not suffer the footfall and vacancy challenges of many places its size. However, there is work to do to ensure Arnold adapts to the changing needs of the communities around it if the centre is to thrive.

Beeston Town Centre

5.16 Beeston is a highly regarded and resilient town centre with a diverse offer. There is clear evidence of civic pride and commercial confidence in the centre, with businesses reporting good trade and very low vacancy for a high street of this size.

5.17 Beeston's events calendar activates the town and provides a draw across the year, and Broxtowe Council is supportive of community ideas and leadership to see events and activities delivered.

5.18 There is a need to develop an inclusive mechanism – potentially through the creation of a Town Board - for ongoing conversations about the future of the town centre, and this should lead on a vision and strategy looking to long term liveability for the people of Beeston.

West Bridgford District Centre

5.19 West Bridgford benefits from a comparatively wealthy catchment and caters well to that audience. It is considered one of the best places to live in Greater Nottingham, both by those that live in the area and those that live outside it.

5.20 There is a good sense of community, but scant evidence of community groups that work together for the benefit of the place, beyond the good work of local councillor representation. If West Bridgford is to continue to meet the needs of the community at a time of significant structural change, here is a compelling need to bring the community together to agree a vision that anyone can take a role in delivering.

5.21 The vision need not involve grand plans. The vision is about strengthening the ties that people have to their place and an understanding of their place in achieving the change that is collectively needed.

Kay Principal Centres Action Plans and Recommendations

5.22 We provide a summary below in Table 5.2 of BAS' recommendations for the four centres, based on the findings from the reviews as set out above, the detail of which is provided at Appendix 2. The recommendations below are drawn from the data collected across the workshop, tour, assessment and desk research. They represent some of the interventions that the Councils and their partners can take to address the centres' strengths and weaknesses for the greatest impact.

Table 5.2: Key Principal Centres Recommendations

Centre	Recommendations
Nottingham city centre	**Markets strategy** Nottingham is a city of large-scale events and activities. However, some of the more day-to-day activations that can support the economy and sense of place would benefit from renewed focus. Although not raised as a concern in the workshops, the imminent closure of the Council-run Victoria Centre Market and the untapped potential of Sneinton Market provide cause for consideration. It is recommended that a city markets strategy be produced to explore how Nottingham City Council and its partners can support Victoria Market and Sneinton Market with a comprehensive vision, encompassing: • The potential for markets to support job creation, apprenticeships and enterprise, including in partnership with the Universities. • The commodity gaps and local needs that may be addressed through the city's market provision • Operational issues – potential to secure private operator(s), night markets, street food and events to draw student crowd, discounted units to encourage start-ups etc **City Brand** The promise of the Nottingham Project in 2020 as a 'once in a generation opportunity to revision the future of Nottingham' has been borne out in part through the place branding exercise which led to the 'City of Rebels'. There is work to do to build from this exercise into a rounded-out place brand, that includes a broader demonstration of brand values, message, city offer and articulation. The brand marque should be accessible to the major institutions to signal citywide initiatives, and a plan to roll out the brand through campaigns should be planned by brand owners and affiliates. **Night time strategy** As with other devolved cities and city regions, the appointment of an individual responsible for representing and championing the evening and night time economy is recommended. 'Night Mayors' are particularly effective in drawing attention to the drawbacks of night time working, including lack of access to healthcare and professional services, low pay and precarious employment. Strategies and campaigns have focused also on women's safety, spiking and mental health. Given the importance of Nottingham's night time economy, and the current challenges the hospitality sector in particular faces, a strategic focus on developing an inclusive economy that both supports and diversifies the Nottingham offer is needed. **Vision and masterplan** Nottingham's approach to city-wide governance is progressive and inclusive, involving a range of institutions and representatives each with their own role to play in stewarding transformation. There is an opportunity to use these governance mechanisms to develop a city vision and place principles which can be articulated across projects from the physical (such as Broadmarsh) to the economic (such as a strategy for the city's markets). These principles should be broadly communicated and consulted

Centre	Recommendations
	upon in a visioning exercise that provides all those from Nottingham to have a say in the direction the city should take.
Arnold town centre	**Vision** The Council should drive a process of visioning for the future of Arnold town centre. This should be co-created with the local community, including businesses, residents, faith leaders, representative organisations, local institutions, County Council, health bodies and the police. The Vision will be a critical document that sets the strategic context for why future investment is needed. The vision should outline what the role of the town centre is in the future and what improvements are needed to achieve this. This would identify themes for interventions and key opportunities for improvements. Setting out the vision should be considered a joint responsibility with the community, and steps should be taken to develop an informal group of local representatives to help guide the development and delivery of the vision. This group should be a trusted, ongoing and inclusive reference group to represent local interests in the town centre. The vision should lead to the development of a more detailed masterplan, which will suggest a hierarchy of a number of key regeneration opportunities to support the success and future of the town centre of Arnold.. An early visioning process which helps to inform the brief for the master planners about what local people want in the longer term should give way to a more iterative process as the masterplan comes forward. In addition to physical changes, both the vision and the masterplan should consider how Arnold should change economically, socially and environmentally, with the physical design of the centre reflecting those changing needs and desires. **Masterplan** Responding to the recommendations of the workshop participants, the following elements may be considered for inclusion in the masterplan brief: • **Market review -** The potential for the market to more closely align with changing shopping habits and demand patterns should be explored alongside the physical layout of the market. There is opportunity to ask the public what commodities they want from the market, preferred operating hours etc. Consideration should be given to different sustainable models of operation, both commercial and not-for-profit, and a long-term plan put in place. Municipal markets work best when they are led by regeneration teams as opposed to compliance teams and the Council should support the market as a vital part of town centre activation, whether as direct operator or landowner. This may mean investing in street furniture, hot food, entertainment, guest markets and youth enterprise markets such as The Teenage Market[14], which helps connect young people to their place while giving them valuable experience in selling, interacting with the public and developing job-ready skills. • **Public realm -** Decorative lighting (e.g. festoon lighting across pedestrianised section and at AMP), improved crossings (such as into the recreation ground, clutter removal and

[14] https://theteenagemarket.co.uk

Centre	Recommendations

	aesthetic improvements to Front Street), to improve the pedestrian experience and reduce the dominance of the car.
	
	• **Gateways -** There are four gateways into a relatively permeable town centre, and there is an opportunity to make improvements to each of these.
	  ○ Sainsbury's – the South-western approach to the centre is fragmented and the section between Sainsburys and the market square may benefit from some pedestrian-friendly improvement to knit Sainsbury's into the town centre fabric.
	  ○ George V Recreation Ground – Improvements to routes across Hallam's Lane / Gedling Road and sightlines into the park. Use of park as extension of town centre, e.g. events, market overspill, bonfire night etc.
	  ○ Bonington Theatre – North-eastern gateway to town centre can be marked by public realm treatment or arch to recognise civic and leisure function of library, leisure centre and theatre. Consider timed closure of centre to traffic if takeaways can be accessed from ASDA carpark - this may encourage takeaways to offer tables and chairs on street. Daytime closure could also be considered since servicing occurs from rear.
	  ○ Access from High Street – Routeways into town centre from the northwest present confusing and potentially insecure experience. Could alleys be improved with public art, lighting, ad-hoc commercial uses, trails etc?
	
	20-minute neighbourhoods
	The workshop suggested that a fundamental part of the masterplan brief should be the 'ten-minute neighbourhoods' principle, which holds that the Arnold community should be able to access day-to-day amenities and merchandise within a 20-minute walk or cycle ride.
	
	Crime and antisocial behaviour
	The wet-led night time economy and daytime antisocial behaviour are both causes for concern among some members of the community. A strategy which acts to diversify uses and activity both during the day and at night may help to reduce this and, at night in particular, contribute to the ambition to make Arnold a cultural hub, with accompanying food uses.

Beeston town centre	**Vision** The Council can administer and drive a process of visioning, co-created with the local community, including businesses, residents, faith leaders, representative organisations, local institutions, County Council, health bodies and police. The vision should look to identify actions for short (1 year), medium (1-3 years) and long-term (3-10 years) timeframes, with a clear sense of the mechanisms and funding that will unlock delivery. Delivery of the vision should be considered a joint responsibility (see governance below). **Governance** Governance is an iterative process, starting with the informal and progressing towards the more formal and structured as delivery begins to occur. In the case of Beeston, this process could start around the task of developing the vision described above. Convening all those that want to talk about Beeston's future is a good opportunity to identify those that might want to be more closely involved in the process. This should build on the Civic Society's 2020 work, rather than attempt to replicate it. This in turn can lead to an initially informal steering group and/or sub-groups of individuals developing sections of the vision they have the skills or interest to take forward. In this case governance should be

<table>
<tr><th>Centre</th><th>Recommendations</th></tr>
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considered a loose term which provides the opportunity for anyone who wishes to get involved in planning for the future to do so, according to their particular skills set.
This process is not simply the means to developing the vision, but an end in itself. It should create and strengthen local networks; it should seek broad buy-in and ownership and it should encourage local people to deliver elements of the vision themselves.
Other recommendations

Identify with the business and resident community small-scale actions around clutter removal, public realm improvements, walkability and accessibility. Businesses should be involved to stress the area where outdoor seating and signage are important.
A nighttime economy and culture strategy may become more important if Beeston’s nightlife expands as a result of new student populations. Helping the night time economy and culture sectors grow in a way that benefits local people, creates jobs and provides access to a range of people requires positive planning and local consultation.
An events plan may consolidate the great successes of Beeston’s existing calendar and consider the role events play in the economy and reputation of the centre. Are events held at the right time? Do they benefit and involve local businesses, including by celebrating sectoral clusters such as food and drink? Do events support the brand messaging? Is the promotion of events reaching the right audience? How can Beeston encourage more accessibility both in community led events and attendance?
A creative place brand exercise would help to amplify the town centre’s reputation to a geographically wider audience, generate clear messaging about the offer and direction of travel, and deliver campaigns around events and the nighttime economy that attract greater spend. Such an exercise might be led by the Town Board but should be considered an opportunity to be broad and inclusive.
Produce a strategy for the development (potentially as a Supplementary Planning Document) for the cluster of sites around the transport interchange, The Square and significant new student housing.

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<tr><td>West Bridgford</td><td>
Vision
The Council can administer and drive a process of visioning, co-created with the local community, including businesses, residents, faith leaders, representative organisations, local institutions (including cricket and football clubs, which should be considered key stakeholders and potentially funders of town centre improvements), County Council, health bodies and police.
The vision should look to identify actions for short (1 year), medium (1-3 years) and long-term (3-10 years) timeframes, with a clear sense of the mechanisms and funding that will unlock delivery. Delivery of the vision should be considered a joint responsibility (see governance below).
The vision might include a range of elements such as:

The West Bridgford brand – what are the town’s values? What are its key selling points? How does it communicate about the place to different target audiences (local residents, other Nottingham residents, football and cricket fans, visitors from outside Nottingham, evening visitors)?
Economic Growth - how does West Bridgford grow these different audiences and markets? What does inclusive growth look like? What are the physical opportunities to expand the centre (e.g. bigger market, expansion of units to upper floors, intensification of centre)? What are the jobs

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Centre	Recommendations
	and skills requirements and how can the principles of community wealth building and the circular economy localise the solutions? • Physical improvements – How can pedestrianisation of the centre be unblocked, what clutter can be removed from the streetscape? Can businesses be incentivised to improve shopfronts? What can be done collectively to install decorative lighting to encourage the evening economy? • Activation – Where West Bridgford is rightly proud of its events and markets, how can these be grown? What data is being collected that demonstrates their impact on the local economy and how can this be used to adjust events for maximum impact? Is it possible to create jobs and apprenticeships through this strand of activity? What events are authentically West Bridgford that should be the focus in future? • Planning for climate change – as identified in the workshop, plans can be drawn up at a local level to prepare for climate change, including planning for emerging jobs, preparing for extreme weather, planting, circular economy and local net-zero plans. **Governance** Governance is an iterative process, starting with the informal and progressing towards the more formal and structured as delivery begins to occur. In the case of West Bridgford, this process could start around the task of developing a vision. Convening all those that want to talk about West Bridgford's future is a good opportunity to identify those that might want to be more closely involved in the process. This in turn can lead to an initially informal steering group and/or sub-groups of individuals developing sections of the vision they have the skills or interest to take forward. In this case, governance should be considered a loose term which provides the opportunity for anyone who wishes to get involved in planning for the future to do so, according to their particular skills set. This process is not simply the means to developing the vision, but an end in itself. It should create and strengthen local networks; it should seek broad buy-in and ownership and it should encourage local people to deliver elements of the vision themselves. **Other recommendations** • The high street would benefit from clutter removal and general updating, including shopfronts, street furniture and planting. Barriers in the central reservation should be removed. The case studies and resources section below includes a link to a manual entitled 'Street Design for Age Friendly Neighbourhoods' • Work towards the pedestrianisation or timed closure of Central Avenue • Conduct a commercial landowner audit and build relationships with landlords that have some commitment to West Bridgford. This enables the letting of empty units with curated uses where landlords are across the detail of the local vision. • Commission research on the potential impact of home working on the West Bridgford economy. Where commuters are no longer travelling into Nottingham or further afield, does this create a new market for co-working space, work hubs, new hybrid café/work models or event daytime business events? • Where formal culture and leisure uses may be a long-term aim for the centre, in the short term, consider how various indoor and outdoor spaces in West Bridgford can be used to provide screenings, performances and art exhibitions. The Council should work with the community to design an event organising process that minimises red tape and cost.

Centre	Recommendations
	• Community Infrastructure Levy can be spent in the town centre – consider how Rushcliffe's processes enable consultation with the community for defrayal of these funds. • The night time economy is clearly an important aspect of the West Bridgford economy – bring the sector together locally to form a group, to discuss pressures, gaps in provision, and strategy to enable inclusive growth of the sector.

6. Market Research – Healthchecks

Introduction

6.1 Paragraph 90 of the NPPF indicates that planning policies should promote the long-term vitality and viability of town centres by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries. The same paragraph also states that town centres should accommodate a suitable mix of uses (including housing) and provide for development that reflects a centre's distinctive character.

6.2 Paragraph 006 of the Town Centres PPG identifies a range of indicators that should be assessed over time in order to establish the health of a town centre. The indicators include the following:

- diversity of uses;
- proportion of vacant street level property;
- retailer representation and intentions to change representation;
- pedestrian flows;
- accessibility;
- perception of safety and occurrence of crime;
- the state of town centre environmental quality;
- the balance between independent and national multiple retailers; and
- the extent to which there is an evening and night time economy.

6.3 New healthcheck assessments have been undertaken for the city, town, district and local centres identified at Policy 6 of the Aligned Core Strategies.

6.4 We have also undertaken a review of the offer of the Centres of Neighbourhood Importance and present our findings in a matrix.

6.5 The assessments are based on site visits which were undertaken in November and December 2023. These assessments should be taken as a 'snapshot' of the performance of each centre at a moment in time, and further issues may subsequently become apparent in each centre as a consequence of the ongoing negative impacts arising from the Covid-19 pandemic, rising inflation and other economic pressures at this time.

6.6 Detailed healthchecks for the city, town, district and local centres are provided at Appendices 3, 4, 5 and 6 respectively. The reviews of Centres of Neighbourhood Importance are provided within the matrix at Appendix 7. We provide a summary of the key conclusions from our healthcheck assessments in respect of the city, town and district centres below.

City Centre

6.7 Nottingham city centre is the primary destination for shopping and leisure provision in the Greater Nottingham area. The centre therefore provides a comprehensive offer, geared at meeting the needs of those within the authority area, but also throughout the East Midlands region and the wider UK.

6.8 Table 6.1 below provides the composition of Nottingham city centre, both in terms of floorspace and units.

Table 6.1: Composition of Nottingham City Centre as at November 2023

Type	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units (no.)	Units (%)	Unit UK Average (%)
Comparison	92,180	24.1	29.8	312	22.6	26.6
Convenience	19,420	5.1	15.5	87	6.3	9.3
Financial and Business Service	14,000	3.7	6.4	51	3.7	8.5
Leisure	161,040	42.1	26.6	461	33.4	25.6
Retail Service	16,870	4.4	7.2	177	12.8	15.8
Vacant	79,140	20.7	13.9	291	21.1	14.1
Total	**382,650**	**100.0%**	**100.0**	**1,379**	**100.0**	**100.0**

6.9 Nottingham benefits from a genuinely multifunctional city centre underpinned by diverse leisure service and comparison retail offers, which are augmented by a strong office market catering to large-scale occupiers such as HSBC and E.ON as well as numerous small and medium-sized businesses. The centre's offer is also further enhanced by its strong tourist offer, alongside the cultural and arts offer. As such, the city centre remains open throughout the day and evening, encouraging activity throughout.

6.10 Thus, while the proportion of vacant units in particular represents some cause for concern, being higher than the national average, we consider the situation in Nottingham to be broadly comparable to other large city centres across the country. Indeed, the current vacancy rate within the city centre is 'skewed' by the closure of Broadmarsh, which as we set out below and in more detail in the healthcheck at Appendix 3, is currently undergoing a substantial transformation which will ultimately benefit the centre. As such, at Appendix 3, we also provide the comparable composition figures excluding Broadmarsh, which brings the vacancy levels in terms of floorspace and proportion of units down to 13.9% and 16.3% respectively.

6.11 In any event, we recommend ongoing monitoring of vacancy rates, particularly in areas of the city centre where empty units are concentrated, to ensure that the impacts of the ongoing redevelopment projects are fully understood and that the local authority is well-placed to adapt to the demands of a rapidly changing market.

6.12 The ongoing redevelopment of the Broadmarsh Shopping Centre represents a significant opportunity to regenerate and transform the south of the city centre. After a long period of decline and previous plans for refurbishment that never came to fruition, the Broadmarsh site is now within Council ownership. Over the past four years the area has seen the development of a new Central Library and Nottingham College City Hub, a car park and bus station, and major public realm improvements.

6.13 Nottingham city centre also benefits from an extensive independent retail and leisure sector, which is particularly focused in Hockley and Sneinton Market. The east-west retail corridor of independent shops between Derby Road and Sneinton Road is a real strength for the city centre, and a key attractor for visitors. Sneinton Market in particular, hosts a wide range of retail, business and leisure independent operators and has a regular events schedule throughout the year.

6.14 The vision for the future of the Broadmarsh site involves the retention of the structural frame of the former Broadmarsh shopping centre, which is to be repurposed for a wide variety of new uses including independent retail and food/drink businesses, together with innovative community spaces, and a new Community Diagnostic Centre due to open in Spring 2025. BDP has been commissioned to deliver a 'cohesive site-wide masterplan' as a precursor to a planning application that will seek permission for 1,000 new homes, 46,000 sq.m of commercial and office floorspace, and new public greenspace.

6.15 A considerable amount of pedestrian activity was observed throughout all areas of Nottingham city centre at different parts of the day and evening. During the daytime, activity was generally busiest along the north-south retail spine and within the Victoria Shopping Centre. The pedestrianised nature of the main shopping streets in the city centre results in a compact and walkable environment, which accommodates relatively straightforward movement on foot. We observed a number of linked trips between different operators in this central part of the city centre. Overall, the city centre benefits from a good level of footfall driven by its strong comparison retail and leisure services offer and a number of key anchors.

6.16 Nottingham city centre enjoys an excellent standard of accessibility by public transport. Road access to the city centre by private car has recently been improved through works associated with the new Broadmarsh Bus Station and Car Park. With regard to accessibility for people with impairments or mobility requirements, travelling north to south through the city centre could prove challenging due to the local topography. Some of the more historic streets are narrow and windy, which could also be difficult for some visitors to navigate. In general, however, the pavements are even and well-maintained, the streets are wide and clutter free, and there is good provision of benches and other street furniture available for those who need to stop and rest.

6.17 The public realm in the city centre is generally of a very high standard, with Nottingham benefitting from a number of valuable heritage assets including a wide range of Grade II listed buildings. Notwithstanding, there are parts of the city centre where the environmental quality is of a somewhat poorer standard. The south of the city centre is generally lower in environmental quality, and the Broadmarsh redevelopment has exacerbated this issue in the short-term by creating a large area of inactive frontages and part-finished demolition/construction works.

6.18 Nottingham city centre is also somewhat lacking in green/open space, although there is tree planting in the pedestrianised areas. The forthcoming Broadmarsh proposals are anticipated to alleviate this issue through the inclusion of a new football pitch-sized ‘Green Heart’ public space, which would lie at the centre of the redeveloped site.

6.19 Overall, Nottingham city centre is considered to be vital and viable, benefitting from robust daytime and night-time economies that befit its status as a regional centre, excellent accessibility and a high level of environmental quality. The number of regeneration opportunity sites across the city centre and the positive signs of both public and private sector investment, means that there are substantial positive indicators for Nottingham’s future.

Town Centres

Table 6.2: Town Centre Unit Composition at December 2023

Town Centre	Authority	Total Units	Comparison	Convenience	Financial	Leisure	Retail Service	Vacant
Arnold	Gedling	202	28.7%	9.9%	5.0%	25.2%	21.8%	9.4%
Beeston	Broxtowe	211	26.5%	10.0%	9.5%	24.2%	20.4%	9.5%
Bulwell	Nottingham	149	29.5%	12.1%	5.4%	21.5%	18.8%	12.8%
National Average	-	-	**26.6%**	**9.3%**	**8.5%**	**25.6%**	**15.8%**	**14.1%**

Source: Composition of town centres derived from Nexus Planning survey of December 2023 using Experian Goad defined boundaries. For Arnold town centre, the Goad boundary includes the Sainsbury’s and adjacent units to the south. National average is from Goad as of December 2023

6.20 Table 6.2 above provides the overview of the town centre unit composition within Arnold, Beeston and Bulwell.

6.21 We provide a brief summary of each town centre below. Detailed healthcheck appraisals are provided at Appendix 4.

Arnold Town Centre

6.22 Overall, Arnold is a town centre which is well connected by buses and benefits from a strong walking catchment. The offer is mixed, and provides a good range of retail, leisure, service and wider community uses to meet the residents' needs.

6.23 Arnold's daytime economy is based around its offer of comparison, convenience, leisure and retail uses and its large pull of independent retailers. Its evening economy is slightly less varied, predominantly being based around food services including takeaways, restaurants and convenience stores, although there are a series of public houses throughout the centre which add to its offer.

6.24 The centre is well suited towards pedestrians with low volumes of traffic passing through the centre and traffic calming measures in place ensuring low speeds. Wide pavements and ample off street planting and furniture also contribute to a pleasant urban environment overall. There may be opportunities to enhance the green infrastructure throughout the centre, providing linkages to the surrounding green spaces.

6.25 To the north, there are areas of more predominant vacancies, and an opportunity to tie in the library and leisure centre better into the centre. Drawing on these important elements of the centre and encouraging trips to and from the wider leisure and community offer will enhance the centre overall.

6.26 Overall, Arnold is performing well in meeting the day-to-day needs of local residents and contains a good variety of services, serving both its daytime and evening economies. Its vacancy level is below the national average and there is a good sign of investment overall. The streetscape is generally pleasant and well maintained. It is considered to be generally vital and viable.

Beeston Town Centre

6.27 Beeston town centre is considered to be meeting its catchment's needs in providing key retail, leisure, service and financial facilities to meet residents' day to day needs.

6.28 The centre's offer in terms of floorspace is dominated heavily by the large convenience operators, which include adjacent car parks serving the town centre. Ensuring that shoppers are drawn into the wider centre from these operators and the adjacent car parking is key, although we did witness linked trips on the days of our visits.

6.29 The pedestrianised areas around High Road and The Square provide a pleasant town centre environment for shoppers, providing space to sit and enjoy the centre.

6.30 Beeston has a low vacancy rate both in terms of floorspace and units and a good commercial offer overall. Its leisure offer is good, providing a range of facilities which serve both the daytime and evening economy and activity in the evening was good overall.

6.31 Beeston is performing well in meeting the day-to-day needs of local residents and contains a good variety of services, serving both its daytime and evening economies. The streetscape is generally pleasant and well maintained. It is considered to be generally vital and viable.

Bulwell Town Centre

6.32 Bulwell town centre is considered to be meeting its catchment's needs in providing key retail, leisure, service and financial facilities to meet residents' day to day needs. The wider offer of the centre also includes the Riverside Library, health centre and play park to the south, alongside the Bulwell railway and tram station.

6.33 The centre is very accessible via public transport and also has a very good provision of off-street car parking available. The pedestrianised area around the Town Square and Main Street provide good, safe access for those on foot, pushing prams or in mobility scooters. Linkages to the north towards the Tesco and Lidl could potentially be improved through better signage and wayfinding

6.34 The environmental quality of the centre is good overall, but there are elements particularly in terms of the built fabric which could be improved. The vacant Wilko also does not add to the overarching environmental quality in the centre, and its reoccupation or redevelopment needs exploring further. There may be opportunities to introduce a wider mixed-use offer on the site, with residential and commercial uses both enhancing the offer of the centre.

6.35 The vacancy rate within Bulwell is below the national average in terms of both floorspace and unit composition, but is considered to be on the higher side particularly when compared to the other two town centres within Greater Nottingham. However, the wider offer of the centre is considered to generally meet residents' needs and overall, the centre is considered to be vital and viable.

District Centres

6.36 Table 6.3 provides an overview of the composition of the district centres within the four authority areas (there are no defined district centres within Gedling).

Table 6.3: District Centre Unit Composition at December 2023

District Centre	Authority	Total Units	Comparison	Convenience	Financial	Leisure	Retail Service	Vacant
Bingham	Rushcliffe	84	32.1%	10.7%	7.1%	23.8%	20.2%	6.0%
West Bridgford	Rushcliffe	134	22.4%	10.4%	17.2%	22.4%	21.6%	6.0%
Clifton	Nottingham	36	25.0%	22.2%	8.3%	16.7%	11.1%	16.7%
Hyson Green	Nottingham	212	19.8%	20.3%	7.5%	13.7%	21.7%	17.0%
Sherwood	Nottingham	132	20.5%	14.4%	4.5%	31.1%	18.2%	11.4%
Eastwood	Broxtowe	156	21.2%	9.0%	11.5%	25.0%	19.2%	14.1%
Stapleford	Broxtowe	147	26.5%	6.1%	10.2%	23.8%	17.7%	15.6%
Kimberley	Broxtowe	66	22.7%	9.1%	6.1%	21.2%	30.3%	10.6%
National Average	-	-	**26.6%**	**9.3%**	**8.5%**	**25.6%**	**15.8%**	**14.1%**

Source: Composition of district centres derived from Nexus Planning survey of December 2023

6.37 Table 6.3 demonstrates that the largest of the district centres in terms of numbers of units is Hyson Green in Nottingham, followed by Eastwood and then Stapleford in Broxtowe and West Bridgford in Rushcliffe.

6.38 The centre with the highest vacancy rate in terms of proportion of units is Hyson Green at 17.0% (compared to a national average of 14.1%), followed by Clifton at 16.7% and Stapleford at 15.6%. A number of the district centres have vacancy rates in terms of the proportion of units above the national average and greater than the proportion in the town centres, as set out above.

6.39 The comparison offer is particularly strong in Bingham, and the convenience offer within Clifton and Hyson Green is particularly strong. Overall, the leisure offer in Sherwood is the highest, with a stronger (in terms of number of units) retail service offer in Kimberley, West Bridgford and Hyson Green.

6.40 We provide a brief summary of each district centre below. Detailed healthcheck appraisals are provided at Appendix 5.

Rushcliffe District Centres

Bingham District Centre

6.41 The district centre is centred around a traditional market square and contains a range of shops and services. Comparison, leisure and retail services dominate Bingham district centre. Within the retail service category, there are a large number of hairdressers and beauty salons but there are also dry-cleaners and opticians. The leisure offer is dominated by cafes and takeaways but overall still falls under the national average. Located centrally are both a Sainsbury's and Co-Op convenience stores, which meet the majority of residents' convenience needs.

6.42 A market is held every Thursday and offers a wide variety of fresh produce as well as household goods, plants and clothing. Another footfall draw is Eaton Place which contains a number of units in an enclosed space.

6.43 Overall, the layout centred around the market square and consistent footfall throughout the centre, means that there is a good level of natural surveillance and all parts feel safe and secure during the daytime.

6.44 There are a few takeaways, public houses and restaurants but the centre would benefit from a greater number and diversity of evening uses, especially restaurants, to ensure all parts of the centre feel active and safe after dark. There is plentiful streetlighting and no graffiti or other evidence of anti-social behaviour, so that the perceived threat of crime is low.

6.45 Bingham is reasonably viable and vital, benefitting from the footfall and trade brought by the weekly market and broad range of services and facilities on offer. This and the remaining units, which predominantly provide for independent retail service and leisure uses, ensure that the district centre is able to meet the majority of the daily needs of local residents.

West Bridgford District Centre

6.46 West Bridgford is located approximately 3 miles south east of Nottingham City centre, off of the A60 and close to the A6011, both of which lead directly into Nottingham. The centre is linear in composition and currently identified as a district centre in the Local Plan Part 1: Rushcliffe Core Strategy.

6.47 The district centre of West Bridgford contains a wide range of uses. There are many national multiple operators, including a M&S superstore, Café Nero and Oliver Bonas, which are complemented by a range of independent shops and service operators which help to fulfil residents' day-to-day needs.

6.48 West Bridgford accommodates 134 commercial units which collectively provide 18,170 sq.m of floorspace. Almost a quarter of the units and floorspace are dedicated to leisure service use. The largest retail units are the Co-op on Park Avenue/Bridgford Road and Marks and Spencer located at Albert Road.

6.49 In retail terms, the centre has an important role in meeting day-to-day local needs. As such, it has a higher than average proportion of convenience goods retailers and a lower than average proportion of comparison goods retailers. West Bridgford Park is also located within the centre provided a plethora of amenity space and greenery for residents to utilise.

6.50 Overall, West Bridgford is viable and vital, benefitting from high levels of footfall and trade by the broad range of services and facilities on offer. This and the remaining units, which predominantly provide for financial, retail service and leisure uses, ensure that the district centre is able to meet the majority of the daily needs of local residents and visitors alike.

6.51 The centre's composition is skewed towards its leisure service offer, which has historically serviced an extensive young professional and student population. The leisure service offer is principally focused around cafés, restaurants, and takeaways (rather than licensed premises).

6.52 The district centre is well used both during the day and into the evening, which reflects the local demographic and the leisure uses supported. The centre has a relatively low vacancy rate and provides an important range of goods and services. It is considered to be generally vital and viable.

Nottingham District Centres

Clifton District Centre

6.53 Clifton is a well-connected centre with strong bus and tram links to Nottingham City Centre and the wider area. The centre is focussed along Southchurch Drive and Green Lane.

6.54 In terms of district centres, Clifton contains a smaller number of units. However these occupy a range of small and larger units which add up to a significant floorspace of 17,710 sq.m. The most prevalent use is convenience, followed by leisure and comparison. There is a large number of national operators present.

6.55 The architectural style is generally of the 20th century. Green Lane accommodates some larger and more contemporary buildings. Southchurch Drive comprises of buildings dating from roughly the 1960s and whilst it is somewhat underwhelming in terms of design, the shopfronts are well kept, and the wider urban environment contributes to an overall pleasing atmosphere.

6.56 Clifton is well connected to the wider area via tram and bus links and benefits from a strong walking catchment. It has a pleasant urban realm which is well kept and contains a good level of street furniture and greenery.

6.57 The types of commercial units range from smaller terraced units to larger outlets, with 6 units at over 1,000 sq.m in floorspace. Convenience and comparison uses are the most prevalent within the centre. Whilst leisure use occupies a significant floorspace (mainly due to the Leisure Centre), it is considered this use performs a relatively small function and that the centre would benefit from a more diverse selection of leisure services.

Hyson Green District Centre

6.58 Hyson Green district centre is elongated in nature, providing for 212 commercial units focussed around the busy Radford Road. The centre is anchored by a large Asda superstore, which trades strongly and draws from a wide catchment extending into the city centre and further afield.

6.59 Indeed, convenience retailing is a key strength of the district centre, which also benefits from a number of independent and specialist foodstores selling a range of goods which reflect the ethnic diversity of the local community. These include halal supermarkets and butchers and stores specialising in African and Caribbean foods. The district centre also provides for a strong retail services offer, largely focussed on the health and beauty sector but including a number of uses such as travel agencies, opticians, a post office and vehicle repairs which help to fulfil a number of the day-to-day needs of the centre's large residential catchment.

6.60 Comparison retail and leisure provision are more limited in Hyson Green compared to other district centres in the locality, reflecting the proximity of the city centre which provides for many of these needs. Those comparison operators which are present are largely independent and comprise a good range of uses including pharmacies, furniture shops, and a number of fashion stores. The leisure sector overwhelmingly comprises food and drink operators and includes a diverse range of independent cafes, takeaways and restaurants, which bring activity and footfall into the centre until fairly late into the evenings.

6.61 The floorspace vacancy rate in Hyson Green is below the national average, whereas the proportion of vacant units is higher than that found within a typical centre in the UK. This finding reflects the small size of many of the centre's units. These vacancies are generally spread throughout the elongated centre and their small size means that they have little detrimental impact on the overall streetscene. However, there are areas where small clusters of two or three vacancies occur, and the negative effects of these are exacerbated in some places by poorly-maintained shopfronts and the presence of takeaway operators that are shuttered during the day, leading to a perception of a lack of activity.

6.62 In general, however, the centre benefits from high footfall and a vibrant mix of largely independent operators. It is accessible by a range of means of transport and generally performs well in meeting the daily needs of its large residential catchment and is therefore considered to be reasonably vital and viable.

Sherwood District Centre

6.63 Sherwood is a significant District Centre which holds a range of offerings for the surrounding and wider area.

6.64 The built form is linear in nature and centres along Mansfield Road/A60. To the south of Mansfield Road, units are typically terraced and of three storeys with residential use above. However, form does vary with the Locally Listed Sherwood Bus Dept and The Samuel Hall public house buildings holding greater architectural significance and breaking the run of terracing.

6.65 Towards the north of Mansfield Road, 1970s purpose built retail units dominate the built form. With a deeper set back from the road, this area has a wider public realm and offers units curtilage space, alongside seating, cycle parking, bins for users and tree planting. Units 621 -637 Mansfield Road are of older architectural design which adds interests to the street scene. On the northern and southern edge of the district centre, more modern units have been built including a new Sainsburys local with residential flats which replaced the former Sherwood Library.

6.66 The District Centre offer is relatively mixed, with food units, health and beauty and convenience uses most predominant. There are multiple competing units which suggests a healthy market and also a significant number of independent businesses operating in the town centre, which bring a unique and attractive offering for users.

6.67 In retail terms, the centre has an important role in meeting day-to-day local needs. As such, it has a higher than UK average proportion of convenience goods retailers. The new Sainsburys Local which occupies the former Library site, and the Co-op occupies the largest floorspace within the comparison category. The additional convenience units are made up of smaller units mainly occupied by bakeries and off-licenses.

6.68 Almost half of all floorspace is dedicated to leisure service use. This includes three independent bars and one independent pub (Crafty Teller) and three chain public houses; The Samuel Hall, Sherwood Manor and The Robin Hood. Thirteen fast food takeaways were identified and nine cafes with a good range of cuisines provided. These offerings provide the District Centre with a mix of daytime and evening opening hours.

6.69 Our overall conclusion with regard to Sherwood is that it is vital and viable, benefitting from the footfall and trade brought by independent and national multiple stores and other uses. Improvements to the quality of environment throughout the high street is recommended to ensure that the district centre is able to meet the majority of the daily needs of local residents.

Broxtowe District Centres

Eastwood District Centre

6.70 Eastwood district centre is relatively large, containing 156 commercial units. Nottingham Road forms the main shopping street, with the secondary frontages being located along Mansfield Road and Church Street. A large edge-of-centre Morrisons store, which is accounted for in the table above, provides some potential for linked trips but remains slightly separated from the defined district centre due to topography and the distance between the centre and the store entrance. The Scargill Walk/Victoria Street area of the district centre has heritage value as the birthplace of DH Lawrence, and contains a Grade II listed museum and row of houses associated with the writer.

6.71 Key strengths of the centre include its convenience retail and retail service offers. In addition to the edge-of-centre Morrisons, the district centre provides for Iceland and Heron Foods stores, together with a range of smaller convenience stores and independent bakers and confectioners, and a delicatessen. Retail services are largely focussed on the health and beauty sector, with 20 of the centre's 30 outlets falling into this category, although there is also representation from opticians, travel agents, undertakers, a vehicle repairs/service business, and a post office. The leisure sector in Eastwood is also reasonably well-developed, with representation from a range of food and drink operators including a number of bars, public houses and takeaways which bring activity to the centre in the evenings.

6.72 The proportions of comparison outlets and floorspace in the district centre fall below UK averages, reflecting its proximity to Giltbrook Shopping Park, which provides for a strong range of national multiple non-food retailers anchored by Ikea. Despite the competition, Eastwood is able to sustain a good variety of comparison operators, including some national multiples, albeit that provision is slightly skewed towards the lower or value end of the market.

6.73 The proportions of vacant floorspace and units in the centre are largely in line with the relevant national averages. Vacancies are distributed throughout the centre, but with a particular concentration in the central part of Nottingham Road, where their detrimental impact is exacerbated by some poorly-maintained and dated shopfronts and the presence of takeaways which are shuttered during the day.

6.74 Overall, however, Eastwood is considered to be a reasonably vital and viable centre which meets the majority of the day-to-day shopping and service needs of the surrounding residential catchment.

Stapleford District Centre

6.75 Stapleford is a well-connected district centre with strong bus links to Nottingham City Centre and the wider area. It is focussed along Derby Road and follows a linear pattern.

6.76 Stapleford accommodates 147 commercial units which collectively provide 23,430 sq.m of floorspace. The centre's commercial premises generally consist of the ground floor units of a mix of smaller terraced buildings and 1960s-style, purpose-built buildings. The centre's economy is underpinned by its leisure, retail and comparison service offer.

6.77 The environmental quality of Stapleford is generally pleasant with well-maintained shopfronts and street furniture. There is however a lack of urban greenery, and a number of vacant units which detract from the overall impression.

6.78 Overall, we consider Stapleford is well connected and benefits from a strong walking catchment. Its daytime economy is underpinned by its leisure, retail and comparison service offer, and its evening economy is based mostly around eating and drinking establishments. The commercial units are generally smaller terraced units, with only the Poundstretcher unit exceeding 1,000 sq.m in floorspace.

6.79 The centre has a fairly pleasant urban environment and feels safe due to the levels of passive surveillance and low speeds of traffic passing through. However, there are a number of vacant units which are located at the south western gateway into the centre, which detract from the users' first impression as they enter Stapleford.

6.80 Overall, the district centre is considered to be vital and viable.

Kimberley District Centre

6.81 Kimberley district centre is compact, comprising just 66 units anchored by a large Sainsbury's superstore in its east. Retail and service provision in the town comprises a mix of purpose-built modern-format units like the Sainsbury's and the small retail park at Green Lane, and small units on the traditional shopping streets of Main Street and James Street, which largely comprise the ground floors of converted terraced housing.

6.82 Sainsbury's accounts for the majority of convenience floorspace in the centre and dominates the retail offer, although this is supplemented by a Heron Foods store and a number of smaller food operators including a Greggs bakery and independent off-licence and convenience store. The comparison offer similarly comprises a small number of national multiples, concentrated at Green Lane and including Poundland and Card Factory, and a range of smaller independent retailers. The latter includes some quality specialist retailers selling a diverse range of goods including flowers, boutique clothing and hardware.

6.83 Retail services are a key strength of the district centre, which provides for a large number of residents' day-to-day needs including health and beauty operators, a post office, opticians and a dog groomer.

6.84 The leisure offer focusses on food and drink and the range of takeaways, restaurants and public houses is good for a centre of this size. The centre's pubs, in particular, draw footfall and activity to Kimberley in the evenings.

6.85 Vacancy rates in the centre are well below the relevant national average in terms of floorspace, reflecting the small size of the units in the traditional part of the centre. In terms of proportions of units, vacancy rates are closer to the UK average, but still comfortably below. Vacancies are generally concentrated towards the west of the centre, further away from the anchor Sainsbury's store. These units are generally well-maintained, limiting their adverse impact on the street-scene, but it will be important to reoccupy or repurpose this space in the future.

6.86 In general, the district centre scores highly for environmental quality and accessibility, with features like the war memorial creating an attractive street scene and with the compact geography and flat topography making the centre easily navigable even for those with mobility impairments. The centre enjoys good footfall, with the Sainsbury's being well-connected with the remainder of the centre and thus generating substantial linked trips.

6.87 Our overall conclusion with regard to the health of Kimberley district centre is that it is vital and viable, and performs well in meeting the needs of local residents.

Local Centres

6.88 We have visited and reviewed each of the 27 local centres in Greater Nottingham. The healthchecks for the local centres are provided at Appendix 6. Nexus has reviewed each centre to determine how the centres are performing and their wider offer, and as such, where they should sit within the recommended hierarchy. The centres reviewed vary considerably in size, from 119 units recorded at Alfreton Road to eight units at Robin Hood Chase. The provision of retail and service facilities also varies considerably between the centres, with three centres having no convenience store.

6.89 Similarly, the quality of operators varies significantly, with all but five of the centres accommodating national multiple operators. Eight local centres had no vacant units at the time of our visit and, as whole, the smaller centres have a lesser issue in respect of their vacancy rate. Table 6.4 below provides a summary of the unit composition of the 27 local centres in Greater Nottingham.

Table 6.4: Local Centre Unit Composition at December 2023

Local Centre	Total Units	Comparison	Convenience	Financial	Leisure	Retail	Vacant
Burton Joyce	13	30.6%	15.4%	7.7%	23.1%	23.1%	0.0%
Calverton	16	18.8%	25.0%	0.0%	25.0%	18.8%	12.5%
Carlton Hill	78	17.9%	7.7%	7.7%	26.9%	29.5%	10.3%
Carlton Square	19	21.1%	21.1%	0.0%	36.8%	15.8%	5.3%
Gedling Colliery site	-	-	-	-	-	-	-
Gedling Village	41	12.2%	7.3%	17.1%	29.3%	29.3%	4.9%
Mapperley Plains	99	16.2%	11.1%	12.1%	24.2%	27.3%	9.1%
Netherfield	63	20.6%	14.3%	1.6%	22.2%	36.5%	4.8%
Ravenshead	14	14.3%	14.3%	21.4%	21.4%	28.6%	0.0%
Alfreton Road	119	13.4%	12.6%	7.6%	31.9%	19.3%	15.1%
Aspley Lane	35	14.3%	17.1%	5.7%	17.1%	37.1%	8.6%
Beckhampton Road	15	6.3%	31.3%	0.0%	20.0%	37.5%	0.0%
Bracebridge Drive	21	28.6%	19.0%	0.0%	23.8%	14.3%	14.3%
Bramcote Lane	31	29.0%	16.1%	9.7%	22.6%	12.9%	9.7%
Bridgeway Centre	16	31.3%	25.0%	0.0%	25.0%	12.5%	6.3%
Carrington	24	8.3%	16.7%	8.3%	41.7%	25.0%	0.0%
Mansfield Road	40	2.5%	12.5%	5.0%	30.0%	20.0%	30.0%
Nuthall Road	39	28.2%	7.7%	7.7%	20.5%	25.6%	10.3%
Robin Hood Chase	8	25.0%	12.5%	0.0%	0.0%	0.0%	62.5%
Sneinton Dale	50	22.0%	18.0%	2.0%	22.0%	16.0%	20.0%
Strelley Road	12	25.0%	25.0%	0.0%	25.0%	25.0%	0.0%
Cotgrave	15	6.7%	20.0%	6.7%	40.0%	26.7%	0.0%

Local Centre	Total Units	Comparison	Convenience	Financial	Leisure	Retail	Vacant
East Leake	37	24.3%	13.5%	10.8%	27.0%	24.3%	0.0%
Keyworth (The Square)	28	25.0%	17.9%	10.7%	17.9%	25.0%	3.6%
Keyworth (Wolds Drive)	15	6.7%	13.3%	0.0%	40.0%	33.3%	6.7%
Radcliffe on Trent	60	15.0%	10.0%	11.7%	23.3%	28.3%	11.7%
Ruddington	69	20.3%	10.1%	15.9%	29.0%	24.6%	0.0%
National Average	**-**	**26.6%**	**9.3%**	**8.5%**	**25.6%**	**15.8%**	**14.1%**

Source: Composition of local centres derived from Nexus Planning survey of December 2023.

Neighbourhood Parades

6.90 In addition to the above, part of the commission was to also visit 52 additional smaller parades of commercial units identified by the Councils as Centres of Neighbourhood Importance. The smaller parades are located across the authority areas and all were identified in light of their potential to be included within the proposed hierarchy of centres within the local plan, and to provide a wider range of facilities to meet residents' needs. The principal purpose of allocating the parades as local centres (and therefore moving them up the hierarchy) is to provide the Councils with greater control over the future protection through planning policy, particularly from competing edge and out of centre retail and leisure development.

6.91 Nexus has used a matrix to determine how the commercial provision is performing and as such, where they should sit within the recommended hierarchy. As set out above, the matrix is based on an assessment of the provision of facilities, ATM services and the proportion of national operators, types and scale of facilities provided and vacancies which were located in each centre.

6.92 As was the case for the majority of the commercial parades assessed as part of this part of the Study, the identified group of commercial units clearly played a vital role in providing day-to-day facilities for the local catchment, particularly in respect of convenience provision (providing facilities to enable residents to purchase goods such as milk and bread), retail service facilities such as hairdressers and barbers and cafes.

6.93 Details in respect of the centres assessed for this part of the Study are provided at Appendix 7, and recommendations were then used to help formulate the recommended policy approach contained within the final part of this Study.

7. Out of Centre Provision

Introduction

7.1 We set out below a review of the role, function and current performance of the principal larger out of centre retail destinations in the Greater Nottingham area. The retail parks are set out in Table 7.1 below.

Table 7.1: Retail Parks in Greater Nottingham

Retail Park	Authority Area	Size	Key Operators
Beechdale Retail Park	Nottingham City Council	3,190 sq.m	Lidl, Subway, Costa, Greggs
Castle Marina Retail Park	Nottingham City Council	17,605 sq.m	DFS, B&M, Currys, Pets at Home and Carpetright
Castle Retail Park	Nottingham City Council	10,403 sq.m	B&M, Maplin, Poundland and Aldi
Clifton Triangle Site, Green Lane	Nottingham City Council	5,110 sq.m	Lidl, B&M
Eastpoint Retail Park, Daleside Road	Nottingham City Council	4,570 sq.m	Aldi, Smyths Toys, Costa
Lady Bay Retail Park	Nottingham City Council	9,762 sq.m	ScS, Hobbycraft, Dreams, B&M, Burger King
Riverside Retail Park	Nottingham City Council	20,508 sq.m	B&Q, Boots, Next
Springfield Retail Park	Nottingham City Council	6,503 sq.m	Matalan, Brantano, Wickes
Chilwell Retail Park	Broxtowe Borough Council	13,052 sq.m	TK Maxx, Next Clearance, Matalan, Halfords, Sports Direct, McDonald’s, Costa, M&S Foodhall
Giltbrook Retail Park	Broxtowe Borough Council	18,394 sq.m (not including the Ikea)	M&S, DFS, Boots, TK Maxx, Next/Next Home, Decathlon, Pets at Home
Madford Retail Park	Gedling Borough Council	6,195 sq.m	Homebase, Currys and B&M
Victoria Retail Park	Gedling Borough Council	19,045 sq.m	M&S Foodhall, TK Maxx, Next, Boots, Pets at Home, B&Q, B&M
Wilford Lane Retail Park	Rushcliffe Borough Council	8,000 sq.m (est)	Lidl, Puregym, Starbucks, Aldi

Source: Completely Retail

7.2 The retail parks provide important facilities to the residents of Greater Nottingham and further afield, accommodating some retailers who may not be able to locate within any of the authorities’ defined centres (principally the city, town and district centres) due to their specific business model requirements.

Nottingham Authority Area

7.3 In total, there are eight retail parks within the Nottingham authority area, providing a mix of comparison, convenience and wider food and beverage and leisure offers.

7.4 The retail park offer within the Nottingham authority area is mixed overall, with some more traditional retail parks focusing on the bulky goods market (furniture, electrical goods, DIY and so on) and others focusing more on the non-bulky sector, which includes fashion retailers, chemists, household goods and so on. In addition, a number of retail parks are also now anchored by foodstores and more predominantly Aldi and Lidl foodstores, alongside a wider leisure offer focusing on food and drink uses.

7.5 The largest retail park in the Nottingham authority area is Riverside Retail Park, providing a total of circa 20,500 sq.m of commercial floorspace across seven units. The retail park is located to the south east of the city centre. Riverside Retail Park is anchored by a large B&Q Warehouse store, and other retailers currently trading at the site include Boots, Next, Argos and Home Bargains. The customer car park provides spaces for 1,094 vehicles. The retail park benefits from Class E non-food consent, with food sales also permitted from a number of units as a consequence of a number of applications to broaden the offer of the park in recent years.

7.6 The smallest retail park is Eastpoint Retail Park located on Daleside Road, providing circa 4,500 sq.m of commercial floorspace across five units. Eastpoint Retail Park is located approximately 2.4km to the south east of the city centre, accessed off Daleside Road.

7.7 The retail park includes an Aldi foodstore, a Smyths, Poundland and a Costa drive-thru. Existing planning conditions attached to the permission restrict the sale of comparison goods to no more than 15% of the net sales area of the foodstore. No unit is permitted to exceed more than 750 sq.m, with the exception of the foodstore and one other unit. A minimum of three retail units must be maintained within the rear terrace.

7.8 Castle Marina Retail Park, which is located approximately 0.8km to the south west of the city centre is a more 'traditional' retail park, including a DFS, Currys, Homesense, Furniture Village, Pets at Home and Carpetright, alongside a B&M and Costa.

7.9 The retail park comprises circa 17,600 sq.m of commercial floorspace and is located adjacent to the Sainsbury's, Lidl and Dunelm. The current planning conditions controlling the use of the floorspace at the retail park restrict the sale of fashion, sports goods and jewellery to a maximum of 30% of the net sales area of the retail park and limits the amount of convenience floorspace across the retail park. In this regard, planning permission was granted in November 2023 (reference 23/01502/PVAR3) to enable the sale of food from Unit 1 (from a maximum of 931 sq.m of net sales area). The accompanying planning application documents state that the application is to allow a discount food operator to trade from the unit, following its long-term vacancy, but no specific operator is referenced.

Broxtowe Borough Council

7.10 There are two principal retail park destinations within Broxtowe authority area, being Chilwell Retail Park and Giltbrook Shopping Park. Both are large retail parks, providing a wide range of commercial operators, both in terms of retailers and leisure operators.

7.11 Chilwell Retail Park is located approximately 3.1km to the south west of Beeston town centre and 0.8km to the south east of the Tesco Extra at Toton. The retail park currently comprises 12 units across a total of circa 13,050 sq.m of commercial floorspace, with operators such as TKmaxx, Sports Direct, Poundland, Pets at Home and Matalan, alongside a Costa and McDonald's. The retail park benefits from comparison goods sales, with a limit of up to 1,144 sq.m of convenience goods sales from one of units 4, 6a and 6b.

7.12 A recent planning application has been submitted to the Council (reference 23/00900/FUL) to subdivide Unit 4 into two units, and widen the use of Unit 4a to be used for the sale of food and drink for consumption on and off the premises. It is understood though the application documents, that the one of the newly created units could be occupied by Greggs.

7.13 Giltbrook Shopping Park, which comprises a total of circa 18,400 sq.m of commercial floorspace (not including the Ikea), is located approximately 1.6km to the north east of Kimberley district centre. The shopping park benefits from around 2,300 car parking spaces and a total of 19 commercial units, occupied by both retailers and leisure operators.

7.14 Giltbrook is anchored by the Ikea, with other comparison operators including M&S, DFS, Boots, TKMaxx, Pets at Home, Decathlon and Next. The leisure offer includes Escape Play, a large soft play centre, alongside a Nando's, Pizza Express, Starbucks, Frankie and Bennie's and Subway. There have been no recent applications of direct relevance to our analysis of the overarching offer of the shopping park.

Gedling Borough Council

7.15 The Gedling authority area also includes two retail parks; Madford Retail Park and Victoria Retail Park.

7.16 Madford Retail Park is located approximately 0.8km to the south west of Arnold town centre and comprises a total of 6,200 sq.m of commercial floorspace across three units. The units are currently occupied by Currys, B&M and Homebase and each have adjacent dedicated car parks.

7.17 Victoria Retail Park is located approximately 0.7km to the east of Netherfield local centre. The large retail park comprises a total of 19,050 sq.m of commercial floorspace over 17 units of varying scales. The retail park also benefits from 674 parking spaces and is situated adjacent to a large Morrisons foodstore to the south and a Lidl to the west.

7.18 The retail park includes a mix of operators, from the 'bulkier' end including the B&Q, Halford, Oak Furnitureland and Pets at Home, to the non-bulky end including JD, Boots, TK Maxx and B&M. There is also a M&S Foodhall and food and drink operators including McDonald's, Subway and Greggs.

Rushcliffe Borough Council

7.19 There is just one large retail park within the Rushcliffe authority area being the new Wilford Lane Retail Park located off The Becket Way, approximately 0.9km to the west of West Bridgford district centre. The new retail park comprises a Lidl foodstore, an Aldi foodstore, alongside a PureGym and a small terrace of commercial units. To the front of the retail park off Wilford Lane is a Starbucks drive-thru.

Summary and Conclusion

7.20 The out of centre retail provision within Greater Nottingham is varied and relatively well distributed across the four authority areas.

7.21 The out of centre retail parks typically have a broad offer which goes beyond the 'traditional' retail park provision of offering just bulky goods. The retail parks are also well served by ancillary Class A3/A5 operators, which add to the overall offer of the out of centre destinations.

7.22 Overall, we consider that Greater Nottingham is well served by out of centre retail floorspace, which meets the needs of residents through the provision of a range of operators who otherwise could not always occupy floorspace within one of the town or district centres across Greater Nottingham. However, it will be important for the Councils to continue to monitor applications for the potential expansion of floorspace or relaxation of use due to the potential implications such applications could have on the health of defined centres within the four authority areas.

8. Summary and Policy Recommendations

Context

8.1 The principal purpose of the commission was to better understand the ongoing challenges for Greater Nottingham's high streets and opportunities for their revitalisation and reimagining, and to set out a range of strategic policy recommendations to assist the preparation of the Greater Nottingham Strategic Plan.

8.2 Following approval by Broxtowe, Gedling and Rushcliffe Borough and Nottingham City Councils, the Greater Nottingham Planning Partnership consulted on the Preferred Approach for the Greater Nottingham Strategic Plan between the 4 January 2023 and 14 February 2023.

8.3 The Greater Nottingham Strategic Plan will comprise Part 1 of each authority's Local Plan, replacing their Aligned Core Strategies. The Greater Nottingham Strategic Plan will contain strategic policies identifying the amount and distribution of development and infrastructure. Following adoption of the Greater Nottingham Strategic Plan each individual authority will commence reviews of Part 2 of their Local Plans. Reviewed Part 2 Local Plans will identify non-strategic sites and detailed policies that deliver the strategic policies in the Greater Nottingham Strategic Plan.

8.4 As part of this process, the Councils will be updating the policies of relevance to town centre and retail planning including matters such as defined town centre boundaries, the hierarchy of defined centres and local impact thresholds for retail and leisure developments.

8.5 The Study has been underpinned by a range of market research, stakeholder consultation and on-site surveys within the defined centres, in order to better understand the current vitality and viability of centres and to provide defensible recommendations to the Councils in respect of the future formulation of planning policies.

8.6 Working alongside BAS Consultancy, a market leading economic development consultancy helping to improve towns and cities, the Study and the supporting documents aim to unravel all of the key matters which are currently moulding the centres, and help to provide action plans to ensure the Councils are appropriately planning for the future of its residents. Understanding what the public and stakeholders want and need in their centres, along with an appreciation of the specific socio-demographics of the catchments of the centres is key in being able to do this effectively.

8.7 As such, the purpose of this final section of the Study is to provide an overview of the recommendations formed as part of this Study, both on a centre-by-centre basis but also in terms of the overarching policy objectives which we consider should form an important role within the Local Plan Review.

8.8 We summarise the key findings of the Study below then address a series of planning policy considerations of relevance to the emerging Strategic Plan and specific local plans for each of the four authorities.

Key Findings: Principal Centres – Future Strategies

8.9 The assessment, analysis and review undertaken as part of this Study looked at Greater Nottingham's defined city, town, district and local centres, providing an overview of the overarching vitality and viability based on the healthcheck indicators provided within national planning policy. The Study also sought to review the offer within the Centres of Neighbourhood Importance. Both Nexus' healthchecks assessments, and the findings compiled by BAS' stakeholder consultation and on-site reviews have been brought together within Table 8.1 below.

8.10 We provide below the overarching conclusions in respect of our assessment of the health of city and four principal defined centres in Table 8.1 below. These have been supplemented with the recommendations provided by BAS Consultancy where relevant. We then go on to providing the further specific policy recommendations in respect of the hierarchy of centres following Table 8.1.

Table 8.1: Overarching City and Principal Centre Conclusions

Centre	Overarching Conclusions and Recommendations
Nottingham City Centre	Nottingham city centre benefits from being a genuinely multifunctional centre underpinned by diverse leisure service and comparison retail offers, which are augmented by a strong office market catering to large-scale occupiers such as HSBC and E.ON as well as numerous small and medium-sized businesses. As such, the city centre remains open throughout the day and evening, encouraging activity throughout. Retaining the city centre at the top of the Greater Nottingham centres hierarchy is therefore important, recognising the centre's regional role in providing a wide range of retail, leisure, office, tourism and cultural offer for not only its local residents, but visitors from further afield. Thus, whilst the proportion of vacant units in particular represents some cause for concern being higher than the national average, we consider the situation in Nottingham to be broadly comparable to other large city centres across the country, particularly if the vacant units in Broadmarsh are discounted from the calculations. We recommend ongoing monitoring of vacancy rates, particularly in areas of the city centre where empty units are concentrated, to ensure that the impacts of the ongoing redevelopment projects are fully understood and that the local authority is well-placed to adapt to the demands of a rapidly changing market. The ongoing redevelopment of the Broadmarsh Shopping Centre represents a significant opportunity to regenerate and transform the south of the city centre. After a long period of decline and previous plans for refurbishment that never came to fruition, the Broadmarsh site is now within Council ownership. Over the past four years the area has seen the development of a new Central Library and Nottingham College City Hub, a car park and bus station, and major public realm improvements. The vision for the future of the Broadmarsh site involves the retention of the structural frame of the former Broadmarsh shopping centre, which is to be repurposed for a wide variety of new uses including independent retail and food/drink businesses, together with innovative community spaces, and a new Community Diagnostic Centre due to open in Spring 2025. BDP has been commissioned to deliver a 'cohesive site-wide masterplan' as a precursor to a planning application that will seek permission for 1,000 new homes, 46,000 sq.m of commercial and office floorspace, and new public greenspace. The continued support of the Broadmarsh redevelopment scheme, and how it then seeks to contribute to other schemes in the wider city centre will be key, including the improvements to accessibility into and out of the site. Encouraging the wider diversification, improvements to accessibility, infrastructure, public realm and greenspace on the back of the Broadmarsh improvements will also be important in the wider city centre, linking the new development to the existing provision. A considerable amount of pedestrian activity was observed throughout all areas of Nottingham city centre at different parts of the day and evening. During the daytime, activity was generally busiest along the north-south retail spine and within the Victoria Shopping Centre. The pedestrianised nature of the main shopping streets in the city centre results in a compact and walkable environment, which accommodates relatively straightforward movement on foot. We observed a number of linked trips between different operators in this central part of the city centre. Overall, the city centre benefits from a good level of footfall driven by its strong comparison retail and leisure services offer and a number of key anchors. Nottingham city centre enjoys an excellent standard of accessibility by public transport. Road access to the city centre by private car has recently been improved through works associated with the new Broadmarsh Bus Station and Car Park. With regard to accessibility for people with impairments or

Centre	Overarching Conclusions and Recommendations
	mobility requirements, travelling north to south through the city centre could prove challenging due to the local topography. Some of the more historic streets are narrow and windy, which could also be difficult for some visitors to navigate. In general, however, the pavements are even and well-maintained, the streets are wide and clutter free, and there is good provision of benches and other street furniture available for those who need to stop and rest. It is therefore key that future policy supports the improvement of accessibility within the city centre overall, ensuring that it is inclusive and encourages visitors of all ages and from all socio-demographic backgrounds. The city centre must be seen as being welcoming to all to ensure that it draws in everyone. The public realm in the city centre is generally of a very high standard, with Nottingham benefitting from a number of valuable heritage assets including numerous of Grade II listed buildings. Notwithstanding, there are parts of the city centre where the environmental quality is of a somewhat poorer standard. The south of the city centre is generally lower in environmental quality, and the Broadmarsh redevelopment has exacerbated this issue in the short-term by creating a large area of inactive frontages and part-finished demolition/construction works. As noted above, encouraging the wider improvements to the public realm as an 'extension' to the work being undertaken to Broadmarsh will assist. Nottingham city centre is also somewhat lacking in green/open space, although there is tree planting in the pedestrianised areas. The forthcoming Broadmarsh proposals are anticipated to alleviate this issue in the south through the inclusion of a new football pitch-sized 'Green Heart' public space, which lies at the centre of the redeveloped site but further strategies elsewhere in the city centre to improve the provision of greenspace should be considered, and opportunities to encourage open spaces should be explored wherever possible. Such strategies should also consider better wayfinding opportunities to encourage visitors to explore the wider city centre. Overall, Nottingham city centre is considered to be vital and viable, benefitting from robust daytime and night-time economies that befit its status as a regional centre, excellent accessibility and a high level of environmental quality. The number of regeneration opportunity sites across the city centre and the positive signs of both public and private sector investment, means that there are substantial positive indicators for Nottingham's future. Nottingham's approach to city-wide governance is progressive and inclusive, involving a range of institutions and representatives each with their own role to play in stewarding transformation. There is an opportunity to use these governance mechanisms to develop a city vision and place principles which can be articulated across projects from the physical (such as Broadmarsh) to the economic (such as a strategy for the city's markets). These principles should be broadly communicated and consulted upon in a visioning exercise that provides all those from Nottingham with the opportunity to have a say in the direction the city should take.
Arnold town centre	Overall, Arnold is a town centre which is well connected by public transport and benefits from a strong walking catchment. The offer is mixed, and provides a good range of retail, leisure, service and wider community uses to meet the residents' needs. The demand for floorspace and confidence in the centre by retailers has been evidenced recently by the reoccupation of the former Wilko store by B&M. Arnold's daytime economy is based around its offer of comparison, convenience, leisure and retail uses and its large pull of independent retailers. Its evening economy is slightly less varied, predominantly being based around food services including takeaways, restaurants and convenience stores, although there are a series of public houses throughout the centre which add to its offer. The centre is well suited towards pedestrians with low volumes of traffic passing through the centre and traffic calming measures in place ensuring low speeds. Wide pavements and ample planting and furniture also contribute to a pleasant urban environment overall. There may be opportunities to

Centre	Overarching Conclusions and Recommendations
	enhance the green infrastructure throughout the centre, providing linkages to the surrounding green spaces. To the north, there is an opportunity to tie in the library and leisure centre better into the centre. Drawing on these important elements of the centre and encouraging trips to and from the wider leisure and community offer will enhance the centre overall. Overall, Arnold is performing well in meeting the day-to-day needs of local residents and contains a good variety of services, serving both its daytime and evening economies. Its vacancy level is below the national average and there is a good sign of investment overall. The streetscape is generally pleasant and well maintained but there are opportunities to help improve the wider public realm, through improved crossings, aesthetic improvements to Front Street and an overarching reduction in the dominance of the car.
Beeston town centre	Beeston town centre is considered to be meeting its catchments' needs in providing key retail, leisure, service and financial facilities to meet residents' day to day needs. The centre's offer in terms of floorspace is dominated heavily by the large convenience operators, which include adjacent car parks serving the town centre. Ensuring that shoppers are drawn into the wider centre from these operators and the adjacent car parking is key, although we did witness linked trips on the days of our visits. There may be opportunities to explore wider wayfinding, public realm and infrastructure strategies which seek to encourage a higher propensity of linked trips within the centre. The pedestrianised areas around High Road and The Square provide a pleasant town centre environment for shoppers, providing space to sit and enjoy the centre. Overall, the public realm is pleasant and links well to the proximate greenspace. The pedestrian links between the bus and tram interchange and the large format operators on the periphery of the centre could be improved to encourage footfall into the 'heart' of the centre. However, Beeston has a low vacancy rate both in terms of floorspace and units and a good commercial offer overall. Its leisure offer is good, providing a range of facilities which serve both the daytime and evening economy and activity in the evening was good overall. Beeston is performing well in meeting the day-to-day needs of local residents and contains a good variety of services, serving both its daytime and evening economies. The streetscape is generally pleasant and well maintained. It is considered to be generally vital and viable.
Bulwell town centre	Bulwell town centre is considered to be meeting its catchments' needs in providing key retail, leisure, service and financial facilities to meet residents' day to day needs. The wider offer of the centre also includes the Riverside Library, health centre and play park to the south, alongside the Bulwell railway and tram station. The centre is very accessible via public transport and also has a very good provision of off-street car parking available. The pedestrianised area around the Town Square and Main Street provide good, safe access for those on foot, pushing prams or in mobility scooters. Linkages to the north towards the Tesco and Lidl could potentially be improved through better signage and wayfinding. The environmental quality of the centre is good overall, but there are elements particularly in terms of the built fabric which could be improved. Seeking to encourage high quality shopfronts, controlling signage and creating a more uniformed approach to design for the centre could go some way to improving the aesthetics overall. Furthermore, the vacant Wilko also does not add to the overarching environmental quality in the centre, and its reoccupation or redevelopment needs exploring further. There may be opportunities to

Centre	Overarching Conclusions and Recommendations
	introduce a wider mixed-use offer on the site, with residential and commercial uses both enhancing the offer of the centre. The vacancy rate within Bulwell is below the national average in terms of both floorspace and unit composition, but is considered to be on the higher side particularly when compared to the other two town centres within Greater Nottingham. However, the wider offer of the centre is considered to generally meet residents’ needs and overall, the centre is considered to be vital and viable.
West Bridgford	West Bridgford is a vital and viable centre overall, benefitting from high levels of footfall and trade by the broad range of services and facilities on offer. The offer within the centre, which predominantly provides for financial, retail service and leisure uses, ensure that the centre is able to meet the majority of the daily needs of local residents and visitors alike. The M&S Simply Food and the Co-op store are the principal convenience operators in the centre, which trade alongside operators such as Iceland and a range of independent operators. Further consumer choice is also provided by the Asda superstore, which is located less than 1km to the south west. The centre’s composition is skewed somewhat towards its leisure service offer, which has historically serviced an extensive young professional and student population. The leisure service offer is principally focused around cafés, restaurants, and takeaways (rather than licensed premises) and provides for operators such as The Lounges, Wagamama, Pizza Express and Giggling Squid. The general environmental quality of the centre is good, although traffic does still dominate through the main streets running through the centre, which can detract in some parts. It is noted that some operators have sought to utilise areas of wider pavements to provide for outdoor seating, but it is considered that this could be further enhanced in the centre through wider public realm improvements, traffic calming and in some cases, pedestrianisation of key areas. Encouraging visitors to extend their stay in the centre will assist in supporting businesses in West Bridgford. Overall however, the vacancy rates in terms of the proportion of floorspace and units is significantly below the national average. Furthermore, the centre is well used both during the day and into the evening, which reflects the local demographic and the leisure uses supported. It is considered to be generally vital and viable. The overarching provision of operators, including the mix of national multiples and independents and the nature of the provision, indicates the important role that West Bridgford plays in meeting residents’ needs. It is clear that the centre draws from a wider area than a typical district centre, and is already acting as a town centre in terms of its position in the hierarchy.

Planning Policy Recommendations

General Policy Approach and Wider Strategy for Greater Nottingham

8.11 The adopted Aligned Core Strategies promotes a ‘town centre first’ approach which pre-dates but is broadly consistent with the general requirements of paragraph 90 of the NPPF (which indicates that planning policy should support the role of town centres at the heart of local communities), paragraphs 91 and 92 (which set out the sequential approach to development), and paragraph 94 (which sets out the town centre impact test).

8.12 In this regard, we note that paragraph 017 of the Town Centres PPG indicates that proposals for edge and out of centre retail and leisure developments should be considered with reference to the health of centres that would be impacted upon. Paragraph 017 states that:

'A judgement as to whether the likely adverse impacts are significant can only be reached in light of local circumstances. For example, in areas where there are high levels of vacancy and limited retailer demand, even very modest trade diversion from a new development may lead to a significant adverse impact.'

8.13 Taking account of the four wider authority areas and Greater Nottingham as a whole, and the large catchment they serve, there are a range of significant out of centre retail and leisure developments which have undoubtedly, amongst other commercial matters, had implications on the performance of the defined centres within the authority areas. However, the pressure from out of centre retail and leisure development has not been the only impact on the high streets and further stress from online retailing, the pandemic and now the rising cost of living have all had implications on the performance and overarching health of the centres across the authority areas.

8.14 This trend is very apparent particularly to the south of Nottingham city centre, where Castle Marina and Eastpoint retail parks play an important role in providing key retail and leisure destination for residents in the surrounding wards but have as a consequence, attracted a range of retail and leisure operators who could otherwise be typically found within defined centres. This is also the case in other parts of Greater Nottingham, where retail parks are dominant and provide a wide range of retail and leisure uses which would compete directly with the offer of defined centres and in particular, town and larger district centres. This is particularly the case where retail parks provide a main food convenience operator (i.e. where residents can typically purchase their full weekly shop) alongside a wider retail and leisure offer, thus attracting shoppers away from centres in some cases.

8.15 In this regard, the objective is to ensure, where possible, the growth of an inclusive economy, which provides access to jobs, opportunity, skills acquisition, products and services, culture, leisure, healthy lifestyles and social connection. This does not mean developing high streets that are the same as one another, it means planning high streets based on the needs of the catchment. Recommendations such as those included in this report for Greater Nottingham's city, town, district and local centres, importantly reflect current and projected catchment demand to improve resilience in the long-term and acknowledge that not all centres need to be uniformed or provide precisely the same offer in order to provide satisfactorily for their catchments.

8.16 As a consequence, we believe that it is important for the forthcoming policies within the Strategic Plan to clearly identify that the larger defined centres should continue to be the focus for comparison goods retail and that there is a need to direct such operators towards the centre in order for it to remain relevant and appropriately serve residents' needs. We also consider it important that future planning policy seeks to support the growth of the key centres through the improvement of facilities, public realm and space to be able to attract residents to meet and interact but also to provide inclusive centres which draw in visitors of all ages and from all backgrounds. This means providing a mix of operators, a variety of uses and providing, where appropriate, affordable town centre living.

8.17 More generally, it will be important for the emerging plan to clearly set out the importance of the sequential and impact tests and explain the local circumstances which frame how they will be applied in practice. The sequential and impact tests will need to be applied in a robust manner so as to reduce the vacancy rate across the defined centres and support centres that are fit for purpose going forward. Whilst non-retail uses will be an important component of the mix of land uses in principal centres moving forward, there is still a requirement to accommodate new retailers and additional retail floorspace within defined centres wherever possible.

8.18 Overall, however, the centres within Greater Nottingham are performing relatively well against the UK averages, and the offer of retail, leisure and service floorspace is generally meeting residents needs well. There are also opportunities to create more pedestrian-friendly areas within the centres to help support more community events and other informal activities throughout the year.

8.19 A key priority, which is already being explored by the partner Councils and stakeholders, is the reuse of existing stock, the repurposing of important town centre assets to provide active uses such as leisure, community and residential uses, and wider aesthetic improvements to encourage safe pedestrian movement and promote pleasant town centre environments. We note the positive steps being brought forward in wider masterplanning work in Nottingham and Arnold in particular.

8.20 Town centre policies will therefore need to promote diverse centres, which encourage a mix of main town centre uses. Tracking the implications of Permitted Development Rights, and particularly the change of use from commercial to residential uses will be important, to ensure that the centres' focus is still around the retail and leisure offer so residents can meet their daily needs. This will also help to avoid the loss of expenditure from the centres to other larger competing destinations and encourage sustainable shopping and leisure patterns within the suburbs of Greater Nottingham.

8.21 We provide policy recommendations below in respect of the respective tiers contained within the recommended hierarchy (see below for the recommended hierarchy).

Nottingham City Centre

8.22 Nottingham city centre remains the principal centre within Greater Nottingham, and provides a wide range of retail, leisure, service and other main town centre uses serving a wide catchment area. The ongoing significant levels of investment being made within the city centre should be further supported through policy, acknowledging that the city centre requires ongoing diversification and development to respond to wider commercial market trends. Such trends include the retraction in retail space, and particularly the closure of some larger department stores, the demand for larger-format convenience shopping within the city centre, an ongoing drive to diversity the leisure and tourism offer and the increase in city centre living, including affordable housing and student accommodation.

8.23 In light of the above, a continued encouragement of the city centre being the focus at the regional level for retail, leisure, tourism, offices, residential and cultural facilities should be brought forward through planning policy at the strategic level.

8.24 Changes that are taking place in the retail sector will continue to impact on the shape and character of the city centre. Whilst retailing will still have a significant place, the emphasis in terms of the city centre strategy should be on diversification, in retail itself, but also through the introduction of additional uses. Alongside this, continued efforts should be made to deliver development, regeneration and public realm and other improvements across the city centre.

8.25 One of the key elements to the city centre's future success is the successful delivery of Broadmarsh, which is currently skewing the vacancy rates within the city centre due to the investment taking place. The emerging masterplan for Broadmarsh seeks to bring forward a mix of commercial floorspace, which will provide space for a variety of new uses including an opportunity for the independent sector to grow further, alongside community spaces and a new Community Diagnostic Centre. However, running through the new and enhanced Broadmarsh floorspace opportunities will be the substantial improvement to the public realm, landscaping and accessibility. These wider aesthetic and movement improvements being directed towards Broadmarsh then need to 'spill out' into the wider city centre, providing for a greener, more sustainable and accessible centre.

8.26 The leisure and cultural sector is key in supporting Nottingham city centre's economy, and specifically a vital aspect currently supporting the overarching vitality and viability of Nottingham city centre. The city centre benefits from a range of leisure and cultural facilities, from large scale arenas and theatres through to smaller niche venues, all of which support a wide variety of artists. Not only is there a wide offer of permanent leisure facilities, but the city centre also hosts a spectrum of temporary events throughout the year which draw in visitors from all over the region and beyond. Further supporting both the daytime and nighttime leisure and cultural offer will help to enhance the city centre as a regional destination, encouraging activity throughout the day and into the evening.

8.27 There is also an opportunity to continue to grow significantly the residential role of this core area, including a broader range of dwelling types and an increase in the supply of affordable housing. Securing large numbers of new homes in this part of the sub-region will enable more people to live near to a variety of employment, business and leisure opportunities, and reduce pressure on greenfield and Green Belt land elsewhere in Greater Nottingham. However, it will be important to ensure that this complements rather than displaces the economic functions.

8.28 In the context of the current vacancy rate and national planning policy requirements, we recommend that emerging plan policies are sufficiently flexible so as to allow for an appropriate range of town centre uses beyond retail, and reflect the need to repurpose historic, sometimes outdated retail stock in order to accommodate new residential, leisure and community uses. To this end, we note that paragraph 90 of the NPPF states that planning policies should: '…recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.'

8.29 We believe that it is important for the forthcoming plan to clearly identify that the city centre should continue to be the focus for comparison goods retail and that there is a need to direct such operators towards the centre in order for it to remain relevant and appropriately serve residents' needs.

8.30 In this regard, the Primary Shopping Area within the city centre will continue to be the key focus for the provision of retail uses, with the wider City Centre Boundary seeking to encourage a mix of uses, including both main town centre and residential. Although the introduction of Class E Uses within the Use Class Order has widened the permitted uses within units in defined centres, there is still a need to focus traditional retail in the Primary Shopping Area to continue to drive footfall in. In this regard, the application of the sequential and impact policy tests (within which the Primary Shopping Area comprises 'the centre') will still provide the local authority with some control over directing retail uses to the Primary Shopping Area in the first instance.

8.31 Alongside the encouragement of a diversity of uses within the city centre will be the significant improvements to the public realm, the level of accessibility and ability for all to be able to visit and use the city centre in its entirety.

8.32 Given all of the above, we summarise our policy recommendations below:

- Recognising that the city centre will continue to be the primary focus for retail, leisure, business, culture and tourism activity within Greater Nottingham, and be the priority for investment for both development and infrastructure improvements;
- Encouraging the redevelopment of the key regeneration opportunity sites within the city centre, including Broadmarsh, and ensuring that future schemes link with the existing built environment through appropriate design solutions in the building fabric, public realm and wider landscaping;
- Retaining the defined Primary Shopping Area as the focus for retailing within the city centre, to reinforce and protect the offer and continue to be a key driver of footfall into the city centre;
- Encouraging a wider diversity of uses within the wider City Centre Boundary, including city centre living and purpose built student accommodation, which will complement, rather than displace the area's non-residential functions;
- Building on and improving the independent sector within the city centre, through improvements to the infrastructure and accessibility of key areas and the development of specific strategies at the local level;

- Improving the public realm, green infrastructure and wider pedestrian and cycle accessibility throughout the city centre, to remove barriers and provide for an inclusive environment; and
- Supporting and protecting the city's cultural and heritage offer, through appropriate development.

Town Centres

8.33 The town centres within Greater Nottingham vary in offer and scale but perform important roles in providing for the majority of day-to-day functions for local residents. Arnold, Beeston, Bulwell and West Bridgford each provide large format convenience operators, alongside a wide range of other retail, leisure and service uses. They are accessible by a range of public transport modes and benefit from a good catchment area, which makes them suitable for a range of main town centre uses.

8.34 The town centres have also been subject to the ongoing market trends, and as a result, they have witnessed some key closures of larger operators, including the Wilko stores in Arnold, Beeston and Bulwell (although it is noted that the former Wilko store in Arnold has already been reoccupied by B&M and therefore, there may be positive signs of future investment in the other vacant units in the short term) and other smaller closures across the centres more generally. However, in each case, there is a good sign of general 'churn' with former vacant units having been occupied by alternative operators.

8.35 In any event, the town centres will need to continue to adapt and respond to changing circumstances if they are to continue to successfully meet the needs of their neighbourhoods. Expanding the resident population of the town centres will help to generate the necessary footfall and vibrancy to sustain facilities and enhance the attractiveness of the centres. The public transport corridors into the town centres will also have an important function, especially as a location for new housing, further increasing the number of people with easy access to town centre facilities by sustainable modes of transport.

8.36 We provide our policy recommendations in respect of the town centres below:

- Retaining Arnold, Beeston and Bulwell as town centres and upgrading West Bridgford from district centre status to town centre status;
- Recognising that retail will continue to play an important and invaluable role in supporting the vitality and viability of the centres and that other main town centre uses will also be key, working alongside the core retail provision;
- Seeking to protect the vitality and viability of the town centres through the application of the sequential and impact policy tests and careful consideration of the implications of out-of-centre retail and leisure developments;
- Encouraging the priority of those on foot or on bike throughout the centres, through pedestrianisation and traffic calming measures and improvements to the public realm;
- Improving linkages within and on the edge of the centres to encourage trips between other commercial, open space and transport provision;
- Supporting existing market provision within the centres, through extended opening hours and marketing;
- Continuing to guide investment into the town centres in order to support the existing commercial offer, whilst seeking to encourage the diversification of uses to meet residents' needs;
- Increasing the residential population within the town centres, through the provision of a mix and type and size of dwellings, including affordable housing;
- Improving the active travel routes and public transport modes within the town centres; and
- Recognising that the town centres are distinctive and that their qualitative differences need to be supported and celebrated. Development therefore needs to be carefully managed to help retain their distinctiveness.

District and Local Centres

8.37 The district and local centres in Greater Nottingham vary considerably in scale and offer but generally provide a good mix of retail, leisure, service and other main town centre uses to principally meet the day-to-day needs of the local catchment.

8.38 In the context of the district centres, the offer is more diverse with a higher number of commercial operators which provide a range of functions, including a more diverse comparison offer. The local centres are smaller in scale, meeting a much more localised catchment in terms of small scale convenience provision, some leisure uses and retail services.

8.39 In terms of the district and local centres, the vitality and viability should be protected and in doing so, the sequential and impact tests must be applied properly to ensure main town centre uses are directed to the defined centres in the first instance.

8.40 It is important that policy recognises the important roles that these smaller centres play in meeting residents' needs and that future development, of an appropriate scale, should be directed to the centres. Encouraging wider enhancements through improvements to the centres' environments is important, alongside the enhancement of accessibility for pedestrians and cyclists to encourage safe movement.

Centres of Neighbourhood Importance

8.41 We have also provided recommendations as part of our review of centres of neighbourhood importance in respect of their position in the hierarchy. In the first instance, it is recommended that they are referred to as neighbourhood parades so as to avoid any confusion in respect of their status in the local plan.

8.42 In this regard, the offer of these neighbourhood parades continue to be of importance in providing a very localised offer but which do not result in the elevation to local centre status and therefore do not comprise a 'defined centre' in the context of the local plan policies. We recommend that reference is made to the agreed list of centres of neighbourhood importance and that policy will recognise the importance of the neighbourhood parades in providing a very localised function for residents.

Out of Centre Facilities

8.43 This Study has also assessed the current provision of out of centre retail and leisure provision and how this has evolved over time. It is clear that retail parks and warehouses have a place in the wider context of facilities within Greater Nottingham, and particularly in terms of providing larger format space for operators who could not otherwise meet their business model requirements within the defined centres.

8.44 However, there are instances where out of centre retail destinations have 'poached' operators from defined centres or where they have broadened the permitted range of goods that can be sold so as to diversify the offer. This can add to the attraction of retail parks, drawing trade away from defined centres. As such, the Councils will need to exercise caution when considering proposals for additional out of centre development.

8.45 In this regard, there is a need for development plan policy to be consistent with the provisions of the NPPF and, in this context, the Council's future strategy will be to safeguard against inappropriately sited retail and leisure development which will likely result in significant adverse impacts arising at defined centres.

8.46 However, it is evident from this Study that, whilst Nottingham city centre is faring well in terms of its vacancy rates (when excluding Broadmarsh) and accommodates a good range of national multiple operators, there are still elements of the overarching health of the centre which could be improved. As such, appropriate consideration should be given to the imposition of restrictive conditions for additional comparison goods development that is located outside of defined centres to ensure that no unacceptable impacts arise at any centres.

8.47 The evidential background provided by this Study will assist the Councils in identifying where significant adverse impacts are likely to arise, and it will be necessary to robustly assess all applications in Greater Nottingham which provide for any material improvement in the offer of out of centre retail destinations. It will also be necessary for future retail planning policy supporting text to appropriately summarise the challenges that the city centre, and other centres face in order to provide a policy context which allows the refusal of planning applications which provide for out of centre development which will lead to a further erosion of the centres' retail market shares.

Boundaries

8.48 Paragraph 90 of the NPPF requires local plans to 'define the extent of town centres and primary shopping areas', with there being no specific requirement to identify primary and secondary frontages.

8.49 The removal of the requirement to define frontages reflects the general need to be flexible in planning for the future of town centres due to the rapid changes taking place in the retail and leisure industries. Whilst the removal of the requirement does not preclude local planning authorities from identifying primary and secondary shopping frontages where supported by local circumstances, we do not believe that this is merited in this instance. There is a clear need to repurpose and reoccupy centres across Greater Nottingham in the manner that Use Class E generally provides for. In this context, the designation of primary and secondary frontages would serve no useful purpose.

8.50 Annex 2 of the NPPF indicates that a primary shopping area is the 'Defined area where retail development is concentrated'. Annex 2 also identifies that a town centre is the:

'Area defined on the local authority's policies map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area'.

8.51 In this regard, it is important to note that although there is the opportunity to define a PSA and a town centre boundary as separate entities, there is no general requirement to unless the specific context of the centre allows for it. The Government has encouraged the diversification of centres and whilst retail will still in most cases be a focus of the offer within the centres, lower-order centres are typically diverse and uses are typically spread throughout the boundaries and therefore, defining the town centre boundary and the primary shopping area as one single designation may be appropriate.

8.52 Furthermore, it is also important to recognise the purpose of defining both a PSA and town centre boundary. In this regard and in terms of applying policies, distinguishing between the PSA and town centre boundary is only of relevance when referring to the impact policy test in relation to retail proposals. As such, if a PSA is not defined as well as a town centre boundary (instead of considering them as one boundary) what is defined as 'in centre' would be all uses within the town centre boundary, thus providing protection to the overarching offer within centres.

8.53 In this regard, we have reviewed the current boundaries of the defined city, town, district and local centres and maps providing our recommendations are provided at Appendix 8. We provide a summary of our recommendations below in Table 8.2 in respect of town centres. Our recommendations relating to district centres are provided at Table 8.3 and for local centres, our recommendations are provided at Table 8.4.

Table 8.2: Summary of Boundary Recommendations for the City Centre and Town Centres

City and Town Centres	Authority	Boundary Recommendations and Justification
Nottingham city centre	Nottingham	No changes recommended to the existing primary shopping area and town centre boundary. We are of the view that the currently defined boundaries appropriately reflect the area within which retail uses are focused (the primary shopping area) and the wider area within which main town centre uses are focused (the wider city centre boundary).
Arnold town centre	Gedling	We do not recommend that the primary shopping area is differentiated from the wider town centre boundary and therefore, one single boundary is proposed. No changes are recommended to the existing town centre boundary.
Beeston town centre	Broxtowe	We do not recommend that the primary shopping area is differentiated from the wider town centre boundary. We recommend extending the boundary to the northwest so that it includes the Lidl supermarket on Wollaton Road. The Lidl is well-connected to the current boundary and functions as part of the town centre, attracting trade and footfall, generating linked trips, and contributing to the overall vitality and viability of Beeston.
Bulwell town centre	Nottingham	We do not recommend that the primary shopping area is differentiated from the wider town centre boundary. We recommend that the boundary extends northwards as far as Linby Street, so that it continues to encompass the Tesco Extra and Lidl supermarkets but excludes the secondary service uses, non-main town centre uses and large-format comparison retailers to the north.

Table 8.3: District Centre Boundary Recommendations

District Centre	Authority	Boundary Recommendations
Eastwood	Broxtowe	No changes are recommended to the existing boundary. We are of the view that the Morrisons superstore to the west of the centre functions as an edge-of-centre store, which is reasonably well-connected to the district centre but remains slightly separated due to topography and the distance between the centre and the store entrance.
Kimberley	Broxtowe	We recommend extending the boundary to the northwest to include the commercial units at 10-16 Main Street. No other changes are recommended to the existing boundary.

District Centre	Authority	Boundary Recommendations
Stapleford	Broxtowe	We recommend that the district centre boundary be extended to the south as far as the Midland Hotel public house on the east side of Derby Road, and as far as the vacant unit at 250-254 Derby Road on the western side. This area contains a number of retail, leisure and other service uses which function as part of the wider centre. Whilst we note that the boundary was retracted in 2019 to enable more residential uses to be provided at ground floor, we consider the uses along Derby Road continue to play an important role in the overarching offer of the district centre. In the northern part of the centre, we recommend some contraction to exclude the dwellings on Cyril Avenue and the car park at Cliffe Hall Avenue. We also recommend a small extension to encompass the cafe and library on Church Street.
Clifton	Nottingham	We do not recommend that the primary shopping area is differentiated from the wider district centre boundary. We propose the expansion of the district centre boundary to include the adjacent Clifton Triangle Retail Park which provides a range of larger-format retail, leisure and service uses and which connects well to the existing district centre. It is our view that the two commercial areas can function well as one defined district centre, and provide a good range of commercial uses for the surrounding catchment.
Hyson Green	Nottingham	No changes recommended; the ‘non-main town centre uses’ in the north are a library and medical centre (with dwellings at upper floors), which function as part of local centre and draw footfall.
Sherwood	Nottingham	We do not recommend any changes to the boundary. We are of the view that the existing boundary appropriately encompasses the main town centre uses which form the district centre.
Bingham	Rushcliffe	We recommend that a section in the northwest corner of the defined centre is removed from the existing boundary. This primarily comprises dwellings and serves no purpose to the function of the wider district centre. We do not recommend the retention of the currently defined primary shopping area, and instead recommend that there is just one district centre boundary encompassing the main town centre uses within the centre.
West Bridgford	Rushcliffe	We do not recommend any amendments are made to the existing district centre boundary. We do not recommend the retention of the currently defined primary shopping area, and do recommend that there is just one district centre boundary encompassing the main town centre uses within the centre.

Table 8.4: Local Centre Boundary Recommendations

Local Centre	Authority	Boundary Recommendations
Burton Joyce	Gedling	No changes recommended.
Calverton	Gedling	We recommend exclusion of the carwash, which has permission for the erection of four dwellings and will therefore no longer form part of the centre's commercial offer.
Carlton Hill	Gedling	No changes recommended.
Carlton Square	Gedling	We recommend the removal of the non-main town centre uses from the local centre boundary in the north west part of the currently defined boundary.
Gedling Colliery site	Gedling	N/A – extant consent (reference 2020/1255) allows for the construction of a local centre. The development has yet to commence but the boundary will encompass the local shops permitted.
Gedling Village	Gedling	No changes recommended.
Mapperley Plains	Gedling	No changes recommended.
Netherfield	Gedling	We recommend removal of the residential units to the north on Kennrick Street.
Ravenshead	Gedling	No changes recommended.
Alfreton Road	Nottingham	We recommend extending the boundary to the southeast, to encompass the commercial units on Ilkeston Road and Derby Road. These (predominantly leisure and retail service) uses are well-connected to the existing centre and function as part of it. Although currently vacant, the large units at 103-111 Derby Road represent a redevelopment opportunity, with the potential to strengthen the overall vitality and viability of the local centre, and so their inclusion within the boundary is recommended. We recommend that the remainder of the boundary is to be left as existing.
Aspley Lane	Nottingham	No changes recommended; current boundary includes all commercial units and excludes surrounding dwellings.
Beckhampton Road	Nottingham	No changes recommended.
Bracebridge Drive	Nottingham	No changes recommended; current boundary includes all commercial units.
Bramcote Lane	Nottingham	We recommend the exclusion of the dwellings at 146 to 150 Bramcote Lane in the north of the centre.
Bridgeway Centre	Nottingham	No changes recommended to existing boundary. Whilst not town centre uses, the health centre and church provide community facilities that function well as part of the centre.
Carrington	Nottingham	No changes recommended.
Mansfield Road	Nottingham	We recommend that the boundary extend as far as the commercial unit at 213 Mansfield Road. To the north of this point, the uses primarily comprise dwellings and a small concentration of retail services uses in the north that are not well-related to the existing centre and do not function as part of it.

Local Centre	Authority	Boundary Recommendations
Nuthall Road	Nottingham	No changes recommended; the 'non-main town centre uses' in the north are a library and medical centre (with dwellings at upper floors), which function as part of local centre and draw footfall.
Robin Hood Chase	Nottingham	No changes recommended.
Sneinton Dale	Nottingham	We recommend extending the boundary to the north-east to encompass the retail and leisure units at 158 to 198 Sneinton Dale. We also recommend a further extension, in order to include the commercial uses at 118 to 102 Sneinton Dale. These uses adjoin the existing centre and function as part of it, drawing trade/footfall and supporting its vitality and viability. Other changes include the regularisation of the southern part of the boundary to exclude dwellings. No further changes are recommended.
Strelley Road	Nottingham	We recommend amending the centre boundary to include all of Strelley Court building. Other than that no changes suggested as current boundary includes all commercial units. The 'non-main town centre uses' in the middle part of the local centre are a children's nursery and library/residential block, which function as part of local centre and draw footfall.
Cotgrave	Rushcliffe	No amendments recommended to centre boundary. We recommend that the Primary Shopping Area is removed.
East Leake	Rushcliffe	We recommend significant contraction of the local centre boundary to include only those commercial uses concentrated around Main Street/Gotham Road in the middle of the existing defined centre.
Keyworth (The Square)	Rushcliffe	Would recommend eastern section is excluded as it primarily contains residential with the exception of one unit on the eastern edge which is a camera club. South western section also to be excluded. We recommend that the Primary Shopping Area is removed.
Keyworth (Wolds Drive)	Rushcliffe	The most western building is a library and adjacent building eastwards is a young people's centre, so we recommend that the boundary here remains as currently defined. There is some woodland/overgrown shrubs north of the pub that separates it from the nearby residential that should be excluded for completeness. We recommend that the Primary Shopping Area is removed.
Radcliffe on Trent	Rushcliffe	We recommend that the south western element should be excluded (south of Main Road). The western part includes a hall and church so should remain within the boundary. We are of the view that residential units south of the town centre boundary on Cropwell Road can be excluded. The dwellings on the north side of Bingham Road should be excluded. We are also of the view that the dwellings on the east side of Main Road should be excluded, recognising that this would remove the train station

Local Centre	Authority	Boundary Recommendations
		from the boundary. A further section of dwellings is also proposed to be removed on the northern side of Main Road. We recommend that the Primary Shopping Area is removed.
Ruddington	Rushcliffe	We recommend relatively substantial contraction of the boundary to the west, so that it is more concentrated on commercial uses. We recommend that the Primary Shopping Area is removed.

Article 4 Directions and Implications

8.54 It is also worth noting the importance of Article 4 Directions being imposed in appropriate circumstances.

8.55 In this regard, Article 4 directions give power to local authorities to withdraw a specified permitted development right within a specified area. Paragraph 53 of the NPPF sets out how Article 4 directions should be used as a means of removing permitted development rights, and states that they should be used as follows:

'where they relate to change from non-residential use to residential use, be limited to situations where an Article 4 direction is necessary to avoid wholly unacceptable adverse impacts (this could include the loss of the essential core of a primary shopping area which would seriously undermine its vitality and viability, but would be very unlikely to extend to the whole of a town centre)

in other cases, be limited to situations where an Article 4 direction is necessary to protect local amenity or the well-being of the area (this could include the use of Article 4 directions to require planning permission for the demolition of local facilities)

in all cases, be based on robust evidence, and apply to the smallest geographical area possible.'

8.56 The use of Article 4 directions is further set out at Paragraph 38 of the Government's 'When is permission required?' PPG, which states that:

'Article 4 directions should be applied in a measured and targeted way. They should be based on robust evidence, and apply to the smallest geographical area possible'

8.57 Suitable circumstances for the use of Article 4 directions include the protection of town centres, as a July 2021 Written Ministerial Statement noted at Paragraph 53. Taken together, it is clear than an Article 4 direction applied to a town centre could support and protect the ongoing vitality and viability of the centre, and could provide local authorities a greater level of control in the context of increasing permitted development rights and the introduction of Class E.

8.58 Whilst we note that the Ministerial Statement also states that for Article 4 directions on high streets and town centres, the smallest area of geography (and consequently the area most easily targeted and covered) is likely to be the PSA, the introduction of an Article 4 direction is not exclusively dependent on there being a defined PSA within a centre. The Ministerial Statement goes on to confirm that, provided a local authority can demonstrate robust evidence and justification to support the introduction of an Article 4 direction, they can be used to cover a specified geographical area provided it accords with the basic requirements of Policy.

8.59 It is clear that although planning policy will not specifically refer to Article 4 directions within specific centres in Greater Nottingham, reference could be made within policy that there may be appropriate occasions where such controls could be explored further by the respective Councils.

Hierarchy

8.60 Paragraph 90 of the NPPF indicates that local planning authorities should define a network and hierarchy of town centres. However, very little detail is provided in this regard and, notably, neither the NPPF nor the Town Centres PPG differentiate between different types of town centre and the role each serves.

8.61 The most recent definitions provided by the Government were provided by Planning Policy Statement 4: Planning for Sustainable Economic Growth ('PPS4'), which was published in December 2009 (and was superseded by publication of the original iteration of the NPPF in March 2012). Whilst PPS4 should be considered on this basis (i.e. it is not up to date practice guidance), in the absence of any other definitions, it is of some relevance to the consideration of a retail centres hierarchy.

8.62 Annex B of PPS4 identifies that:

'City centres are the highest level of centre identified in development plans. In terms of hierarchies, they will often be a regional centre and will serve a wide catchment. The centre may be very large, embracing a wide range of activities and may be distinguished by areas which may perform different main functions. Planning for the future of such areas can be achieved successfully through the use of area action plans, with masterplans or development briefs for particular sites. In London the 'international' and 'metropolitan' centres identified in the Mayor's Spatial Development Strategy typically perform the role of city centres.

Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability. In London the 'major' and many of the 'district' centres identified in the Mayor's Spatial Development Strategy typically perform the role of town centres.

District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.

Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.

Small parades of shops of purely neighbourhood significance are not regarded as centres for the purposes of this policy statement.'

8.63 Policy 6 of the adopted Aligned Core Strategies sets out the current hierarchy of centres. At the top of the hierarchy is the city centre. Below the city centre in the hierarchy are the town centres, district centres and then local centres.

8.64 We have reviewed the current adopted hierarchy and provide our recommended hierarchy below. The principal change within the hierarchy is the elevation of West Bridgford from the district centre tier to town centre tier. Our recommendation is based on the findings set out as part of the socio demographic analysis, the stakeholder feedback and in particular, the findings of the healthcheck work undertaken by Nexus. Overall, we are of the view that West Bridgford provides a very good level of retail, leisure, service and other town centre uses which draw in trade from a catchment area which is considered to be wider than that which would typically be related to a district centre.

8.65 Taking the above definitions into account, West Bridgford is the principal centre within Rushcliffe and currently meets the general needs of the authority's residents from a retail, leisure and service perspective. The centre is performing well and provides a good level of key facilities for residents. Overall, due to the overarching offer of the centre, its draw from residents in the wider area and West Bridgford being the principal centre within the Rushcliffe authority area, we recommend that it is defined as a town centre.

8.66 In addition to the above, we have also recommended the upgrade of Chilwell Road/High Road in Broxtowe from a centre of neighbourhood importance to a defined local centre. This is due to the number of units present and the overarching offer provided by the operators, which we consider are commensurate with the other local centres defined in the Study. We note that Policy 14 of the adopted plan specifically relates to the CoNI and states that the wording of the policy is to ensure that the vitality and viability of Beeston is protected by removing the potential for retailers to move from the town centre to the CoNI. However, we are of the view that even with the elevated position in the hierarchy, the centre would continue to perform a local role and would not draw operators from Beeston town centre.

8.67 Other than the above referenced changes, we do not recommend any additional changes to the currently adopted hierarchy. This is based on the centres' offer, size and catchment. In short, we are satisfied that each of these centres continues to perform a role and function commensurate with their position in the four-tier retail hierarchy and do not recommend any changes in respect of these centres' positions.

Table 8.5: Recommended Centres Hierarchy

Tier	Centres
City Centre	Nottingham city centre
Town Centres	Broxtowe: Beeston Gedling: Arnold Nottingham: Bulwell Rushcliffe: West Bridgford
District Centres	Broxtowe: Eastwood, Kimberley and Stapleford *Gedling: None designated* Nottingham City: Hyson Green, Sherwood and Clifton
Local Centres	Broxtowe: Chilwell Road/High Road Gedling: Burton Joyce, Calverton, Carlton Hill, Carlton Square, Gedling Colliery/ Chase Farm, Gedling Village, Mapperley Plains, Netherfield and Ravenshead. Nottingham City: Alfreton Road, Aspley Lane, Beckhampton Road, Bracebridge Drive, Bramcote Lane, Bridgeway Centre, Carrington, Mansfield Road, Nuthall Road, Robin Hood Chase, Sneinton Dale and Strelley Road. Rushcliffe: Cotgrave, Keyworth (The Square), Keyworth (Wolds Drive), Radcliffe on Trent, East Leake and Ruddington

Thresholds

8.68 Paragraph 94 of the NPPF indicates that it is appropriate to identify thresholds for the scale of edge of centre and out of centre retail and leisure development, which should be the subject of an impact assessment. Any such threshold policy applies only to the impact test (most[15] planning applications for main town centre uses that are not in an existing centre and not in accordance with an up-to-date development plan will be the subject of the sequential test).

8.69 The purpose of applying an impact threshold within the development plan which deviates from the national threshold of 2,500 sq.m, is to allow the Councils to retain appropriate control in respect of the potential for development to impact on the future health of defined centres within the authority areas. By applying a lower threshold, applications for developments which could potentially have a harmful effect on the overall vitality and viability of a defined centre, will need to be supported by a proportionate impact assessment which sets out the potential trade diversion impact assumptions.

8.70 Paragraph 16 of the Town Centres PPG provides specific guidance in relation to floorspace thresholds and states:

'The impact test only applies to proposals exceeding 2,500 square metres gross of floorspace unless a different locally appropriate threshold is set by the local planning authority. In setting a locally appropriate threshold it will be important to consider the:

- **scale of proposals relative to town centres**
- **existing viability and vitality of town centres**
- **cumulative effects of recent developments**
- **whether local town centres are vulnerable**
- **likely effects of development on any town centre strategy**
- **impact on any other planned investment.'**

8.71 Using the above guidance, we set out the justification to support our view that lower thresholds should be applied across the hierarchy of centres within Greater Nottingham.

8.72 To note, the current adopted policies provided within the respective local authorities' Local Plan Part 2 are provided in Table 8.6 below.

Table 8.6: Current Adopted Impact Threshold Policies

Authority Area	Relevant Adopted Policy	Type of Development Outside a Centre to which Threshold Applies	Local Impact Threshold (sq.m gross)
Broxtowe	Policy 13	Retail, leisure, office or food and drink uses	2,500 sq.m
Gedling	Policy LPD 52	Retail All other main town centre uses	500 sq.m 2,500 sq.m
Nottingham	Policy SH4	Retail	1,000 sq.m
Rushcliffe	Policy 27	All main town centre uses	500 sq.m

8.73 Whilst it is welcomed that the Councils are minded to adopt a lower threshold than provided for nationally as indicated by the currently adopted policy, applying a single threshold for retail development to apply to all types of centres in Greater Nottingham may not be appropriate given the different scale and nature of each of the centres.

8.74 Furthermore, in accordance with national policy, we would advise that the thresholds adopted apply to all retail and leisure development across the board, instead of different thresholds for retail and leisure. Importantly,

[15] Paragraph 93 of the NPPF states that the sequential approach should not be applied to applications for small scale rural offices or other small scale rural development

national policy no longer requires applications for office development outside of centres to be supported by an impact assessment (but should be supported by a sequential test).

Methodology and Justification

8.75 In considering the setting of a local impact threshold, it is important to give consideration to the type of development (relating to convenience and comparison goods retail uses, and leisure uses) which would, in practice, provide space for key operators who could act to 'anchor' a centre. Should one of these anchor units or operators leave a centre, there will likely be the potential for a significant adverse impact to arise.

8.76 As such, where there is genuine potential for an application proposal to divert a material level of expenditure away from a defined centre, or potentially remove a key tenant from that centre, there will likely be a requirement to consider the impacts arising from the proposal in detail.

8.77 In respect of lower order centres, the introduction of even a small convenience store nearby (of the type operated by Sainsbury's Local or Tesco Express) may have the potential to impact on the ongoing viability of key operators. Small convenience stores operated by national multiple grocers can generate a relatively substantial turnover. If this is diverted from existing retailers in defined centres, the impact on the overall vitality and viability through the loss of spend and footfall, could be of a significant adverse magnitude.

8.78 Therefore, in implementing a local threshold policy, it is considered more appropriate to apply a range of thresholds in accordance with the type of centre the proposed development is proximate to. The thresholds should not only apply to new floorspace, but also to changes of use and variations of condition to remove or amend restrictions on how units operate or trade in practice.

8.79 In terms of policy recommendations relating to the impact policy threshold, this relates to the defined centre, which for the purposes of retail development comprises the primary shopping area, and for all other main town centre uses comprises the town centre boundary. We provide our recommendations in respect of the defined boundaries above, noting that we only recommend the designation of a primary shopping area within the city centre.

8.80 In this context, we recommend that the impact threshold of relevance to Nottingham city centre is set at 500 sq.m for both retail and leisure proposals. This threshold would effectively be the default to be applied authority-wide, should a proposal not fall within the criteria set out below.

8.81 The above recommendation is also reflective of the city centre vacancy rates and the potential for out of centre retail developments to become even stronger in the future at the expense of centres' vitality and viability. The existing out of centre commercial destinations all offer a range of comparison goods and a leisure offer which traditionally would have been found within defined centres. As such, the recommendation is reflective of the need to safeguard against the out of centre retail destinations becoming even stronger at the expense of the health of defined centres.

8.82 In terms of the lower order centres (town, district and local centres) we are of the view that the thresholds should be lower, in light of the potential for relatively small developments to have a material impact on the overarching vitality and viability moving forwards. Due to the sizes of the units, the offer, the catchment and types of operators, we are of the view that such an approach has considerable merit.

8.83 We believe that town and district centre anchor units will typically provide at least 300 sq.m of gross floorspace, particularly in the context of Greater Nottingham's centres, which (as we demonstrate below) typically have relatively low average unit sizes. Such a unit could potentially accommodate an operator of importance, which is capable of attracting shoppers to a centre, thus increasing the potential for linked trips. In this regard and as we set out in further detail below, we note that there are a relatively limited number of units greater than 300 sq.m in the town and district centres in particular.

8.84 The following provides a summary of the proportion of units within each town and district centre over 300 sq.m, and the current vacancy rate identified as part of this study.

Town Centres

8.85 Table 8.7 below provides a summary of the proportion of units within each town centre over 300 sq.m, and the current vacancy rate of each town centre as identified as part of this Study.

Table 8.7: Town centre threshold analysis

Town Centre	Total units	Units larger than 300 sq.m	Proportion of units larger than 300 sq.m	Proportion of Vacant Units	Proportion of Retail Floorspace	Retail Floorspace (sq.m)	Average unit size
Arnold	202	28	13.9%	9.4%	55.8%	25,790	274
Beeston	211	21	10.0%	9.5%	54.9%	23,250	203
Bulwell	149	24	16.1%	12.8%	68.6%	34,530	334

Source: Composition of town centres derived from Nexus Planning survey of December 2023 using Experian Goad definitions

8.86 We summarise the key findings from the town centre analysis below:

- In **Arnold town centre**, approximately 13.9% of all units have a greater floorspace than 300 sq.m, which includes the Asda and Sainsbury's stores. The proportion of vacant units in the town centre equates to 9.4%, and the average retail unit size is 274 sq.m. In total, retail uses (convenience and comparison operators) account for 25,790 sq.m of floorspace, which equates to 55.8% of the total stock of retail floorspace.
- **Beeston town centre** has the highest number of commercial units in terms of the three centres but has the lowest average unit size at 203 sq.m. At the time of our survey, the proportion of vacant units in the town centre equated to 9.5%. In total, retail uses (convenience and comparison operators) account for 23,250 sq.m of floorspace, which equates to 54.9% of the total stock of retail floorspace.
- In **Bulwell town centre**, approximately 16.1% of all units have a greater floorspace than 300 sq.m, which includes large format retail units which accommodate national multiples such as Tesco, Morrisons and Matalan. The vacancy rate equates to 12.8% of all retail units in the town centre, and the average retail unit size is 334 sq.m. In total, retail uses (convenience and comparison operators) account for 34,530 sq.m of floorspace, which equates to 68.6% of the total stock of retail floorspace.

8.87 We revisit the above analysis later in this section.

District Centres

8.88 Table 8.8 below provides a summary of the proportion of units within each district centre over 300 sq.m, and the current vacancy rate of each district centre as identified as part of this Study.

Table 8.8: District centre threshold analysis

District Centre	Total units	Units larger than 300 sq.m	Proportion of units larger than 300 sq.m	Proportion of Vacant Units	Proportion of Retail floorspace	Retail Floorspace (sq.m)	Average unit size
Bingham	84	8	9.5%	6.0%	47.6%	4,080	126
West Bridgford	134	9	6.7%	6.0%	45.5%	4,130	142
Clifton	36	10	27.8%	16.7%	57.0%	10,100	543
Hyson Green	212	9	4.2%	17.0%	60.8%	17,540	158
Sherwood	132	8	6.1%	11.4%	30.4%	4,970	135
Eastwood	156	16	10.3%	14.1%	45.0%	12,730	185
Stapleford	147	18	12.2%	15.6%	39.1%	9,160	184
Kimberley	66	6	9.1%	10.6%	63.8%	7,912	243

Source: Composition of district centres derived from Nexus Planning survey of December 2023

8.89 The above analysis of the district centres indicates that other than for Clifton and Kimberley district centres, the average units size falls below 200 sq.m, and the proportion of units larger than 300 sq.m for all centres except Clifton, Eastwood and Stapleford also falls below 10%.

8.90 Looking at the proportion of vacant units, all district centres except Bingham and West Bridgford have a vacancy rate over 10%, with Hyson Green the highest at 17.0%. Furthermore, the proportion of retail floorspace (comparison and convenience operators) constitutes more than 30% in all centres, with the highest proportions in Hyson Green and Kimberley district centres.

Recommended Policy Approach

8.91 The above findings demonstrate that in the town and district centres there are a relatively low proportion of units above the 300 sq.m threshold, and that generally the average size of units is relatively small. We do note that the average unit size in the context of Clifton district centre is significantly higher, but the figure is skewed due to the low number of units in total and the presence of large foodstores including Morrisons and Lidl, alongside uses such as Clifton Leisure Centre. It is important to note that the composition of Clifton includes the adjacent retail park which is not within the allocated boundary, but is within the recommended town centre boundary.

8.92 As such, and in this context, it is considered that there is a need to protect these centres against out-of-centre or edge-of-centre proposals for town centre uses.

8.93 We therefore consider that a policy threshold of 300 sq.m is appropriate for town and district centres due to their overarching offer and importance of ensuring that they continue to provide their important offer and role to their local catchments. The proposed threshold for town and district centres also demonstrates the potential implications any future out of centre developments could have.

8.94 In this regard, existing schemes such as Victoria Retail Park in Gedling (19,045 sq.m), Giltbrook Retail Park in Broxtowe (18,394 sq.m), and Castle Marina Retail Park in Nottingham (17,605 sq.m) all provide for substantial levels of retail and leisure floorspace at out of centre locations across the authority areas. The units within the out of centre retail parks range from 200 sq.m up to around 3,000 sq.m, with the ability to be sub-divided and provide space for operators which would typically locate in town centres.

8.95 These schemes provide space for operators which sell goods which are typically sold from town centres. If these destinations expand further or relax their current controls over the use of the floorspace, they could have substantial detrimental implications on all defined centres but particularly the larger centres within the hierarchy. The low threshold therefore ensures that applications at these out of centre destinations (and elsewhere in the authority areas) are appropriately assessed against the relevant impact tests and that the defined centres within Greater Nottingham are appropriately protected.

8.96 We believe that a lower threshold for local centres is appropriate as a consequence of their localised role and function, and the fact the opening of a small format convenience store outside of these smaller centres is likely to directly compete with the type of local needs provision typically found within such centres. We therefore believe it is reasonable for applicants proposing developments of 200 sq.m gross floorspace for local centres, to demonstrate that their proposal will not have a significant adverse impact on smaller centres sharing part of the same catchment.

8.97 The proposed thresholds at local centre level are considered to reflect the relatively small size of some of the centres at the lower end of the retail hierarchy and their consequent potential susceptibility to alternative 'out-of-centre' provision. In practice, it is envisaged that a proposal of just greater than 200 sq.m adjacent to a local centre would generally require an impact assessment of proportionate length (i.e. for development of such a scale, impact may on occasion be able to be dealt with as part of the covering letter accompanying the application).

8.98 Where an application proposal is above the respective stated impact threshold, we would recommend that the applicant discusses and agrees the scope of the retail impact assessment with the relevant Council prior to submission. The lower threshold of 200 sq.m for local centres is considered appropriate due to potential for convenience stores of even a relatively small nature to substantially impact upon the performance of existing operators, due to the potential higher sales densities of such proposals. This would ensure that particular protection of these smaller centres is considered appropriately.

8.99 For the purpose of drafting future planning policy, it is important to qualify the area to which each local impact threshold will apply. We recommend that the threshold of relevance to the town and district centres (i.e. 300 sq.m) and local centres (i.e. 200 sq.m) would be applicable within 800 metres of the boundary of the relevant centre. The distance of 800 metres is broadly commensurate with the potential walk-in catchments of smaller centres and is identified by Guidelines for Providing for Journeys on Foot (The Institution of Highways & Transportation, 2000) as being the 'preferred maximum' acceptable walking distance to a centre.

8.100 For clarity, we consider it to be appropriate for the higher threshold of 500 sq.m to apply across Greater Nottingham when the centre-specific thresholds do not apply (i.e. beyond 800 metres of these centres), due to the lesser likelihood of significant adverse impacts arising from retail and leisure development. This general 500 sq.m threshold would therefore apply to proposals outside of the 800 metre boundary of the defined centres due to the lesser likelihood of the proposals having an impact.

8.101 It is important to emphasise that, whilst the locally set threshold would require the submission of an impact assessment for all edge-of-centre and out-of-centre developments exceeding the thresholds, national guidance states that the impact test should be undertaken in a proportionate and locally appropriate way, commensurate to the scale of development proposed. The level of detail would typically be agreed with planning officers during the pre-application process in order to avoid overly onerous requirements that may otherwise restrict and delay development opportunities from coming forward.

8.102 Based on the above, we are of the view that an impact assessment will be necessary to accompany proposals for retail and leisure uses (including those relating to mezzanine floorspace and the variation of restrictive conditions) which are not located within a defined centre where:

1. the proposal provides a gross floorspace in excess of 500 sq.m gross; or
2. the proposal is located within 800 metres of either;
    a) a town or district centre and is in excess of 300 sq.m gross; or,
    b) a local centre and is in excess of 200 sq.m gross.

8.103 In our experience, it will only generally be development of a scale greater than these thresholds which could lead to a 'significant adverse' impact, which could merit the refusal of an application for town centre uses in accordance with the provisions of paragraph 95 of the NPPF. The setting of a 'tiered' threshold is consistently accepted by Inspectors at Local Plan Examination and, in our view, acts to appropriately ensure that only those proposals which could genuinely result in an unacceptable impact are the subject of an impact assessment.

Glossary of Terms

Bulky goods: Goods of a large physical nature (for example DIY, furniture, carpets) that sometimes require large areas for storage or display.

Source: Planning Portal

Comparison Goods: Clothing materials & garments, Shoes & other footwear, Materials for maintenance & repair of dwellings, Furniture & furnishings; carpets & other floor coverings, Household textiles, Major household appliances, whether electric or not, Small electric household appliances, Tools & miscellaneous accessories, Glassware, tableware & household utensils, Medical goods & other pharmaceutical products, Therapeutic appliances & equipment, Bicycles, Recording media, Games, toys & hobbies; sport & camping equipment; musical instruments, Gardens, plants & flowers, Pets & related products, Books & stationery, Audio-visual, photographic and information processing equipment, Appliances for personal care, Jewellery, watches & clocks, Other personal effects.

Convenience Goods: Food and non-alcoholic beverages, Tobacco, Alcoholic beverages (off-trade), Newspapers and periodicals, Non-durable household goods.

Edge-of-Centre: For retail purposes, a location that is well connected to, and up to 300 metres from, the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge of centre, account should be taken of local circumstances.

Source: NPPF

Experian Goad: Experian Goad is a retail property intelligence system that helps retail developers, property investors, planning professionals, and commercial agents to identify profitable locations for retail property development and investment projects. It offers comprehensive retail location plans and easy to use reports covering over 3,000 shopping areas in the UK and Ireland.

Financial & Business Services: An Experian Goad category comprising the likes of banks, building societies, employment agencies, legal services, estate agents and business services.

Source: Experian Goad

Floorplate: Defined as the physical rentable area on one whole floor; sometimes called the footprint.

Goad Plans: A plan showing a bird's eye view of a retail centre including the exact location of all retail outlets and vacant premises, fascia name, retail category, and floor space. Key location factors such as pedestrian zones, road crossings, bus stops and car parks are also featured, allowing you to instantly assess the site quality of existing or prospective store locations.

Source: Experian

Independent Retailers: Retailers with less than 10 outlets/ stores.

Source: Experian

Leisure Services: An Experian Goad category for town centre leisure units which includes bars, cafes, cinemas, nightclubs, take-aways, hotels, public houses and restaurants. For clarity, it does not include facilities for leisure pursuits e.g. sports centres, swimming pools or health & fitness clubs.

Source: Experian Goad

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

Source: NPPF

National Multiple: Defined as retailers with ten or more stores/ outlets.

Source: Experian

Primary shopping area: Defined area where retail development is concentrated.

Source: NPPF

Retail Floorspace: Total floor area of the property that is associated with all retail uses in square metres. May be expressed as a net figure (the sales area) or in gross (including storage, preparation and staff areas).

Source: Planning Portal

Retail Impact: The potential effects of proposed retail development upon existing shops.

Source: Planning Portal

Retail Services: An Experian Goad category comprising the likes of dry cleaners, health & beauty, opticians, photo processing, post offices and travel agents.

Source: Experian Goad

Sequential Approach: A planning principle that seeks to identify, allocate or develop certain types or locations of land before others. For example, town centre retail sites before out-of-centre sites.

Source: Planning Portal

Special Forms of Trading: Special forms of trading (SFT) are defined as sales via the internet, mail order, stalls and markets, vending machines, door-to-door and telephone sales, including online sales by supermarkets, department stores and catalogue companies.

Source: Experian

Trade draw: The proportion of trade that a development is likely to receive from customers within and outside its catchment area. It is likely that trade draw will relate to a certain geographic area (i.e. the distance people are likely to travel) and for a particular market segment (e.g. convenience retail). The best way of assessing trade draw where new development is proposed is to look at existing proxies of that type of development in other areas.

Source: PPG Paragraph: 017 Reference ID: 2b-017-20140306

Town Centre: Area defined on the local authority's policies map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in the development plan, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.

Source: NPPF

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