Bury But Better 2009

Town Centre Vision and Development Strategy update

A report for...
Bury Council

by...
URBED with Emma Fiedler Regeneration
Consultation draft
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Town Centre Health Check 7.

The Health of the Centre

Planning Policy Statement 6: Planning for Town Centres, (PPS6) sets out the Government's key objectives for town centres to promote their vitality and viability by:

- Planning for the growth and development of existing centres;
- Promoting and enhancing existing centres, by focusing development in such centres; and
- Encouraging a wide range of services in a good environment accessible to all.

The Drivers Jonas Retail Study 2007 is firmly based on current Government guidance on retailing and town centres and particularly PPS6. It outlines the Government Objectives that need to be taken into account:

- Enhancing consumer choice by making provision for a range of shopping, leisure and local services, which allow genuine choice to meet the needs of the entire community, and particularly socially excluded groups.
- Supporting efficient, competitive and innovative retail, leisure, tourism and other sectors, with improving productivity.
- Improving accessibility, ensuring that existing or new development is or will be accessible and well served by a choice of means of transport.

With consideration for these objectives the Drivers Jonas Retail Study 2007 carried out such analysis that concluded similarly to the 2002 study, that Bury is a relatively strong centre, in terms of vitality and viability. Despite the proportion of vacant retail space having increased over time, yields have improved, rental levels have increased and there is a good mix of national multiples and smaller independent retailers. The study drew particular conclusions in support of this view and highlighted some particular issues:

- The Mill Gate Shopping Centre continues to be the main retail attraction but suffers from poor legibility detracting shoppers and its small units constrain the retail offer, making it difficult to compete with other centres and to attract quality retailers.
- Recent surveys show a decline in footfall, which is probably explained by competition from other centres.
- A reassessment of pedestrian crossing points on the Angouleme Way and improved access from the town centre to Woodfield and Angouleme Way retail parks are required to promote pedestrian access.
- The quality of The Rock is a particular issue. Future investment needs to be pointed towards this part of town as it has potential for linking the core and edge of centre retail areas.

Facing page: Shopping Arcade at Kay Gardens

Comparison Retail Capacity;
Source: Driver Jonas Retail Study 2007

2012	Capacity (£m)	Indicative Floorspace (sq ft / sq m gross)
Scenario A	-£30m	n/a
Scanario B	£20m	50,590 sq ft / 4,700 sq m
Scenario C	£53m	132,397 sq ft /12,300 sq m
Scenario D	£76m	189,446 sq ft /17,600 sq m

- Overall development opportunities identified within the town should be progressed in order to sustain and enhance the vitality and viability of the centre as a whole by attracting new investment and retailers to help the centre to compete more effectively. In particular, Bury Market traders and the existing independent retailers in the rest of the town need to benefit from these developemnts effectively.

Capacity and Demand for Expansion

The Drivers Jonas 2007 Study includes an update of the quantitative and qualitative assessment of retail need/capacity in Bury in both comparison and convenience goods sectors. The assessment considers the period to 2021, but notes that figures beyond the PPS 6 'Five Year' horizon (2012) should be treated with caution. For the quantitative assessment of both comparison and convenience goods, the analysis compares the available expenditure over the study period with the forecast total turnover of existing and approved stores.

Convenience Retail Capacity - For convenience goods there is assessed to be capacity for an additional c 43,000 sq ft of new floorspace across the borough by 2012, this is reduction on the 2002 study. (The analysis arriving at these figures factored in the extant planning permission for a foodstore at Whitefield assumed to open in 2009). In accordance with PPS6 it is recommended to locate this need within existing town centres and particularly within Bury town centre with a store in the modern town centre format.

Comparison Retail Capacity - For comparison goods the study identified four different scenarios, where A is the most cautious and D the least, with which to analyse potential quantitative growth to the year 2012 for the borough. The scenarios and capacity identified are set out in the table above.

The 2012 position follows the assumed implementation and opening of the approved Rock development. Given the scale and enhancement to the attractiveness of Bury that this would inevitably create it is relevant to consider scenarios B, C and D.

Qualitatively the study identifies that Bury currently lacks a higher order department store and large floorplate retail units and would benefit from the development of such facilities in the town centre.

Overall therefore the quantitative and qualitative analysis concluded that Bury town centre would benefit from a least one new medium to high order department store to help compete effectively with other shopping locations. The delivery of The Rock development would satisfy part of this requirement.

Retailer Demand - The Drivers Jonas 2007 report utilising the Focus database reported that 60% of the top 20 retailers are currently represented within the centre. At April 2007 the database revealed requirements from 46 retailers for representation within Bury. This figure is likely to not include all requirements as not all retailers add their name to the requirements list but pursue independent enquiries. Outstanding retailer demand in Bury includes operators such as Debenhams, T J Hughes and Pets at Home. This outstanding demand is considered to demonstrate an existing relative lack of volume high quality, national retailers, particularly in relation to the high street fashion sector.

Current Proposals

There are currently proposals for a major new town centre retail development at The Rock and improvements to the Mill Gate Shopping Centre.

The Rock - Thornfield Properties Ltd. have committed to the delivery of a substantial new mixed use development over a 7.9 ha site known as The Rock. The development has planning permission for floorspace including: c500,000 sq ft of retail/food and drink, c100,00 sq ft of leisure, c360,000 sq ft residential and 1250 parking spaces (including a multi-storey). The scheme will extend up from The Rock incorporating improvements to the existing pedestrianised street. The new units are aimed at attracting retail, restaurant and café operators with larger floorplates including for the provision of a new department store. To the upper levels of the scheme plans include for a new 10 screen cinema and bowling alley and 397 residential units. Work has started on site (mid 2008), with expected completion by Summer 2010. The delivery of a retail scheme of this size in Bury town centre with floorplates of a size to attract a wider range of retailers should enable a step change in the retail function of the town. The independent retail fare in and around The Rock development currently suffers from a lack of connectivity with the Millgate Shopping Centre. The introduction of The Rock should greater improve footfall in this area.

The Mill Gate Shopping Centre - The current owners of the Mill Gate Shopping Centre, Scottish Widows, have proposals for the centre which include namely;

- The creation of a separate kiosk style building providing two units of 1,100 sq ft each.
- The expansion of the centre to provide one large unit of 50,000 sq ft over 2 floors and two units of 5,000 sq ft.
- The provision of an additional floor to the BhS store.
- Improvement works to Clerke Street
- Glazing over of the Princess Parade and the Market Square, enabling a full pedestrian circuit within the shopping centre.
- The creation of several larger units from existing units and underused space.

Facing page: artist's impression of the Pilkington showrooms proposals, image courtesy of Thornfield Properties Plc;

This page: artist's impression of The Rock scheme, image courtesy of Thornfield Properties Plc.

In addition to these proposals, there are other potential works in and around the Mill Gate Centre that are being considered.

The combination of creating a new retail area at The Rock and improvements/development of the Mill Gate Centre, should enable a greater range of retailers to be attracted to the town including some of the higher order clothes retailers that are currently absent in Bury. Further, with the provision of space within a good quality new retail environment for a greater range of food and drink outlets, Bury will be in a position to compete well with neighbouring boroughs and reduce shopping and leisure leakage to Manchester city centre. The leisure elements of The Rock scheme as noted, will further contribute to creating a more diverse evening economy within the town centre through providing family-based facilities. Whilst the development of a new shopping and leisure area at The Rock can only help to improve the town's vitality and viability, there needs to be careful consideration given to how this new scheme will link and relate to the rest of the town centre. The creation of a high quality retail scheme at The Rock could have a negative impact on retailing in the rest of the town centre. Continued investment into other town centre areas and ensuring good pedestrian linkages throughout the centre both by day and night will be critical to the town's ongoing success.

Considering the capacity of the town for the proposed retail development, as noted, the Drivers Jonas Study identifies the capacity for at least one or more department store in Bury at 2012, which is likely to be delivered through The Rock scheme. Considering the quantitative analysis, there could also be capacity for a further department store at the Mill Gate Centre. However, given the current economic climate, in the short to medium term there is unlikely to be sufficient consumer demand and

retailer confidence to support the take-up of two department stores. A further consideration is the take up of currently vacant space, that will soak up some demand particularly given improvements to the Mill Gate Centre where some of it is located.

Summary / Conclusions

- The retail sector has begun to weaken with the impact of the national economic slowdown, however, some sectors are still looking to expand.
- Bury continues to be ranked second among the four North Manchester towns for retail provision.
- Bury along with the other North Manchester towns has fallen in the retail rankings since 2003 suggesting it is less able to compete compared to other centres nationally in terms of its retail draw.
- In Bury there has been an increase in convenience retail floorspace and a decrease in comparison floorspace, which corresponds to the current condition of the retail sector and could serve to demonstrate the weakness of Bury's retail sector in terms of attracting comparison retailers.
- The Drivers Jonas report identifies capacity for expanded comparison retail in Bury that would be provided for by a new department store as part of The Rock scheme.
- Capacity to 2012 may also support a further department store at the Mill Gate Centre but the retail sector is unlikely to be strong enough to support two new stores.
- Existing independent retail stores exist throughout the town centre but are particularly apparent on The Rock and in and around Bury Market. New retail development in the town will improve footfall into the shopping areas and provide greater support for independent traders in the future.
- There are substantial proposals for the development and improvement of retail facilities in Bury that should significantly improve the vitality and viability of the centre.
- With the development of The Rock scheme, good linkages to the rest of the town centre and an improvement programme will be vital to ensuring Bury's ongoing success.

Facing page: artist's impression of The Triangle scheme, image courtesy of Thornfield Properties Plc;

This page:
left: artist's impression of the Modus scheme, image courtesy of RGP architects