EXECUTIVE SUMMARY

Scope and Purpose

1. WYG Planning & Design (WYG) was commissioned by Oldham Council in August 2008, to undertake a Boroughwide Retail and Leisure Study that will inform part of the Local Development Framework evidence base.

Market Research

2. A key element of this study was to obtain a detailed understanding of shopping patterns within and just beyond Oldham Borough and identify the potential catchment of existing centres within it. This was achieved by three strands of original market research:

- Household Telephone Survey – in August 2008 a survey of 1,001 households was undertaken within a defined Study Area, which comprised Oldham Borough and which also extended into the neighbouring authorities of Rochdale and Tameside. The Study Area was broken down into ten zones based on post code sectors:

1.	Shaw	(OL1 4, OL2 7 and OL2 8);
2.	Royton	(OL1 2, OL2 5 and OL2 6);
3.	Chadderton	(M24 1, OL9 0, OL9 8 and OL9 9);
4.	Failsworth	(M35 0, M35 9 and OL8 3);
5.	Lees	(OL4 3, OL4 4, OL4 5);
6.	Uppermill	(OL3 5, OL3 6 and OL3 7);
7.	Oldham East	(OL1 1, OL1 3, OL4 1 and OL4 2);
8.	Oldham West	(OL8 1, OL8 2, OL8 4, OL9 6 and OL9 7);
9.	Rochdale South	(OL11 2, OL16 3, OL16 4, M24 2 and M24 6); and
10.	Mossley	(OL5 0, OL5 9, OL6 8, OL6 9, OL7 9 and SK15 3).

- On- Street Survey – an on-street survey was undertaken within the defined centres of Oldham Town Centre together with the seven district centres – Chadderton, Failsworth, Huddersfield Road, Uppermill, Royton, Shaw and Lees. These surveys were undertaken in order to identify customer views, including their perception of each centre and how they could be improved.

- Business Survey – was distributed to all businesses within Oldham Town Centre and the seven district centres. These surveys explored the current strengths and weaknesses from a business operator's perspective.

Defined Study Area

3. The defined Study Area was identified to have a population of approximately 288,825 people (2008 estimate) and generates £463m of convenience goods expenditure and £871m of comparison goods expenditure. These levels of expenditure are forecast to increase to £619m and £1,803m respectively by 2026, which takes into account population change and current forecasts of retail expenditure growth.

Vitality and Viability of Existing Centres

4. In accordance with PPS6, as part of this study an assessment of the 'health' of the main centres within the Borough was undertaken. SWOT analysis (which assessed strengths, weaknesses, opportunities and threats) of the main centres was undertaken:

Oldham

Table 1: SWOT Analysis of Oldham Town Centre

Strengths	Weaknesses
• Improving rental levels and commercial yields • Good accessibility, with no perceived parking issues identified by visitors • Businesses suggesting growth in trade	• High proportion of vacancies (albeit focused at the edge of the town centre) • Tommyfield Market • Limited evening economy
Opportunities	**Threats**
• Improved accessibility through the Metro link expansion • Redevelopment/improvement of Tommyfield Market • Redevelopment of Old Town Hall/Clegg Street	• Continued growth of out-of-centre provision, including large-format supermarkets and at Elk Mill Retail Park • Improvement at competing centres such as Rochdale, Manchester City Centre • Continued growth of online shopping • Limited clear development opportunities within the town centre in the short-term

Chadderton

Table 2: SWOT Analysis of Chadderton District Centre

Strengths	Weaknesses
• Low vacancies • Anchored by a main food shopping destination – the most popular in the Borough	• A third of businesses suggest that trade has declined • Perception of being unsafe, particularly in the evening • Environmental quality • Quality of car parks
Opportunities	**Threats**
• Improved security • Enhance linkages between Asda and other businesses • Diversification of the retail offer	• Improvement at competing centres such as Oldham and Elk Mill Retail Park • Continued growth of online shopping • Over dominance of Asda store

Failsworth

Table 3: SWOT Analysis of Failsworth District Centre

Strengths	Weaknesses
• Low vacancies • Anchored by a main food shopping destination • The majority of businesses suggest that trade has grown in recent years • High proportion of owner-occupied units	• Almost a third of businesses suggest that trade has declined • Lack of choice
Opportunities	**Threats**
• Enhance linkages between Tesco and other businesses • Improved security	• Continued growth of online shopping • Over dominance of Tesco store resulting in lack of choice for local residents • Increased competition from nearby out-of-centre Morrisons store

Huddersfield Road

Table 4: SWOT Analysis of Huddersfield Road District Centre

Strengths	Weaknesses
• Will be anchored by a main food shopping destination following the redevelopment of the New Tesco store • Local businesses suggest that trade has improved in recent years	• A62 can get congested and does not provide an attractive shopping environment • Environmental quality • Contains a number of small vacant units
Opportunities	**Threats**
• Improve the overall attraction of the centre following the redevelopment of the Tesco store • Increased footfall created by the enlarged Tesco	• Dominance of larger Tesco store

Lees

Table 5: SWOT Analysis of Lees District Centre

Strengths	Weaknesses
• Low vacancies • Strong service sector • Local businesses suggest that trading performance has improved in recent years	• Car parking and traffic congestion • Limited development opportunities • Range and choice of local shops
Opportunities	**Threats**
• Reduce traffic congestion and overall quality of the centre	• Limited opportunities for expansion • Potential loss of key attractors such as Post Office

Royton

Table 6: SWOT Analysis of Royton District Centre

Strengths	Weaknesses
• Low vacancies • Market • Strong service sector • Local businesses suggest that trading performance has improved in recent years	• Environmental quality of precinct • Not anchored by a main food shopping destination • Range and choice of local shops • Market operates on the same day as nearby market in Shaw
Opportunities	**Threats**
• Greater promotion of the centre • Extension of district centre • Improve the range of facilities available	• Continued growth of on-line shopping • Growth of competing centres and out-of-centre destinations, most notably large-format superstores • Improvement in competing centres such as Rochdale

Shaw

Table 7: SWOT Analysis of Shaw District Centre

Strengths	Weaknesses
• Improving business performance • Market • Strong service sector • Local businesses suggest that trading performance has improved in recent years • High number of respondents visit Shaw more frequently than they did five years ago	• Above average proportion of vacancies • Limited evening economy • Choice and range of shops • Market operates on the same day as the market in nearby Royton
Opportunities	**Threats**
• Greater promotion/marketing of the centre • Change day of market	• Loss of a key attractor Woolworths • Continued growth of on-line shopping • Increased threat from Asda as a 'one-stop shop' • Improvements at competing centres

Uppermill

Table 8: SWOT Analysis of Uppermill District Centre

Strengths	Weaknesses
• Improving business performance • Low vacancies • Attractive centre • Events • Specialist/niche shopping • Attracts both visitors and local residents	• Difficulty in parking
Opportunities	**Threats**
• Improvements to parking provision/parking regime • Improved marketing of centre and promotion of a Uppermill as a visitor destination • Provide specialist/niche shopping	• Continued growth of online shopping • New foodstore at Greenfield • Lack of development opportunities

Shopping Patterns within the Study Area

Convenience Goods

5. With regard to convenience goods shopping (food and grocery goods), shopping patterns were broken down into two types – main food shopping where respondents bought the bulk of their food and grocery shopping and 'top-up' food shopping, which were shopping trips between their main food shop for day-to-day purchases.

6. The principal 'main food' shopping destinations in the Borough are identified by the Household Survey to be: the Asda store at Milne Street in Chadderton District Centre (15%); the out-of-centre Morrisons store at Holinwood Avenue near Failsworth District Centre (8%); the Sainsbury's store on Union Street at the edge-of Oldham Town Centre (8%); the Asda store at Greenfield Lane in Shaw (7%) and the out-of-centre Tesco store at Oldham Way near Oldham Town Centre (7%).

7. Overall, convenience goods facilities within the Borough attract almost **68%** of main food shopping trips undertaken by residents within the Study Area.

8. The Household Survey identified that 'top-up' convenience shopping is more localised. Within the Study Area, facilities in Oldham Borough attract **70%** of 'top-up' shopping trips undertaken within the Study Area.

9. The patterns of convenience goods shopping in the Study Area recorded by the Household Survey is as follows:

Table 9: Oldham Borough Convenience Shopping Patterns – 2008 (Study Area)

	Main	Top-up
Oldham Borough	**67.5%**	**70.1%**
Oldham (including Tesco at Oldham Way)	18.1%	17.7%
Chadderton (including Morrisons at Holinwood Avenue)	22.5%	13.1%
Failsworth	8.5%	9.9%
Huddersfield Road	6.8%	4.4%
Lees	1.5%	4.0%
Shaw	8.9%	7.8%
Uppermill	0.1%	2.1%
Royton	0.9%	6.1%
Other	0.2%	5.0%
Manchester	**1.7%**	**0.8%**
Rochdale	**15.0%**	**20.3%**
Tameside	**12.3%**	**8.9%**
Other Outside Oldham Borough	**1.4%**	**0.2%**
(Internet/ home delivery)	**1.7%**	**0.0%**
TOTAL	**100%**	**100%**

10. Overall, approximately 32% of main food shopping trips (including internet/ home delivery) and 30% of 'top-up' convenience shopping trips undertaken within the Study Area are directed to facilities outside the Borough. These are primarily directed to facilities in Rochdale and Tameside. As would be expected facilities within the neighbouring authorities draw most of their trade from expenditure generated within the Study Area from the peripheral zones (9 - Rochdale South and 10 – Mossley), which extend outside Oldham Borough.

11. The market share achieved by all facilities within the Borough is relatively high for convenience goods shopping (70%) with limited 'leakage'. Furthermore, within Zones 1 to 8 of the defined Study Area (which broadly equates to Oldham Borough) the market share for convenience goods (main and 'top-up') increases to 85%.

Comparison Goods (Non Food) Shopping

12. In terms of non-bulky comparison goods shopping, facilities in the Borough generally achieve lower market shares than those identified for convenience goods shopping. This is understandable given the strength and proximity of competing centres such as Manchester City Centre. Although retention levels for bulky goods (63%) is higher than that identified for non-bulky goods (52%), the market shares achieved remain lower than those identified for convenience goods shopping (70%).

13. The pattern for comparison shopping within the Study Area recorded by the Household Survey is identified as follows:

Table 10: Oldham Borough Comparison Shopping Patterns – 2008 (Study Area)

	Oldham Borough	**Tameside**	**Manchester**	**Rochdale**	**Other**	**Internet**
Clothing & Footwear	45.6%	9.2%	19.2%	9.4%	12.1%	4.5%
Books, CDs, etc.	46.0%	8.0%	13.7%	9.1%	6.6%	16.6%
Household Goods	54.1%	15.5%	9.5%	10.0%	6.8%	4.1%
Toys, etc.	47.8%	9.7%	18.9%	8.8%	4.8%	10.0%
Chemist Goods	64.1%	7.5%	3.7%	16.3%	6.1%	2.3%
Electrical Goods	58.8%	9.8%	5.8%	11.6%	3.9%	10.1%
Furniture Goods	59.9%	11.2%	7.7%	11.9%	4.7%	4.8%
DIY Goods	67.6%	14.0%	2.6%	13.7%	4.2%	0.9%
Garden Centre Goods	58.2%	5.0%	0.0%	34.9%	1.9%	0.0%
Overall	**55.2%**	**10.4%**	**11.9%**	**9.7%**	**6.6%**	**6.1%**

14. The Household Survey identifies that facilities in the Borough retain between 46% (Clothing & Footwear) and 68% (DIY goods) of comparison goods shopping trips undertaken within the Study Area. Facilities in Oldham Town Centre are identified to be the main destinations within the Borough for comparison goods shopping, reflecting the relative strength of provision, although the attraction of Oldham Town Centre is likely to be overstated, by the survey evidence given the role and strength of nearby Elk Mill Retail Park, which was not strongly represented by the survey evidence. Accordingly, in assessing both the current role and future 'capacity' for additional retail floorspace in Oldham Town Centre it is appropriate to make some adjustment to take this into account.

15. Notwithstanding this, despite the relative strength of Oldham Town Centre compared to other destinations within the Borough, it remains evident that a significant proportion of shopping trips within the Sub-Region are being lost to competing centres elsewhere.

16. Overall, existing facilities within the Borough are identified to attract 55% of comparison goods shopping trips undertaken within the Study Area. Accordingly, some 45% of shopping trips for comparison goods undertaken in the Study Area are directed to facilities outside Oldham Borough. In this respect, facilities in Manchester attract (12%), followed by Rochdale and Tameside (both 10%).

17. Table 11 provides a summary of the market shares achieves by all facilities in Oldham Borough for convenience and comparison goods.

Table 11: Market Share of Existing Facilities within the Borough

Goods	Market Share (%)										
	Shaw	Royton	Chadderton	Failsworth	Lees	Uppermill	Oldham E	Oldham W	Rochdale S	Mossley	TOTAL
Convenience	85.5	86.5	72.8	93.3	83.5	68.6	90.5	91.2	23.5	5.0	**70.4**
Comparison	74.0	64.6	54.6	56.0	65.2	55.8	75.3	77.1	18.8	10.9	**55.2**
Total	**77.7**	**72.0**	**60.9**	**69.1**	**71.5**	**61.6**	**80.6**	**82.2**	**20.5**	**8.9**	**60.3**

Source: NEMS Oldham Household Survey (August 2008)
Based on expenditure

Capacity for Future Convenience Goods

Oldham Borough

18. Within Oldham Borough, existing facilities are identified to attract 70% of convenience goods expenditure generated within the Study Area. This equates to a convenience goods turnover of almost £326m in 2008. This compares to an expected turnover of existing facilities derived from the defined Study Area of £306m. Accordingly, existing facilities are identified to be trading marginally above expected turnover (6.6%). A number of the main superstores within the Borough are identified be trading above company average turnover, including the Asda store in Chadderton (by 81%) and the Asda store in Shaw (by 23%).

19. Given this overtrading based on current market shares there is identified to be capacity of some £41m within the Borough in 2013, increasing to more than £101m by 2026.

Table 12: Estimated Capacity for Additional Convenience Goods Facilities – Oldham Borough

Year	Benchmark Turnover - £m[1*^]	Expenditure Available - £m[2*]	Surplus Expenditure - £m	Residual Floorspace Requirement – sq m (net)[3]
2008	305.56	325.74	20.18	1,715 - 4,035
2011	310.17	342.52	32.35	2,705 – 6,375
2013	313.28	354.06	40.78	3,375 – 7,955
2016	318.00	371.37	53.37	4,355 – 10,255
2018	321.19	383.29	62.10	5,015 – 11,815
2023	329.30	415.18	85.88	6,765 – 15,940
2026	334.26	435.28	101.02	7,840 – 18,470

Notes:
[1] – Allows for increased productivity at +0.5% per annum
[2] – Assumes constant market share 70.4% in the Study Area
[3] – Based on average sales density of between £5,000 per sq m and £11,778 per sq m and allows for increased productivity at +0.5% per annum
* - Assumes that local shops are trading in equilibrium
^ - Based on only 70% of the expected turnover of the Tesco store at Failsworth, the Morrisons store at Poplar Street and other local shops in Failsworth being derived from the Study Area
At 2005 prices

20. This level of capacity compares to outstanding commitments for additional convenience goods floorspace achieving a potential convenience goods turnover of more than £66m. These commitments include the redevelopment and enlargement of the Tesco store at Huddersfield Road District Centre, replacement Lidl store at Broadway, extension of the existing Tesco Extra store at Failsworth and a new foodstore as part of the comprehensive regeneration scheme at Knoll Mill, Frenches Wharf at Greenfield (located within Zone 6 of the defined Study Area). Accordingly, all the identified capacity at current market share will be met until after 2018 by these commitments. By 2023, there is identified to be residual capacity of less than £16m, increasing to almost £30m by 2026.

21. There appears to be no clear demonstrable capacity for major additional convenience goods floorspace within the Borough in the short to medium-term (i.e. introduction of a new foodstore) over and above outstanding commitments within the Borough – assuming all commitments are implemented. However, given the geography of existing consents, which are generally located in the western part of the Borough there may be scope to provide appropriate local convenience goods floorspace that would meet a specific local need and provide more sustainable shopping patterns and accessible facilities. However, any such development should be appropriate in scale to the catchment it is intended to serve.

Capacity for Future Comparison Goods

Oldham Borough

22. In terms of capacity within Oldham Borough, existing facilities are identified to attract 55% of comparison goods expenditure generated in the Study Area. Based on this market share existing facilities are identified to have a comparison goods turnover of £481m in 2008.

23. By rolling forward current market shares there is identified to be capacity of some £83m in 2013, increasing to more than £296m by 2026 (Table 13). Should they all be implemented, outstanding commitments within the Borough (most notably the redevelopment of Alexandra Retail Park), which are identified to have a comparison goods turnover of up to £94m, will absorb the identified capacity at least in the short-term (i.e. after 2013). However, by 2026 even after taking into account outstanding commitments, there is identified to be capacity of some £183m (or 28,025 sq m net) within the Borough based on no change in current market shares.

24. However, there is no certainty that all the outstanding commitments identified will be implemented. Indeed, despite certain commitments being partly implemented there is no sign that these are being brought forward particularly in the short-term. Should these commitments not come forward (with the exception of the new Tesco store at Huddersfield Road that is currently under construction and one of the extant permissions to extend the Tesco store at Failsworth[1]) the residual capacity available to support additional floorspace increases to £13m by 2011, to £40m by 2013, to £79m by 2016, to £110m by 2018, to £174m by 2023 and £244m by 2026.

25. Should all outstanding commitments not come forward the level of capacity available to support additional retail floorspace increases significantly – most notably identifying capacity in the short-term. Consequently, the Council should monitor the future developments with regard to the implementation of these outstanding commitments.

Table 13: Estimated Available Comparison Goods Expenditure – Oldham Borough (excluding commitments)

Year	Benchmark Turnover – £m	Expenditure Available - £m	Surplus Expenditure - £m
2008	436.92	481.19	44.27
2011	456.88	510.93	54.05
2013	470.69	553.29	82.60
2016	492.19	616.12	123.93
2018	507.06	662.46	155.40
2023	546.25	769.67	223.42
2026	571.20	868.06	296.86

Notes: Allows for increased productivity of +1.5% per annum and assumes constant market share of 55.2% in the defined Study Area
Allows for SFT to increase from 6.2% in 2008, to 12.9% by 2013, 14.4% by 2016, 15% by 2018 and to 20% by 2023 and 2026
At 2005 prices

[1] Assumed to be the larger permission for the purposes of this assessment

Qualitative Need

Convenience Goods

26. The study identifies that across the Borough as a whole there is a reasonable distribution of main food shopping destinations. The recent Asda store development at Shaw District Centre has improved the distribution of facilities by providing a main food shopping facility in the northern part of the Borough. Furthermore, existing provision is being improved with the redevelopment and enlargement of the Tesco store at Huddersfield Road District Centre. The one remaining part of the Borough where there is a clear qualitative need to improve existing provision is within the Uppermill Zone. In this respect, extant permission exists for a medium-sized foodstore at Greenfield. If implemented, this store will significantly improve the convenience goods offer in this part of the Borough and reduce the need for local residents to travel significant distances to facilities elsewhere.

27. The strength of existing provision is reflected by the high market share achieved within the Borough. Furthermore, as a whole existing provision is identified to be trading broadly at expected levels. Whilst certain stores are identified to be overtrading (such as the Asda store at Chadderton District Centre) this overtrading is likely to be addressed by the improvement in provision elsewhere in the Borough, such as at Huddersfield Road District Centre and Greenfield.

28. Given this, the analysis undertaken does not consider that there is a clear qualitative need for significant improvement in the convenience goods floorspace in the Borough (over and above outstanding commitments). However, given the location of existing and proposed convenience goods floorspace there may be appropriate locations for small-scale provision that could help meet some of the day-to-day needs of the local population and improve the distribution of local facilities.

Comparison Goods

29. Existing facilities within Oldham Borough also perform a strong comparison goods shopping role, despite the strength and proximity of Manchester City Centre. Within zones 1 to 8 of the defined Study Area, which broadly equates to Oldham Borough, existing facilities attract some 66% of comparison goods expenditure generated.

30. Although the findings of the Household Survey suggest that Oldham Town Centre is performing strongly and is the most dominant destination in the Borough, this is likely to have been overstated due to the Household Survey underestimating the role of Elk Mill Retail Park as a retail destination. Notwithstanding this, by looking more specifically at the clothing

and footwear market share of Oldham Town Centre (which is traditionally the key attraction of sub-regional centres) our assessment identifies that less than half (39%) of shopping trips undertaken within the Study Area are directed to facilities in Oldham Town Centre. Even within the zones 1 to 8 of the defined Study Area, the market share of Oldham Town Centre is identified to be only 47%. Given that this market is likely to have been overestimated by the Household Survey (as it identifies a market share of only 1% for Elk Mill Retail Park) this suggests that there is scope to improve the retail offer of the town centre. In particular there is a need to improve the quality of the retail offer of the town centre. Representation from retailers such as Marks & Spencer, whom is not currently represented in the Borough, would contribute to improving the retail offer of the town centre.

31. Oldham Town Centre has faced strong competition from out-of-centre provision in recent years (most notably at Elk Mill Retail Park) and the growing popularity of the non-food offer of large-format supermarkets (including for clothing and footwear) will continue to have an impact on the overall viability of the town centre. Given this, there is need for the Council to improve the quality of the centre retail offer in the long-term in order to compete with the growing threat of out-of-centre retail provision and further competition from nearby centres such as Rochdale, where significant improvements to the town centre retail offer are planned.

32. Smaller centres within the Borough are performing a much more limited role. Whilst it is unlikely that there will be significant commercial demand to improve the comparison goods offer of these centres, appropriate development should be carefully considered by the Council. This is particularly important where it will contribute to the vitality and viability of the centre and will provide more sustainable shopping patterns. For example, appropriate improvements to the retail offer at Failsworth and Royton that will contribute to the vitality of these centres would improve the distribution of facilities in the Borough.

33. In relation to large format, bulky goods retailing, Oldham Borough is well provided for and there appears no clear qualitative need for this type of retail facility.

Leisure

34. In addition to considering shopping patterns and retail capacity the study has sought to establish commercial leisure patterns within the Borough. Again, this was informed by the survey evidence undertaken. In particular the Household Survey asked questions relating to the following leisure activities:

- Cinemas;

- Indoor sports or health and fitness activity:
- Nightlife such as bars, pubs and nightclubs;
- Restaurants;
- Ten-pin bowling; and
- Bingo.

35. Existing commercial leisure facilities within Oldham Borough are very limited, lacking both a cinema and ten-pin bowling facility. Consequently, significant leisure trips (understandably those visiting the cinema or ten-pin bowling facilities) are directed to facilities outside the Borough, most notably to Ashton-under-Lyne, Rochdale and Manchester.

36. Consequently, there is immediate scope to improve the leisure offer within the Borough in order to reduce the need for local residents to travel to facilities outside the Borough. Based on a realistic retention level there is 'capacity' for a multiplex cinema (c. ten screens) and a ten-pin bowling facility within the Borough together with an additional large-format bingo facility. However, any improvement in provision will be dependent on commercial demand and commercial viability.

37. In accordance with development plan policy, WYG considers that Oldham Town Centre is the most appropriate location for major commercial leisure provision within the Borough.

38. Furthermore, there is also a need to improve the wider 'evening economy' both within Oldham Town Centre and the surrounding district centres. The survey evidence suggests that very few visitors to the main centres in the Borough during the day also visit the same centres in the evening. Indeed, analysis of the survey evidence suggested that Oldham Town Centre, despite being the principal retail destination in the Borough, provides a very limited leisure offer. Appropriate improvement in the leisure offer/evening economy of established centres will contribute to the vitality of the centres.

Role of Existing Centres

39. Based on the analysis undertaken it is possible to identify a hierarchy of centres within the Borough.

40. The total turnover of the eight main centres identified for this study within the Borough is identified to be almost £556m in 2008 (both convenience and comparison goods). Table 14 summarises the hierarchy, turnover and the market share achieved by the main centres within the Borough.

Table 14: Hierarchy and Market Share of the Main Centres within the Borough (excludes out-of-centre provision)

Centre	Floorspace (sq m)	Convenience Turnover (£m)	Comparison Turnover (£m)^	Total Turnover (£m)	Market Share in Study Area (%)	Market Share Amongst Centres (%)
1. Oldham*	54,870	47.43	249.84	297.27	22.3	53.5
2. Chadderton	12,439	64.88	25.56	90.44	6.8	16.3
3. Shaw	12,813	44.46	18.13	62.59	4.7	11.3
4. Huddersfield Road	5,294	31.39	1.05	32.44	2.4	5.8
5. Failsworth	9,771	16.05	15.26	31.31	2.3	5.6
6. Royton	4,220	8.14	16.29[1]	24.43	1.8	4.4
7. Lees	1,291	8.96	3.66	12.62	0.9	2.3
8. Uppermill	2,550	2.24	2.40	4.64	0.4	0.8
TOTAL	**103,248**	**223.55**	**332.19**	**555.74**	**41.6**	**100**

Notes: WYG (2008)
*Includes edge-of-centre Sainsbury's and Aldi stores
[1] – Excludes out-of-centre floorspace
^Based on revised turnover as outlined in Table 8.6
Floorspace based on convenience and comparison goods floorspace only and derived from Experian Goad (updated) or WYG assessment
At 2005 prices

Key Recommendations and Future Role of Existing Centres

41. The retail strategy contained within the Local Development Framework (LDF) should reflect the overall objectives of PPS6, including draft PPS4 'Planning for Prosperous Economies', which has recently been released for consultation, which is intended to replace PPS4, PPS5, PPS6 and parts of PPS7 and PPG13. This should include the need to promote the vitality and viability of existing centres, by planning for their growth and development. They should also have regard to the wider objectives of other strategies relating to the Region. These are outlined in the recently adopted RSS for the North West.

42. Whilst in the short-term existing commitments (if all implemented) are identified to meet all the need for additional convenience goods floorspace until after 2018 and most of the capacity for additional comparison goods until after 2013 – at current market shares. However, in the longer term, even after taking into account outstanding commitments, the emerging development plan document should seek to identify areas where new development, both retail (although restricted primarily to comparison goods) and commercial leisure uses, could potentially be accommodated.

43. The policy approach contained within the Oldham LDF in relation to main town centre uses (e.g. retail and leisure uses) should seek to encourage new facilities in existing centres of a scale consistent with their current role and function and which assist in maintaining their vitality and viability. It will be clearly be important for any new proposals to be considered in the context of the conclusions of this study and the key PPS6 tests, including need, the sequential approach, impact and accessibility.

44. Oldham Town Centre is identified to be the dominant comparison goods retail destination in the Borough and the wider Study Area. Whilst outstanding commitments (if all implemented)

will meet the identified retail need in the short-term (i.e. after 2013) based on current market shares, it is notable that these are located outside the town centre, including the comprehensive redevelopment of Alexandra Retail Park. Accordingly, town centre opportunities should be identified to meet the identified need for additional retail floorspace in the longer-term and reduce trade currently attracted to out-of-centre facilities such as Elk Mill Retail Park.

45. As the principal centre within the Borough, Oldham Town Centre should continue to be the main focus for major retail and leisure development. Given this, it is important that Oldham Town Centre at least maintains, and if possible improve its existing role by improving the quality as well as the quantity of the its retail offer.

46. In addition, it is also important to note that there is an immediate need to improve the commercial leisure offer of the town centre. Given that these uses are also identified by as 'main town centre uses' by PPS6, as is retail, it is important that appropriate town centre sites should be identified to meet this need.

47. In accordance with PPS6, subject to opportunities being available, any improvement in the retail and leisure offer should, in the first instance, be located within the existing town centre. Failing that, edge-of-centre sites should be considered next, with preference given to sites that are, or will be well connected to the centre.

48. The LDF for Oldham should seek to maintain and increase the town centre's existing market share of comparison goods expenditure particularly from out-of-centre destinations such as Elk Mill Retail Park. Accordingly, in relation to Oldham Town Centre the primary objective should be to maintain and enhance the centre's existing sub-regional role through new investment. Therefore, the Council should seek to resist further out-of-centre retail comparison floorspace in the Borough (particularly for floorspace that is not restricted to bulky goods) given the need to improve Oldham Town Centre as a retail and leisure destination.

49. In terms of other centres within the Borough, whilst these are significantly smaller than Oldham Town Centre, they generally serve an important role in meeting the day-to-day needs of the local population, particularly for convenience goods shopping. Given this, it may be appropriate to improve the retail and leisure offer of these centres in the future in order to maintain and enhance their vitality and viability and to ensure that there is a good distribution of facilities. Our analysis suggests that Royton, Shaw and Failsworth serve particularly important roles for specific areas of the Borough.

50. Whilst there appears scope for some additional retail floorspace in smaller centres, opportunities within existing centres are likely to be limited. In addition, the current and future role of Huddersfield Road and Uppermill District Centres (given the significant improvement taking place at Huddersfield Road and proposed at Greenfield), together with other defined centres should be monitored by the Council. Uppermill, in particular serves an important role in meeting the needs of residents within the east of the Borough, which is generally rural in nature.