APPENDIX 5:
HEALTH CHECK ASSESSMENTS

HEALTH CHECK ASSESSMENTS

Introduction

Set out below is WYG's assessment of the vitality and viability of the eight main centres within Oldham: Chadderton, Failsworth, Huddersfield Road 'Hill Stores', Lees, Oldham, Royton, Shaw and Uppermill.

The Importance of Town Centres

The eight main centres have an important role to play in Oldham serving the needs of the local community. They form a focal point for the community and provide a wide range of services that are accessible to the local population, including retail, employment, leisure, education and transport.

Planning Policy Statement 6 (PPS6) 'Planning for Town Centres', emphasises the need for local authorities to monitor the 'health' of their town centres and how they are changing over time. Indeed, vital and viable town centres help to foster civic pride and local identity and can contribute towards the aims of sustainable development.

Since the turn of the century, town centres nationally have witnessed high levels of vitality and viability with strong retail sales growth and the implementation of major town centre redevelopment schemes. Therefore, despite the ongoing growth of out-of-centre retail development there has been resurgence in development activity with established centres primarily linked to the ambitious expansion plans of national department stores and key retailers such as Debenhams, Next, Primark, etc. However, recent indications appears to suggest that the onset of the "credit crunch" could impact on consumer spending which may in turn impact on the vitality of the high street nationally.

Purpose

It is important that the main established centres in Oldham remain competitive in light of increased competition and continue to attract shoppers, visitors and businesses. To achieve this, town centres must continually strive to build on their strengths, alleviate their weaknesses and continually improve the facilities they provide to the community. Successful town centres must respond effectively to the changing needs and demand of their users.

The Town Centre Health Checks in Oldham serve a number of important functions:

1. help assess the success of retail policies in the existing Oldham UDP and will assist in the formulation of new policies where necessary;
2. provide a starting point for any retail strategy that may be produced in the future;
3. provide useful baseline data that will facilitate a process of monitoring that can be undertaken each year to assess how the town centre is performing over time;
4. allow positive and negative aspects of the town centre to be identified and appropriate action taken;
5. provide data that can be used to compare the performance of town centres in the Borough to other neighbouring centres in the region and to ensure that Oldham's centres remain competitive.

Regional Hierarchy

Table 1 illustrates the position of Oldham Borough's eight main centres within the hierarchy of centres based on the Management Horizons Europe's (MHE) UK Shopping Index (2008). The index ranks the top 7,000 retail venues within the UK (including town centres, stand-alone malls, retail warehouse parks and factory outlets) based on current retail provision. This data has only recently been released and represents the most up to date national ranking. Towns and major shopping centres are rated using a straightforward weighted scoring system which takes account of each location's provision of multiple retailers and anchor store strength. However, it should be noted that the 2004 data includes only 1,672 centres. A breakdown of the scoring system applied by MHE is contained at Appendix 10.

Table 1: The Sub-Regional Shopping Hierarchy

Centre	MHE Score	Location Grade	Rank 2008	Rank 2004	Change in Rank 2004 - 2008
Manchester	655	Major City	4	2	-2
The Trafford Centre, Manchester	286	Major Regional	38	32	-6
Bolton	198	Regional	110	64	-46
Ashton-under-Lyne	172	Sub-Regional	153	171	18
Oldham	155	Sub-Regional	173	156	-17
Bury	151	Sub-Regional	183	143	-40
Rochdale	127	Major District	221	171	-50
Chadderton	86	District	381	524	143
Hyde	80	District	424	374	-50
Royton	58	Minor District	590	685	95
Shaw	28	Local	1,290	1,545	255
Stalybridge	24	Local	1,481	863	-618
Failsworth	17	Local	1,950	-	-
Lees	5	Minor Local	3,870	-	-
Uppermill	3	Minor Local	4,666	-	-

Source: Management Horizons Europe: UK Shopping Index (2008)

Of approximately 7,000 shopping venues surveyed, Oldham is ranked 173rd, which places it within the top 3% of all UK shopping venues and is identified as a 'sub regional centre' by Management Horizons Europe, as is nearby Bury and Ashton-under-Lyne. However, it is evident that Oldham's position has fallen since 2004 (by 17 places) when it was previously ranked 156th. However, in the same period other centres within the sub-region have witnessed a decline including Bolton, Bury and Rochdale.

Chadderton, in comparison is ranked 381st of retail venues surveyed, placing it within the top 6% of UK shopping venues. This suggests that Chadderton is a relatively strong centre. However, its position within the top 6% of all centres is also partly due to there now being a greater number of centres recorded by Management Horizons Europe. In contrast to Oldham, Chadderton is identified as a 'district centre' by Management Horizons Europe. Chadderton's ranking has increased by 143 places since 2004, when it was ranked 524th. This is a particularly large increase, and of the nearby centres of a similar size to Chadderton, only Royton has increased in ranking by a large amount. It appears that Management Horizons Europe have included Elk Mill Retail Park in the Chadderton figures, which may explain Chadderton's high ranking. If Elk Mill Retail Park was not included, Chadderton would have a much lower ranking.

Royton is ranked 590th of retail venues surveyed, placing it within the top 8% of UK shopping venues. Royton is identified as a 'minor district centre' by Management Horizons Europe. Royton's ranking has increased by 95 places since 2004, when it was ranked 685th. Shaw and Failsworth are both identified as a 'local centre' by Management Horizons Europe and are ranked 1,290th and 1,950th respectively. Lees and Uppermill are both identified as a 'minor local centre' by Management Horizon's Europe and are ranked 3,870th and 4,666th respectively. Failsworth, Lees and Uppermill were not surveyed in 2004.

OLDHAM HEALTH CHECK ASSESSMENT

Date of Site Visit: 21 October 2008

Status: Town Centre (Oldham UDP 2006)

Photographs of Oldham Town Centre (1)

Figure 1 (top left): Signage, Manchester Street
Figure 2 (top centre): The Spindles Shopping Centre, Market Place
Figure 3 (top right): Sainsbury's store, Clegg Street
Figure 4 (bottom left): Bus station, West Street
Figure 5 (bottom right): Retail frontages, High Street

Photographs of Oldham Town Centre (2)

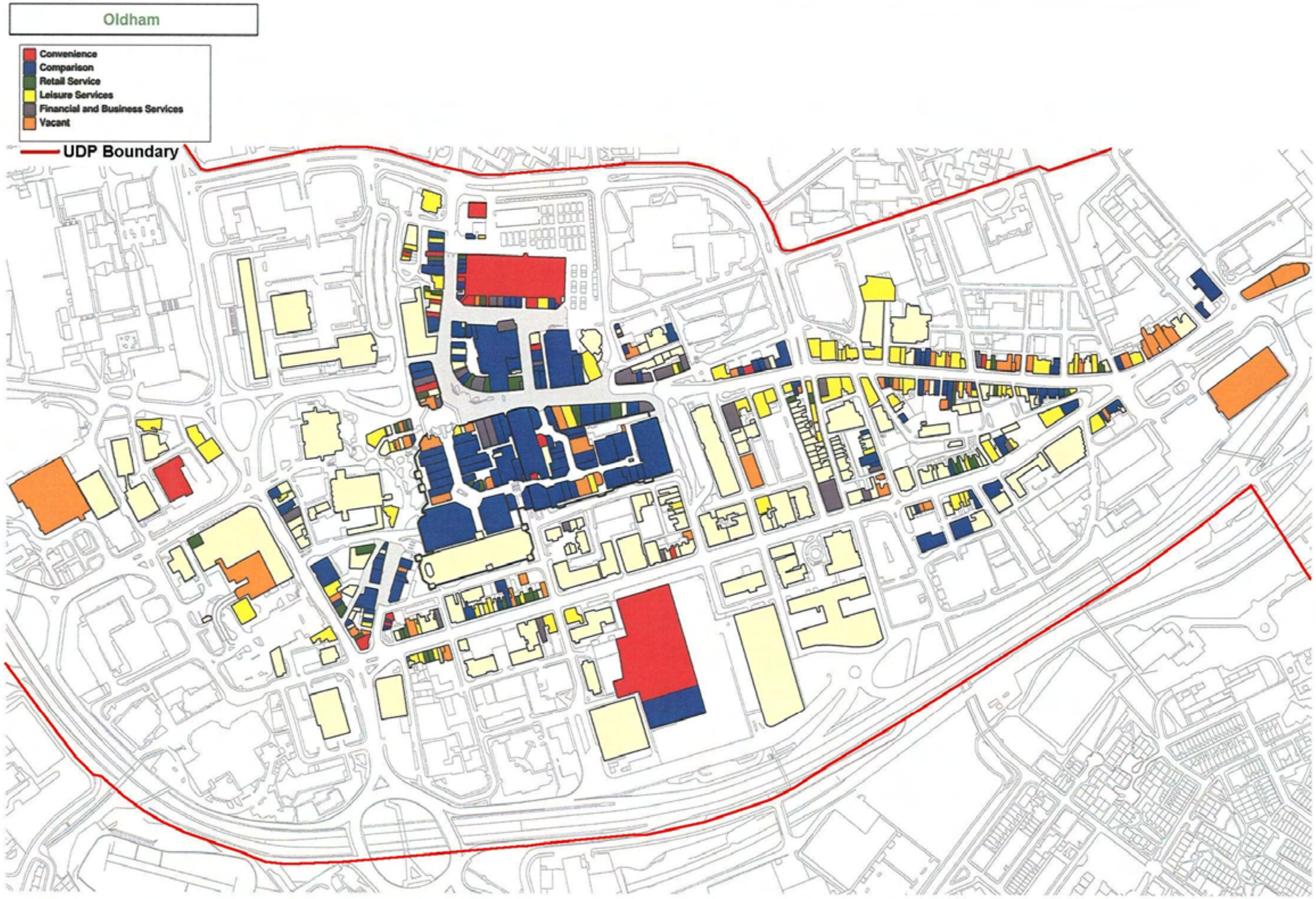
Figure 6 (top left): Vacant unit, King Street
Figure 7 (top centre): Vacant unit, King Square
Figure 8 (top right): Vacant unit, Bloom Street
Figure 9 (bottom left): Vacant unit, Yorkshire Street
Figure 10 (bottom right): Vacant unit, Roscoe Street

Centre Overview

Oldham is defined as a town centre by the Oldham Unitary Development Plan (July 2006). The town benefits from excellent road communications with the A627 situated immediately to the south, linking with the M62 (junction 20) and the nearby A62 linking with the M60 (junction 22). Oldham lies seven miles north east of Manchester and 22 miles south west of Huddersfield. At the time of the 2001 census, the Oldham urban area had a population of 103,544 (Focus).

The main focus for retailing in Oldham comprises Albion Street, Henshaw Street, High Street and Market Place. There are also secondary retail frontages along George Street, Union Street and Yorkshire Street. A land use plan of Oldham Town Centre as defined by GOAD is provided overleaf.

Figure 11: Land Use map for Oldham Town Centre (2008)



Source: GOAD base validated by WYG site visit (October 2008)
(It should be noted that units in light yellow are classed as non-retail. Each plan shows the ground floor only, however floorspace figures in the text relate to all floors. The UDP boundary extends from Mumps to the east and Middleton Road to the West. Each UDP boundary is sourced from the published hard copy of the proposals map)

Table 2: Diversity of Uses in Oldham Town Centre (2008)

	Number of Outlets		
	Number	Oldham (%)	UK (%)
Convenience	25	5.2	8.4
Comparison	152	31.6	35.4
Retail Service	44	9.1	12.6
Leisure Services	109	22.7	21.2
Financial and Business Services	89	18.5	11.6
Vacant	62	12.9	10.4
Total	481	100	100

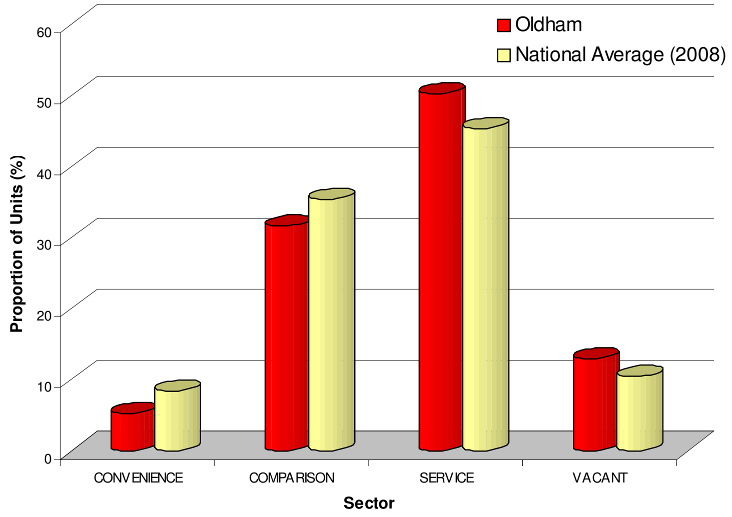
Source: GOAD Report (October 2008)

Table 3: Existing Floorspace in Oldham Town Centre (2008)

	Existing Floorspace		
	Sq m	Oldham (%)	UK (%)
Convenience	12,090	11.2	13.7
Comparison	41,640	38.7	38.8
Retail Service	4,650	4.3	6.8
Leisure Services	23,160	21.5	22.5
Financial and Business Services	10,530	9.8	9.1
Vacant	15,510	14.4	8.4
Total	107,580	100	100

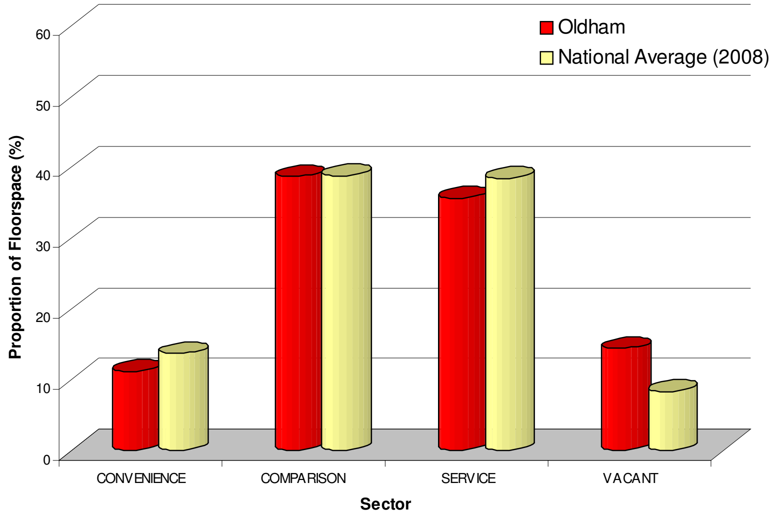
Source: GOAD Report (October 2008)

Figure 12: Proportion of Units in Oldham Town Centre (2008)



Source: Experian GOAD (October 2008)

Figure 13: Proportion of Floorspace in Oldham Town Centre (2008)



Source: Experian GOAD (October 2008)

Convenience

5.2% of all units in Oldham are in use for the sale of convenience goods. This compares to a national average of 8.4%. Oldham town centre is not traditionally a convenience destination, so it is not surprising to discover that the proportion of units used for the sale of convenience goods is below the national average. Likewise, as expected the proportion of convenience floorspace is below the national average (11.2% compared to 13.7% nationally). Therefore, there are a below average number of convenience outlets which are small in size and sell a limited range of goods. At present, this sector is dominated by the Sainsbury's store on Union Street. Other convenience traders in the centre include an Aldi store on Manchester Street and a number of independents including: seven 'bakers and confectioners'; seven 'confectionary, tobacco and news' stores and two 'health food' stores. There is an outdoor market on Whalley Street (although not identified on Figure 11) which is open Monday, Friday and Saturday. Also, there is an indoor market (Tommyfield market) also on Whalley Street, which is open Monday to Saturday. It should be noted that GOAD classifies markets as convenience goods. However, the market comprises a mix of convenience and comparison retail stalls.

Comparison

Comparison traders in Oldham occupy 31.6% of outlets against a national average of 35.4%. However, when it comes to comparison goods floorspace, Oldham is slightly below the national average with a figure of 38.7% compared to a national average of 38.8%. The comparison goods retail offer in Oldham includes a number of national multiples.

Overall Service

The service sector comprises 242 units and occupies 38,340 sq m of floorspace. The proportion of service outlets (50.3%) is above the national average (45.4%). However the proportion of service floorspace (35.6%) is below the national average (38.4%).

Retail Service

Retail services, which comprise such uses as hairdressers, dry cleaners and petrol filling stations, account for 9.1% of outlets and 4.3% of floorspace in Oldham, which compares to national averages of 12.6% and 6.8% respectively. 'Health and beauty' traders are particularly dominant in this sector, accounting for 23 (or 52%) of all retail service outlets. Oldham contains a Post Office on Lord Street.

Leisure Services

Leisure services, as defined by GOAD, include uses such as restaurants, cafes, bookmakers and public houses. Oldham is well provided for in terms of the proportion of outlets against the national average (22.7% compared to 21.2%). However, the proportion of floorspace occupied (21.5%) is below the national average (22.5%). Fast-food and take away units are the most prolific in this sector, occupying 33 units. Other well represented traders include: public houses (24 units); restaurants (13 units); and cafes (12 units). In addition, although not classified by GOAD, there is a sports centre on Lord Street, which falls within the town centre boundary.

Financial Services

In terms of the proportion of units occupied by financial and business services the figures for the proportion of outlets are significantly above the national average (18.5% compared to 11.6%). A number of 'high street' banks are present in the town centre, including: Abbey; Barclays Bank; Bradford and Bingley; Britannia Building Society; Co-operative Bank; Halifax; HSBC; Lloyds TSB; Nat West; Nationwide Building Society; Northern Rock; Skipton Building Society; Royal Bank of Scotland; and Yorkshire Bank.

Non Retail

In addition to the retail service on offer, there are numerous offices, four educational institutions and three religious institutions.

Unit Sizes

Table 4 below highlights the composition of Oldham Town Centre at October 2008 in terms of the size of units. This is taken from an assessment of retailing facilities provided by Experian GOAD.

Table 4: Size of Units

Size of Unit (ground floor area)	Number of units	Proportion of Total (%)	
		Oldham	**GB**
Under 93 sq m (1,000 sq ft)	234	48.6	39.1
93-232 sq m (1,000-2,499 sq ft)	158	32.8	39.6
232-464 sq m (2,500-4,999 sq ft)	56	11.6	12.6
465-929 sq m (5,000-9,999 sq ft)	13	2.7	5.1
929-1,393 sq m (10,000-14,999 sq ft)	6	1.2	1.5
1,393-1,858 sq m (15,000-19,999 sq ft)	6	1.2	0.7
1,858-2,787 sq m (20,000-29,999 sq ft)	3	0.6	0.7
Above 2,787 sq m (30,000 sq ft)	5	1.0	0.8
Total	**481**	**100**	

Source: Experian GOAD (2008)

Oldham has a large proportion of small units of less than 93 sq m (48.6%), compared to the national average (39.1%). For the other categories, Oldham appears to reflect national averages although there is a slight over-representation of units above 2,787 sq m which is often sought after.

Top 20 Retailers

Oldham Town Centre accommodates twelve of the 'Top Twenty Retailers' identified by Focus, including: Boots; Argos; Debenhams; WH Smith; Next; Superdrug; Lloyds Pharmacy; Primark; New Look; HMV; Dorothy Perkins; and Waterstones. Focus defines the 'Top Twenty Retailers' as the top 20 comparison goods multiples ranked by ORC Data Service's forecast of average town centre sales for individual retailers within Great Britain.

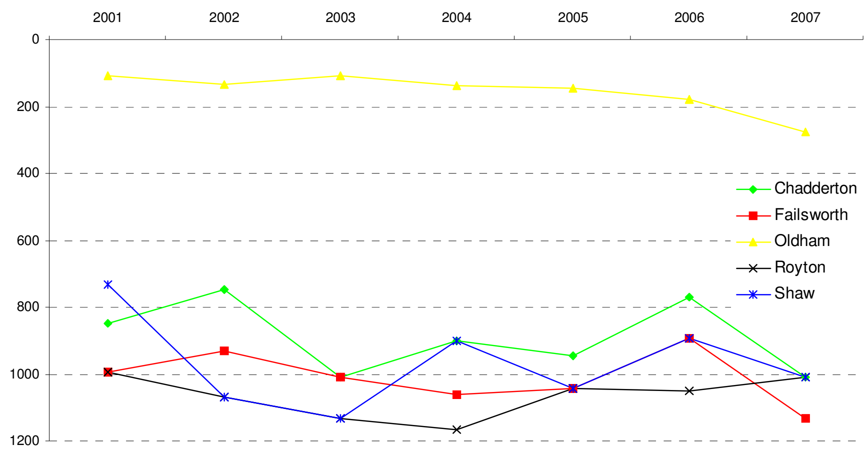
Table 5: Top 20 Retailers

Rank	Retailer
1	Boots
2	Marks & Spencer
3	Argos
4	Woolworths
5	Debenhams
6	John Lewis
7	W.H. Smith
8	BHS
9	Next
10	Dixons
11	Superdrug
12	Lloyds Pharmacy
13	Wilkinson
14	CO-OP Department Stores
15	Primark
16	New Look
17	HMV
18	Dorothy Perkins
19	Rosebys
20	Waterstones

Source: Focus Report (October 2008)

Retail Demand

Figure 14: Retail Ranking in Oldham Catchment



Source: Focus Report (October 2008)

Oldham's retail ranking based on retailer demand has varied since 2001. However, in general terms, its ranking has gradually fallen in recent years reflecting trends in Chadderton, Failsworth and Shaw. Only Royton has witnessed an increase in ranking recently.

Retailer Requirements

Table 6: Retailer Requirements

	Number of Requirements	Minimum Floorspace (sq m)	Maximum Floorspace (sq m)
Convenience	2	93	232
Comparison	12	4,311	7,581
Service	5	2,488	4,041
TOTAL	**19**	**6,892**	**11,854**

Source: Focus Report (October 2008)

At October 2008 there were 19 retailers seeking representation within Oldham, collectively requiring up to 11,854 sq m (gross) retail floorspace. Comparison traders account for the highest number of requirements in outlet terms (12) and are seeking the highest amount of floorspace (7,581 sq m gross).

Vacancies

The number of vacant units within a centre can provide a good indication of how a shopping centre is performing. However, care should be taken when interpreting figures. Vacancies can occur for positive as well as negative reasons; for example, the opening of a new retail centre elsewhere in a town may draw retailers from older properties or more peripheral areas of the city. Vacant units will be found in even the strongest of town centres. However, they can be a useful indicator of the level of demand. For example, some properties may lay vacant because they are poorly maintained, unsuited to modern retailing requirements or simply not being actively marketed. Conversely a low vacancy rate does not necessarily mean that a centre is performing well. For example, if there is a proliferation of charity shops and other uses not usually associated with a town centre it may be a sign of decline, particularly where these uses are located in prime locations. Despite these issues, it is still a useful indicator of town centre performance.

Table 7: Vacancies in Oldham (2008)

	Vacancy		
	Total	**Oldham (%)**	**UK (%)**
No. of Outlets	62	12.9	10.4
Floorspace	15,510	14.4	8.4

Source: GOAD Report (October 2008)

Table 7 illustrates that at October 2008 there were 62 vacant retail units in the town centre, which occupied a floorspace of 15,510 sq m. This represents 12.9% of all outlets and 14.4% of floorspace, compared to respective national averages of 10.4% and 8.4%. From examining the GOAD plan of Oldham, it can be seen that Yorkshire Street (fifteen units), Union Street (ten units) and Mumps (nine units) have the highest number of vacant units within the town centre. Aside from this, the remaining vacant units are spread throughout the town centre. It should be noted that at the time of the survey, the Northern Carpet Warehouse at Mumps was vacant. However, it is now in the process of being redeveloped primarily for residential use. This would reduce the vacant floorspace by 580 sq m or 3.7%.

Figure 15: Vacancies in Oldham Town Centre (2008)

Source: GOAD base validated by WYG site visit (October 2008)
(It should be noted that units in light yellow are classed as non-retail. Each plan shows the ground floor only, however floorspace figures in the text relate to all floors. Each UDP boundary is sourced from the published hard copy of the proposals map)

Rents

Table 8 identifies the changes in Zone A rents in Oldham Town Centre between 2000 and 2008 and compares them to other nearby centres.

Table 8: Prime Pitch Zone A Rents (£/sq m)

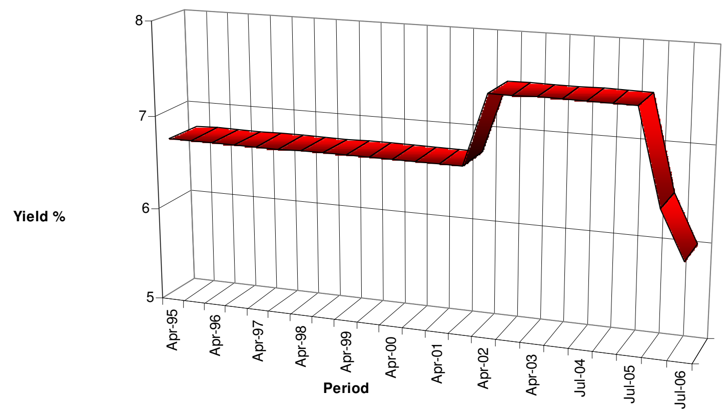
Centre	June '00	June '01	June '02	June '03	June '04	June '05	June '06	June '07	June '08	%
Ashton-under-Lyne	807	807	861	861	861	1,023	1,023	1,076	1,076	33
Bolton	1,507	1,507	1,399	1,399	1,507	1,507	1,507	1,507	1,507	0
Bury	1,023	1,076	1,076	1,076	1,076	1,130	1,345	1,399	1,399	37
Manchester	3,229	3,014	3,014	3,229	3,229	3,229	3,229	3,229	3,229	0
Oldham	**807**	**807**	**861**	**1,184**	**1,184**	**1,184**	**1,184**	**1,184**	**1,184**	**47**
Rochdale	1,023	1,023	1,023	1,023	1,023	1,076	1,076	1,076	1,076	5

Source: Focus Town Centre Reports (2008) based on Colliers CRE's opinion of open market Zone A rents

Zone A rents for Oldham Town Centre have increased by 47% since June 2000, from £807/sq m to £1,184/sq m in June 2008. In comparison to other nearby centres, Ashton-under-Lyne and Bury have both witnessed similar high increased between 2000 and 2008.

Yields

Figure 16: Retail Yields in Oldham



Apr-95	Oct-95	Apr-96	Oct-96	Apr-97	Oct-97	Apr-98	Oct-98	Apr-99	Oct-99	Apr-00	Oct-00	Apr-01	Oct-01	Apr-02	Oct-02	Apr-03	Jan-04	Jul-04	Jan-05	Jul-05	Jan-06	Jul-06
6.75	6.75	6.75	6.75	6.75	6.75	6.75	6.75	6.75	6.75	6.75	6.75	6.75	6.75	7.5	7.5	7.5	7.5	7.5	7.5	7.5	6.5	6

Source: Valuation Office Agency (VOA): Property Market Report (PMR), October 2008.

The commercial yield of Oldham has been identified to fluctuate between 6% and 7.5%. Although commercial yields increased between October 2001 and April 2002, where it remained stable at 7.5% until July 2005, in recent years the commercial yields has reduced to 6% reflecting a perceived increase in investor confidence in Oldham Town Centre.

In Street Survey Results

Accessibility

In respect of accessibility, the on-street visitors survey undertaken by NEMS over three separate days, identified the following:

- Half (50%) of visitors to Oldham had no access to a car for personal use during the day-time. During the evening/ night-time, the proportion of visitors who did not have access to a car for personal use was 48%;
- 44% of visitors arrived in the centre by car or van (either as driver or passenger) with a further 39% arriving by bus, minibus or coach. 14% of visitors walked to the centre;
- Of those visitors who drove, the most popular place to leave their vehicle was at Spindles car park with 51% of drivers parking here. 12% of visitors parked at the Sainsbury's store;
- 94% of drivers did not encounter any difficulty when obtaining a car parking space on the day of the survey;
- 41% if visitors travelled for 10 minutes or less to reach the centre. An additional 31% travelled for between 11 and 15 minutes, with 11% travelling for between 16 and 20 minutes and 10% for between 21 and 30 minutes. Only 2% of visitors travelled for over an hour to reach the centre;
- Visitors were asked to consider car parking provision in Oldham. Of those that answered this question, 32% deemed this to be 'about the same' as that in other centres;
- In terms of car parking prices, 29% considered prices to be 'about the same' as in other centres; and
- Accessibility by public transport was described by 53% of visitors as being 'about the same' as in other centres, although 18% felt that this was 'better' or 'much better' in Oldham than in other shopping centres.

Perception of Safety and Occurrence of Crime

The on-street visitors survey asked specific questions to visitors about their perceptions of crime in Oldham. During the day-time, some 80% of visitors indicated that safety in Oldham was 'about the same' as that in other centres, with 8% considering it to be 'better' or 'much better'. However, with respect to safety during the evening/ night-time, the proportion of visitors who deemed safety to be 'about the same' as in other centres fell to 30%, with some 29% considering safety to be either 'worse' or 'much worse' than that in other centres. 4% of visitors felt that evening/ night-time safety in the centre was 'better' or 'much better' than other centres, with 38% indicating that they did not know either way.

Customer Views and Behaviour

The mains finding of the on-street survey undertaken by NEMS Market Research were:

- 86% of visitors to the town had travelled directly from home;
- 55% of those shoppers interviewed lived in the Oldham urban area, with 38% just visiting the centre and 8% working in the centre;
- The main reasons for visiting the centre were: clothes/ shoes shopping (34%), food and grocery shopping (11%), due to work/ school/ college (11%) and to visit the bank/ building society/ Post Office (10%);
- 15% of visitors planned to stay in the centre for up to half an hour, with 61% planning to stay in the centre for up to two hours and 9% planning to stay in the centre all day;
- The majority of visitors (85%) did not plan to undertake their main food shop on the day of the survey;

- When asked whether they were planning to buy anything other than food goods on the day of the survey, 47% of respondents stated that they planned to purchase clothing, footwear or household goods;
- 46% of visitors stated that they visited Oldham 'about as frequently' today as compared to five years ago. 24% stated that they visited the centre 'more' or 'much more frequently' than five years ago; and
- 69% of visitors indicated that they did not visit the centre during the evening.

Areas of weakness were seen to be cinemas, which 68% of visitors rated as being either 'worse' or 'much worse' than other centres (due to there being no cinema facilities in the centre), the choice of independent/ specialist shops (45% stating that this was worse than elsewhere), entertainment/ events/ performances (40%) and leisure facilities (38%).

Visitors were asked about the types of shops and services they would like to see more of in the centre. Popular responses were clothing stores (33%) and department stores (23%). Visitors were asked about the types of leisure facilities they would like to see more of in the centre. Popular responses were a cinema (40%), a bowling alley (21%) and a swimming pool (10%). This is in addition to any leisure facilities already in the centre.

Business Survey Results

A questionnaire was distributed to all local businesses within Oldham by in order to gain an understanding of the opinions and views of retailers. A total of 490 questionnaires were distributed with 88 being returned: a response rate of 18%. The main findings of the business survey results were as follows:

- 37% of respondents had been trading in the town centre in excess of twenty years, with some 22% having been in operation for over ten years and 13% for over five years;
- 70% of respondents were independent traders, with 30% being part of a national group or chain;
- 33% of respondents indicated that they were professional services, 22% being retail services, 19% being leisure services, 18% being non-food retailers, 6% being food retailers and 2% being charity shops;
- 60% of traders stated that since they began trading business had either 'grown significantly' or 'grown moderately', with 18% indicating that business had 'remained largely static'. 22% indicated that their business had declined to some degree since they began trading;
- 33% of respondents indicated that their business was currently trading 'moderately' with 40% stating that their business was currently performing either 'very well' or 'well' illustrating strong performance;

▪ The majority of respondents (65%) leased their premises; ▪ The survey indicated that 12% of traders relied upon local residents primarily for the majority of their business, although a further 51% relied primarily on residents in the wider Oldham area and 10% on office employees. 9% relied mainly on passers-by; ▪ When asked about measures that would improve the town centre, 7% of respondents stated that lower parking charges would have this effect. Other important measures included an increased choice/ range of shops (5%), creation of a metro link through the town centre (5%) and a cinema (5%); ▪ 56% of respondents felt that there was a good balance between shops and other non-retail uses, with 35% stating that there were too many non-retail uses in the town centre and 10% that there were not enough non-retail uses; ▪ Respondents identified the main barriers to trading performance as being inadequate customer car parking (16%), high rents/ overheads (12%) and a lack of passing trade outside premises (11%); ▪ Over half of respondents (62%) indicated that they had no plans to alter their business in any way over the next five years, with a further 13% planning to refurbish their existing floorspace; ▪ The largest proportion of respondents (19%) considered Ashton-under-Lyne to be their biggest competitor.	The business survey asked respondents to rate a number of different aspects of Oldham in terms of whether they were 'good', 'average' or 'poor'. The majority of aspects were rated as being 'average' by the largest proportion of respondents. However, a number of aspects were rated as being 'poor' by the greatest proportion of respondents. These aspects were: pricing of car parking (31%), Tommyfield Market (28%), the image of Oldham Town Centre (24%) and the number of restaurants (21%). Respondents were also able to add any additional comments they would like to make at the end of the survey. Through this process a number of retailers highlighted that the indoor and outdoor markets need improving. Aside from this, certain retailers felt that parking is particularly poor, and the pricing of car parking should be reduced.

Accessibility	Environmental Quality
Car: Oldham is situated near the A67 and A627, which connects to Manchester to the south east and Huddersfield to the north west. The M60 (junction 22) and the M62 (junction 20) are nearby. There are many busy roads surrounding the centre, such as Oldham Way and Rochdale Road, however pedestrian crossings are provided to aid pedestrians. **Car parks:** Parking is plentiful in Oldham, with their being ten main car parks which are a mixture of short and long stay. These car parks include: Bow Street; Bradshaw Street; Clegg Street; Civic Centre; Hobson Street; New Radcliffe Street; Southgate Street; Sports Centre; Tommyfield Market; and Waterloo Street. There is also on-street parking available. **Public transport:** The town also benefits from good accessibility by public transport. There is a bus station on Cheapside. Buses provide services to Ashton-under-Lyne, Chadderton, Manchester, Rochdale, Royton and Shaw amongst others. There is also a railway station on Victoria Street, which provides services to Manchester, Rochdale and Shaw.	Oldham is a busy large town which dominates the borough. The town is focused on Albion Street, Henshaw Street, High Street and Market Place and the Spindles Shopping Centre. These streets in particular are pedestrianised, which provides a safe environment for shoppers. At the time of the survey, there was a high level of footfall in Oldham, particularly in the more central areas. Pavement widths vary, and where the centre meets busy roads, pedestrian crossings aid movement by foot. The streets are generally clean with little evidence of litter, whilst shop units themselves are maintained to fairly high standards, creating an attractive shopping environment in parts. Units are a mixture of old and new build. Street furniture is plentiful and includes: lighting; benches; bins; bike racks; and flowers. Furthermore, Oldham has a good level of signage. It should be noted that there are adequately maintained public toilets in the centre.

CHADDERTON HEALTH CHECK ASSESSMENT

Date of Site Visit: 7 November 2008

Status: District Centre (Oldham UDP 2006)

Photographs of Chadderton District Centre

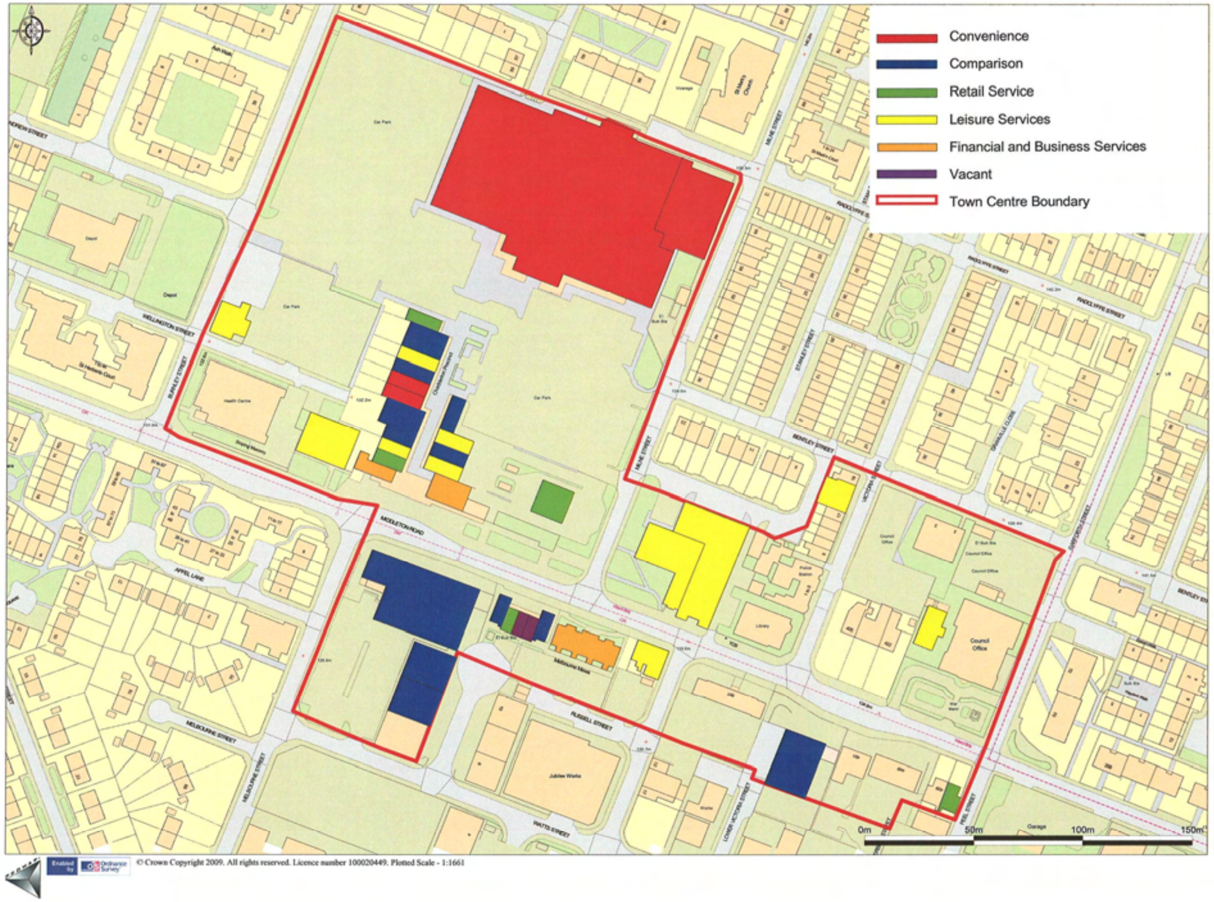
Figure 17 (top left): Asda store, Milne Street
Figure 18 (top centre): Retail frontages, Chadderton Precinct
Figure 19 (top right): Home Bargains store, Melbourne Street
Figure 20 (bottom left): Retail frontages, Middleton Road
Figure 21 (bottom right): Swimming baths, Middleton Road

Centre Overview

Chadderton is defined as a district centre by the Oldham Unitary Development Plan (July 2006). It is located one mile west of Oldham and six miles north east of Manchester. Road communications are good with the A576 and A56 providing access to the M60, M62 and M66. At the time of the 2001 census, the Chadderton urban area had a population of 33,001 (Focus).

The main focus for retail in Chadderton comprises Chadderton Precinct, Melbourne Street and Middleton Road. There are also secondary retail frontages along Burnley Street and Victoria Street. A land use plan of Chadderton District Centre is provided overleaf.

Figure 22: Land Use map for Chadderton District Centre (2008)



Source: Promap base validated by WYG site visit (November 2008)
(It should be noted that units in light yellow are classed as non-retail. Each plan shows the ground floor only, however floorspace figures in the text relate to all floors. Each UDP boundary is sourced from the published hard copy of the proposals map)

Table 9: Diversity of Uses in Chadderton District Centre (2008)

	Number of Outlets		
	Number	Chadderton (%)	UK (%)
Convenience	5	12.8	8.4
Comparison	11	28.2	35.4
Retail Service	6	15.4	12.6
Leisure Services	11	28.2	21.2
Financial and Business Services	4	10.3	11.6
Vacant	2	5.1	10.4
Total	39	100	100

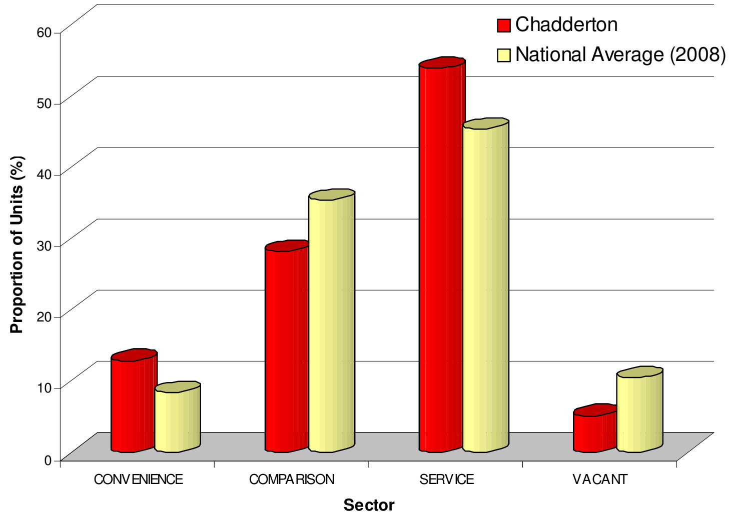
Source: GOAD Report (November 2008)

Table 10: Existing Floorspace in Chadderton District Centre (2008)

	Existing Floorspace		
	Sq m	Chadderton (%)	UK (%)
Convenience	9,016	54.9	13.7
Comparison	2,616	15.9	38.8
Retail Service	677	4.1	6.8
Leisure Services	3,295	20.1	22.5
Financial and Business Services	562	3.4	9.1
Vacant	243	1.5	8.4
Total	16,409	100	100

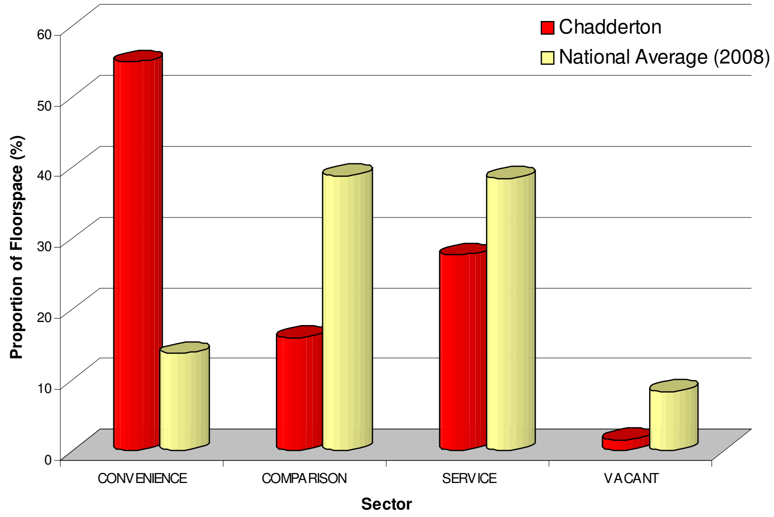
Source: GOAD Report (November 2008)

Figure 23: Proportion of Units in Chadderton District Centre (2008)



Source: Experian GOAD (November 2008)

Figure 24: Proportion of Floorspace in Chadderton District Centre (2008)



Source: Experian GOAD (November 2008)

Convenience

12.8% of all units in Chadderton are in use for the sale of convenience goods. This compares to a national average of 8.4%. Given the role performed by Chadderton, it is not surprising to discover that the proportion of units used for the sale of convenience goods is above the national average. Likewise, as expected the proportion of convenience floorspace is well above the national average (54.9% compared to 13.7% nationally). Therefore, there are an above average number of convenience outlets which are large in size and sell a range of goods. At present, this sector is dominated by the Asda store on Milne Street. Other convenience traders in the centre include a Farmfoods store on Melbourne Street and a number of independents. There is an outdoor market at Chadderton Precinct which operates every Wednesday, however this is not shown on Figure 22. It should be noted that GOAD classifies markets as convenience goods. However, the market comprises a mix of convenience and comparison retail stalls.

Comparison

Comparison traders in Chadderton occupy 28.2% of outlets against a national average of 35.4%. Similarly, when it comes to comparison goods floorspace, Chadderton is below the national average with a figure of 15.9% compared to a national average of 38.8%. The comparison goods retail offer in Chadderton is predominantly comprised of independent traders.

Overall Service

The service sector comprises 21 units and occupied 4,534 sq m of floorspace. The proportion of service outlets (53.9%) is above the national average (45.4%). However, the proportion of service floorspace (27.6%) is below the national average (38.4%).

Retail Service

Retail services, which comprise such uses as hairdressers, dry cleaners and petrol filling stations, account for 15.4% of outlets and 4.1% of floorspace in Chadderton, which compares to national averages of 12.6% and 6.8% respectively. Chadderton contains a Post Office at Chadderton Precinct.

Leisure Services

Leisure services, as defined by GOAD, include uses such as restaurants, cafes, bookmakers and public houses. Chadderton is well provided for in terms of the proportion of outlets (28.2%) compared to the national average (21.2%). However, in the terms of the proportion of floorspace, Chadderton has an under-provision (20.1% compared to a national average of 22.5%).

Financial Services

There are a smaller proportion of units occupied by financial and business services in Chadderton compared to the national average (10.3% compared to a national average of 11.6%). Chadderton also has a relative under-provision in terms of the proportion of floorspace (3.2% compared to 9.1%).

Non Retail

In addition to the retail service on offer, there is a police station and a public library within the centre. Chadderton District Centre is surrounded by residential areas. Furthermore, there is a Primary Employment Zone (PEZ) to the south of the centre.

Unit Sizes

Table 11 below highlights the composition of Chadderton District Centre at November 2008 in terms of the size of retail units. This is taken from an assessment of retailing facilities provided by Experian GOAD.

Table 11: Size of Units within Chadderton District Centre

Size of Unit (ground floor area)	Number of units	Proportion of Total (%)	
		Chadderton	GB
Under 93 sq m (1,000 sq ft)	8	20.5	39.1
93-232 sq m (1,000-2,499 sq ft)	21	53.8	39.6
232-464 sq m (2,500-4,999 sq ft)	3	7.7	12.6
465-929 sq m (5,000-9,999 sq ft)	4	10.3	5.1
929-1,393 sq m (10,000-14,999 sq ft)	2	5.1	1.5
1,393-1,858 sq m (15,000-19,999 sq ft)	0	0.0	0.7
1,858-2,787 sq m (20,000-29,999 sq ft)	0	0.0	0.7
Above 2,787 sq m (30,000 sq ft)	1	2.6	0.8
Total	**39**	**100**	

Source: Experian Goad (2008)

Chadderton has a lower proportion of small units of less than 93 sq m (20.5%), compared to the national average (39.1%). However, when it comes to small vacant units of the size 93-232 sq m, Chadderton has a higher proportion than the national average (53.8% compared to 39.6%). There is just one unit in the centre with a floorspace above 2,787 sq m. Retailers are increasingly looking for bigger units of which Chadderton is lacking.

Top 20 Retailers

Chadderton District Centre accommodates one of the 'Top Twenty Retailers' identified by Focus, this being a Boots store.

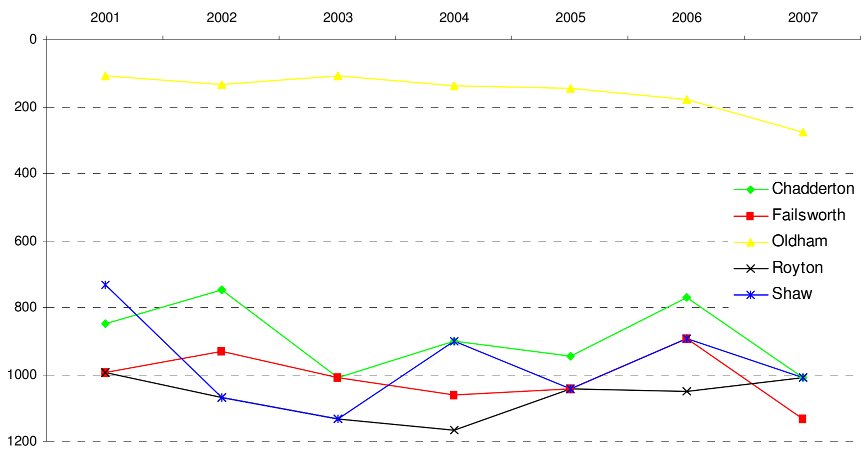
Table 12: Top 20 Retailers

Rank	Retailer
1	Boots
2	Marks & Spencer
3	Argos
4	Woolworths
5	Debenhams
6	John Lewis
7	W.H. Smith
8	BHS
9	Next
10	Dixons
11	Superdrug
12	Lloyds Pharmacy
13	Wilkinson
14	CO-OP Department Stores
15	Primark
16	New Look
17	HMV
18	Dorothy Perkins
19	Rosebys
20	Waterstones

Source: Focus Report (November 2008)

Retail Demand

Figure 25: Retail Ranking in Oldham Catchment



Source: Focus Report (November 2008)

Chadderton's retail ranking based on retailer demand has varied since 2001. However, in recent years its ranking has decreased, which is similar to many other centres in the Borough, with Failsworth, Oldham and Shaw all having witnessed a decrease in ranking recently.

Retailer Requirements

Table 13: Retailer Requirements

	Number of Requirements	Minimum Floorspace (sq m)	Maximum Floorspace (sq m)
Convenience	0	0	0
Comparison	0	0	0
Service	1	46	186
TOTAL	**1**	**46**	**186**

Source: Focus Report (November 2008)

At November 2008 there was one retailer, Subway, seeking representation within Chadderton, requiring up to 186 sq m (gross) retail floorspace.

Vacancies

The number of vacant units within a centre can provide a good indication of how a shopping centre is performing. However, care should be taken when interpreting figures. Vacancies can occur for positive as well as negative reasons; for example, the opening of a new retail centre elsewhere in a town may draw retailers from older properties or more peripheral areas of the city. Vacant units will be found in even the strongest of town centres. However, they can be a useful indicator of the level of demand. For example, some properties may lay vacant because they are poorly maintained, unsuited to modern retailing requirements or simply not being actively marketed. Conversely a low vacancy rate does not necessarily mean that a centre is performing well. For example, if there is a proliferation of charity shops and other uses not usually associated with a town centre it may be a sign of decline, particularly where these uses are located in prime locations. Despite these issues, it is still a useful indicator of town centre performance.

Table 14: Vacancies in Chadderton (2008)

	Vacancy		
	Total	Chadderton (%)	UK (%)
No. of Outlets	2	5.1	10.4
Floorspace	243	1.5	8.4

Source: GOAD Report (November 2008)

Table 14 illustrates that at November 2008 there were two vacant retail units in the district centre, which occupied a floorspace of 243 sq m. This represents 5.1% of all outlets and 1.5% of floorspace, compared to respective national averages of 10.4% and 8.4%. From examining the plan of Chadderton, it can be seen that both vacant units are located on Middleton Road.

In Street Survey Results

Accessibility

In respect of accessibility, the on-street visitors survey undertaken by NEMS over three separate days, identified the following:

- Over half (58%) of visitors to Chadderton had access to a car for personal use during the day-time. During the evening/ night-time, the proportion of visitors who had access to a car for personal use was 64%;
- 40% of visitors arrived in the centre by car or van (either as driver or passenger), with a further 36% walking to the centre. 18% of visitors arrived in the centre by bus, minibus or coach;
- Of those visitors who drove, the most popular place to leave their vehicle was at the Shopping Precinct/ Asda store with 85% of drivers parking here. 10% of visitors parked on-street;
- 100% of drivers did not encounter any difficulty when obtaining a car parking space on the day of the survey;
- 68% of visitors travelled for 10 minutes or less to reach the centre. An additional 12% travelled for between 11 and 15 minutes, with 8% travelling for between 16 and 20 minutes and 6% for between 21 and 30 minutes. Only 4% travelled for over an hour to reach the centre;
- Visitors were asked to consider car parking provision in Chadderton. Of those that answered this question, 42% deemed this to be 'better' or 'much better' than other centres;
- In terms of car parking prices, 44% considered prices to be 'better' or 'much better' than other centres; and
- Accessibility by public transport was described by 64% of visitors as being 'better' or 'much better' than other centres, although 24% felt that this was 'about the same' as in other shopping centres.

Perception of Safety and Occurrence of Crime

The on-street visitors survey asked specific questions to visitors about their perceptions of crime in Chadderton. During the day-time, some 70% of visitors indicated that safety in Chadderton was 'about the same' as that in other centres, with 10% considering it to be 'better' or 'much better'. However, with respect to safety during the evening/ night-time, the proportion of visitors who deemed safety to be 'about the same' as in other centres fell to 24%, with some 64% considering safety to be either 'worse' or 'much worse' than that in other centres. No visitors felt that evening/ night-time safety in the centre was 'better' or 'much better' than other centres, with 12% indicating that they did not know either way.

Customer Views and Behaviour

The main findings of the on-street survey undertaken by NEMS Market Research were:

- 88% of visitors to the centre had travelled directly from home;
- 74% of those shoppers interviewed were just visiting the centre, with 55% living in the Chadderton urban area and 10% working in the centre;
- The main reasons for visiting the centre were: food and grocery shopping (60%), to visit the bank/ building society/ Post Office (12%), to visit the bookmakers (6%) and due to work/ school/ college (4%);
- 52% of visitors planned to stay in the centre for up to half an hour, with 32% planning to stay in the centre for up to two hours and 8% planning to stay in the centre all day;
- Half of visitors (50%) planned to undertake their main food shop on the day of the survey;

- When asked whether they were planning to buy anything other than food goods on the day of the survey, 78% of respondents stated that they would buy no other goods;
- 64% of visitors stated that they visited Chadderton 'about as frequently' today as compared to five years ago. 18% stated that they visited the centre 'less' or 'much less frequently' than five years ago; and
- 84% of visitors indicated that they did not visit the centre during the evening.

Areas of weakness were see to be cinemas, which 90% of visitors rated as being either 'worse' or 'much worse' than other centres (due to there being no cinema facilities in the centre), restaurants (86% stating that this was worse than elsewhere), entertainment/ events/ performances (86%) and choice of High Street names (78%).

Visitors were asked about the types of shops and services they would like to see more of in the centre. Popular responses were clothing stores (14%) and department stores (6%). Visitors were also asked about the types of leisure facilities they would like to see more of in the centre. Popular responses were a swimming pool (18%), a cinema (12%) and a health and fitness centre (10%). This is in addition to any leisure facilities already in the centre.

Business Survey Results

A questionnaire was distributed to all local businesses within Chadderton in order to gain an understanding of the opinions and views of retailers. A total of 34 questionnaires were distributed with 6 being returned: a response rate of 18%. The main findings of the business survey results were as follows:

- Half (50%) of respondents had been trading in the district centre in excess of twenty years, with some 33% having been in operation for over five years and 17% for under six months;
- 80% of respondents were part of a national group or chain, with 20% being independent traders;
- 33% of respondents indicated that they were professional services, 33% being leisure services, 17% being food retailers and 17% being non-food retailers;
- 33% of traders stated that since they began trading business had either 'grown significantly' or 'grown moderately', with 33% indicating that business had 'remained largely static'. 33% indicated that their business had declined to some degree since they began trading;
- 67% of respondents indicated that their business was currently trading 'moderately' with 17% stating that their business was currently performing either 'very well' or 'well' illustrating strong performance;

▪ All of the respondents (100%) leased their premises; ▪ The survey indicated that half (50%) of traders relied upon local residents primarily for the majority of their business, although a further 33% relied primarily on residents in the wider Oldham area and 17% on specialist buyers; ▪ When asked about measure that would improve the district centre, 11% of respondents stated that an increased choice/ range of shops would have this effect. Other important measures included improved security/ CCTV (11%), improved street furniture (9%) and improved street paving (7%); ▪ 83% of respondents felt that there was a good balance between shops and other non-retail uses, with 17% stating that there were too many non-retail uses in the district centre; ▪ Respondents identified the main barriers to trading performance as being high rents/ overheads (13%), inadequate customer car parking (7%) and competition from other traders in the district centre (7%); ▪ The majority of respondents (80%) indicated that they had no plans to alter their business in any way over the next five years, with a further 20% planning to close their premises; ▪ The largest proportion of respondents (29%) considered Oldham to be their biggest competitor.	The business survey asked respondents to rate a number of different aspects of Chadderton in terms of whether they 'good', 'average' or 'poor'. The majority of aspects were rated as being 'average' by the largest proportion of respondents. However, a number of aspects were rated as being 'poor' by the greatest proportion of respondents. These aspects were: number of events (100%), range of events (100%), number of restaurants (83%) and safety within the public realm (83%). Respondents were also able to add any additional comments they would like to make at the end of the survey. Through this process a number of retailers highlighted that the car parks are not very well maintained with too much litter being apparent.

Accessibility	Environmental Quality
Car: Chadderton is situated on the A669, which connects to Oldham to the east and Manchester to the south west. The M60 (junction 21) and M62 (junction 20) are nearby. Middleton Road, on which much of the centre is based is a busy road, however pedestrian crossings are provided to aid pedestrians. **Car parks:** There are four car parks in Chadderton. These car parks are located on Melbourne Street (Home Bargains), Milne Street (Asda) behind the town hall on Middleton Road and a further car park near to Middleton Road. The majority of these car parks are free of charge. At the time of the survey, these car parks were close to full capacity. There is very limited on-street parking available. **Public transport:** The town also benefits from good accessibility by public transport. Buses provide services to the nearby centres of Lees, Oldham, Royton and Shaw.	Chadderton is a large district centre west of Oldham. The centre is focused at Chadderton Precinct, Melbourne Street and Middleton Road. Chadderton precinct is pedestrianised, which provides a safe environment for shoppers. However, Middleton Road is not, and at the time of the survey, there was a large volume of traffic travelling along this road. When the centre was visited, there was a low level of footfall. Pavement widths vary, and where the centre meets busy roads, pedestrian crossings aid movement by foot. The streets are clean with no evidence of litter, whilst shop units themselves are maintained to mixed standards, creating a fairly attractive environment in places. Units are a mixture of old and new build. Street furniture is plentiful including: benches, bins, bike racks and christmas lights. There were no public toilets in the centre.

FAILSWORTH HEALTH CHECK ASSESSMENT

Date of Site Visit: 7 November 2008

Status: District Centre (Oldham UDP 2006)

Photographs of Failsworth District Centre

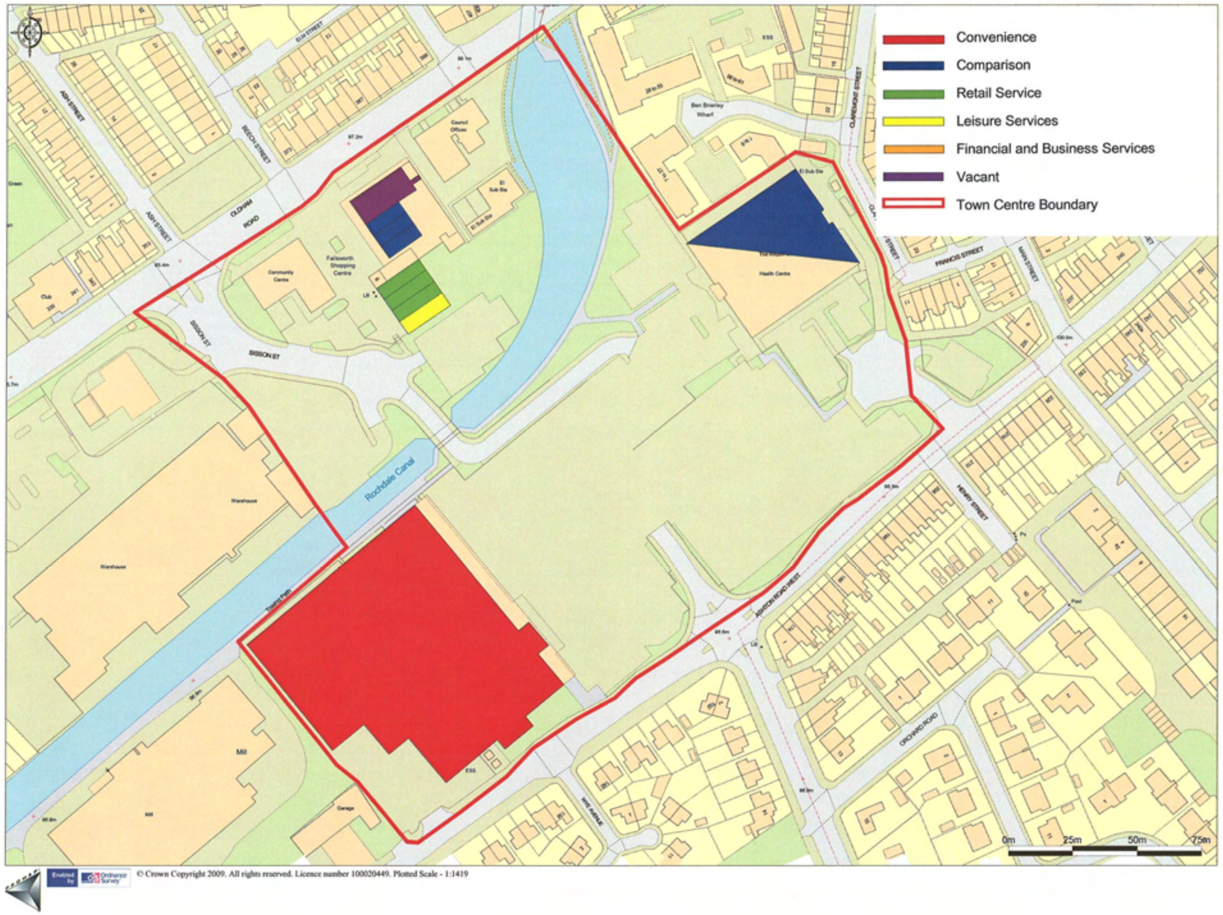
Figure 26 (top left): Tesco Extra store, Ashton Road West
Figure 27 (top centre): Failsworth Health Centre, Claremont Street
Figure 28 (top right): Attractive canalside location, Failsworth
Figure 29 (bottom left): Retail frontages, Failsworth Shopping Centre
Figure 30 (bottom right): Public realm, Failsworth Shopping Centre

Centre Overview

Failsworth is defined as a district centre by the Oldham Unitary Development Plan (July 2006). It is generally seen as the area that directly links the town of Oldham to the city of Manchester. Road communications are good with the A62, A57 and A635 providing access to the M60, M6, M56 and M66. At the time of the 2001 census, the Failsworth urban area had a population of 20,007 (Focus).

The main focus for retailing in Failsworth comprises Failsworth Shopping Centre, Oldham Road and Sission Street. A land use plan of Failsworth District Centre is provided overleaf.

Figure 31: Land Use map for Failsworth District Centre (2008)



Source: Promap base validated by WYG site visit (November 2008)
(It should be noted that units in light yellow are classed as non-retail. Each plan shows the ground floor only, however floorspace figures in the text relate to all floors. Each UDP boundary is sourced from the published hard copy of the proposals map)

Table 15: Diversity of Uses in Failsworth District Centre (2008)

	Number of Outlets		
	Number	Failsworth (%)	UK (%)
Convenience	1	10.0	8.4
Comparison	4	40.0	35.4
Retail Service	3	30.0	12.6
Leisure Services	1	10.0	21.2
Financial and Business Services	0	0.0	11.6
Vacant	1	10.0	10.4
Total	10	100	100

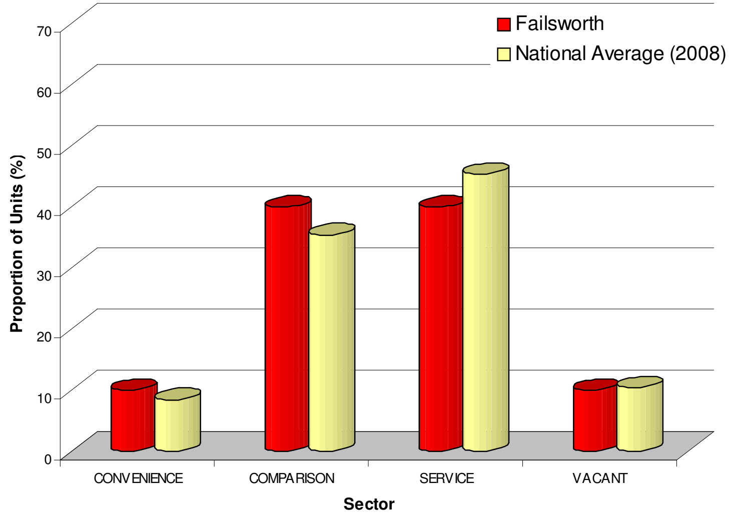
Source: GOAD Report (November 2008)

Table 16: Existing Floorspace in Failsworth District Centre (2008)

	Existing Floorspace		
	Sq m	Failsworth (%)	UK (%)
Convenience	8,397	80.3	13.7
Comparison	1,374	13.1	38.8
Retail Service	311	3.0	6.8
Leisure Services	118	1.1	22.5
Financial and Business Services	0	0.0	9.1
Vacant	261	2.5	8.4
Total	10,461	100	100

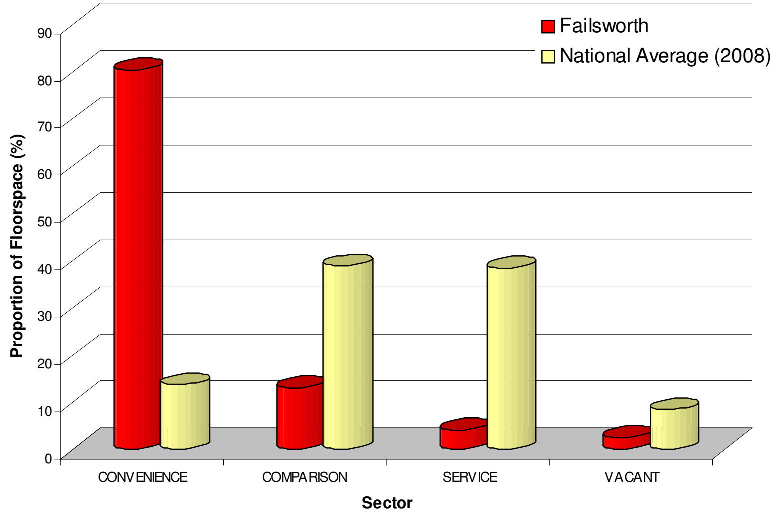
Source: GOAD Report (November 2008)

Figure 32: Proportion of Units in Failsworth District Centre (2008)



Source: Experian GOAD (November 2008)

Figure 33: Proportion of Floorspace in Failsworth District Centre (2008)



Source: Experian GOAD (November 2008)

Convenience

10.0% of all units in Failsworth are in use for the sale of convenience goods, compared to a national average of 8.4%. Given the role performed by Failsworth, it is not surprising to discover that the proportion of units used for the sale of convenience goods is above the national average. Likewise, as expected, the proportion of convenience floorspace is well above the national average (80.3% compared to 13.7% nationally). There is only one convenience retailer in the centre at present, this being the Tesco Extra store on Ashton Road West.

Comparison

Comparison traders in Failsworth occupy 40.0% of outlets against a national average of 35.4%. Conversely, when it comes to comparison goods floorspace, Failsworth is below the national average with a figure of 13.1% compared to a national average of 38.8%. The comparison goods retail offer in Failsworth comprised of predominately independent traders.

Overall Service

The service sector comprises four units and occupies 429 sq m of floorspace. The proportion of service outlets (40.0%) is below the national average (45.4%). Likewise, the proportion of service floorspace (4.1%) is also below the national average (38.4%).

Retail Service

Retail services, which comprise such uses as hairdressers, dry cleaners and petrol filling stations, account for 30.0% of outlets and 3.0% of floorspace in Failsworth, compares to national averages of 12.6% and 6.8% respectively. Failsworth contains a Post Office at Failsworth Shopping Centre.

Leisure Services

Leisure services, as defined by GOAD, include uses such as restaurants, cafes, bookmakers and public houses. Failsworth is under provided for in terms of the proportion of outlets (10.0%) compared to the national average (21.2%). In terms of the proportion of floorspace, Failsworth has an under-provision (1.1% compared to a national average of 22.5%).

Financial Services

There are no financial and business services within the centre.

Non Retail

In addition to the retail service on offer, there are Council offices and a health centre within Failsworth. Failsworth District Centre is surrounded by residential areas.

Unit Sizes

Table 17 below highlights the composition of Failsworth District Centre at November 2008 in terms of the size of retail units. This is taken from an assessment of retailing facilities provided by Experian GOAD.

Table 17: Size of Units within Chadderton District Centre

Size of Unit (ground floor area)	Number of units	Proportion of Total (%)	
		Failsworth	GB
Under 93 sq m (1,000 sq ft)	3	30.0	39.1
93-232 sq m (1,000-2,499 sq ft)	4	40.0	39.6
232-464 sq m (2,500-4,999 sq ft)	1	10.0	12.6
465-929 sq m (5,000-9,999 sq ft)	0	0.0	5.1
929-1,393 sq m (10,000-14,999 sq ft)	1	10.0	1.5
1,393-1,858 sq m (15,000-19,999 sq ft)	0	0.0	0.7
1,858-2,787 sq m (20,000-29,999 sq ft)	0	0.0	0.7
Above 2,787 sq m (30,000 sq ft)	1	10.0	0.8
Total	**10**	**100**	

Source: Experian Goad (2008)

Failsworth has a lower proportion of small units of less than 93 sq m (30.0%), compared to the national average (39.1%). However, when it comes to small vacant units of the size 93-232 sq m, Failsworth has a similar proportion to the national average (40.0% compared to 39.6%). There is just one unit in the centre with a floorspace above 2,787 sq m. Retailers are increasingly looking for bigger units of which Failsworth is lacking.

Top 20 Retailers

Failsworth District Centre accommodates none of the 'Top Twenty Retailers' identified by Focus.

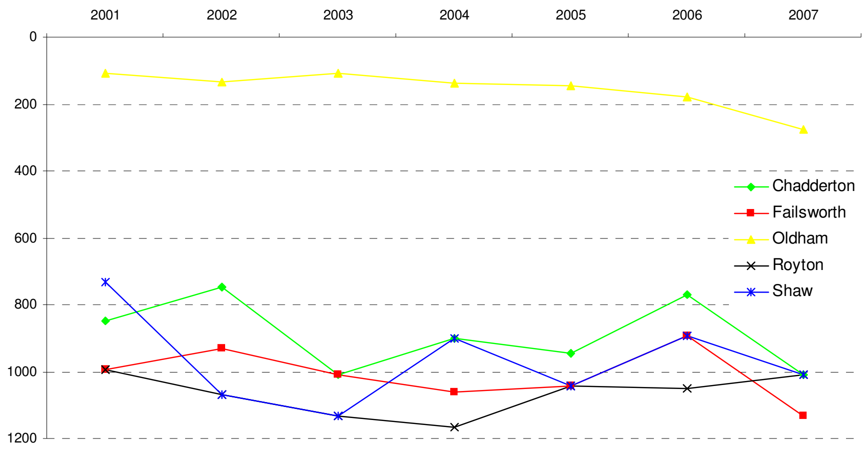
Table 18: Top 20 Retailers

Rank	Retailer
1	Boots
2	Marks & Spencer
3	Argos
4	Woolworths
5	Debenhams
6	John Lewis
7	W.H. Smith
8	BHS
9	Next
10	Dixons
11	Superdrug
12	Lloyds Pharmacy
13	Wilkinson
14	CO-OP Department Stores
15	Primark
16	New Look
17	HMV
18	Dorothy Perkins
19	Rosebys
20	Waterstones

Source: Focus Report (November 2008)

Retail Demand

Figure 34: Retail Ranking in Oldham Catchment



Source: Focus Report (November 2008)

Failsworth's retail ranking based on retailer demand has varied since 2001. However, in recent years its ranking has decreased, which is similar to many other centres in the Borough, with Chadderton, Oldham and Shaw all having witnessed a decrease in ranking recently.

Vacancies

The number of vacant units within a centre can provide a good indication of how a shopping centre is performing. However, care should be taken when interpreting figures. Vacancies can occur for positive as well as negative reasons; for example, the opening of a new retail centre elsewhere in a town may draw retailers from older properties or more peripheral areas of the city. Vacant units will be found in even the strongest of town centres. However, they can be a useful indicator of the level of demand. For example, some properties may lay vacant because they are poorly maintained, unsuited to modern retailing requirements or simply not being actively marketed. Conversely a low vacancy rate does not necessarily mean that a centre is performing well. For example, if there is a proliferation of charity shops and other uses not usually associated with a town centre it may be a sign of decline, particularly where these uses are located in prime locations. Despite these issues, it is still a useful indicator of town centre performance.

Table 19: Vacancies in Failsworth (2008)

	Vacancy		
	Total	Failsworth (%)	UK (%)
No. of Outlets	1	10.0	10.4
Floorspace	261	2.5	8.4

Source: GOAD Report (November 2008)

Table 19 illustrates that at November 2008 there was one vacant unit in the district centre, which occupied a floorspace of 261 sq m. This represents 10.0% of all outlets and 2.9% of floorspace, compared to respective national averages of 10.4% and 8.4%. From examining the plan of Failsworth it can be seen that the vacant unit is at Failsworth Shopping Centre.

In Street Survey Results

Accessibility

In respect of accessibility, the on-street visitors survey undertaken by NEMS over three separate days, identified the following:

- 92% of visitors to Failsworth had access to a car for personal use during the daytime. During the evening/ night-time, the proportion of visitors who did not have access to a car for personal use was also 8%;
- 98% of visitors arrived in the centre by car or van (either as driver or passenger), with a further 2% arriving by bus, minibus or coach;
- Of those visitors who drove, the most popular place to leave their vehicle was at the Tesco Extra store with 100% drivers parking here;
- 100% of drivers did not encounter any difficulty when obtaining a car parking space on the day of the survey;
- 57% of visitors travelled for 10 minutes or less to reach the centre. An additional 35% travelled for between 11 and 15 minutes, with 6% travelling for between 21 and 30 minutes. Only 2% of visitors travelled for over 30 minutes to reach the centre;
- Visitors were asked to consider car parking provision in Failsworth. Of those that answered this question, 92% deemed this to be 'about the same' as that in other centres;
- In terms of car parking prices, 90% considered prices to be 'about the same' as that in other centres; and
- Accessibility by public transport was described by 86% of visitors as being 'about the same' as in other centres, although 8% felt that this was 'worse' or 'much worse' as in other shopping centres.

Perception of Safety and Occurrence of Crime

The on-street visitors survey asked specific questions to visitors about their perceptions of crime in Failsworth. During the day-time, some 92% of visitors indicated that safety in Failsworth was 'about the same' as that in other centres, with 4% considering to be 'worse' or 'much worse'. However, with respect to safety during the evening/ night-time, the proportion of visitors who deemed safety to be 'about the same' as in other centres rose to 94%, with some 2% considering safety to be either 'better' or 'much better' than in other centres. 4% indicated that they did not know either way.

Customer Views and Behaviour

The main findings of the on-street survey undertaken by NEMS Market Research were:

- 98% of visitors to the centre had travelled directly from home;
- 53% of those shoppers interviewed were just visiting the centre, with 45% living in the Failsworth urban area and 2% working in the centre;
- 100% of visitors indicated that they were in the centre for food and grocery shopping;
- 53% of visitors planned to stay in the centre for up to half an hour, with 14% planning to stay in the centre for up to two hours and 29% planning to stay in the centre all day;
- The majority of visitors (96%) planned to undertake their main food shop on the day of the survey;

- When asked whether they were planning to buy anything other than food goods on the day of the survey, 69% of respondents stated that they planned to purchase clothing, footwear or household goods;
- 84% of visitors stated that they visited Failsworth 'about as frequently' today as compared to five years ago. 4% stated that they visited the centre 'more' or 'much more frequently' than five years ago; and
- 6% of visitors indicated that they did not visit the centre during the evening.

Areas of weakness were seen to be choice of High Street names, which 41% of visitors rated as being either 'worse' or 'much worse' than other centres, the choice of shops (39% stating that this was worse than elsewhere), choice of independent/ specialist shops (31%) and quality of shops (27%).

Visitors were asked about the types of shops and services they would like to see more of in the centre. Popular responses were clothing stores (39%) and department stores (14%). Visitors were also asked about the types of leisure facilities they would like to see more of in the centre. Popular responses were a cinema (47%), a bowling alley (33%) and an ice rink (6%). This is in addition to any leisure facilities already in the centre.

Business Survey Results

A questionnaire was distributed to all local businesses within Failsworth in order to gain an understanding of the opinions and views of retailers. A total of 73 questionnaires were distributed with 13 being returned: a response rate of 18%. The main findings of the business survey results were as follows:

- 62% of respondents had been trading in the district centre in excess of twenty years, with some 15% having been in operation for over ten years and 8% for under six months;
- 77% of respondents were independent traders, with 23% being part of a national group or chain;
- 44% of respondents indicated that they were professional services, 22% being food retailers, 22% being non-food retailers and 11% being retail services;
- 62% of traders stated that since they began trading business had either 'grown significantly' or 'grown moderately', with 8% indicating that business had 'remained largely static'. 31% indicated that their business had declined to some degree since they began trading;
- 46% of respondents indicated that their business was currently trading 'moderately' with 31% stating that their business was currently performing either 'very well' or 'well' illustrating strong performance;

▪ The majority of respondents (54%) owned their premises; ▪ The survey indicated that 64% of traders relied upon local residents primarily for the majority of their business, although a further 14% relied primarily on residents in the wider Oldham area and 7% on residents outside the Oldham area. 7% relied mainly on specialist buyers; ▪ When asked about measures that would improve the district centre, 10% of respondents stated that improved security/ CCTV would have this effect. Other important measures included more quality restaurants/ pavement cafes (8%), more street cleaning (7%) and more entertainment/ leisure facilities (7%); ▪ 62% of respondents felt that there was a good balance between shops and other non-retail uses, with 23% stating that there were too many non-retail uses in the town centre and 15% that there were not enough non-retail uses; ▪ Respondents identified the main barriers to trading performance as being inadequate customer car parking (12%), high rents/ overheads (10%) and a lack of passing trade outside premises (8%); ▪ Over half of respondents (58%) indicated that they had no plans to alter their business in any way over the next five years, with a further 17% planning to refurbish their existing floorspace; ▪ The largest proportion of respondents (23%) considered other retailers in Failsworth to be their biggest competitor.	The business survey asked respondents to rate a number of different aspects of Failsworth in terms of whether they were 'good', 'average' or 'poor'. The majority of aspects were rated as being 'average' by the largest proportion of respondents. However, a number of aspects were rated as being 'poor' by the greatest proportion of respondents. These aspects were: number of events (36%), range of events (36%), range of marketing and promotion (32%) and amount of car parking (28%). Respondents were also able to add any additional comments they would like to make at the end of the survey. Through this process a number of retailers highlighted that there is an anti-social behaviour problem in the centre. Aside from this, certain retailers felt that many of the small businesses are suffering because of the two large supermarkets, i.e. the Tesco Extra store on Ashton Road West within the centre and the Morrisons store on Poplar Street outside the centre.

Accessibility	Environmental Quality
Car: Failsworth is situated on the A62, which connects to Oldham to the north east and Manchester to the south west. The M60 (junctions 21 and 22) are nearby. Oldham Road, on which much of the centre is based is a busy road, however pedestrian crossings are provided to aid pedestrians. **Car parks:** There is one main car park in Failsworth, at the Tesco Extra store, Ashton Road West. This car park is free of charge. There is very limited on-street parking available. **Public transport:** The town also benefits from good accessibility by public transport. Buses provide services to the nearby centres of Chadderton, Lees, Oldham, Royton and Shaw. Furthermore, there is a railway station on Hardman Lane which provides services to Manchester and Rochdale amongst others.	Failsworth is a small district centre south west of Oldham. The centre is focused at Failsworth Shopping Centre, Oldham Road and Sisson Street. Failsworth Shopping Centre is pedestrianised, which provides a safe environment for shoppers. However, Oldham Road is not, and at the time of the survey, there was a large volume of traffic travelling along this road. When the centre was visited, there was generally a low level of footfall; however there was very high footfall in the Tesco Extra store on Ashton Road West. Pavements are wide, and where the centre meets busy roads, pedestrian crossings aid movement by foot. The streets are clean with no evidence of litter, whilst shop units themselves are maintained to mixed standards, creating a fairly attractive environment in places. Units are mostly new build. There is limited street furniture including: lights; tress; and signage. There were no public toilets in the centre.

HUDDERSFIELD ROAD HEALTH CHECK ASSESSMENT

Date of Site Visit: 7 November 2008

Status: District Centre (Oldham UDP 2006)

Photographs of Huddersfield Road District Centre

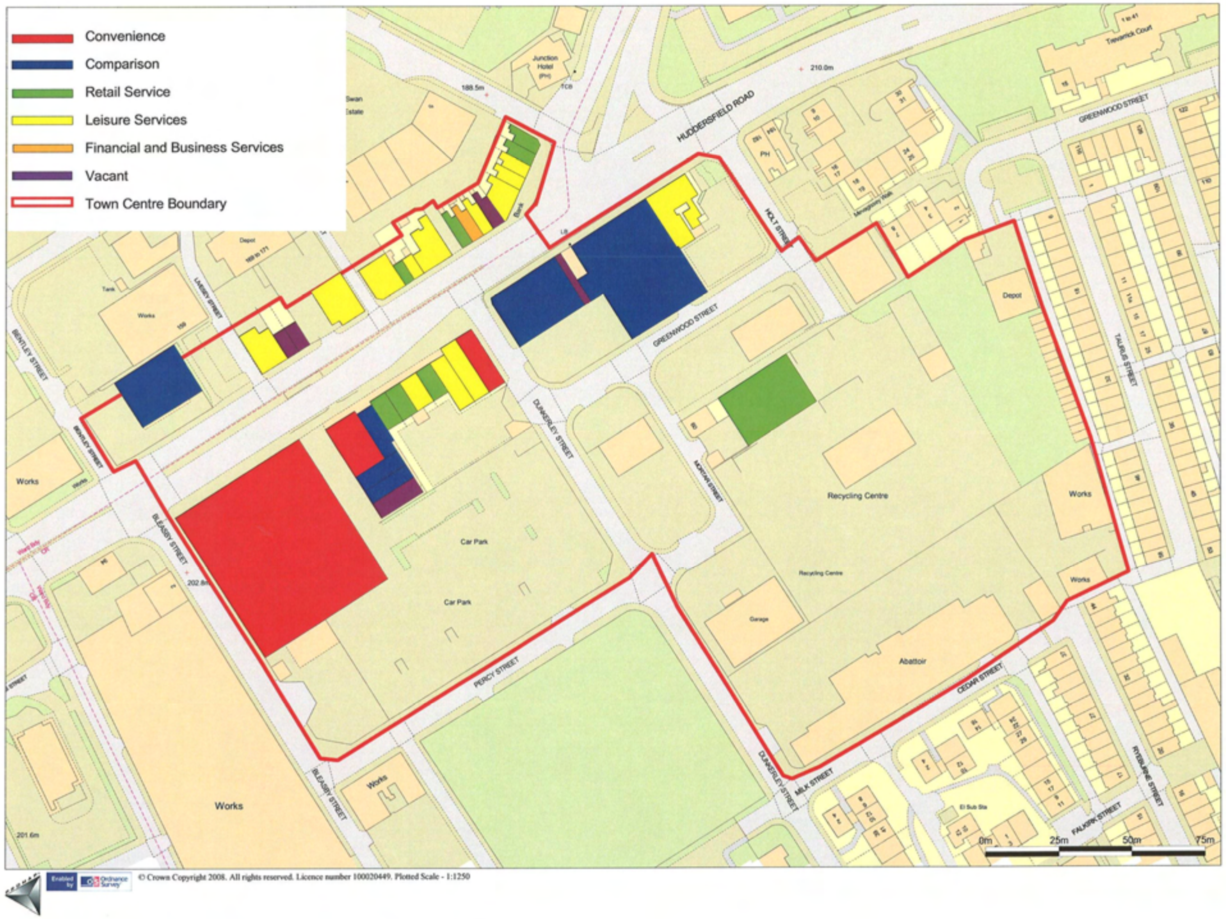
Figure 35 (top left): Tesco Extra store, Bleasby Street
Figure 36 (top centre): Car park, Dunkerley Street
Figure 37 (top right): Retail frontages, Huddersfield Road
Figure 38 (bottom left): Retail frontages, Huddersfield Road Precinct
Figure 39 (bottom right): Vacant unit, Huddersfield Road

Centre Overview

Huddersfield Road is defined as a district centre by the Oldham Unitary Development Plan (July 2006). It is located one mile east of Oldham and eight miles north east of Manchester. Road communications are good with the A62 providing access to the M60, M62 and M66.

The main focus for retailing in Huddersfield Road comprises Huddersfield Road Precinct and Huddersfield Road. There are also secondary retail frontages along Dunkerley Street and Holt Street. A land use plan of Huddersfield Road District Centre is provided overleaf.

Figure 40: Land Use map for Huddersfield Road District Centre (2008)



Source: Promap base validated by WYG site visit (November 2008)
(It should be noted that units in light yellow are classed as non-retail. Each plan shows the ground floor only, however floorspace figures in the text relate to all floors. At the time of the survey, the Tesco store was being re-developed. The original floorspace of the Tesco was used for this assessment. Each UDP boundary is sourced from the published hard copy of the proposals map. Please note that some units on this plan are shown as one unit, but in fact comprise more than one unit)

Table 20: Diversity of Uses in Huddersfield Road District Centre (2008)

	Number of Outlets		
	Number	**Huddersfield Road (%)**	**UK (%)**
Convenience	3	7.9	8.4
Comparison	5	13.2	35.4
Retail Service	8	21.1	12.6
Leisure Services	14	36.8	21.2
Financial and Business Services	2	5.3	11.6
Vacant	6	15.8	10.4
Total	38	100	100

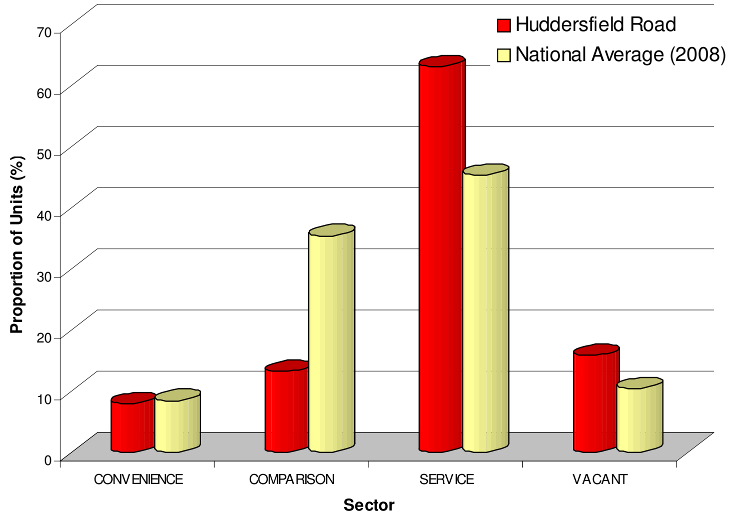
Source: GOAD Report (November 2008)

Table 21: Existing Floorspace in Huddersfield Road District Centre (2008)

	Existing Floorspace		
	Sq m	**Huddersfield Road (%)**	**UK (%)**
Convenience	3,448	46.7	13.7
Comparison	897	12.1	38.8
Retail Service	922	12.5	6.8
Leisure Services	1,440	19.5	22.5
Financial and Business Services	225	3.0	9.1
Vacant	455	6.2	8.4
Total	7,387	100	100

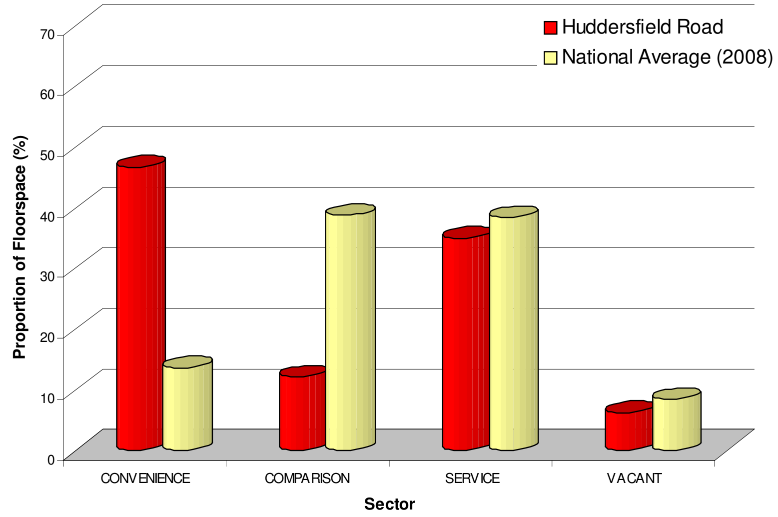
Source: GOAD Report (November 2008)

Figure 41: Proportion of Units in Huddersfield Road District Centre (2008)



Source: Experian GOAD (November 2008)

Figure 42: Proportion of Floorspace in Huddersfield Road District Centre (2008)



Source: Experian GOAD (November 2008)

Convenience

7.9% of all units in Huddersfield Road are in use for the sale of convenience goods. This compares to a national average of 8.4%. However, the proportion of convenience floorspace is well above the national average (46.7% compared to 13.7% nationally). Given the role performed by Huddersfield Road, it is not surprising to discover that the proportion of floorspace used for the sale of convenience goods is above the national average. At present, this sector is dominated by the Tesco store on Bleasby Street. Other convenience traders in the centre are mainly independents.

Comparison

Comparison traders in Huddersfield Road occupy 13.2% of outlets against a national average of 35.4%. Similarly, when it comes to comparison goods floorspace, Huddersfield Road is below the national average with a figure of 12.1% compared to a national average of 38.8%. The comparison goods retail offer in Huddersfield Road is predominantly comprised of independent traders.

Overall Service

The service sector comprises 24 units and occupies 2,587 sq m of floorspace. The proportion of service outlets (63.2%) is above the national average (45.4%). However, the proportion of service floorspace (35.0%) is below the national average (38.4%).

Retail Service

Retail services, which comprise such uses as hairdressers, dry cleaners and petrol filling stations, account for 21.1% of outlets and 12.5% of floorspace in Huddersfield Road, which compares to respective national averages of 12.6% and 6.8%.

Leisure Services

Leisure services, as defined by GOAD, include uses such as restaurants, cafes, bookmakers and public houses. Huddersfield Road is well provided for in terms of the proportion of outlets (36.8%) compared to the national average (21.2%). However, in terms of the proportion of floorspace, Huddersfield Road has an under-provision (19.5% compared to a national average of 22.5%).

Financial Services

There are a smaller proportion of units occupied by financial and business services, in Huddersfield Road compared to the national average (5.3% compared to a national average of 11.6%). Huddersfield Road also has a relative under-provision in terms of the proportion of floorspace (3.0% compared to 9.1%).

Non Retail

In addition to the retail service on offer, there is a recycling centre and a number of industrial works within the centre. Huddersfield Road District Centre is surrounded by industrial/business premises to the south and south west. The northern and western boundaries of the district centre also adjoin an area defined in the UDP as a primary employment zone.

Unit Sizes

Table 22 below highlights the composition of Huddersfield Road District Centre at November 2008 in terms of the size of retail units. This is taken from an assessment of retailing facilities provided by Experian GOAD.

Table 22: Size of Units within Huddersfield Road District Centre

Size of Unit (ground floor area)	Number of units	Proportion of Total (%)	
		Huddersfield Road	GB
Under 93 sq m (1,000 sq ft)	20	52.6	39.1
93-232 sq m (1,000-2,499 sq ft)	14	36.8	39.6
232-464 sq m (2,500-4,999 sq ft)	2	5.3	12.6
465-929 sq m (5,000-9,999 sq ft)	1	2.6	5.1
929-1,393 sq m (10,000-14,999 sq ft)	0	0.0	1.5
1,393-1,858 sq m (15,000-19,999 sq ft)	0	0.0	0.7
1,858-2,787 sq m (20,000-29,999 sq ft)	0	0.0	0.7
Above 2,787 sq m (30,000 sq ft)	1	2.6	0.8
Total	**38**	**100**	

Source: Experian Goad (2008)

Huddersfield Road has a higher proportion of small units of less than 93 sq m (52.6%), compared to the national average (39.1%). There is just one unit in the centre with a floorspace above 2,787 sq m. Retailers are increasingly looking for bigger units of which Huddersfield Road is lacking.

Vacancies

The number of vacant units within a centre can provide a good indication of how a shopping centre is performing. However, care should be taken when interpreting figures. Vacancies can occur for positive as well as negative reasons; for example, the opening of a new retail centre elsewhere in a town may draw retailers from older properties or more peripheral areas of the city. Vacant units will be found in even the strongest of town centres. However, they can be a useful indicator of the level of demand. For example, some properties may lay vacant because they are poorly maintained, unsuited to modern retailing requirements or simply not being actively marketed. Conversely a low vacancy rate does not necessarily mean that a centre is performing well. For example, if there is a proliferation of charity shops and other uses not usually associated with a town centre it may be a sign of decline, particularly where these uses are located in prime locations. Despite these issues, it is still a useful indicator of town centre performance.

Table 23: Vacancies in Huddersfield Road (2008)

	Vacancy		
	Total	Huddersfield Road (%)	UK (%)
No. of Outlets	6	15.8	10.4
Floorspace	455	6.2	8.4

Source: GOAD Report (November 2008)

Table 23 illustrates that at November 2008 there were six vacant retail units in the district centre, which occupied a floorspace of 455 sq m. This represents 15.8% of all outlets and 6.2% of floorspace, compared to respective national averages of 10.4% and 8.4%. This indicates the presence of a large number of small vacant units. There are currently five vacant units on Huddersfield Road and one at Huddersfield Road Precinct (N.B. The plan of vacancies illustrated at Figure 40 includes six vacancies although ProMap, which forms the base map, illustrates some units as being only one unit when in fact they actually comprise two units).

In Street Survey Results

Accessibility

In respect of accessibility, the on-street visitors survey undertaken by NEMS over three separate days, identified the following:

- Over half (56%) of visitors to Huddersfield Road had access to a car for personal use during the day-time. During the evening/ night-time, the proportion of visitors who had access to a car for personal use was also 56%;
- 44% of visitors arrived in the centre by car or van (either as driver or passenger), with a further 28% arriving by bus, minibus or coach. 28% of visitors walked to the centre;
- Of those visitors who drove, the most popular place to leave their vehicle was on-street with 64% of drivers parking here. 18% of visitors parked at the Tesco store;
- 86% of drivers did not encounter any difficulty when obtaining a car parking space on the day of the survey;
- 44% of visitors travelled for 10 minutes or less to reach the centre. An additional 36% travelled for between 11 and 15 minutes, with 10% travelling for between 16 and 20 minutes and 6% for between 21 and 30 minutes. Only 4% of visitors travelled for over 30 minutes to reach the centre;
- Visitors were asked to consider car parking provision at Huddersfield Road. Of those that answered this question, 46% deemed this to be 'about the same' as that in other centres;
- In terms of car parking prices, 52% considered prices to be 'about the same' as in other centres' and
- Accessibility by public transport was described by 88% of visitors as being 'about the same' as in other centres, although 6% felt that this was 'better' or 'much better' as in other shopping centres.

Perception of Safety and Occurrence of Crime

The on-street visitors survey asked specific questions to visitors about their perceptions of crime at Huddersfield Road. During the day-time, some 80% of visitors indicated that safety at Huddersfield Road was 'about the same' as that in other centres, with 14% considering it to be 'worse' or 'much worse'. However, with respect to safety during the evening/ night-time, the proportion of visitors who deemed safety to be 'about the same' as in other centres fell to 24%, with some 44% considering safety to be either 'worse' or 'much worse' than that in other centres. 12% indicated that they did not know either way.

Customer Views and Behaviour

The main findings of the on-street survey undertaken by NEMS Market Research were:

- 82% of visitors to the centre had travelled directly from home;
- 56% of those shoppers interviewed were just visiting the centre, with 52% living in the Huddersfield Road urban area and 24% working in the centre;
- The main reasons for visiting the centre were: food and grocery shopping (32%), to visit the bank/ building society/ Post Office (14%), due to work/ school/ college (12%) and electrical goods shopping (10%);
- 58% of visitors planned to stay in the centre for up to half an hour, with 26% planning to stay in the centre for up to two hours and 4% planning to stay in the centre all day;
- The majority of visitors (72%) did not plan to undertake their main food shop on the day of the survey;

- When asked whether they were planning to buy anything other than food goods on the day of the survey, 12% of respondents stated that they planned to purchase clothing, footwear or household goods;
- 68% of visitors stated that they visited Huddersfield Road 'about as frequently' today as compared to five years ago. 30% stated that they visited the centre 'less' or 'much less frequently' than five years ago; and
- 48% of visitors indicated that they did not visit the centre during the evening.

Areas of weakness were seen to be choice of shops, choice of High Street names, choice of independent/ specialist shops and quality of shops all of which were rated by 66% of visitors as being either 'worse' or 'much worse' than other centres.

Visitors were asked about the types of shops and services they would like to see more of in the centre. Popular responses were footwear stores (8%) and restaurants/ cafes (8%). Visitors were also asked about the types of leisure facilities they would like to see more of in the centre. Popular responses were a cinema (12%), a health and fitness centre (10%) and parks/ gardens (8%). This is in addition to any leisure facilities already in the centre.

Business Survey Results

A questionnaire was distributed to all local businesses within Huddersfield Road in order to gain an understanding of the opinions and views of retailers. A total of 36 questionnaires were distributed with 5 being returned: a response rate of 14%. The main findings of the business survey results were as follows:

- 40% of respondents had been trading in the district centre in excess of twenty years, with some 20% having been in operation for over ten years and 40% for over five years;
- All (100%) of respondents were independent traders;
- 25% of respondents indicated that they were food retailers, 25% being non-food retailers, 25% being retail services and 25% being professional services;
- 80% of traders stated that since they began trading business had either 'grown significantly' or 'grown moderately'. 20% indicated that their business had declined to some degree since they began trading;
- 80% of respondents indicated that their business was currently trading 'moderately' with 20% stating that their business was currently performing either 'very well' or 'well' illustrating strong performance;

- The majority of respondents (60%) leased their premises;
- The survey indicated that 29% of trades relied upon local residents primarily for the majority of their business, although a further 43% relied primarily on residents in the wider Oldham area and 14% on office employees. 14% relied mainly on passers-by;
- When asked about measures that would improve the district centre, 8% respondents stated that improved street paving would have this effect. Other important measures included an increased choice/ range of shops (6%), more independent/ specialist traders (6%) and improved street furniture (6%);
- Half (50%) of respondents to this particular question felt that there was a good balance between shops and other non-retail uses, with 50% stating that there were not enough non-retail uses;
- Respondents identified the main barriers to trading performance as being inadequate customer car parking (20%), high rents/ overheads (7%) and poor location of premises (7%);
- 40% of respondents indicated that they had plans to refurbish their existing floorspace, with 20% planning to relocate out-of-centre, 20% planning to relocate in-centre and 20% with no plans to alter their business in any way over the next five years;
- The largest proportion of respondents (14%) considered Oldham to be their biggest competitor.

The business survey asked respondents to rate a number of different aspects of Huddersfield Road in terms of whether they were 'good', 'average' or 'poor'. The majority of aspects were rated as being 'average', by the largest proportion of respondents. However, a number of aspects were rated as being 'poor' by the greatest proportion of respondents. These aspects were: the appearance of entrances to Huddersfield Road district centre (26%), number of events (26%), range of marketing and promotion (26%) and amount of car parking (21%). Respondents were also able to add any additional comments they would like to make at the end of the survey. Through this process a number of retailers highlighted that the district centre is generally run-down and needs refurbishment. Aside from this, certain retailers felt that the centre has been disrupted by the current construction works to the Tesco store.

Accessibility	Environmental Quality
Car: Huddersfield Road is situated on the A62, which connects to Oldham to the west and Manchester to the south west. The M60 (junction 21) and M62 (junction 20) are nearby. Pedestrian access to the centre is problematic from Derker to the north and Littlemoor to the north east. **Car parks:** There are two car parks in Huddersfield Road. These car parks are located at Huddersfield Road Precinct (limited spaces) and at the Tesco store, Bleasby Street. Both these car parks are free of charge. There is very limited on-street parking available. **Public transport:** The town also benefits from good accessibility by public transport. Buses provide services to the nearby centres of Chadderton, Lees, Oldham, Royton and Shaw.	Huddersfield Road is a small district centre east of Oldham. The centre is focused on Huddersfield Road Precinct and Huddersfield Road. None of the centre is pedestrianised, meaning the centre is a fairly unsafe environment for shoppers. At the time of the survey, there was a large volume of traffic travelling along Huddersfield Road. At the time of the survey, there was a low level of footfall. The centre was most busy at Huddersfield Road Precinct. Pavement widths vary, and where the centre meets busy roads, pedestrian crossings aid movement by foot. The streets are clean with no evidence of litter. Shop units are maintained to mixed standards, and the centre is fairly unattractive in general. Units are mostly new build. Street furniture includes benches and bins. There were no public toilets in the centre.

LEES HEALTH CHECK ASSESSMENT

Date of Site Visit: 7 November 2008

Status: District Centre (Oldham UDP 2006)

Photographs of Lees District Centre

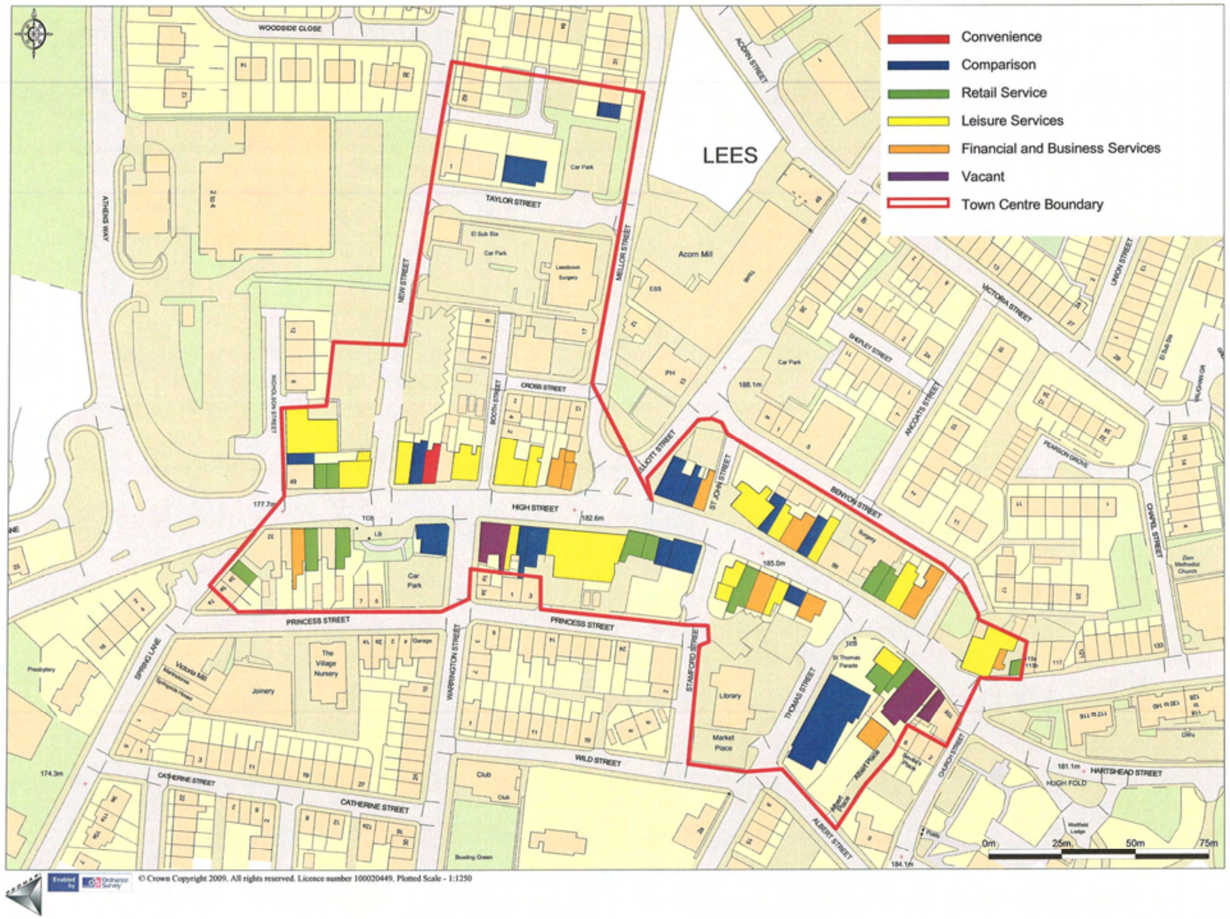
Figure 43 (top left): Co-op store, Athens Way
Figure 44 (top centre): Retail frontages, High Street
Figure 45 (top right): Attractive amenity space, High Street
Figure 46 (bottom left): Retail frontages, St Thomas Parade
Figure 47 (bottom right): Vacant unit, High Street

Centre Overview

Lees is defined as a district centre by the Oldham Unitary Development Plan (July 2006). It is located on the A669, three miles east of Oldham and nine miles north east of Manchester.

The main focus for retailing in Lees comprises High Street and St Thomas Parade. There are also secondary retail frontages along Taylor Street. A land use plan of Lees District Centre is provided overleaf.

Figure 48: Land Use map for Lees District Centre (2008)



Source: Promap base validated by WYG site visit (November 2008)
(It should be noted that units in light yellow are classed as non-retail. Each plan shows the ground floor only, however floorspace figures in the text relate to all floors. Each UDP boundary is sourced from the published hard copy of the proposals map)

Table 24: Diversity of Uses in Lees District Centre (2008)

	Number of Outlets		
	Number	Lees (%)	UK (%)
Convenience	1	1.5	8.4
Comparison	19	28.8	35.4
Retail Service	13	19.7	12.6
Leisure Services	18	27.3	21.2
Financial and Business Services	12	18.2	11.6
Vacant	3	4.5	10.4
Total	66	100	100

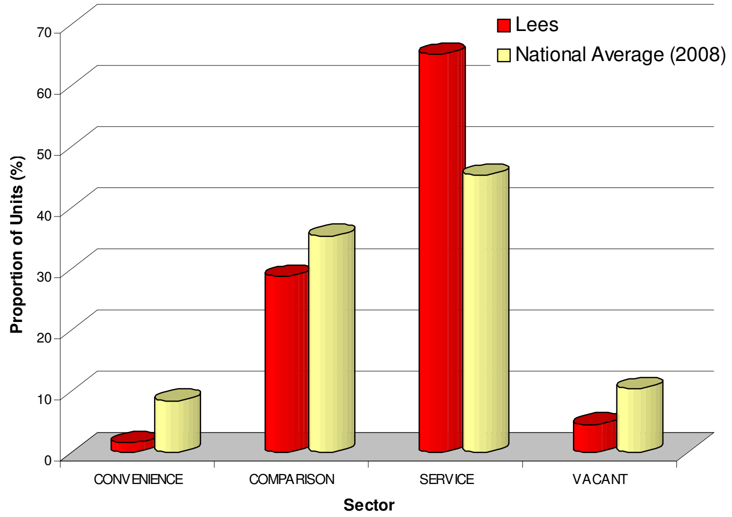
Source: GOAD Report (November 2008)

Table 25: Existing Floorspace in Lees District Centre (2008)

	Existing Floorspace		
	Sq m	Lees (%)	UK (%)
Convenience	60	1.2	13.7
Comparison	1,231	25.6	38.8
Retail Service	658	13.7	6.8
Leisure Services	1,820	37.9	22.5
Financial and Business Services	695	14.5	9.1
Vacant	339	7.1	8.4
Total	4,803	100	100

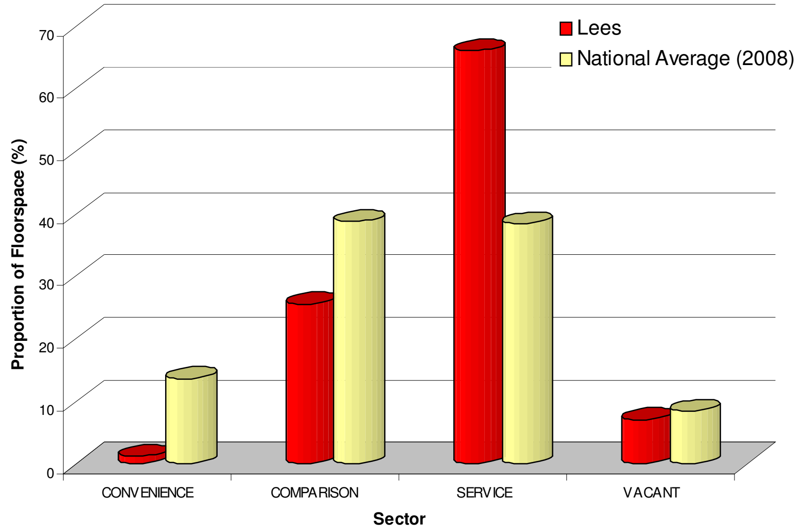
Source: GOAD Report (November 2008)

Figure 49: Proportion of Units in Lees District Centre (2008)



Source: Experian GOAD (November 2008)

Figure 50: Proportion of Floorspace in Lees District Centre (2008)



Source: Experian GOAD (November 2008)

Convenience

1.5% of all units in Lees are in use for the sale of convenience goods. This compared to a national average of 8.4%. Likewise, the proportion of convenience floorspace is below the national average (1.2% compared to 13.7% nationally). It should be noted that there is a Co-op foodstore on Athens Way which is located outside the town centre boundary. This store covers 1,788 sq m of convenience retail floorspace, and would significantly increase the proportion of convenience floorspace in Lees if it was included in the district centre boundary. The only convenience trader within the town centre boundary is an independent store on High Street.

Comparison

Comparison traders in Lees occupy 28.8% of outlets against a national average of 35.4%. Similarly, when it comes to comparison goods floorspace, Lees is below the national average with a figure of 25.6% compared to a national average of 38.8%. The comparison goods retail offer in Lees is predominantly comprised of independent traders.

Overall Service

The service sector comprises 43 units and occupies 3,173 sq m of floorspace. The proportion of service outlets (65.2%) is above the national average (45.4%), as are the proportion of service floorspace (66.1% compared to 38.4%).

Retail Service

Retail services, which comprise such uses as hairdressers, dry cleaners and petrol filling stations, account for 19.7% of outlets and 13.7% of floorspace in Lees, which compares to national averages of 12.6% and 6.8% respectively. Lees contains a Post Office on High Street.

Leisure Services

Leisure services, as defined by GOAD, include uses such as restaurants, cafes, bookmakers and public houses. Lees is well provided for in terms of the proportion of outlets (27.3%) compared to the national average (21.2%). In terms of the proportion of floorspace, Lees is also well provided (37.9% compared to a national average of 22.5%).

Financial Services

There are a higher proportion of units occupied by financial and business services in Lees compared to the national average (18.2% compared to a national average of 11.6%). Lees also has a relative over-provision in terms of the proportion of floorspace (14.5% compared to 9.1%).

Non Retail

In addition to the retail service on offer, there is a library on Thomas Street.
Lees District Centre is surrounded by residential areas.

Unit Sizes

Table 26 below highlights the composition of Lees District Centre at November 2008 in terms of the size of retail units. This is taken from an assessment of retailing facilities provided by Experian GOAD.

Table 26: Size of Units within Lees District Centre

Size of Unit (ground floor area)	Number of units	Proportion of Total (%)	
		Lees	GB
Under 93 sq m (1,000 sq ft)	52	78.8	39.1
93-232 sq m (1,000-2,499 sq ft)	12	18.2	39.6
232-464 sq m (2,500-4,999 sq ft)	2	3.0	12.6
465-929 sq m (5,000-9,999 sq ft)	0	0.0	5.1
929-1,393 sq m (10,000-14,999 sq ft)	0	0.0	1.5
1,393-1,858 sq m (15,000-19,999 sq ft)	0	0.0	0.7
1,858-2,787 sq m (20,000-29,999 sq ft)	0	0.0	0.7
Above 2,787 sq m (30,000 sq ft)	0	0.0	0.8
Total	**66**	**100**	

Source: Experian Goad (2008)

Lees has a higher proportion of small units of less than 93 sq m (78.8%), compared to the national average (39.1%). There are no units in the centre with a floorspace above 465 sq m. Retailers are increasingly looking for bigger units of which Lees is lacking.

Vacancies

The number of vacant units within a centre can provide a good indication of how a shopping centre is performing. However, care should be taken when interpreting figures. Vacancies can occur for positive as well as negative reasons; for example, the opening of a new retail centre elsewhere in a town may draw retailers from older properties or more peripheral areas of the city. Vacant units will be found in even the strongest of town centres. However, they can be a useful indicator of the level of demand. For example, some properties may lay vacant because they are poorly maintained, unsuited to modern retailing requirements or simply not being actively marketed. Conversely a low vacancy rate does not necessarily mean that a centre is performing well. For example, if there is a proliferation of charity shops and other uses not usually associated with a town centre it may be a sign of decline, particularly where these uses are located in prime locations. Despite these issues, it is still a useful indicator of town centre performance.

Table 27: Vacancies in Lees (2008)

	Vacancy		
	Total	Lees (%)	UK (%)
No. of Outlets	3	4.5	10.4
Floorspace	339	7.1	8.4

Source: GOAD Report (November 2008)

Table 27 illustrates that at November 2008 there were three vacant retail units in the district centre, which occupied a floorspace of 339 sq m. This represents 4.5% of all outlets and 7.1% of floorspace, compared to respective national averages of 10.4% and 8.4%. From examining the plan of Lees, it can be seen that all three vacant units are located on High Street.

In Street Survey Results

Accessibility

In respect of accessibility, the on-street visitors survey undertaken by NEMS over three separate days, identified the following:

- Just over half (54% of visitors to Leeds had no access to a car for personal use during the day-time. During the evening/ night-time, the proportion of visitors who did not have access to a car for personal use was 52%;
- 56% of visitors walked to the centre, with a further 24% arriving by car or van (either as driver or passenger). 18% of visitors arrived in the centre by bus, minibus or coach;
- Of those visitors who drove, the most popular place to leave their vehicle was at the Co-op store with 25% of drivers parking here. 17% of visitors parked on-street;
- 75% of drivers did not encounter any difficulty when obtaining a car parking space on the day of the survey;
- 70% of visitors travelled for 10 minutes or less to reach the centre. An additional 18% travelled for between 11 and 15 minutes, with 4% travelling for between 16 and 20 minutes and 8% for between 21 and 30 minutes;
- Visitors were asked to consider car parking provision in Lees. Of those that answered this question, 34% deemed this to be 'worse' or 'much worse' than in other centres;
- In terms of car parking prices, 32% considered prices to be 'about the same' as in other centres; and
- Accessibility by public transport was described by 60% of visitors as being 'better' or 'much better' as in other centres, although 16% felt that this was 'about the same' as in other shopping centres.

Perception of Safety and Occurrence of Crime

The on-street visitors survey asked specific questions to visitors about their perceptions of crime in Lees. During the day-time, some 44% of visitors indicated that safety in Lees was 'about the same' as that in other centres, with 36% considering it to be 'better' or 'much better'. However, with respect to safety during the evening/ night-time the proportion of visitors who deemed safety to be 'about the same' as in other centres fell to 40%, with some 28% considering safety to be either 'worse' or 'much worse' than in other centres. 8% of visitors felt that evening/ night-time safety in the centre was 'better' or 'much better' than other centres, with 24% indicating that they did not know either way.

Customer Views and Behaviour

The main findings of the on-street survey undertaken by NEMS Market Research were:

- 90% of visitors to the centre had travelled directly from home;
- 62% of those shoppers interviewed lived in the Lees urban area, with 26% just visiting the centre and 12% working in the centre;
- The main reasons for visiting the centre were: food and grocery shopping (36%), to visit the bank/ building society/ Post Office (18%), to visit the library (10%) and due to work/ school/ college (6%);
- 52% of visitors planned to stay in the centre for up to half an hour, with 40% planning to stay in the centre for up to two hours and 2% planning to stay in the centre all day;
- The majority of visitors (60%) did not plan to undertake their main food shop on the day of the survey;

- When asked whether they were planning to buy anything other than food goods on the day of the survey, 6% of respondents stated that they planned to purchase clothing, footwear or household goods;
- 66% of visitors stated that they visited Lees 'about as frequently' today as compared to five years ago. 18% stated that they visited the centre 'more' or 'much more frequently' than five years ago; and
- 52% of visitors indicated that they did not visit the centre during the evening.

Areas of weakness were seen to be cinemas, which 92% of visitors rated as being either 'worse' or 'much worse' than other centres (due to there being no cinema facilities in the centre), entertainment/ events/ performances (84% stating that this was worse than elsewhere), choice of High Street names (78%) and leisure facilities (68%).

Visitors were asked about the types of shops and services they would like to see more of in the centre. Popular responses were clothing stores (16%) and specialist foodstores (16%). Visitors were also asked about the types of leisure facilities they would like to see more of in the centre. Popular responses were a swimming pool (18%), parks/ gardens and a health and fitness centre (8%). This is in addition to any leisure facilities already in the centre.

Business Survey Results

A questionnaire was distributed to all local businesses within Lees in order to gain an understanding of the opinions and views of retailers. A total of 64 questionnaires were distributed with 17 being returned: a response rate of 27%. The main findings of the business survey were as follows:

- 20% of respondents had been trading in the district centre in excess of twenty years, with some 40% having been in operation for over ten years and 13% for over five years;
- 82% of respondents were independent traders, with 18% being part of a national group or chain;
- 40% of respondents indicated that they were professional services, 27% being retail services, 13% being leisure services, 13% being non-food retailers and 7% being food retailers;
- 76% of traders stated that since they began trading business had either 'grown significantly' or 'grown moderately', with 18% indicating that business had 'remained largely static'. 6% indicated that their business had declined to some degree since they began trading;
- 29% of respondents indicated that their business was currently trading 'moderately' with 65% stating that their business was currently performing either 'very well' or 'well' illustrating strong performance;

▪ The majority of respondents (53%) owned their premises; ▪ The survey indicated that 24% of traders relied upon local residents primarily for the majority of their business, although a further 52% relied primarily on residents in the wider Oldham area and 14% on residents outside the Borough. 5% relied on office employees and 5% relied mainly on passers-by; ▪ When asked about measures that would improve the district centre, 11% of respondents stated that improved security/ CCTV would have this effect. Other important measures included an increased choice/ range of shops (8%), improved street paving (8%) and more independent/ specialist traders (7%); ▪ 60% of respondents felt that there was a good balance between shops and other non-retail uses, with 33% stating that there were too many non-retail uses in the district centre and 7% that there were not enough non-retail uses; ▪ Respondents identified the main barriers to trading performance as being inadequate customer car parking (18%), high rents/ overheads (13%) and a lack of passing trade outside premises (8%); ▪ Over three quarters of respondents (77%) indicated that they had no plans to alter their business in any way over the next five years, with a further 18% planning to refurbish their existing floorspace; ▪ The largest proportion of respondents (32%) considered Oldham to be their biggest competitor.	The business survey asked respondents to rate a number of different aspects of Lees in terms of whether they were 'good', 'average' or 'poor'. The majority of aspects were rated as being 'average' by the largest proportion of respondents. However, a number of aspects were rated as being 'poor' by the greatest proportion of respondents. These aspects were: amount of car parking (33%), location of car parking (25%), number of events (25%) and amount of marketing and promotion (25%). Respondents were also able to add any additional comments they would like to make at the end of the survey. Through this process a number of retailers highlighted that there is inadequate car parking in the centre. Aside from this, certain retailers felt that the district centre needs a wider range of shops and restaurants.

Accessibility	Environmental Quality
Car: Lees is situated on the A669, which connects to Oldham to the west and Manchester to the south west. The M60 (junction 21) and M62 (junction 20) are nearby. High Street, on which much of the centre is based is a busy road, however pedestrian crossings are provided to aid pedestrians. **Car parks:** There is limited parking in Lees. The main car park visitors to the centre use are the one associated with the Co-op foodstore on Athens Way, just outside the town centre boundary. There is limited on-street parking available.| **Public transport:** The town also benefits from good accessibility by public transport. Buses provide services to the nearby centres of Chadderton, Huddersfield Road, Oldham, Royton and Shaw.	Lees is an attractive district centre east of Oldham. The centre is focused on High Street and St Thomas Parade. St Thomas Parade is pedestrianised, which provides a safe environment for shoppers. However, High Street is not, and at the time of the survey, there was a large volume of traffic travelling along this road. When the centre was visited, there was a medium level of footfall. The centre was most busy on High Street. Pavement widths tend to be narrow. Where the centre meets busy roads, pedestrian crossings aid movement by foot. The streets are clean with no evidence of litter, whilst shop units themselves are maintained to high standards, creating an attractive shopping environment. Units are a mixture of old and new build. Street furniture is plentiful including: benches, bins, trees and christmas lights. There were no public toilets in the centre.

ROYTON HEALTH CHECK ASSESSMENT

Date of Site Visit: 21 October 2008

Status: District Centre (Oldham UDP 2006)

Photographs of Royton District Centre

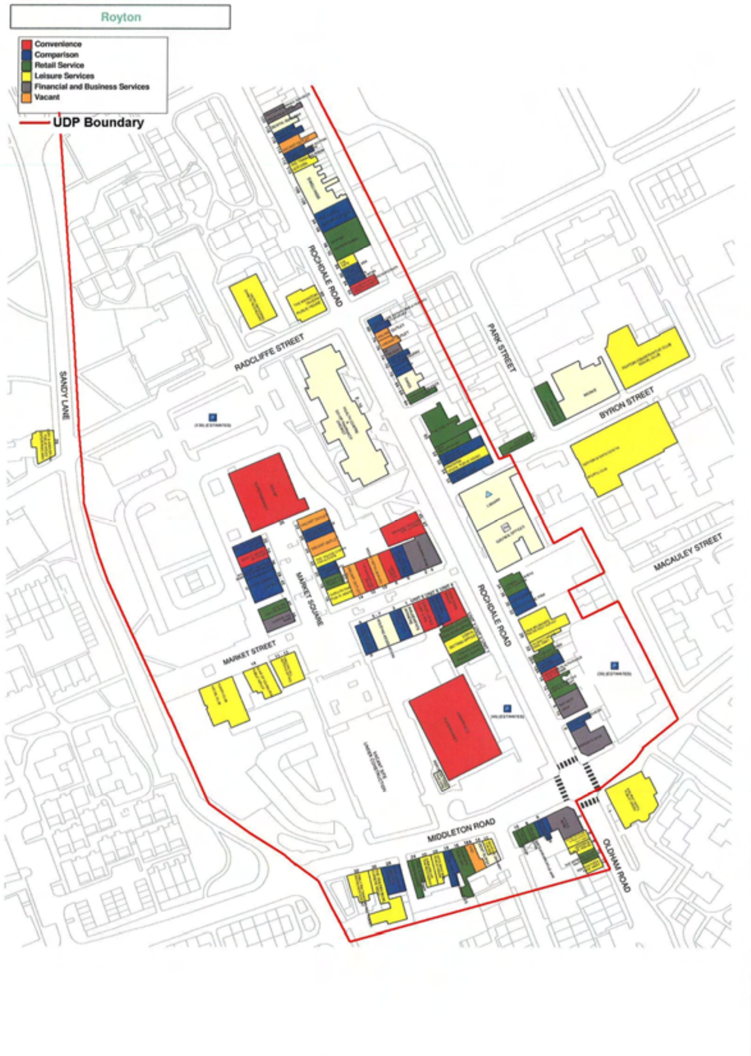
Figure 51 (top left): Council Offices, Rochdale Road
Figure 52 (top centre): Retail frontages, Market Street
Figure 53 (top right): Retail frontages, Westgate
Figure 54 (bottom left): New development, Middleton Road
Figure 55 (bottom right): Retail frontages, Market Square

Centre Overview

Royton is defined as a district centre by the Oldham Unitary Development Plan (July 2006). It is located on the A671, three miles from junction 20 of the M62, two miles north of Oldham and 10 miles north east of Manchester. At the time of the 2001 census, the Royton urban area had a population of 22,238 (Focus).

The main focus for retailing in Royton comprises Market Square, Market Street and Rochdale Road. There are also secondary retail frontages along Byron Street, Middleton Road, Oldham Road, Park Street and Radcliffe Street. A land use plan of Royton District Centre as defined by GOAD is provided overleaf.

Figure 56: Land Use map for Royton District Centre (2008)



Source: GOAD base validated by WYG site visit (October 2008)
(It should be noted that units in light yellow are classed as non-retail and for this centre include: Council Offices; a Health Centre; and a Library amongst others. Each plan shows the ground floor only, however floorspace figures in the text relate to all floors. The UDP boundary extends from Rochdale Road to the north and Byron Street to the east. Each UDP boundary is sourced from the published hard copy of the proposals map)

Table 28: Diversity of Uses in Royton District Centre (2008)

	Number of Outlets		
	Number	Royton (%)	UK (%)
Convenience	11	12.2	8.4
Comparison	23	25.6	35.4
Retail Service	15	16.7	12.6
Leisure Services	22	24.4	21.2
Financial and Business Services	11	12.2	11.6
Vacant	8	8.9	10.4
Total	90	100	100

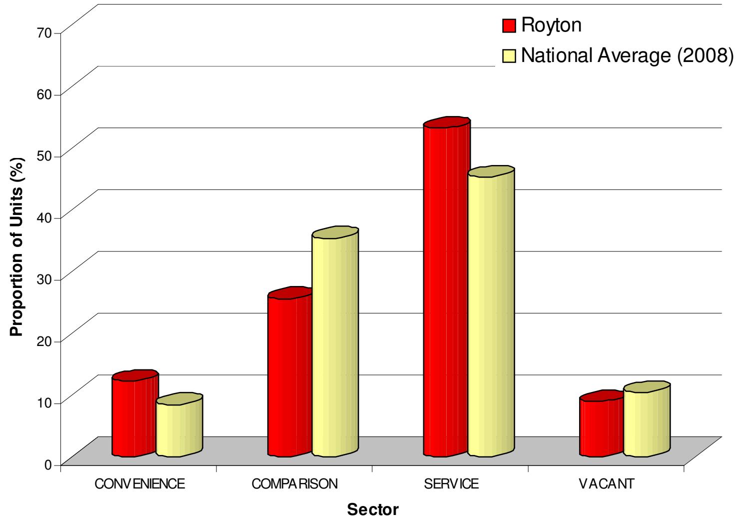
Source: GOAD Report (October 2008)

Table 29: Existing Floorspace in Royton District Centre (2008)

	Existing Floorspace		
	Sq m	Royton (%)	UK (%)
Convenience	2,580	26.4	13.7
Comparison	1,640	16.8	38.8
Retail Service	1,430	14.6	6.8
Leisure Services	2,470	25.3	22.5
Financial and Business Services	1,130	11.6	9.1
Vacant	530	5.4	8.4
Total	9,780	100	100

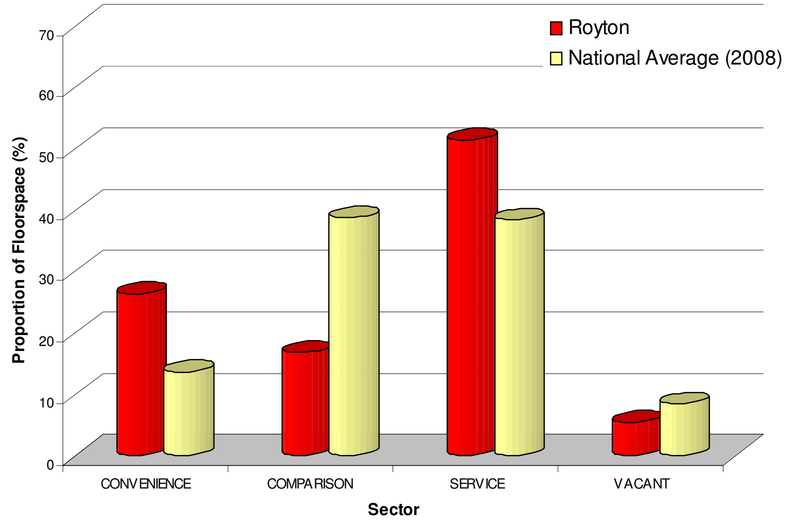
Source: GOAD Report (October 2008)

Figure 57: Proportion of Units in Royton District Centre (2008)



Source: Experian GOAD (October 2008)

Figure 58: Proportion of Floorspace in Royton District Centre (2008)



Source: Experian GOAD (October 2008)

Convenience

12.2% of all units in Royton are in use for the sale of convenience goods. This compares to a national average of 8.4%. Given the role performed by Royton, it is not surprising to discover that the proportion of units used for the sale of convenience goods is above the national average. Likewise, as expected the proportion of convenience floorspace is well above the national average (26.4% compared to 13.7% nationally). Therefore, there are an above average number of convenience outlets which are large in size and sell a range of goods. At present, this sector is dominated by the Somerfield store on Rochdale Road and the Co-op store on Market Square (both food and non-food). Other convenience traders in the centre are generally independents including: four 'bakers and confectioners', one 'butchers' and one 'grocers and delicatessens'. There is an outdoor market on Market Square which operates every Thursday, however this is not shown on Figure 56. It should be noted that GOAD classifies markets as convenience goods. However, the market comprises a mix of convenience and comparison retail stalls.

Comparison

Comparison traders in Royton occupy 25.6% of outlets against a national average of 35.4%. Similarly, when it comes to comparison goods floorspace, Royton is below the national average with a figure of 16.8% compared to a national average of 38.8%. The comparison goods retail offer in Royton is predominantly comprised of independent traders.

Overall Service

The service sector comprises 48 units and occupies 5,030 sq m of floorspace. The proportion of service outlets (53.3%) is above the national average (45.4%) as are the proportion of service floorspace (51.5% compared to 38.4%).

Retail Service

Retail services, which comprise such uses as hairdressers, dry cleaners and petrol filling stations, account for 16.7% of outlets and 14.6% of floorspace in Royton, which compares to national averages of 12.6% and 6.8% respectively. 'Health and beauty' traders are particularly dominant in this sector, accounting for 8 (or 53%) of all retail service outlets. Royton contains a Post Office on Rochdale Road.

Leisure Services

Leisure services, as defined by GOAD, include uses such as restaurants, cafes, bookmakers and public houses. Royton is well provided for in this sector with both the proportion of outlets (24.4%) and the proportion of floorspace occupied (25.3%) being above the national average (21.2% and 22.5% respectively). Public houses are the most prolific in this sector, occupying six units. Other well represented traders include restaurants (five units) and fast-food and takeaway units (also five units). It should be noted that this refers to leisure facilities within the UDP boundary only.

Financial Services

In terms of the proportion of units occupied by financial and business services the figures closely reflect the national average, occupying 12.2% of all outlets compared to a figure of 11.6% nationally. A number of 'high street' banks are present in the district centre, including: Barclays Bank; HSBC; Lloyds TSB; Nat West; and Yorkshire Bank.

Non Retail

In addition to the retail service on offer, there are three medical services and a public library within the centre. Royton District Centre is surrounded by residential areas.

Unit Sizes

Table 30 below highlights the composition of Royton District Centre at October 2008 in terms of the size of retail units. This is taken from an assessment of retailing facilities provided by Experian GOAD.

Table 30: Size of Units within Royton District Centre

Size of Unit (ground floor area)	Number of units	Proportion of Total (%)	
		Royton	**GB**
Under 93 sq m (1,000 sq ft)	63	70.0	39.1
93-232 sq m (1,000-2,499 sq ft)	22	24.4	39.6
232-464 sq m (2,500-4,999 sq ft)	3	3.3	12.6
465-929 sq m (5,000-9,999 sq ft)	1	1.1	5.1
929-1,393 sq m (10,000-14,999 sq ft)	1	1.1	1.5
1,393-1,858 sq m (15,000-19,999 sq ft)	0	0.0	0.7
1,858-2,787 sq m (20,000-29,999 sq ft)	0	0.0	0.7
Above 2,787 sq m (30,000 sq ft)	0	0.0	0.8
Total	**90**	**100**	

Source: Experian Goad (2008)

Royton has a higher proportion of small units of less than 93 sq m (70.0%), compared to the national average (39.1%). There are no units in the centre with a floorspace above 1,393 sq m. Retailers are increasingly looking for bigger units which can only be addressed by combining existing vacancies or through redevelopment.

Top 20 Retailers

Royton District Centre accommodates none of the 'Top Twenty Retailers' identified by Focus.

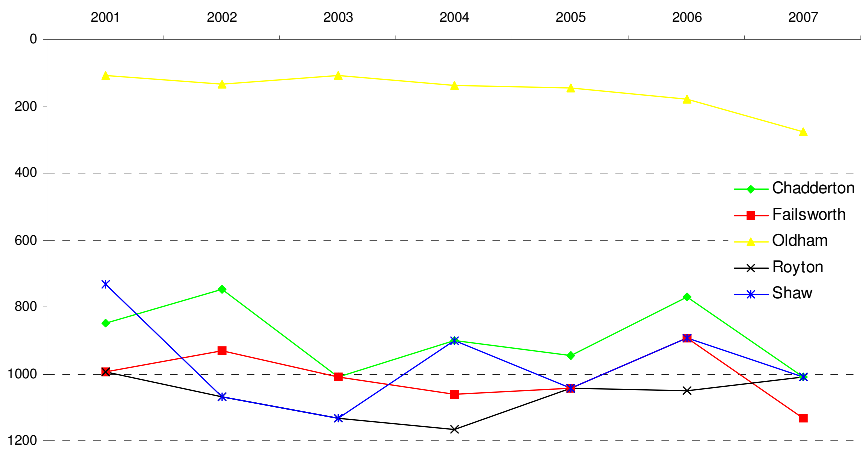
Table 31: Top 20 Retailers

Rank	Retailer
1	Boots
2	Marks & Spencer
3	Argos
4	Woolworths
5	Debenhams
6	John Lewis
7	W.H. Smith
8	BHS
9	Next
10	Dixons
11	Superdrug
12	Lloyds Pharmacy
13	Wilkinson
14	CO-OP Department Stores
15	Primark
16	New Look
17	HMV
18	Dorothy Perkins
19	Rosebys
20	Waterstones

Source: Focus Report (October 2008)

Retail Demand

Figure 59: Retail Ranking in Oldham Catchment



Source: Focus Report (October 2008)

Royton's retail ranking based on retailer demand has varied since 2001. However, in general terms, its ranking has gradually increased in recent years, which is in contrast to the other centres within the Borough with Chadderton, Failsworth, Oldham and Shaw have all witnessed a decrease in ranking recently.

Retailer Requirements

Table 32: Retailer Requirements

	Number of Requirements	Minimum Floorspace (sq m)	Maximum Floorspace (sq m)
Convenience	0	0	0
Comparison	0	0	0
Service	1	46	186
TOTAL	**1**	**46**	**186**

Source: Focus Report (October 2008)

At October 2008 there was one retailer, Subway, seeking representation within Royton, requiring up to 186 sq m (gross) retail floorspace.

Vacancies

The number of vacant units within a centre can provide a good indication of how a shopping centre is performing. However, care should be taken when interpreting figures. Vacancies can occur for positive as well as negative reasons; for example, the opening of a new retail centre elsewhere in a town may draw retailers from older properties or more peripheral areas of the city. Vacant units will be found in even the strongest of town centres. However, they can be a useful indicator of the level of demand. For example, some properties may lay vacant because they are poorly maintained, unsuited to modern retailing requirements or simply not being actively marketed. Conversely a low vacancy rate does not necessarily mean that a centre is performing well. For example, if there is a proliferation of charity shops and other uses not usually associated with a town centre it may be a sign of decline, particularly where these uses are located in prime locations. Despite these issues, it is still a useful indicator of town centre performance.

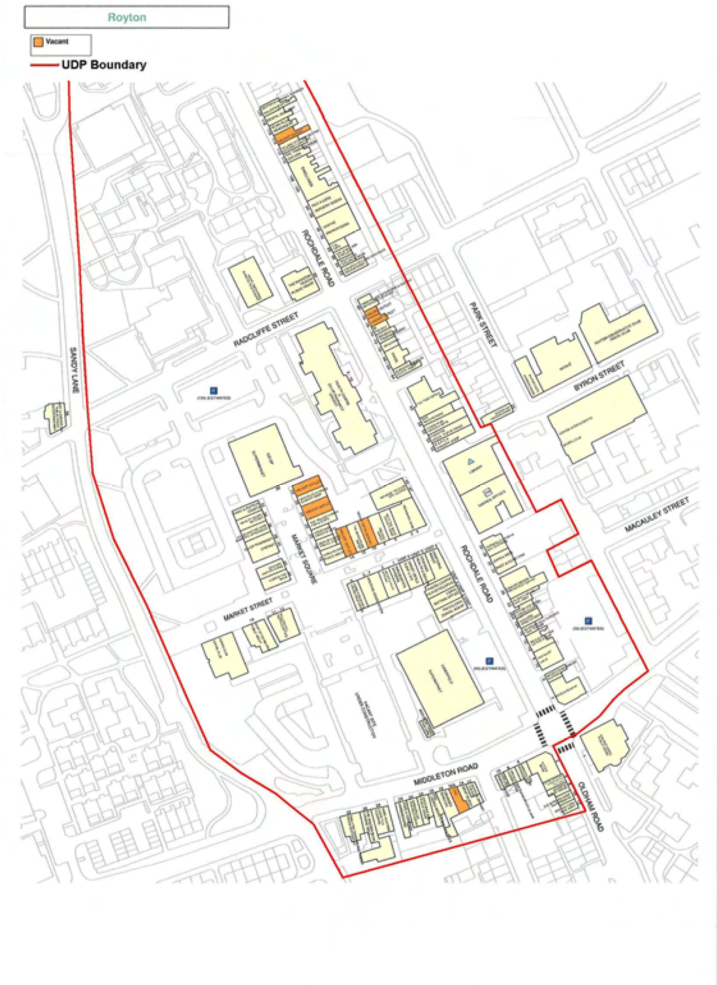
Table 33: Vacancies in Royton (2008)

	Vacancy		
	Total	Royton (%)	UK (%)
No. of Outlets	8	8.9	10.4
Floorspace	530	5.4	8.4

Source: GOAD Report (October 2008)

Table 33 illustrates that at October 2008 there were eight vacant retail units in the district centre, which occupied a floorspace of 530 sq m. This represents 8.9% of all outlets and 5.4% of floorspace, compared to respective national averages of 10.4% and 8.4%. From examining the GOAD plan of Royton, it can be seen that Market Square (four units) and Rochdale Road (three units) have the highest number of vacant units within the district centre. Aside from this, there is one vacant unit on Middleton Road.

Figure 60: Vacancies in Royton District Centre (2008)



Source: GOAD base validated by WYG site visit (October 2008)
(It should be noted that units in light yellow are classed as non-retail. Each plan shows the ground floor only, however floorspace figures in the text relate to all floors. Each UDP boundary is sourced from the published hard copy of the proposals map)

In Street Survey Results

Accessibility

In respect of accessibility, the on-street visitors survey undertaken by NEMS over three separate days, identified the following:

- Almost a third (32%) of visitors had no access to a car for personal use during the day-time. During the evening/ night-time, the proportion of visitors who did not have access to a car for personal use was also 32%;
- Just over half (52%) of visitors arrived in the centre by car or van (either as driver or passenger), with a further 26% walking to the centre. 20% of visitors arrived in the centre by bus, minibus or coach;
- Of those visitors who drove, the most popular place to leave their vehicle was at the Precinct with 19% of drivers parking here. 12% of visitors parked on-street;
- 81% of drivers did not encounter any difficulty when obtaining a car parking space on the day of the survey;
- 68% of visitors travelled for 10 minutes or less to reach the centre. An additional 10% travelled for between 11 and 15 minutes, with 12% travelling for between 16 and 20 minutes and 6% for between 21 and 30 minutes. Only 4% of visitors travelled for over an hour to reach the centre;
- Visitors were asked to consider car parking provision in Royton. Of those that answered this question, 38% deemed this to be 'about the same' as that in other centres;
- In terms of car parking prices, 34% considered prices to be 'better' or 'much better' than other centres; and
- Accessibility by public transport was described by 48% of visitors as being 'about the same' as in other centres, although 26% felt that this was 'better' or 'much better' as in other shopping centres.

Perception of Safety and Occurrence of Crime

The on-street visitors survey asked specific questions to visitors about their perceptions of crime in Royton. During the day-time, some 50% of visitors indicated that safety in Royton was 'about the same' as that in other centres, with 26% considering it to be 'worse' or 'much worse'. However, with respect to safety during the evening/ night-time, the proportion of visitors who deemed safety to be 'about the same' as in other centres fell to 16%, with some 46% considering safety to be either 'worse' or 'much worse' than that in other centres. 4% of visitors felt that evening/ night-time safety in the centre was 'better' or 'much better' than other centres, with 34% indicating that they did not know either way.

Customer Views and Behaviour

The main findings of the on-street survey undertaken by NEMS Market Research were:

- 86% of visitors to the centre had travelled directly from home;
- 62% of those shoppers interviewed lived in the Royton urban area, with 60% just visiting the centre and 10% working in the centre;
- The main reasons for visiting the centre were: food and grocery shopping (22%), to visit the market (18%), for social/ leisure activities (14%) and to visit the bank/ building society/ Post Office (10%);
- 40% of visitors planned to stay in the centre for up to half an hour, with 50% planning to stay in the centre for up to two hours and 6% planning to stay in the centre all day;
- The majority of visitors (82%) did not plan to undertake their main food shop on the day of the survey;

- When asked whether they were planning to buy anything other than food goods on the day of the survey, 14% of respondents stated that they planned to purchase clothing, footwear or household goods;
- 54% of visitors stated that they visited Royton 'about as frequently' today as compared to five years ago. 22% stated that they visited the centre 'more' or 'much more frequently' than five years ago; and
- 68% of visitors indicated that they did not visit the centre during the evening.

Areas of weakness were seen to be the choice of High Street names, which 86% of visitors rated as being 'worse' or 'much worse' than other centres, entertainment/ events/ performances (86% stating that this was worse than elsewhere), choice of shops (82%) and restaurants (80%).

Visitors were asked about the types of shops and services they would like to see more of in the centre. Popular responses were clothing stores (26%) and footwear stores (20%). Visitors were also asked about the types of leisure facilities they would like to see more of in the centre. Popular responses were a cinema (24%), a health and fitness centre (12%) and a bowling alley (8%). This is in addition to any leisure facilities already in the centre.

Business Survey Results

A questionnaire was distributed to all local businesses within Royton in order to gain an understanding of the opinions and views of retailers. A total of 90 questionnaires were distributed with 25 being returned: a response rate of 28%. The main findings of the business survey results were as follows:

- 40% of respondents had been trading in the district centre in excess of twenty years, with some 12% having been in operation for over ten years and 16% for over five years;
- 80% of respondents were independent traders, with 20% being part of a national group or chain;
- 26% of respondents indicated that they were non-food retailers, 22% being food retailers, 22% being retail services, 22% being leisure services, 4% being professional services and 4% being charity shops;
- Half (50%) of traders stated that since they began trading business had either 'grown significantly' or 'grown moderately', with 31% indicating that business had 'remained largely static'. 19% indicated that their business had declined to some degree since they began trading;
- 60% of respondents indicated that their business was currently trading 'moderately' with 36% stating that their business was currently performing either 'very well' or 'well' illustrating strong performance;

- The majority of respondents (84%) leased their premises; - The survey indicated that 62% of traders relied upon local residents primarily for the majority of their business, although a further 15% relied primarily on residents in the wider Oldham area and 9% on office employees. 9% relied mainly on passers-by; - When asked about measures that would improve the district centre, 9% of respondents stated that an increased choice/ range of shops would have this effect. Other important measures include improved security/ CCTV (8%), greater promotion/ marketing of the centre (7%) and public toilets (7%); - 60% of respondents felt that there was a good balance between shops and other non-retail uses, with 20% stating that there were too many non-retail uses in the district centre and 20% that there were not enough non-retail uses; - Respondents identified the main barriers to trading performance as being high rents/ overheads (14%), a lack of passing trade outside premises (11%) and inadequate customer car parking (6%); - Over two thirds of respondents (68%) indicated that they had no plans to alter their business in any way over the next five years, with a further 12% planning to refurbish their existing floorspace; - The largest proportion of respondents (24%) considered Oldham to be their biggest competitor.	The business survey asked respondents to rate a number of different aspects of Royton in terms of whether they were 'good', 'average' or 'poor'. The majority of aspects were rated as being 'average' by the largest proportion of respondents. However, a number of aspects were rated as being 'poor' by the greatest proportion of respondents. These aspects were: range of marketing and promotion (95%), amount of marketing and promotion (90%), image of Royton District Centre (84%) and range of events (79%). Respondents were also able to add any additional comments they would like to make at the end of the survey. Through this process a number of retailers highlighted that the shopping precinct needs regenerating. Aside from this, certain retailers felt that there was more variety of shops needed in the centre.

Accessibility	Environmental Quality
Car: Royton is situated on the A671, which connects to Oldham to the south and Manchester to the south west. The M62 (junction 20) is nearby. Rochdale Road, on which much of the centre is based is a busy road, however pedestrian crossings are provided to aid pedestrians. **Car parks:** There are three car parks in Royton. These car parks include: High Barn Street; and the Precinct. All these car parks are free of charge. There is also limited on-street parking available. Based on the Council's survey, 28% of respondents were positive about the availability of spaces and 56% were positive about the convenience of the car parks. **Public transport:** The town also benefits from good accessibility by public transport. Buses provide services to the nearby centres of Ashton, Chadderton, Lees, Oldham, Rochdale and Shaw. Based on the Council's survey, 63% of respondents were positive about the bus routes and again 63% were positive about the location of bus stops.	Royton is a quiet, small, dated centre north of Oldham and is in need of regeneration. The centre is focused on Market Square, Market Street and Rochdale Road. Market Square and Market Street are pedestrianised, which provide a safe environment for shoppers. However, Rochdale Road is not, and at the time of the survey, there was a large volume of traffic travelling along this road. When the centre was visited, there was a low level of footfall. The centre was most busy along Rochdale Road. Pavements widths vary, and where the centre meets busy roads, pedestrian crossings aid movement by foot. The streets are clean with no evidence of litter, whilst shop units themselves are maintained to high standards. Units are a mixture of old and new build. Street furniture includes: benches, bins and Christmas lights. There were adequately maintained public toilets on the Precinct car park.

SHAW HEALTH CHECK ASSESSMENT

Date of Site Visit: 21 October 2008

Status: District Centre (Oldham UDP 2006)

Photographs of Shaw District Centre

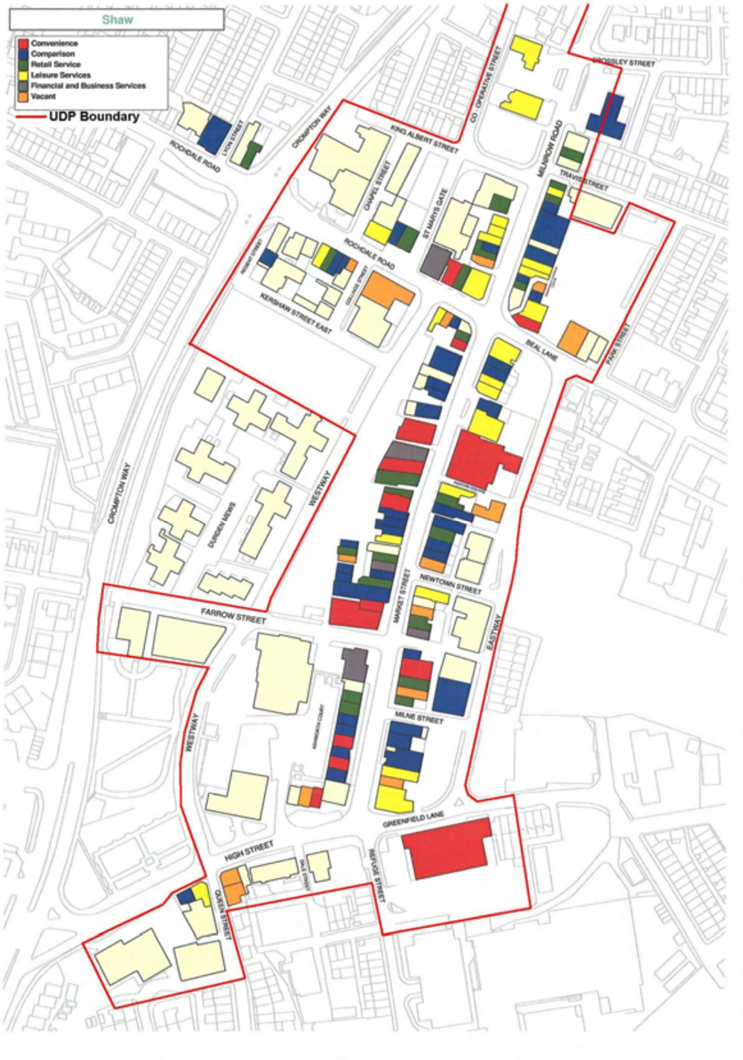
Figure 61 (top left): Retail frontages, Market Street
Figure 62 (top centre): Asda store, Eastway
Figure 63 (top right): Retail frontages, Market Street
Figure 64 (bottom left): Vacant unit, Rochdale Road
Figure 65 (bottom right): Vacant units, Market Street

Centre Overview

Shaw is defined as a district centre by the Oldham Unitary Development Plan (July 2006). It is located on the A663, close to junction 20 of the M62, seven miles south east of Rochdale and 11 miles north east of Manchester. At the time of the 2001 census, the Shaw urban area had a population of 19,335 (Focus).

The main focus for retailing in Shaw comprises High Street, Market Street and Rochdale Road. There are also secondary retail frontages along Beal Lane, Farrow Street, Milne Street, Milnrow Road, Newtown Street and St Marys Gate. A land use plan of Shaw District Centre as defined by GOAD is provided overleaf.

Figure 66: Land Use map for Shaw District Centre - without Asda store (2008)



Source: GOAD base validated by WYG site visit (October 2008)
(It should be noted that units in light yellow are classed as non-retail. Each plan shows the ground floor only, however floorspace figures in the text relate to all floors. The UDP boundary extends from Milnrow Road to the north. Each UDP boundary is sourced from the published hard copy of the proposals map)

Table 34: Diversity of Uses in Shaw District Centre - with Asda store (2008)

	Number of Outlets		
	Number	Shaw (%)	UK (%)
Convenience	17	12.3	8.4
Comparison	35	25.4	35.4
Retail Service	23	16.7	12.6
Leisure Services	31	22.5	21.2
Financial and Business Services	16	11.6	11.6
Vacant	16	11.6	10.4
Total	138	100	100

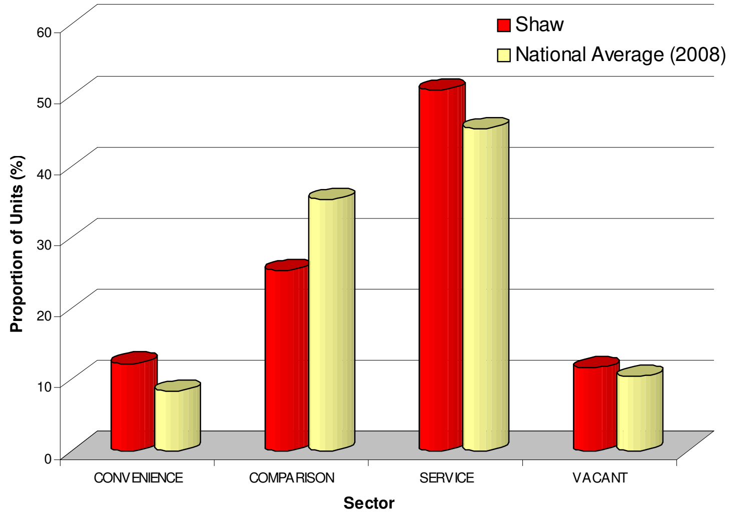
Source: GOAD Report (October 2008)

Table 35: Existing Floorspace in Shaw District Centre - with Asda store (2008)

	Existing Floorspace		
	Sq m	Shaw (%)	UK (%)
Convenience	9,763	41.8	13.7
Comparison	3,050	13.1	38.8
Retail Service	1,920	8.2	6.8
Leisure Services	5,280	22.6	22.5
Financial and Business Services	1,920	8.2	9.1
Vacant	1,430	6.1	8.4
Total	23,363	100	100

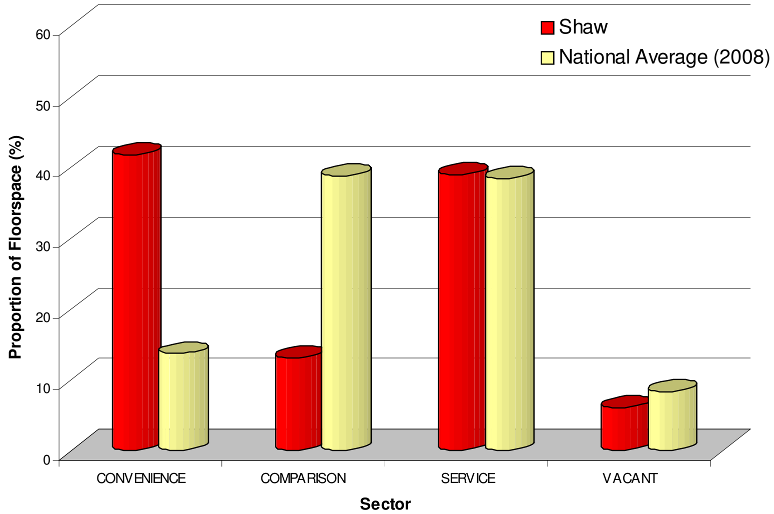
Source: GOAD Report (October 2008)

Figure 67: Proportion of Units in Shaw District Centre (2008)



Source: Experian GOAD (October 2008)

Figure 68: Proportion of Floorspace in Shaw District Centre (2008)



Source: Experian GOAD (October 2008)

Convenience

12.3% of all units in Shaw are in use for the sale of convenience goods. This compares to a national average of 8.4%. Given the role performed by Shaw, it is not surprising to discover that the proportion of units used for the sale of convenience goods is above the national average. Likewise, as expected the proportion of convenience floorspace is well above the national average (41.8% compared to 13.7% nationally). Therefore, there are an above average number of convenience outlets which are large in size and sell a range of goods. At present, this sector is dominated by the Asda store on Eastway. Aside from this, the Aldi store on Greenfield Lane and the Iceland store on Market Street contribute strongly to this sector, as does the Tesco Express store on Market Street. Other convenience traders in the centre are generally independents including three 'bakers and confectioners', three 'butchers' and two 'convenience stores'. There is an outdoor market off High Street which operates every Thursday, however this is not shown on Figure 66. It should be noted that GOAD classifies markets as convenience goods. However, the market comprises a mix of convenience and comparison retail stalls.

Comparison

Comparison traders in Shaw occupy 25.4% of outlets against a national average of 35.4%. Similarly, when it comes to comparison goods floorspace, Shaw is below the national average with a figure of 13.1% compared to a national average of 38.8%. The comparison goods retail offer in Shaw is predominantly comprised of independent traders. It should be noted that since the town centre survey was undertaken, Woolworths have gone into administration. All their stores have now closed, including the Woolworths store on Market Street, which is now vacant.

Overall Service

The service sector comprises 70 units and occupies 9,120 sq m of floorspace. The proportion of service outlets (50.8%) is above the national average (45.4%). Likewise, the proportion of service floorspace is above the national average (39.0% compared to 38.4%).

Retail Service

Retail services, which comprise such uses as hairdressers, dry cleaners and petrol filling stations, account for 16.7% of outlets and 8.2% of floorspace in Shaw, which compares to national averages of 8.4% and 6.8% respectively. 'Health and beauty' traders are particularly dominant in this sector, accounting for 13 (or 57%) of all retail service outlets. Shaw contains a Post Office on Rochdale Road.

Leisure Services

Leisure services, as defined by GOAD, include uses such as restaurants, cafes, bookmakers and public houses. Shaw is well provided for in this sector with both the proportion of outlets (22.5%) and the proportion of floorspace occupied (22.6%) being above the national average (21.2% and 22.5% respectively). Fast-food and takeaway units are the most prolific in this sector, occupying nine units. Other well represented traders include public houses (four units) and restaurants (also four units).

Financial Services

In terms of the proportion of units occupied by financial and business services the figures reflect the national average, occupying 11.6% of all outlets compared to a figure of 11.6% nationally. A number of 'high street' banks are present in the district centre, including: Barclays Bank; Bradford and Bingley; the Royal Bank of Scotland; and Yorkshire Bank.

Non Retail

In addition to the retail service on offer, there is a library, leisure centre, community centre, health centre, Parish Council Office, children's centre and theatre (Newtown Street) within Shaw. Shaw District Centre is surrounded by residential areas.

Unit Sizes

Table 36 below highlights the composition of Shaw District Centre at October 2008 in terms of the size of retail units. This is taken from an assessment of retailing facilities provided by Experian GOAD.

Table 36: Size of Units within Shaw District Centre

Size of Unit (ground floor area)	Number of units	Proportion of Total (%)	
		Shaw	GB
Under 93 sq m (1,000 sq ft)	89	64.5	39.1
93-232 sq m (1,000-2,499 sq ft)	34	24.6	39.6
232-464 sq m (2,500-4,999 sq ft)	11	8.0	12.6
465-929 sq m (5,000-9,999 sq ft)	1	0.7	5.1
929-1,393 sq m (10,000-14,999 sq ft)	2	1.4	1.5
1,393-1,858 sq m (15,000-19,999 sq ft)	0	0.0	0.7
1,858-2,787 sq m (20,000-29,999 sq ft)	0	0.0	0.7
Above 2,787 sq m (30,000 sq ft)	1	0.7	0.8
Total	**138**	**100**	

Source: Experian Goad (2008)

Shaw has a higher proportion of small units of less than 93 sq m (64.5%), compared to the national average (39.1%). There is one unit in the centre with a floorspace above 2,787 sq m, the Asda on Greenfield Lane. Retailers are increasingly looking for bigger units which can only be addressed by combining existing vacancies or through redevelopment.

Top 20 Retailers

Shaw District Centre accommodates two of the 'Top Twenty Retailers' identified by Focus, these being Boots and Woolworths. However, it should be noted that since the town centre survey was undertaken, the Woolworths store on Market Street has been vacated and has remained this way.

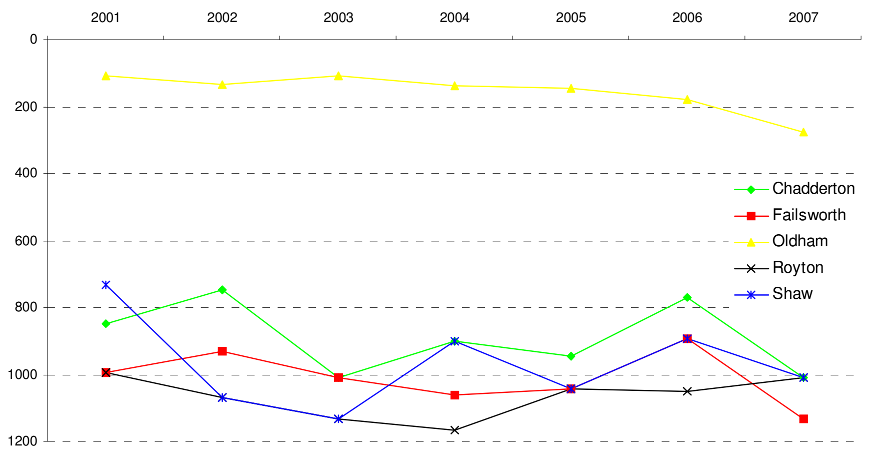
Table 37: Top 20 Retailers

Rank	Retailer
1	Boots
2	Marks & Spencer
3	Argos
4	Woolworths
5	Debenhams
6	John Lewis
7	W.H. Smith
8	BHS
9	Next
10	Dixons
11	Superdrug
12	Lloyds Pharmacy
13	Wilkinson
14	CO-OP Department Stores
15	Primark
16	New Look
17	HMV
18	Dorothy Perkins
19	Rosebys
20	Waterstones

Source: Focus Report (October 2008)

Retail Demand

Figure 69: Retail Ranking in Oldham Catchment



Source: Focus Report (October 2008)

Shaw's retail ranking based on retailer demand has varied since 2001. However, in general terms, its ranking has gradually fallen in recent years reflecting trends in Chadderton, Failsworth and Oldham. Only Royton has witnessed an increase in ranking recently.

Retailer Requirements

Table 38: Retailer Requirements

	Number of Requirements	Minimum Floorspace (sq m)	Maximum Floorspace (sq m)
Convenience	0	0	0
Comparison	0	0	0
Service	1	46	186
TOTAL	**1**	**46**	**186**

Source: Focus Report (October 2008)

At October 2008 there was one retailer, Subway, seeking representation within Shaw, requiring up to 186 sq m (gross) retail floorspace.

Vacancies

The number of vacant units within a centre can provide a good indication of how a shopping centre is performing. However, care should be taken when interpreting figures. Vacancies can occur for positive as well as negative reasons; for example, the opening of a new retail centre elsewhere in a town may draw retailers from older properties or more peripheral areas of the city. Vacant units will be found in even the strongest of town centres. However, they can be a useful indicator of the level of demand. For example, some properties may lay vacant because they are poorly maintained, unsuited to modern retailing requirements or simply not being actively marketed. Conversely a low vacancy rate does not necessarily mean that a centre is performing well. For example, if there is a proliferation of charity shops and other uses not usually associated with a town centre it may be a sign of decline, particularly where these uses are located in prime locations. Despite these issues, it is still a useful indicator of town centre performance.

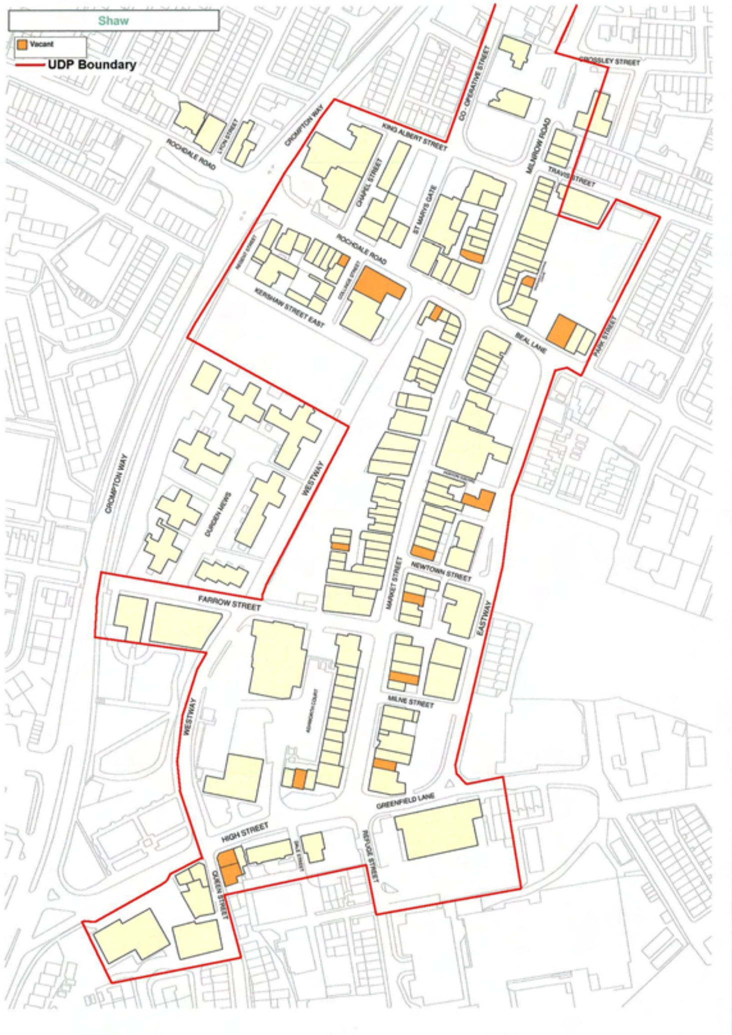
Table 39: Vacancies in Shaw (2008)

	Vacancy		
	Total	Royton (%)	UK (%)
No. of Outlets	16	11.6	10.4
Floorspace	1,430	6.1	8.4

Source: GOAD Report (October 2008)

Table 39 illustrates that at October 2008 there were sixteen vacant retail units in the district centre, which occupied a floorspace of 1,430 sq m. This represents 11.6% of all outlets and 6.1% of floorspace, compared to respective national averages of 10.4% and 8.4%. From examining the GOAD plan of Shaw, it can be seen that Market Street (four units) and Rochdale Road (also four units) have the highest number of vacant units within the district centre. The eight remaining units are placed throughout the centre. Whilst visiting the centre, the large amount of vacancies was noticeable. Some of the vacancies may be due to the Asda and Aldi stores, which seem to dominate the centre.

Figure 70: Vacancies in Shaw District Centre - without Asda store (2008)



Source: GOAD base validated by WYG site visit (October 2008)
(It should be noted that units in light yellow are classed as non-retail. Each plan shows the ground floor only, however floorspace figures in the text relate to all floors. Each UDP boundary is sourced from the published hard copy of the proposals map)

In Street Survey Results

Accessibility

In respect of accessibility, the on-street visitors survey undertaken by NEMS over three separate days, identified the following:

- Over half (56%) of visitors to Shaw had access to a car for personal use during the day-time. During the evening/ night-time, the proportion of visitors who had access to a car for personal use was also 56%;
- Half (50%) of visitors arrived in the centre by car or van (either as driver or passenger), with a further 28% walking to the centre. 14% of visitors arrived in the centre by bus, minibus or coach;
- Of those visitors who drove, the most popular place to leave their vehicle was at Market Place with 24% of drivers parking here. 16% of visitors parked on-street;
- 92% of drivers did not encounter any difficulty when obtaining a car parking space on the day of the survey;
- 64% of visitors travelled for 10 minutes or less to reach the centre. An additional 20% travelled for between 11 and 15 minutes, with 8% travelling for between 16 and 20 minutes and 8% for between 21 and 30 minutes;
- Visitors were asked to consider car parking provision in Shaw. Of those that answered this question, 46% deemed this to be 'better' or 'much better' than in other centres;
- In terms of car parking prices, 50% considered prices to be 'better' or 'much better' than in other centres; and
- Accessibility by public transport was described by 56% of visitors as being 'about the same' as in other centres, although 26% felt that this was 'better' or 'much better' as in other shopping centres.

Perception of Safety and Occurrence of Crime

The on-street visitors survey asked specific questions to visitors about their perceptions of crime in Shaw. During the day-time, some 66% of visitors indicated that safety in Shaw was 'about the same' as that in other centres, with 12% considering it to be 'better' or 'much better'. However, with respect to safety during the evening/ night-time, the proportion of visitors who deemed safety to be 'about the same' as in other centres fell to 40%, with some 28% considering safety to be either 'worse' or 'much worse' that that in other centres. 2% of visitors felt that evening/ night-time safety in the centre was 'better' or 'much better' than other centres, with 30% indicating that they did not know either way.

Customer Views and Behaviour

The main findings of the on-street survey undertaken by NEMS Market Research were:

- 96% of visitors to the centre had travelled directly from home;
- 48% of those shoppers interviewed were just visiting the centre, with 42% living in the Shaw urban area and 2% working in the centre;
- The main reasons for visiting the centre were: food and grocery shopping (38%), to visit the market (16%), for social/ leisure activities (8%) and to visit the stationers/ newsagents (4%);
- 26% of visitors planned to stay in the centre for up to half an hour, with 72% planning to stay in the centre for up to two hours and 2% planning to stay in the centre all day;
- Half (50%) of visitors did plan to undertake their main food shop on the day of the survey;

- When asked whether they were planning to buy anything other than food goods on the day of the survey, 12% of respondents stated that they planned to purchase clothing, footwear of household goods;
- 46% of visitors stated that they visited Shaw 'about as frequently' today as compared to five years ago. 34% stated that they visited the centre 'more' or 'much more frequently' than five years ago; and
- 68% of visitors indicated that they did not visit the centre during the evening.

Areas of weakness were seen to be cinemas, which 82% of visitors rated as being either 'worse' or 'much worse' than other centres (due to there being no cinema facilities in the centre), the choice High Street names (72% stating that this was worse than elsewhere), tourist facilities/ hotels (52%) and restaurants (44%).

Visitors were asked about the types of shops and services they would like to see more of in the centre. Popular responses were clothing stores (32%) and footwear stores (20%). Visitors were also asked about the types of leisure facilities they would like to see more of in the centre. Popular responses were a health and fitness centre (24%), a cinema (22%) and a bowling alley (12%). This is in addition to any leisure facilities already in the centre.

Business Survey Results

A questionnaire was distributed to all local businesses within Shaw in order to gain an understanding of the opinions and views of retailers. A total of 136 questionnaires were distributed with 31 being returned: a response rate of 23%. The main findings of the business survey results were as follows:

- 36% of respondents had been trading in the district centre in excess of twenty years, with some 16% having been in operation for over ten years and 29% for over five years;
- 72% of respondents were independent traders, with 28% being part of a national group or chain;
- 22% of respondents indicated that they were non-food retailers, 22% being retail services, 22% being leisure services, 22% being professional services, 9% being food retailers and 4% being charity shops;
- 52% of traders stated that since they began trading business had either 'grown significantly' or 'grown moderately', with 10% indicating that business had 'remained largely static'. 39% indicated that their business had declined to some degree since they began trading;
- Over half (52%) of respondents indicated that their business was currently trading 'moderately' with 26% stating that their business was currently performing either 'very well' or 'well' illustrating strong performance;

▪ The majority of respondents (61%) leased their premises; ▪ The survey indicated that half (50%) of traders relied upon local residents primarily for the majority of their business, although a further 27% relied primarily on residents in the wider Oldham area and 9% on office employees. 6% relied mainly on specialist buyers; ▪ When asked about measures that would improve the district centre, 8% of respondents stated that public toilets would have this effect. Other important measures included greater promotion/ marketing of the centre (8%), improved security/ CCTV (8%) and an increased choice/ range of shops (8%); ▪ Over half (52%) of respondents felt that there was a good balance between shops and other non-retail uses, with 29% stating that there were too many non-retail uses in the district centre and 19% that there were not enough non-retail uses; ▪ Respondents identified the main barriers to trading performance as being a lack of passing trade outside premises (12%), high rents/ overheads (9%) and inadequate customer car parking (4%); ▪ Over half (53%) indicated that they had no plans to alter their business in any way over the next five years, with a further 13% planning to refurbish their existing floorspace; ▪ The largest proportion of respondents (18%) considered Manchester to be their biggest competitor.	The business survey asked respondents to rate a number of different aspects of Shaw in terms of whether they were 'good', 'average' or 'poor'. The majority of aspects were rated as being 'average' by the largest proportion of respondents. However, a number of aspects were rated as being 'poor' by the greatest proportion of respondents. These aspects were: amount of marketing and promotion (66%), range of marketing and promotion (66%), attractiveness of the public realm (62%) and range of events (62%). Respondents were also able to add any additional comments they would like to make at the end of the survey. Through this process a number of retailers highlighted that there is an antisocial behaviour problem in the centre at night. Aside from this, certain retailers felt that the Asda store has led to an increased number of vacancies in the centre.

Accessibility	Environmental Quality
Car: Shaw is situated on the A663, which connects to Oldham to the south and Manchester to the south west. The M62 (junction 20) is nearby. Beal Lane and Rochdale Road are both busy roads, however pedestrian crossings are provided to aid pedestrians. **Car parks:** Parking is plentiful in Shaw, with their being six main car parks. These car parks include: Eastway; Market Place; Milne Street; Rochdale Road; Swimming Baths; and Westway. There is also parking at the Asda store on Greenfield Lane. All these car parks are free of charge. There is also limited on-street parking available. Based on the Council's survey, 34% of respondents were positive about the availability of spaces and 57% were positive about the convenience of the car parks. **Public transport:** The town also benefits from good accessibility by public transport. Buses provide services to Chadderton, Lees, Oldham and Royton. There is also a railway station on Beal Lane, which provides services to Crompton, Manchester, Oldham and Rochdale amongst others. Based on the Council's survey, 51% of respondents were positive about the bus routes and 57% were positive about the location of bus stops.	Shaw is a fairly attractive, busy, medium sized centre north of Oldham. The centre is focused on High Street, Market Street and Rochdale Road. None of the centre is pedestrianised. At the time of the survey, there was a medium level of footfall. The centre was most busy along Rochdale Road. Pavement widths vary, and where the centre meets busy roads, pedestrian crossings aid movement by foot. The streets are clean with no evidence of litter, whilst shops units themselves are maintained to mixed standards. In particular, units above ground floor levels tend to be maintained to a poor standard. Units are a mixture of old and new build. Street furniture includes benches and bins. There are public toilets at the swimming baths in Farrow Street and at the Asda store on Greenfield Lane.

UPPERMILL HEALTH CHECK ASSESSMENT

Date of Site Visit: 21 October 2008

Status: District Centre (Oldham UDP 2006)

Photographs of Uppermill District Centre

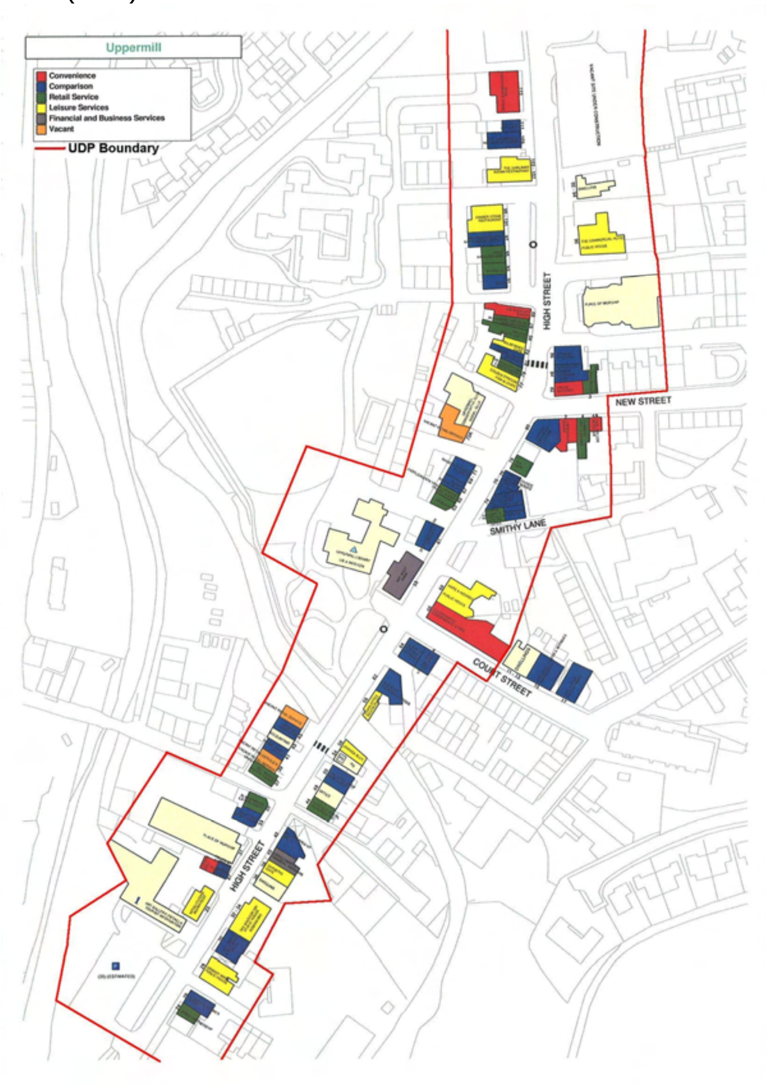
Figure 71 (top left): Car park, High Street
Figure 72 (top centre): Attractive canalside location, off High Street
Figure 73 (top right): Retail frontages, High Street
Figure 74 (bottom left): Vacant unit, High Street
Figure 75 (bottom right): Attractive Square, Off Court Street

Centre Overview

Uppermill is defined as a district centre by the Oldham Unitary Development Plan (July 2006). It is located on the A670, which is a short distance from the M60 (junction 21) and the M62 (junction 21). Uppermill is 6 miles east of Oldham and 13 miles north east of Manchester. At the time of the 2001 census, Uppermill had a population of 7,475.

The main focus for retail in Uppermill is on High Street. There are also secondary retail frontages along Court Street, New Street and Smithy Lane. A land use plan of Uppermill District Centre as defined by GOAD is provided overleaf.

Figure 76: Land Use map for Uppermill District Centre (2008)



Source: GOAD base validated by WYG site visit (October 2008)
(It should be noted that units in light yellow are classed as non-retail. Each plan shows the ground floor only, however floorspace figures in the text relate to all floors. The UDP boundary extends from High Street to the north. Each UDP boundary is sourced from the published hard copy of the proposals map)

Table 40: Diversity of Uses in Uppermill District Centre (2008)

	Number of Outlets		
	Number	Uppermill (%)	UK (%)
Convenience	7	9.7	8.4
Comparison	27	37.5	35.4
Retail Service	11	15.3	12.6
Leisure Services	13	18.1	21.2
Financial and Business Services	10	13.9	11.6
Vacant	4	5.6	10.4
Total	72	100	100

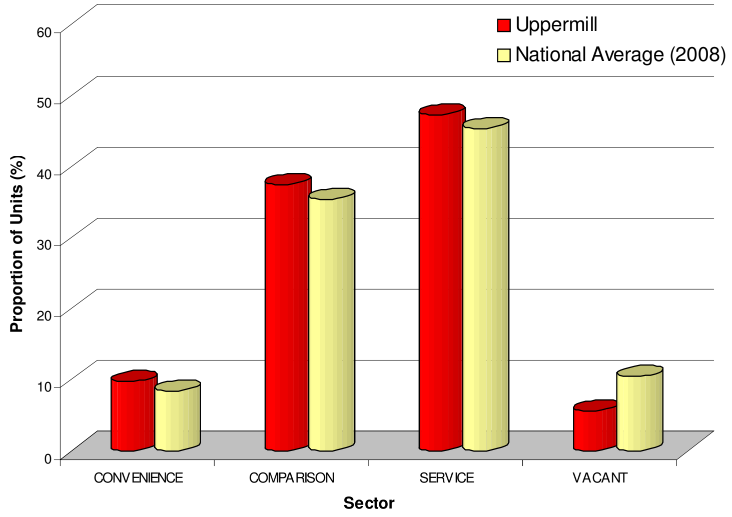
Source: GOAD Report (October 2008)

Table 41: Existing Floorspace in Uppermill District Centre (2008)

	Existing Floorspace		
	Sq m	Uppermill (%)	UK (%)
Convenience	780	13.5	13.7
Comparison	1,770	30.6	38.8
Retail Service	660	11.4	6.8
Leisure Services	1,620	28.0	22.5
Financial and Business Services	660	11.4	9.1
Vacant	300	5.2	8.4
Total	5,790	100	100

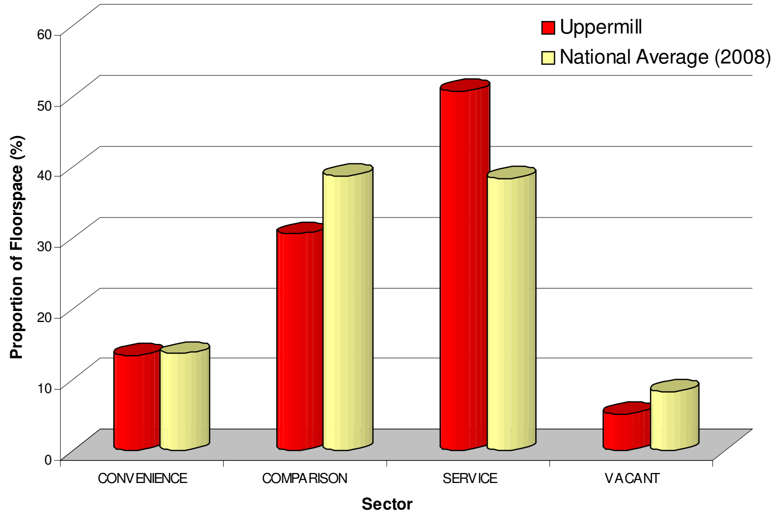
Source: GOAD Report (October 2008)

Figure 77: Proportion of Units in Uppermill District Centre (2008)



Source: Experian GOAD (October 2008)

Figure 78: Proportion of Floorspace in Uppermill District Centre (2008)



Source: Experian GOAD (October 2008)

Convenience

9.7% of all units in Uppermill are in use for the sale of convenience goods. This compares to a national average of 8.4%. Uppermill's convenience provision serves the needs of the local population. This is reflected in the proportion of convenience floorspace (13.5%) which is similar to the national average (13.7). At present, this sector is dominated by the Co-op store and Spar store which are both located on High Street. Other convenience traders in the centre are generally independents including two 'bakers and confectioners', two 'bakers' and one 'grocers and delicatessens'. There is an outdoor market off High Street which operates every Wednesday, however this is not shown on Figure 76. It should be noted that GOAD classifies markets as convenience goods. However, the market comprises a mix of convenience and comparison retail stalls.

Comparison

Comparison traders in Uppermill occupy 37.5% of outlets against a national average of 35.4%. When it comes to comparison goods floorspace, Uppermill is under provided for with a figure of 30.6% compared to a national average figure of 38.8%. The comparison goods retail offer in Uppermill is comprised of predominantly independent traders.

Overall Service

The service sector comprises 34 units and occupies 2,940 sq m of floorspace. The proportion of service outlets (47.3%) is above the national average (45.4%). Likewise, the proportion of service floorspace exceeds the national average (50.8% compared to 38.4%).

Retail Service

Retail services, which comprise such uses as hairdressers, dry cleaners and petrol filling stations, account for 15.3% of outlets and 11.4% of floorspace in Uppermill, which compares to national averages of 12.6% and 6.8% respectively. 'Health and beauty' traders are particularly dominant in this sector, accounting for 7 (or 64%) of all retail service outlets. Uppermill contains a Post Office on High Street.

Leisure Services

Leisure services, as defined by GOAD, include uses such as restaurants, cafes, bookmakers and public houses. Uppermill is under provided for in terms of the proportion of outlets (18.1% compared to a national average of 21.2%). However, in terms of the proportion of floorspace, Uppermill is well provided for (28.0% compared to a national average of 22.5%). Public houses and restaurants are the most prolific in this sector, occupying four units each. Other well represented traders include cafes (three units) and clubs (one unit).

Financial Services

There are a higher proportion of units occupied by financial and business services in Uppermill compared to the national average (13.9% compared to a figure of 11.6% nationally). There is one 'high street' bank present in the district centre, a Nat West.

Non Retail

In addition to the retail service on offer, there are two religious institutions, a swimming pool, a leisure centre, a museum and a library. Uppermill District Centre is surrounded by residential areas.

Unit Sizes

Table 42 below highlights the composition of Uppermill District Centre at October 2008 in terms of the size of retail units. This is taken from an assessment of retailing facilities provided by Experian GOAD.

Table42: Size of Units within Uppermill District Centre

Size of Unit (ground floor area)	Number of units	Proportion of Total (%)	
		Uppermill	GB
Under 93 sq m (1,000 sq ft)	57	79.2	39.1
93-232 sq m (1,000-2,499 sq ft)	14	19.4	39.6
232-464 sq m (2,500-4,999 sq ft)	1	1.4	12.6
465-929 sq m (5,000-9,999 sq ft)	0	0.0	5.1
929-1,393 sq m (10,000-14,999 sq ft)	0	0.0	1.5
1,393-1,858 sq m (15,000-19,999 sq ft)	0	0.0	0.7
1,858-2,787 sq m (20,000-29,999 sq ft)	0	0.0	0.7
Above 2,787 sq m (30,000 sq ft)	0	0.0	0.8
Total	**72**	**100**	

Source: Experian Goad (2008)

Uppermill has a higher proportion of small units of less than 93 sq m (79.2%), compared to the national average (39.1%). There are no units in the centre with a floorspace above 464 sq m. Retailers are increasingly looking for bigger units which can only be addressed by combining existing vacancies or through redevelopment.

Vacancies

The number of vacant units within a centre can provide a good indication of how a shopping centre is performing. However, care should be taken when interpreting figures. Vacancies can occur for positive as well as negative reasons; for example, the opening of a new retail centre elsewhere in a town may draw retailers from older properties or more peripheral areas of the city. Vacant units will be found in even the strongest of town centres. However, they can be a useful indicator of the level of demand. For example, some properties may lay vacant because they are poorly maintained, unsuited to modern retailing requirements or simply not being actively marketed. Conversely a low vacancy rate does not necessarily mean that a centre is performing well. For example, if there is a proliferation of charity shops and other uses not usually associated with a town centre it may be a sign of decline, particularly where these uses are located in prime locations. Despite these issues, it is still a useful indicator of town centre performance.

Table 43: Vacancies in Uppermill (2008)

	Vacancy		
	Total	Uppermill (%)	UK (%)
No. of Outlets	4	5.6	10.4
Floorspace	300	5.2	8.4

Source: GOAD Report (October 2008)

Table 43 illustrates that at October 2008 there were four vacant retail units in the district centre, which occupied a floorspace of 300 sq m. This represents 5.6% of all outlets and 5.2% of floorspace, compared to respective national averages of 10.4% and 8.4%. From examining the GOAD plan of Uppermill, it can be seen that all the vacancies are on High Street. Whilst visiting the centre, it was noticeable that there were few vacancies present.

Figure 79: Vacancies in Uppermill District Centre (2008)

Source: GOAD base validated by WYG site visit (October 2008)
(It should be noted that units in light yellow are classed as non-retail. Each plan shows the ground floor only, however floorspace figures in the text relate to all floors. Each UDP boundary is sourced from the published hard copy of the proposals map)

In Street Survey Results

Accessibility

In respect of accessibility, the on-street visitors survey undertaken by NEMS over three separate days, identified the following:

- Over two thirds (70%) of visitors to Uppermill had access to a car for personal use during the day-time. During the evening/ night-time, the proportion of visitors who had access to a car for personal use was 72%;
- 54% of visitors walked to the centre, with a further 32% arriving by car or van (either as driver or passenger). 10% of visitors arrived in the centre by bus, minibus, or coach;
- Of those visitors who drove, the most popular place to leave their vehicle was on-street with 31% of drivers parking here;
- 63% of drivers did not encounter any difficulty when obtaining a car parking space on the day of the survey;
- 64% of visitors travelled for 10 minutes or less to reach the centre. An additional 6% travelled for between 11 and 15 minutes, with 10% travelling for between 16 and 20 minutes and 10% for between 21 and 30 minutes. Only 4% of visitors travelled for over an hour to reach the centre;
- Visitors were asked to consider car parking provision in Uppermill. Of those that answered this question, 54% deemed this to be 'worse' or 'much worse' than in other centres;
- In terms of car parking prices, 40% considered prices to be 'better' or 'much better' than In other centres; and
- Accessibility by public transport was described by 38% of visitors as being 'about the same' as in other centres, although 20% felt that this was 'better' or 'much better' as in other shopping centres.

Perception of Safety and Occurrence of Crime

The on-street visitors survey asked specific questions to visitors about their perceptions of crime in Uppermill. During the day-time, some 46% of visitors indicated that safety in Uppermill was 'about the same' as that in other centres, with 42% considering it to be 'better' or 'much better'. However, with respect to safety during the evening/ night-time, the proportion of visitors who deemed safety to be 'about the same' as in other centres fell to 30%, with some 22% considering safety to be either 'better' or 'much better' than that in other centres. 6% of visitors felt that evening/ night-time safety in the centre was 'worse' or 'much worse' than other centres, with 42% indicating that they did not know either way.

Customer Views and Behaviour

The main findings of the on-street survey undertaken by NEMS Market Research were:

- 86% of visitors to the centre had travelled directly from home;
- 53% of those shoppers interviewed were just visiting the centre, with 39% living in Uppermill and 6% working in the centre;
- The main reasons for visiting the centre were: for social/ leisure activities (28%), to visit the bank/ building society/ Post Office (20%), for food and grocery shopping (12%) and to visit the stationers/ newsagents (6%);
- 36% of visitors planned to stay in the centre for up to half an hour, with 44% planning to stay in the centre for up to two hours and 4% planning to stay in the centre all day;
- The majority of visitors (92%) did not plan to undertake their main food shop on the day of the survey;

- When asked whether they were planning to buy anything other than food goods on the day of the survey, 88% of respondents stated that they buy no further items;
- 46% of visitors stated that they visited Uppermill 'about as frequently' today as compared to five years ago. 30% stated that they visited the centre 'more' or 'much more frequently' than five years ago; and
- 58% of visitors indicated that they did not visit the centre during the evening.

With regard to High Street names, 80% of visitors rated these as being either 'worse' or 'much worse' than other centres. This is an observation rather than a weakness as one of the perceived strengths of Uppermill is the presence of independent and specialist traders. Respondents also commented on other town centre uses such as cinemas (66% stating that this was worse than elsewhere due to there being no cinema facilities in the centre), car parking provision (54%) and choice of shops (46%).

Visitors were asked about the types of shops and services they would like to see more of in the centre. Popular responses were specialist foodstores (12%) and clothing stores (12%). Visitors were also asked about the types of leisure facilities they would like to see more of in the centre. Popular responses were a health and fitness centre (12%), a cinema (10%) and a swimming pool (6%). This is in addition to any leisure facilities already in the centre.

Business Survey Results

A questionnaire was distributed to all local businesses within Uppermill in order to gain an understanding of the opinions and views of retailers. A total of 70 questionnaires were distributed with 20 being returned: a response rate of 29%. The main findings of the business survey results were as follows:

- 40% of respondents had been trading in the district centre in excess of twenty years, with some 25% having been in operation for over ten years and 15% for over five years;
- 90% of respondents were independent traders, with 10% being part of a national group or chain;
- Half (50%) of respondents indicated that they were non-food retailers, 17% being retail services, 17% being leisure services and 17% being professional services;
- 70% of traders stated that since they began trading business had either 'grown significantly' or 'grown moderately', with 5% indicating that business had 'remained largely static'. 25% indicated that their business had declined to some degree since they began trading;
- Half (50%) of respondents indicated that their business was currently trading 'moderately' with 35% stating that their business was currently performing either 'very well' or 'well' illustrating strong performance;

▪ The majority of respondents (80%) leased their premises; ▪ The survey indicated that half (50%) of traders relied upon local residents primarily for the majority of their business, although a further 27% relied primarily on residents in the wider Oldham area and 9% from residents outside the borough. 9% relied mainly on specialist buyers; ▪ When asked about measures that would improve the district centre, 10% of respondents stated that improved street paving would have this effect. Other important measures included greater promotion/ marketing of the centre (10%), public toilets (10%) and more independent/ specialist traders (8%); ▪ Three quarters (75%) of respondents felt that there was a good balance between shops and other non-retail uses, with 20% stating that there were too many non-retail uses in the district centre and 5% that there were not enough non-retail uses; ▪ Respondents identified the main barriers to trading performance as being inadequate customer car parking (29%), high rents/ overheads (15%) and a lack of passing trade outside premises (15%); ▪ Over half of respondents (57%) indicated that they had no plans to alter their business in any way over the next five years, with a further 14% planning to refurbish their existing floorspace; ▪ The largest proportion of respondents (22%) considered the internet to be their biggest competitor.	The business survey asked respondents to rate a number of different aspects of Uppermill in terms of whether they were 'good', 'average' or 'poor'. The majority of aspects were rated as being 'average' by the largest proportion of respondents. However, a number of aspects were rated as being 'poor' by the greatest proportion of respondents. These aspects were: amount of car parking (41%), range of marketing and promotion (30%), location of car parking (26%) and amount of marketing and promotion (22%). Respondents were also able to add any additional comments they would like to make at the end of the survey. Through this process a number of retailers highlighted that there is a lack of car parking in the centre. On a more positive note, certain retailers felt that there is a good mix of events, and an excellent museum and gallery in the centre.

Accessibility	**Environmental Quality**
Car: Uppermill is situated on the A670, which connects to Oldham to the west and Manchester to the south west. M60 (junction21) and M62 (junction 21) are both a short distance away. At times, High Street can have a large amount of traffic, however pedestrian crossings are provided to aid pedestrians. **Car parks:** There are three main car parks in Uppermill. These car parks include: Hare and Hounds; King George V Playing Fields; and Victoria Mill. All these car parks are free of charge. There is also limited on-street parking available. **Public transport:** The town also benefits from good accessibility by public transport. Buses provide services to Lees, Oldham, Mossley and Ashton.	Uppermill is a very attractive, quiet, small centre west of Oldham. The centre is focused on High Street. None of the centre is pedestrianised. At the time of the survey, there was a medium level of footfall. The centre was most busy along High Street. Pavement widths vary, and where the centre meets busy roads, pedestrian crossings aid movement by foot. The streets are clean with no evidence of litter, whilst shop units themselves are maintained to high standards, creating an attractive shopping environment. Units are mostly old build. Street furniture includes benches and bins, and there were many plants and trees placed throughout the centre. Furthermore, there were adequately maintained public toilets.