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Bolton Retail and Leisure Capacity and Centres Study

Final Report

ON BEHALF OF BOLTON BOROUGH COUNCIL

September 2026

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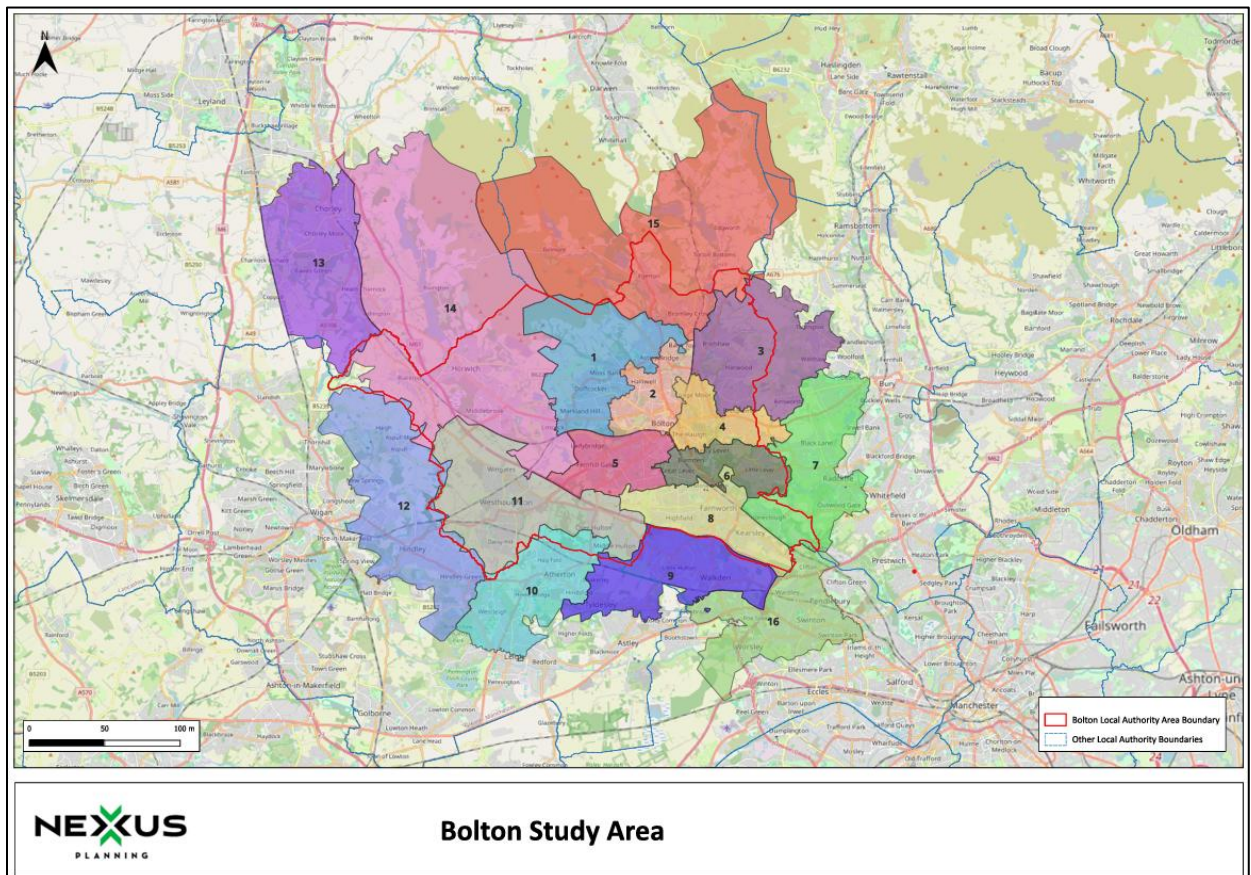
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1. Introduction

Instruction and Purpose

- 1.1 Nexus Planning has been instructed by Bolton Borough Council (hereafter referred to as 'the Council') to undertake a new Retail and Leisure Study. The primary focus of the Study is to provide borough-wide retail and leisure capacity forecasts and centre healthchecks, review and update the hierarchy and boundaries of centres, and advise on the future role of Bolton town centre and other centres including opportunities for diversification and meanwhile uses (subject to regeneration funding). The Study replaces the previous Bolton Retail and Leisure Study, which was reported 2008.
- 1.2 The Council is in the process of preparing a new Local Plan for Bolton. The new local plan will set out where new homes, jobs, community facilities and green space should go, and how the borough will grow up to 2042. The Local Plan 'Direction of Travel' consultation ran until 22 January 2026 and was the second Regulation 18 stage of consultation.
- 1.3 The consultation document set out the overall ambition for a healthier, greener and better-connected Bolton, and presented early spatial options for where new homes and jobs could be located. It also sets out initial themes and areas of focus to guide the more detailed policies which the Local Plan will include.
- 1.4 This 2026 Study will replace the previously published retail and town centre evidence base documents to reflect the latest position in respect of the commercial market, the implications this has had on Bolton's centres and other retail and leisure facilities, and to help plan to protect the future vitality and viability of the defined centres through the provision of appropriate planning policies.
- 1.5 Specifically, the Study will also provide policy recommendations in respect of the out of centre provision within the authority area (including Middlebrook) and the appropriate nature and quantum of ancillary commercial floorspace required as part of the Places for Everyone employment allocation at West of Wingates.
- 1.6 This Study is underpinned by new empirical evidence in the form of a new household shopper survey, and our site visit to survey and assess the health of the defined centres. The household survey was undertaken by NEMS Market Research in April 2026 and covers sixteen separate zones, which are collectively considered representative of the principal catchment area for retail facilities and leisure facilities located within the Bolton authority area.
- 1.7 The zones have been developed with regard to those utilised in the previous Study, which provides us with the opportunity to compare shopping and leisure patterns.
- 1.8 A plan of the Study Area is provided at Figure 1.1 and in Appendix 1, and the tabulated household survey results are provided at Appendix 2.

Figure 1.1: Study Area and Zones



- 1.9 Whilst the Study Area largely corresponds with the boundaries of the Bolton authority area, it does include parts of neighbouring authority areas, where residents sometimes look to facilities in Bolton's centres, along with the wider borough, to meet at least some of their retail and leisure needs.
- 1.10 In this regard, it is important to recognise that shopping habits are not governed by local authority area boundaries. It is therefore appropriate to consider the 'inflow' of retail expenditure from residents of neighbouring authority areas to destinations in Bolton in order to identify retailers' overall turnover and understand the role of centres and standalone stores across the wider area. The household survey also allows us to identify expenditure that originates within Bolton but which 'leaks' to destinations outside of the authority area.
- 1.11 It is important to state at the outset of this study that any medium to long term forecasts should be treated with caution. They are influenced by the dynamic changes in economic, demographic, lifestyle and market trends; including the rise of online shopping over the last decade, and wider implications on the market across the country and further afield.
- 1.12 The inherent uncertainties in forecasting are recognised by both the NPPF and NPPG. For example, the NPPG states that assessments '....may need to focus on a limited period (such as the next five years)' but will also need to take the lifetime of the plan into account and be regularly reviewed.

Structure of Report

1.13 Our report firstly provides an overview of prevailing retail and leisure trends, before then going on to consider the planning policy context for the updated Study. We then consider the vitality and viability of the principal centres within the authority area.

1.14 The remainder of the report identifies retail and leisure needs arising within the borough to 2042. To undertake this assessment, we identify population and expenditure growth across the Study Area. The final sections of the report provide our conclusions in respect of retail and leisure needs and provide our planning policy recommendations.

1.15 Accordingly, this report is structured as follows:

- Section 2 sets out key retail and leisure trends of relevance to the commission;
- Section 3 provides an overview of the planning policy context;
- Section 4 summarises our assessment of the vitality and viability of the principal centres;
- Section 5 provides an overview of forecast changes in Study Area population and expenditure;
- Section 6 provides an overview of the market share attracted to key destinations within the borough and how this has altered since the production of the previous study;
- Section 7 provides an assessment of retail needs;
- Section 8 provides an assessment of leisure needs; and
- Section 9 summarises our key findings and sets out our conclusions and policy recommendations.

2. Current and Emerging Retail and Leisure Trends

- 2.1 In order to provide a context for this Study and to help identify the sectors that are more likely to be the subject of additional development proposals, we set out a summary of current retail and leisure trends below. In reading the summary, it should be noted that the retail and leisure sectors are dynamic and, whilst online shopping and economic conditions have impacted on the high street, new retailers and formats continue to evolve to meet shoppers' needs.
- 2.2 The below commentary should therefore be taken as a 'snapshot' in respect of current market conditions; it will be necessary to judge future development proposals for main town centre uses with reference to the prevailing circumstances at the time of a proposal's determination. Whilst the impact of Covid-19 on the retail and leisure sectors has lessened in 2022 and 2023, the trading outlook remains challenging due to inflationary pressures and significant increases in the cost of living. We reflect further on the current economic outlook below.

The Current State of the UK Economy

- 2.3 In recent years, the UK economy has been greatly affected by commercial circumstances arising from the Covid-19 pandemic ('lockdowns' in 2020 and 2021), Brexit (January 2020) and the conflict in Ukraine (which started in February 2022). National Statistics ('ONS') figures indicate that UK Gross Domestic Product (GDP) has seen dramatic changes, whereby the GDP index fell from 104.2 in February 2020 to 74.6 in April 2020 and eventually rose back towards March 2022 to its pre-pandemic level.
- 2.4 More recently, despite a strong start to 2025, the second Trump term and the imposition of tariffs resulted in a slowdown in UK-US trade. Furthermore, heightened instability in the Middle East throughout 2025 had an impact on energy prices and volatility in the market¹.
- 2.5 The Monthly GDP is estimated to have grown 1.1% in the three months to May 2026, compared with the three months to May 2025². UK GDP is estimated to have increased by 1.3% in May 2026, compared with the same month in 2025, suggesting that the economy has seen a period of recovery from a series of 'economic shocks', such as the Covid-19 pandemic (including the resultant workforce shortage) and the Russian invasion of Ukraine, which were significant contributors to a technical recession in the second half of 2023³, as well as recent conflict in the Middle East.
- 2.6 Interest rates increased rapidly from 2.6% in March 2025 to 3.8% in July 2025 but are expected to settle at 3.50% by the end of 2026. Longer-term forecasts indicate interest rates could continue to fall by the end of 2027 but will not return to pre-March 2025 levels⁴.
- 2.7 UK inflation fell to 2.6% in June 2026, the lowest since December 2024, but still above the Bank of England's 2% target⁵. However, the volatility in international energy prices during July related to continuing conflict in the Middle East means there is a great degree of uncertainty about the future path of UK inflation⁶. A positive forecast for the economy does rely on the absence of any further global shocks, such as continued instability in the Middle East and the intermittent closure of the Strait of Hormuz, which has already spiked energy and petrol prices.

¹Bank of England, [The UK economy in an unpredictable world, June 2025](#)

²ONS, [GDP Monthly Estimate, May 2026](#)

³KPMG, [UK Economic Outlook, March 2024](#)

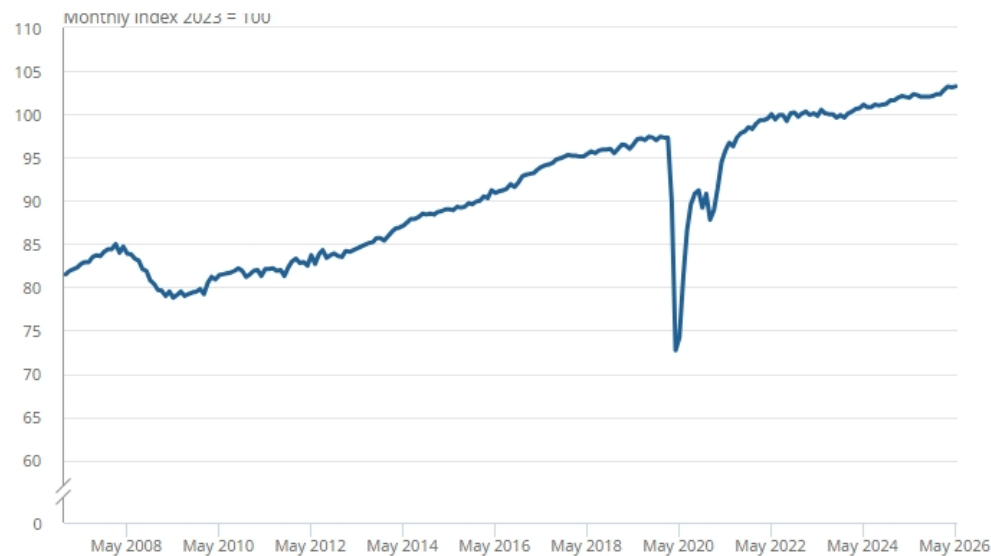
⁴KPMG, [UK Economic Outlook, March 2026](#)

⁵House of Commons Library, [Economic Update, July 2026](#)

⁶House of Commons Library, [Economic Update, July 2026](#)

Figure 2.1: UK Monthly GDP

UK, January 2007 to May 2026



The Retail and Leisure Economy

- 2.8 The retail sector endured a particularly difficult pandemic, with multiple lockdowns and online competition leading to the permanent closure of many shops and businesses. UK high streets have already been in continuous decline since the 2007 recession⁷, with consumer habits moving away from the traditional high street experience. The pandemic, however, accelerated these pre-existing challenges, including an unprecedented rise in online shopping.
- 2.9 Research⁸ shows that the hospitality sector saw the biggest economic decline of all sectors during the pandemic. Periods of public health restrictions saw large falls in output. The peak of the economic downturn was in April 2020, when economic output in the food & accommodation sector was 90% below pre-pandemic levels (February 2020). Overall, economic output from the hospitality industry in 2020 was 42% lower than in 2019, and in 2021, hospitality output was 21% lower than in 2019. The hospitality industry's share of the UK economy fell from 3% in 2019 to 2% in 2020 and 2021. However, as all Covid-19 restrictions were lifted from early 2022, the hospitality sector set a strong trajectory for recovery, particularly as international tourists returned. It is forecast that the hospitality and leisure sectors are expected to be the fastest-growing parts of the economy over the next five years.
- 2.10 Research has also been published on the likely impact of the use of weight-loss drugs on consumption habits⁹. The effects of weight-loss drugs on appetite and appearance, and squeezing household budgets to pay for the drugs, could drive a shift away from categories such as out of home dining and groceries towards categories such as clothing and cosmetics. As a result, spending on dining out could potentially fall by between 1.6% and 3.7%
- 2.11 Retail sales values in the UK grew 3.4% in 2025, with grocery values up by 3.8%, and non-food values up by 2.9%. Savills estimates that average weekly high street footfall saw year-on-year growth across Q1, Q2 and Q3 of 2025

⁷ In 2011, the Portas Review summarised the challenges for high street retailers as follows: "The phenomenal growth of online retailing, the rise of mobile retailing, the speed and sophistication of the major national and international retailers, the epic and immersive experiences offered by today's new breed of shopping mall, combined with a crippling recession, have all conspired to change today's retail landscape".

⁸ House of Commons Library – Research Briefing - Hospitality industry and Covid 19, 11 May 2022

⁹ KPMG, UK Economic Outlook, March 2026

for high streets, shopping centres and retail parks¹⁰. Whilst heatwave weather conditions resulted in a fall in high street footfall during Q2 2026, vacancy rates continue to follow a gradual downward trend. High street vacancy fell to 13.2% in Q1 and Q2 2026 and 16.1% in shopping centres¹¹. This is the lowest level since Q3 2020. Many town centres have benefited from the ongoing diversification of occupier mix, with food and beverage, health and wellbeing, convenience retail and service-led operators continuing to absorb available space.

- 2.12 The occupancy of centres is one thing, but the composition is another important indicator of centre vitality. A report produced by Health Equity North (May 2025)¹², states that community amenities such as banks, pharmacies and grocers are being replaced by vape shops, bookmakers, and takeaway outlets. It is estimated that vape shops have increased by nearly 1200% in England between 2014 and 2024, and takeaway shops are up 24% across the whole of England. Pharmacy availability has decreased by 20% in the most deprived parts of England, and banks and building societies on high streets have decreased by 40% nationally. As such, whilst declining vacancy rates and fast reoccupation of vacant units are positive, the reoccupation of units with 'health reducing' amenities is a key consideration for local planning authorities.
- 2.13 The cost of living is the most commonly reported issue facing the UK according to a recent public opinion survey conducted by the ONS¹³, with 88% of respondents citing it as an important issue. The cumulative effect of price increases over a longer period of time provides an insight into changes to the cost of living. UK consumer prices rose by 30.7% between January 2021 and June 2026¹⁴. By contrast, in the previous five-and-a-half-year period, from August 2015 to January 2021, prices rose by a total of just 8.7%. Food prices rose by 39.3% between January 2021 and June 2026, compared to just 3.9% in the previous 5 and a half years.
- 2.14 The government announced the Budget 2025¹⁵ in November 2025, which has several implications, both positive and negative, for retail and town centres. Reforms to business rates will mean that small and independent businesses will benefit from lower business rate multipliers, while larger chain retailers will experience higher multipliers. An increase in the national minimum wage will increase labour costs, narrowing profit margins. Consumer spending is also likely to be restricted due to the freeze on tax thresholds and limited purchasing power.

Consumer Spending

- 2.15 The latest Experian Retail Planner Briefing 23 (March 2026) makes several comments regarding consumer spending, focusing on the UK's recovery from the economic impact of the Russia-Ukraine war and the Covid-19 pandemic, and discusses the impact of continuing tariffs and geopolitical disruptions in the Middle East.
- 2.16 Data collected at the start of 2025 suggests that, due to high inflation over the last three years, a trend of reduced spending still exists. Spending growth over the course of 2025 is being hindered by the effects of the cost-of-living crisis, high interest rates, and a high tax burden. However, rising real pay growth and continued strength in the labour market should see improvement compared to 2024. Experian estimates that retail sales volumes grew by 1.3% in 2025.

¹⁰ [Savills, Spotlight: Shopping centre and high street, February 2025](#)

¹¹ [Savills, Spotlight: Shopping centre and high street, August 2026](#)

¹² [NIHR, Report finds an increase of 'health reducing' amenities on local high streets, including a sharp rise in vape shops, May 2025](#)

¹³ [ONS, Public Opinions and Social Trends, June 2026](#)

¹⁴ [House of Commons Library, Economic Update, July 2026](#)

¹⁵ [Budget 2025 in full - GOV.UK](#)

- 2.17 Convenience spending has experienced an ongoing wind-down, following a large contraction of -1.8% in 2024, as convenience spending was predicted to further contract in 2025 by about -0.9%. However, growth in spending is estimated from 2026, by +0.5% and +0.9% in 2027.
- 2.18 Conversely, Experian predicted that comparison would grow by 1.8% in 2026, and 1.8% in 2027. The largest growth will be in spending on bulky goods, which is estimated to grow by 4.4% in 2027.
- 2.19 Despite leisure sales falling markedly in 2020 (given the Covid-19-related lockdowns), they recovered lost ground in 2021 and stood higher than pre-pandemic levels by 2022, at £202.3bn nationally. However, the cost-of-living crisis affected spending in 2024, and sales were estimated to have fallen -1.6%. In 2026, an increase of 0.2% is predicted, suggesting a slow reversal of recent leisure spend downturns.

Table 2.1: Experian's Identified and Forecast Growth in Expenditure per Head

Volume Growth Per Head (%)	2025	2026	2027	2028–2032	2033–2041
Retail spend	-0.9%	0.5%	0.9%	1.4%	1.4%
Convenience goods	-1.5%	-0.5%	-0.5%	-0.2%	-0.2%
Comparison goods	-0.5%	1.2%	1.8%	2.5%	2.6%
— of which bulky	-1.0%	2.7%	4.4%	2.1%	1.5%
— non-bulky	-0.2%	0.8%	1.3%	2.8%	3.0%
Leisure	0.7%	0.8%	0.6%	1.1%	1.0%
Consumer spending	-0.1%	0.2%	0.6%	1.2%	1.4%

Source: Figure 5 of Experian Retail Planner Briefing Note 23

Online Shopping

- 2.20 The rise in internet retailing has been at the forefront of retail evolution for a number of years. Covid-19 accelerated this trend.
- 2.21 Generally, Experian shows that growth in non-store retail is expected to be maintained, particularly through the wider adoption of commonplace technology such as mobile phones and tablets combined with 5G and fibre optic networks, faster delivery times, and easier returns processes to make internet shopping even more convenient. Experian expects that market share will continue to grow strongly in the mid-term, whereby by 2040, 37.1% of retail expenditure will be spent online. The pace of e-commerce growth is anticipated to moderate over the long term, but will rise again to a peak of 30.8% (in 2021 as a result of Covid-19) by 2030.

Table 2.2: Experian's Identified and Forecast Market Share of Non-Retail Sales¹⁶

Volume Growth Per Head (%)	2025	2030	2035	2040	% Change
Total	27.8%	30.8%	33.9%	37.1%	+9.3
Convenience goods	17.6%	20.0%	22.2%	24.5%	+6.9
Comparison goods	34.5%	36.9%	39.1%	41.4%	+6.9

Source: Figure 5 of Experian Retail Planner Briefing Note 23

Leisure and Food & Drink

- 2.22 The greater availability of high street units appears to have helped stoke an entrepreneurial spirit in recent years, with a number of centres beginning to benefit from a greater focus on independent retailers and also modern

¹⁶ Experian, Retail Planner Briefing Note 22, March 2025

markets, which are frequently focused around food and drink operators.

- 2.23 More generally, the food and drink sector was buoyed pre-pandemic by the success of mid-market national multiples, which expanded quickly across the UK. However, this market has become saturated in many locations and a number of high profile operators have been in financial difficulty. Given the problems suffered by such operators, the market has become more cautious and mid-market operators are picking new sites carefully as a result. Instead, we have seen a number of independent operators' flourish, both before and throughout the pandemic, and a desire for customers to choose local operators over larger regional and national brands.
- 2.24 A further significant recent high street success story has been the resurgence of the town centre leisure sector, which has resulted in new cinemas being developed close to the shopping core and the emergence of 'competitive socialising' concepts, which include bowling, crazy golf, table tennis, darts, axe-throwing, escape rooms and other seemingly niche pursuits.
- 2.25 Cinema openings have been on the up in the early part of this century (until the Covid-19 pandemic) and 'boutique' cinema operators – including Curzon, Everyman, and The Light – are able to operate from smaller sites in town centres (partly as a consequence of digital technology). Town centre cinema development has successfully underpinned wider mixed-use developments, as food and drink operators are typically keen to locate in close proximity to benefit from spin-off custom. New, innovative leisure operators have been particularly beneficial both in re-using existing difficult to let premises, and in driving the evening economy.
- 2.26 More generally, the gym market continues to perform well, with there now being around 7,200 health and fitness clubs across the UK, which are estimated to have a total turnover of approximately £2bn.¹⁷ Around one in every seven Britons has a gym membership. Budget gyms are currently particularly popular, with operators such as Pure Gym, the Gym Group, and easyGym utilising a format that is based on low costs and high volume.

The Night-Time Economy

- 2.27 The term night-time economy is used to describe a wide range of activities that (typically) take place after 5pm. This could range from a trip to the theatre or cinema, to a family meal, to a night out at a club. A successful night-time economy generally caters for a wide range of demographics and interests.
- 2.28 Creating a safe, vibrant and well-balanced evening and night-time offer is a challenge that can dramatically improve the overall health of a town centre and boost the economy.
- 2.29 The Association of Town and City Management ('ATCM') has identified a number of themes to help improve the attraction and operation of the night-time economy, which are summarised as follows:
- **Alive After Five** – This relates to revisions to trading hours to better suit customers' shopping needs and availability. A Retail Trading Hours Study commissioned by ATCM found that sales between 5 pm and 8 pm are typically 50% greater than those between 9 am and 11am. Revising trading hours to open and close later could increase sales by around 10% to 12%.
 - **Late Night Transport** – The lack of frequent, efficient and safe public transport late at night, or at least the perception of this being the case, could be having a detrimental effect on night-time economy and social scene. One way of increasing night-time visitor numbers is to promote late-night travel provision and its publicity.

¹⁷ 'Number of health clubs in Europe in 2020, by country' dataset, Statista, 27 October 2022.

- **Purple Flag** – This is an accreditation scheme which recognises excellence in the management of town and city centres at night. Obtaining Purple Flag accreditation demonstrates that a town's night-time economy offers clean and safe environments, great bars and clubs, a variety of arts and cultural attractions, and excellent transport links.
- **Evening Economy Ambassadors** – The ambassadors improve the evening and night-time experience in a town centre by liaising between visitors, police, door staff, licensees, and transport operators.
- **Light Night** – This is an initiative where town or city centres stays open after dark for people to enjoy local shops and services within a wider cultural event involving music, art and, most importantly, through the lighting up of buildings and light-based art installations.

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

Planning Reform on the High Street

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

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

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

2.34 The changes in the application of Article 4 directions were first put forward in the January 2021 consultation for draft revisions to the NPPF. However, the actual policy provision differs from the initial consultation in a couple of key areas. Paragraph 53 of the previous NPPF of July 2021 recognised that the loss of the 'essential core of a primary shopping area' could result in wholly unacceptable adverse impacts on an area's vitality and viability. This was the Government's first acknowledgement of the potential for the permitted development rights to undermine the health of centres in the NPPF. The updated text also introduced a requirement for 'robust evidence' to support the removal of development rights. The most recent iteration of the NPPF, published in February 2025, retains these changes.

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

Out-of-Centre Retailing

- 2.36 Another key format of retailing (and provision of leisure uses) are out-of-centre retail warehouse destinations. Whilst local authorities need to retain control over out-of-centre provision from a planning perspective, such provision does play an important part in providing space for operators who may not be able to viably trade from in-centre locations. Such uses include 'bulky' retail operators, including DIY stores, electrical goods retailers, furniture stores and so on.
- 2.37 In their UK Retail Warehousing April 2025 Spotlight Report, Savills note that: **'...despite the failure of two of the sector's longest-running operators, it is important to point out that at no point did national vacancy climb above 5%. The level of interest and speed at which the best vacant Carpetright and Homebase units were acquired is tantamount to the strong competitive tension that still exists in the market.'** In terms of the nature of the operators, it is the value orientated brands which continue to top the charts of the most acquisitive retail and leisure operators.
- 2.38 In this regard, Savills note that the retailers with a focus on essential product categories have continued to drive footfall to out-of-centre schemes, which remain at near parity with the levels seen pre-Covid. Furthermore, operators which focus on essential products have dominated the new openings, including Aldi and Lidl, Home Bargains, B&M Retail and leisure operators such as PureGym, Greggs and Starbucks. Indeed, the Savills' Spotlight Report notes that:
- '...as we have seen in the past, when consumers swing into belt-tightening mode, large parts of the retail warehouse market stand to benefit. As we explored in the previous issue of this Spotlight, the out-of-town market is less dependent on big-ticket discretionary spend and increasingly focused on essential and value-based retail, especially with the growth of discount variety retailers and value-oriented grocers.'**
- 2.39 In addition to the above, most out-of-centre shopping locations retain their apparent significant competitive advantages over town centres and high streets in terms of their supply of larger format modern outlets, their lower occupancy costs, extensive free parking and easy and convenient access to the surrounding highways and key arterial routes. This is still an attractive proposition for those retailers that are still seeking space in the current market, but the implications of the attraction of out-of-centre facilities on defined centres, needs to be monitored carefully and the ongoing ease of access, parking and overarching attraction of out-of-centre facilities can of course have implications for town centre operators and retail and leisure planning policy.

Conclusion

- 2.40 Retail has been an industry under significant stress, as many retailers find themselves squeezed between rising costs and the increasing volume of sales over the internet. Such difficulties have, of course, been exacerbated by the Covid-19 pandemic and the cost-of-living crisis associated with rising energy prices and inflation. In response to this unpredictability, those operating in the market are forced to adapt quickly or otherwise face falling profits.
- 2.41 There will still be the need and demand for physical stores, despite the increase in shopping online. This is particularly the case for convenience goods sales since the online shopping orders are typically picked from the shelves of physical stores. In respect of comparison goods, there is a need for the offer to become more 'experiential' to encourage shoppers onto the high street, and to ensure that shopping is viewed as a pleasurable pastime. The shopping experience needs to evolve and diversify both to attract footfall and convert increased activity into sales. Independents clearly have an important role to play in adding interest and in providing differentiation between shopping venues.
- 2.42 Whilst there may be a demand for more physical stores, the increases in pubs and restaurants in town centres have boosted the economy in the town centres and reduced the number of empty units.

- 2.43 In a market disrupted by continued changes in consumer behaviour, investing in the consumer experience is anticipated to be the key to success in securing resilience in retail stores moving forward. Planning policy can play an important role in helping to future-proof town and village centres against the ongoing uncertainty.

Implications for the Bolton Authority Area

- 2.44 The commercial market in Bolton reflects the wider structural change affecting UK retail and leisure, but the implications are particularly pronounced given the borough's established network of town centres and its significant out-of-centre retail provision. The trends set out above identifies a market that is recovering from the pandemic and cost-of-living pressures, but where consumer behaviour has fundamentally changed. UK retail sales values increased by 3.4% in 2025, while high street vacancy fell to 13.4% by Q4 2025. However, online expenditure is forecast to continue increasing, reaching 37.1% of total retail expenditure by 2040. For Bolton, this points towards less demand for extensive traditional comparison floorspace and greater demand for accessible, experiential, convenience-led, leisure, food and service uses.
- 2.45 Bolton town centre remains the borough's principal commercial location, but its market role is changing. The emerging commercial market is increasingly based on a more compact and diversified centre rather than attempting to sustain the historic scale of comparison retail. This is consistent with Bolton Council's strategy of consolidating the quality retail offer around Market Place while introducing a greater mix of residential, hospitality, leisure and employment uses. As we go on to explore further later in the Study, the relocation of Primark to Market Place has helped reinforce the core, while the redevelopment of Crompton Place represents an important opportunity to remove a significant area of obsolete shopping-centre floorspace and reposition the town centre around a more viable mix of uses.
- 2.46 The Crompton Place opportunity is particularly significant from a commercial market perspective. Rather than treating the loss of the former shopping centre as evidence of a lack of commercial demand across Bolton, it should be viewed as part of the restructuring of the town centre towards a more sustainable commercial footprint.
- 2.47 There is nevertheless evidence of continued retailer demand for well-located, modern and appropriately sized floorspace. The trends evidence notes that comparison expenditure is forecast to grow by around 1.8% per annum in 2026 and 2027, with particularly strong growth anticipated for bulky goods. This suggests that the market is not moving towards the end of physical retail, but towards a different type of physical retailing. In Bolton, this is likely to favour modern units, good accessibility, efficient servicing and parking, with demand concentrated amongst value retailers, essential goods operators, discount retailers, foodstores and selected leisure operators.
- 2.48 This is particularly evident at Middlebrook Retail and Leisure Park, which represents a fundamentally different commercial proposition from Bolton town centre. Middlebrook has over 646,500 sq.ft of retail floorspace, more than 60 retailers, around 40 retail units, substantial free parking and a significant leisure and food-and-drink offer. Its location is adjacent to Junction 6 of the M61 and Horwich Parkway railway station gives it a very strong regional catchment. The trends evidence reinforces the strength of this format: out-of-centre retail parks retain advantages in terms of larger modern units, lower occupancy costs, free parking and convenient access to major highways, while value-oriented and essential retailers are currently among the most active occupiers.
- 2.49 The commercial strength of Middlebrook therefore represents both an opportunity and a challenge for Bolton's town centres. It provides a strong retail and leisure destination for the borough and wider sub-region, but its accessibility, scale and parking offer make it difficult for traditional high street locations to compete directly. The appropriate market response is consequently not to seek to replicate Middlebrook within Bolton town centre, but to establish different reasons to visit the town centre, particularly through food and drink, leisure, culture, events, independent businesses, services, employment and residential development.

- 2.50 Again, as we go on to explore in further detail below as part of our baseline work, the smaller town centres of Farnworth, Horwich, Westhoughton and Little Lever occupy a different position within the borough's hierarchy. Their role is principally to meet local day-to-day needs, with opportunities for convenience retail, local services, food and drink, leisure and independent operators rather than major comparison-led development.
- 2.51 The trends evidence also highlights a potential issue around the quality of reoccupation of vacant units. Although falling vacancy is positive, national evidence indicates that traditional community amenities such as banks and pharmacies are increasingly being replaced by uses such as takeaways, bookmakers and vape shops. For Bolton, this suggests that commercial vitality should not be assessed solely by headline vacancy rates. The composition of occupied floorspace, the quality of the offer, the diversity of operators and the extent to which uses generate activity throughout the day and evening are equally important indicators of market health.

3. Planning Policy Context

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

National Planning Policy Framework

- 3.2 The National Planning Policy Framework ('NPPF') was published in August 2026. The NPPF reflects the fact that the traditional role of town centres has been somewhat undermined by structural changes in the retail sector, and that there may be a need to plan for a more diverse range of uses going forward. As such, the NPPF advocates a more flexible policy framework to support the future vitality and viability of town centres.

- 3.3 The 'Ensuring the vitality of town centres' chapter in the NPPF is split into two parts: one plan-making policy (TC1) and three development management policies (TC2/3/4). There is also an over-arching statement prior to the two sets of policies:

'The objective of the policies in this chapter is to promote the long-term vitality and viability of town centres by prioritising them as locations for main town centre uses and allowing them to adapt to changing community and business needs, in a way which reflects their locally distinctive roles and opportunities'.

- 3.4 Policy TC1 relates to planning for town centres and states that in order to promote the long-term vitality and viability of town centres, development plans should, at the most appropriate level:

- A. **'Be informed by a strategy for town centres in the area, to ensure that the full range of potential needs and opportunities for development is considered, including the scope to accommodate additional floorspace, to broaden the mix of uses (including residential uses) and to bring vacant sites and premises back into use;**
- B. **Set out the hierarchy of centres, and any areas within them where specific policies on the nature and scale of development apply, including:**
 - i. **the extent of town centres;**
 - ii. **areas particularly suitable for a greater diversity and/or intensification of use, including through residential development; and**
 - iii. **areas within which infrastructure and public realm improvements are proposed.**
- C. **Allocate a range of suitable sites in town centres to meet the scale and type of main town centre uses needed over the plan period in these locations, as well as for any complementary uses. Before reviewing town centre boundaries to accommodate any increase in development which is needed, existing vacant town centre sites and areas that are particularly suitable for intensification should be considered to maximise effective use of land;**
- D. **Where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should set out proposals for identified needs to be met in other accessible locations that are well connected to the town centre; and**
- E. **Where appropriate, set a locally defined floorspace threshold for development proposals outside town centres, above which an impact assessment would be required, as set out in policy TC4.'**

- 3.5 There are three development management policies which deal with town centres and the management of proposals for main town centres uses outside of town centres. There is now a specific stand-alone national policy:

TC2. It is directed specifically at proposals located within town centres, with the singular aim of supporting the overall vitality and viability of the centre.

3.6 Policy TC3 is intended to deal with the sequential test. Part (1) of Policy TC3 in the NPPF states:

‘A sequential test should be applied to proposals for main town centre uses for which planning permission is required, where these are neither in an existing centre nor in accordance with an allocation for that purpose in an up-to-date development plan.’

3.7 Policy TC4 deals with the assessment of the likely impact of certain development proposals on town centres. Part (2) of Policy TC4 in the NPPF states that:

‘In circumstances where an impact assessment is required, it should be demonstrated that the development would be unlikely to have a significant adverse impact on:

- a. Existing, committed and planned public and private investment in a town centre or centres in the catchment area of the proposal; and
- b. Town centre vitality and viability, including local consumer choice and trade in the town centre and the wider retail catchment (as applicable to the scale and nature of the scheme).’

Ensuring the Vitality of Town Centres Planning Practice Guidance

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

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

- The realistic role, function and hierarchy of town centres over the plan period. Given the uncertainty in forecasting long-term retail trends and consumer behaviour, this assessment may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed.
- The vision for the future of each town centre, including the most appropriate mix of uses to enhance overall vitality and viability.
- The ability of the town centre to accommodate the scale of assessed need for main town centre uses, and associated need for expansion, consolidation, restructuring or to enable new development or the redevelopment of under-utilised space.
- How existing land can be used more effectively – for example, the scope to group particular uses such as retail, restaurant and leisure activities into hubs or for converting airspace above shops.
- Opportunities for improvements to the accessibility and wider quality of town centre locations, including improvements to transport links in and around town centres, and enhancement of the public realm.
- What complementary strategies are necessary or appropriate to enhance the town centre and help deliver the vision for its future, and how these can be planned and delivered. For example, this may include consideration of how parking charges and enforcement can be made proportionate.

- The role that different stakeholders can play in delivering the vision. If appropriate, it can help establish the level of cross-boundary/strategic working or information sharing required between both public and private sector groups.
- Appropriate policies to address environmental issues facing town centres, including opportunities to conserve and enhance the historic environment.

- 3.10 This Study seeks to provide a high-level authority-wide retail and leisure strategy, which will provide an overall context to the determination of planning applications for such uses and will support the Council's future development plan policy. The Study will also help underpin future town centre-specific strategies or masterplans.
- 3.11 Paragraph 006 of the Town Centres PPG identifies a series of key indicators of relevance in assessing the health of a centre over time. The indicators allow the role, performance, and function of centres to be monitored and are considered in greater detail at Section 4 of this report (which specifically addresses the vitality and viability of the principal centres).

Use Classes Order

- 3.12 Significant changes to the Use Classes Order have been enacted through the Town and Country Planning (Use Classes) (Amendment) (England) Regulations 2020, which came into force on 1 September 2020.
- 3.13 The amendments include the revocation of Parts A and D, and the introduction of three new Use Classes, these being Classes E, F1 and F2. The Government's objective is that the changes will support the revival of the high street and allow for greater flexibility in changing uses within town centres without the need for planning permission.
- 3.14 In addition to the three new Use Classes, the changes also result in some changes in respect of uses classified as *sui generis*. In practical terms, the changes comprise:
- **Use Class E** – Commercial, business and service uses include shops or retail; cafes or restaurants; financial services; professional services; any service appropriate to provide in a commercial, business or service locality; indoor sports, recreation or fitness; medical or health services; crèche, day nursery or day centre; and offices.
 - **Use Class F1** – Learning and non-residential institutions include any non-residential use for the: provision of education; display of works of art; museum; public library or public reading room; public hall or exhibition hall; for or in connection with public worship or religious instruction; or, as a law court.
 - **Use Class F2** – Local community uses include: a shop selling mostly essential goods, including food, no larger than 280 sq.m and where there is no other such facility within 1,000 metres radius of the shop's location. A hall or meeting place for the local community, an area or place for outdoor sport or recreation and an indoor or outdoor swimming pool or skating rink.
 - **Sui Generis** – Use within this Class now include a public house, wine bar or drinking establishment; a drinking establishment with expanded food provision; a hot food takeaway for the sale of hot food where consumption of that food is mostly undertaken off the premises; live music venue; cinema; concert hall; bingo hall; or, dance hall.
- 3.15 The introduction of Class E is significant and places a wide range of uses including retail, food, financial services, gyms, healthcare, nurseries, offices, and light industry into a single use class. Unless restrictive planning conditions extinguish the provisions of Class E, the ability to change the commercial use of premises without planning permission allows centres to evolve in a flexible manner.

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

Town Centre Use Permitted Development Rights

- 3.17 An amendment was made to the General Permitted Development (England) Order 2015 (the 'GPDO') in March 2021. This allows for the change of use from Class E properties to residential from August 2021 (extending a right that had previously been restricted to office uses). This permitted development right is subject to maximum size requirements, the property having been in use as Class E for two years, and the property having been vacant for three months. In addition to this, 'prior approval' for the change of use must be sought from the planning authority. Restrictions on this right apply in conservation areas and for nurseries and health centres, as well as in areas that are covered by an Article 4 direction.

Local Planning Policy Context

Adopted Development Plan

- 3.18 The Bolton Core Strategy is the key document within the Local Development Framework and sets out the spatial planning strategy for the borough up to 2026. It contains a number of policies relevant to retail and town centres, including those relating to Bolton Town Centre, Farnworth, Horwich, Westhoughton, Little Lever and Middlebrook. The relevant policies are summarised below.
- 3.19 Policy P2 (Retail and Leisure) seeks to increase the amount of retail floorspace across the borough, with the majority of new retail development directed towards Bolton Town Centre. The policy identifies a range of sites capable of accommodating up to 130,000 sqm of comparison goods floorspace after 2016, largely within Bolton Town Centre. It also supports bulky goods retailing on edge-of-centre sites, particularly around the town centre, and makes provision for up to 10,000 sqm of additional convenience goods floorspace within town, district and local centres where communities have good access to facilities.
- 3.20 Figure 4.2 sets out the hierarchy of centres across the borough. Bolton is identified as the sub-regional town centre, whilst Farnworth, Westhoughton, Horwich and Little Lever are identified as town centres. Chorley Old Road, Astley Bridge, Brightmet and Harwood are designated as district centres. Deane Road, Derby Centre, Tonge Fold, Daubhill and St Helens Road, Halliwell Road, Tonge Moor Road, Blackrod, Bromley Cross and Kearsley are identified as local centres.
- 3.21 Policy TC1 (Civic and Retail Core) identifies the civic and retail core as the principal location for retailing within the borough, with a focus on renewal and improvement to deliver high-quality floorspace. The policy supports the growth of restaurants, food-orientated public houses and financial and professional services, provided these uses do not undermine the area's primary retail function. It also promotes Victoria Square as a focus for leisure and civic activities, including outdoor seating associated with cafés and restaurants, and seeks to improve pedestrian links between the town centre, transport interchange and surrounding car parks.
- 3.22 Policy TC2 (St Helena) supports the redevelopment of the Central Street phase as a retail-led mixed-use scheme incorporating residential and community uses. It also supports the redevelopment of the King Street phase for either retail-led or residential-led mixed-use development. As such, the St Helena area is identified as an important opportunity for retail-led regeneration within Bolton Town Centre.

- 3.23 Policy TC3 (St Peter's) seeks to conserve and enhance the historic character of Churchgate, Wood Street and Silverwell Street. The policy supports the retention of the existing mix of uses, with a presumption in favour of business and residential development alongside food and drink uses fronting Bradshawgate, Churchgate and Nelson Square.
- 3.24 Policy TC4 (Trinity Gateway) supports the redevelopment of the area surrounding Bolton railway station and bus interchange. The wider site is identified for a mix of office, retail and leisure uses, alongside a new multi-modal transport interchange, residential development and small-scale non-food retailing.
- 3.25 Policy TC5 (Cultural Quarter) supports the development of the Cultural Quarter as a focus for cultural, leisure, tourism, office, hotel and complementary uses. Whilst not principally a retail policy, it supports the diversification of the town centre and contributes towards the vitality and viability of Bolton town centre.
- 3.26 Policy TC6 (Knowledge Campus) supports the continued development of the Knowledge Campus around the University of Bolton and the relocated colleges. The policy seeks to improve pedestrian connections between the campus and the civic and retail core, helping to strengthen links between education, employment and town centre uses.
- 3.27 Policy TC7 (Merchant's Quarter) supports mixed-use redevelopment within the Merchant's Quarter, including employment and other town centre uses. The policy contributes to the wider regeneration of Bolton Town Centre and reinforces its role as a focus for economic activity.
- 3.28 Policy TC8 (Church Wharf) promotes employment-led mixed-use development at Church Wharf, with an emphasis on office, leisure and retail uses alongside residential elements. The policy seeks to support the wider regeneration of Bolton Town Centre whilst ensuring flood risk considerations are appropriately addressed.
- 3.29 Policy TC9 (Little Bolton) seeks to retain existing buildings within the conservation area wherever practicable and, where appropriate, secure new uses for them, including office, leisure, retail and residential uses. Outside the conservation area, the policy also supports redevelopment and refurbishment opportunities for a mix of residential, office and leisure uses.
- 3.30 Policy RA2 (Farnworth) supports the ongoing regeneration of Farnworth Town Centre through a mix of retail, leisure, employment, public service and housing uses. The policy also supports the renewal, development and expansion of the retail precinct, together with improvements to gateways, transport corridors, pedestrian routes and overall connectivity throughout the town centre.
- 3.31 Policy OA1 (Horwich and Blackrod) promotes Horwich Town Centre as a suitable location for a mix of retail, leisure, employment and housing uses. The policy identifies Horwich as serving the western part of the borough's retail needs, whilst Blackrod local centre will continue to provide for day-to-day local requirements.
- 3.32 Policy OA2 (Retail and Leisure Uses at Middlebrook) relates specifically to retail and leisure provision at Middlebrook. It states that changes to retail and leisure uses will be supported provided they do not adversely affect Bolton Town Centre or any other defined centre and do not result in a substantial increase in floorspace. Supporting text explains that further retail expansion at Middlebrook could undermine the transformation of Bolton Town Centre and notes that Middlebrook is not identified as a town centre within the borough hierarchy.
- 3.33 Policy OA3 (Westhoughton) promotes Westhoughton Town Centre as a location for a mix of retail, leisure, employment and housing uses. The policy confirms that the centre will continue to serve the south-western part of the borough and may accommodate additional convenience floorspace should suitable sites become available.

- 3.34 Policy OA6 (Little Lever and Kearsley) identifies Little Lever Town Centre as serving the south-eastern part of the borough. The policy allows for the expansion of convenience retail floorspace where suitable opportunities arise and confirms that Kearsley local centre will continue to serve local needs.
- 3.35 In relation to hot food takeaways, the Core Strategy does not contain a standalone policy specifically controlling such uses. Appendix 5 confirms that the saved UDP policy relating to "Hot food take aways and restaurants" has been replaced by Core Strategy Policy CG4, which relates to compatible uses. As a result, proposals for hot food takeaways and restaurants are considered in the context of their compatibility with surrounding uses, alongside the relevant retail, town centre and area-based policies contained within the Core Strategy.
- 3.36 However, the Council does have an adopted Supplementary Planning Document (SPD) on the 'Location of Restaurants, Cafés, Public Houses, Bars and Hot Food Takeaways in Urban Areas'. The SPD deals with the planning issues that arise from the use of premises for the sale of food and drink for consumption on the premises, or for the sale of hot food for consumption off the premises. These uses include restaurants, cafes, public houses, bars and hot food takeaways.
- 3.37 When the Council considers a planning application for a hot food takeaway (A5), it will take into account the proximity of the proposal to secondary schools, that is any school attended by 11-16 year olds. If an application site is within 400 metres of a secondary school, then the council may refuse the application on the grounds that it would be harmful to public health.
- 3.38 The Council will also take into account the proposed opening hours of a hot food takeaway. If the proposed opening hours do not include lunch-time opening or evening opening before 6pm, then planning permission may be granted, even if a site is within 400 metres of a secondary school.

Places for Everyone (PfE) 2024

- 3.39 The Places for Everyone (PfE) Plan is the long-term strategic spatial plan of the nine Greater Manchester districts (Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Tameside, Trafford, and Wigan), adopted on March 21, 2024, which sets out the framework for jobs, new homes, and sustainable growth up to 2039.
- 3.40 The relevant policies as it pertains to retail uses are summarised below.

Policy JP-P 4 New Retail and Leisure Uses in Town Centres

- 3.41 The policy maintains and enhances the established retail and leisure hierarchy of the principal centres across Greater Manchester. Within this hierarchy, Bolton is identified as one of the main town centres across Greater Manchester. This designation confirms Bolton's role as the Borough's primary focus for new retail and leisure development.
- 3.42 Proposals for such uses should therefore be directed to Bolton in the first instance, in line with the sequential approach set out in national and local policy, to support the vitality and viability of the town centre and ensure it continues to function as a key destination within the wider Greater Manchester centre hierarchy.
- 3.43 Paragraph 9.21 states that:
- 'The boundaries of the centres and detail of other centres at lower levels of the hierarchy are defined in district local plans. Appropriate large-scale retail and leisure development will be accommodated within the centres in the upper levels of the hierarchy. The need for the expansion of any existing centres, or the provision of new centres, will be identified in district local plans.'**

Policy JP-Strat12: Main Town Centres

3.44 Policy JP-Strat12 provides an overview of the role of main town centres within Greater Manchester, and states that:

‘The role of the main town centres as local economic drivers will continue to be developed, providing the primary focus for office, retail, leisure and cultural activity for their surrounding areas. Development here will offer a significant opportunity to reduce levels of poverty and deliver inclusive growth.

Opportunities to further increase the population catchments of these centres will be taken, including significantly increasing the resident population of the main town centres by providing a mix of type and size of dwellings supported by the necessary infrastructure and amenities including new and improved public spaces and green infrastructure. This will be achieved alongside, rather than displacing, the range of non-residential uses in the centres. Housing growth along the key public transport corridors into the main town centres will also be promoted, further increasing the population catchments of those centres.

The role of the main town centres as major public transport hubs will be developed and supported by a network of active travel routes, enabling residents to have improved access to opportunities across Greater Manchester as well as within the centres themselves.

Development will be carefully managed to ensure that the local distinctiveness of each main town centre is retained and enhanced. Opportunities will also be taken to protect and enhance natural and historic assets in the town centres.’

Policy JP Allocation 6 (West of Wingates / M61 Junction 6)

3.45 The policy allocates land west of Wingates for approximately 440,000 sq.m of industry and warehousing development, comprising a mix of large-scale industrial and warehousing development. Development is required to come forward through a comprehensive masterplan and be supported by appropriate transport infrastructure, including highway improvements, public transport enhancements, and walking and cycling connections.

3.46 The adopted West of Wingates Strategic Masterplan SPD meets the requirement of criterion 2 of PFE Policy JPA6 which states that ‘development at this site will be required to be in accordance with a comprehensive masterplan agreed by the local planning authority that shows phasing within the site, and which areas should or should not be developed, in accordance with policy JP-D1’.

3.47 The SPD provides guidance and detail on how Policy JPA6 will be implemented. The Vision of the West of Wingates SPD is that:

‘West of Wingates will be a sustainable and well-connected employment hub that delivers long-term economic and social value for Westhoughton and, by extension, Bolton. This exemplar development will provide modern, adaptable, and accessible business space in a strong landscape setting, supported by integrated and accessible public transport connections. Green corridors and open spaces will define the site’s character, supporting biodiversity, active sustainable travel, and wellbeing. This balance of high-quality employment space and integrated green infrastructure will create a place where businesses thrive, people want to work, and wider benefits are afforded to the local community’.

3.48 The policy seeks to capitalise on the site's strategic location adjacent to Junction 6 of the M61 whilst ensuring that development does not adversely affect the surrounding highway network. It also places significant emphasis on landscape and environmental mitigation, requiring the protection of the Four Gates Site of Biological Importance, retention of existing landscape features where practicable, and measures to minimise visual, noise, air quality and lighting impacts on the surrounding area.

Bolton Town Centre Framework

- 3.49 The Bolton Town Centre Framework was prepared by Bolton Council to guide the long-term regeneration and development of Bolton Town Centre. It sets out a vision for future growth, identifying key opportunity sites and intervention areas that can support investment, economic development and the continued evolution of the town centre. The Framework seeks to build on Bolton's existing strengths, including its retail, leisure, cultural, civic and educational assets, whilst responding to changing consumer behaviour and the wider challenges facing town centres. It aims to create a more vibrant, diverse and sustainable centre that remains an attractive place to live, work, visit and invest.
- 3.50 The Framework recognises that the role of town centres has changed significantly in recent years. Whilst retail remains an important function, successful centres are increasingly expected to accommodate a broader mix of uses, including leisure, food and drink, employment, education, culture and residential development. As such, the Framework promotes a more diverse town centre offer that can support long-term vitality and viability.
- 3.51 The Framework identifies Bolton Town Centre as a major sub-regional centre, anchored by a strong retail offer that includes Bolton Market, Market Place Shopping Centre and a range of national multiple retailers. Retailing continues to play a key role in the town centre's function, although the Framework acknowledges the need for the retail offer to adapt to changing shopping habits and the continued growth of online retailing.
- 3.52 A central theme running through the Framework is the need to strengthen the town centre by broadening its appeal and encouraging people to spend more time within the centre. Rather than relying solely on traditional retail uses, the Framework seeks to support a wider mix of leisure, food and drink, cultural and residential uses that can increase footfall throughout the day and into the evening.
- 3.53 The Framework notes that this investment has already helped establish a stronger food, drink and leisure destination and provides a platform for further improvements elsewhere in the centre. At the same time, it recognises that convenience shopping will remain an important component of the town centre offer, particularly as the residential population grows.
- 3.54 The Framework identifies three principal destinations within Bolton Town Centre: the retail and leisure core centred on Market Place, the civic and cultural area focused around Victoria Square and the Town Hall, and the transport and commercial quarter surrounding the Transport Interchange. Future development proposals are intended to strengthen the links between these destinations and create a more cohesive and accessible town centre.

Crompton Place

- 3.55 Crompton Place is identified as one of the key opportunities for retail-led regeneration within the town centre. The Framework notes that its current offer is largely focused on convenience and service uses and does not fully benefit from the increased activity generated by Market Place and Deansgate.
- 3.56 The Framework therefore seeks to reposition Crompton Place as a stronger part of the town centre retail circuit. Proposed improvements include better pedestrian connections between Bradshawgate, Hotel Street and Victoria Square, alongside a more attractive shopping environment and an expanded food, drink and leisure offer. The Framework also explores opportunities to accommodate the future requirements of major retailers and to introduce new uses that would encourage visitors to spend longer in the town centre.
- 3.57 Particular emphasis is placed on strengthening the relationship between Crompton Place and Victoria Square. Proposed restaurant terraces overlooking the square, alongside additional leisure uses on upper floors, are

intended to increase activity within the area and reinforce its role as part of the town centre's wider retail and leisure destination.

Cheadle Square

- 3.58 The Framework identifies Cheadle Square as a key component of Bolton's Academic and Cultural Quarter. While the area is primarily envisaged as a mixed-use destination, the proposals include several elements that would support the wider town centre economy.
- 3.59 Central to the proposals is the new residential development on the former bus station site. Alongside residential and commercial development, the inclusion of active ground-floor uses is intended to increase footfall, support local businesses and contribute to the overall vitality of the town centre.

Trinity Quarter

- 3.60 Although Trinity Quarter is principally promoted as a commercial and residential destination, the Framework also recognises its role in supporting the wider town centre. New public squares and pedestrian routes are proposed throughout the area, with active ground-floor uses such as cafés, restaurants and smaller retail units helping to animate the streets and public spaces.
- 3.61 The proposals are intended to strengthen connections between the town centre core, the Transport Interchange and surrounding neighbourhoods, helping to integrate new development into the wider town centre and support activity beyond the traditional retail core.

West of Wingates Strategic Masterplan Supplementary Planning Document (SPD)

- 3.62 Bolton Council has prepared the West of Wingates Strategic Masterplan Supplementary Planning Document (SPD) to provide more detailed guidance on the delivery of the strategic employment allocation identified as Policy JPA6 (West of Wingates / M61 Junction 6) within the adopted Places for Everyone Plan. The document has been developed to ensure that future development across the site is planned and delivered in a coordinated way, establishing a clear vision, development principles and design framework for the allocation.
- 3.63 The adopted SPD supports the delivery of approximately 440,000 sq.m of industrial and warehousing floorspace. Given the site's strategic location adjacent to Junction 6 of the M61, the allocation is intended to become a major destination within the Wigan-Bolton Growth Corridor, providing opportunities for investment, business growth and job creation.

4. Healthcheck Assessments and Land Use

Introduction

- 4.1 The NPPF indicates that planning policies should promote the long-term vitality and viability of town centres by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries. The same paragraph also states that town centres should accommodate a suitable mix of uses (including housing) and provide for development that reflects a centre's distinctive character.
- 4.2 Paragraph 006 of the Town Centres PPG identifies a range of indicators that should be assessed over time in reviewing the health of a town centre. The indicators include the following:
- diversity of uses;
 - proportion of vacant street level property;
 - retailer representation and intentions to change representation;
 - pedestrian flows;
 - accessibility;
 - perceptions of safety and occurrence of crime;
 - the state of town centre environmental quality;
 - the balance between independent and national multiple retailers; and
 - the extent to which there is an evening and night-time economy offer.
- 4.3 We begin below by looking at the authority's principal centres. In this regard, new healthcheck assessments have been undertaken for Bolton town centre and the town centres of Farnworth, Horwich, Little Lever and Westhoughton, the district centres of Astley Bridge, Brightmet, Chorley old Road and Harwood and the series of local centres across the authority area. The detailed healthcheck assessment is provided at Appendix 3 and we provide a summary of the key conclusions below. For clarity, the composition of uses within the centres is based on the Goad boundary definitions as shown on the attached composition plans.
- 4.4 The assessments is based on a site visit which was undertaken in February 2026. The assessment should be taken as a 'snapshot' of the performance of the centre at a moment in time.

Bolton Town Centre

- 4.5 Bolton is the principal town centre for the Metropolitan Borough of Bolton in Greater Manchester, located approximately 11 miles north-west of Manchester city centre. The town centre occupies a compact area broadly bounded by Marsden Road and Moor Lane to the west, Topp Way (A673) to the north, St Peters Way (A666) and Bury New Road to the east, and Trinity Street and Bolton railway station to the south. The survey area encompasses 615 retail, leisure, service and commercial units amounting to approximately 183,777 sq.m of commercial floorspace.

Table 4.1: Composition of Bolton Town Centre

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	51,784	28.2%	28.6%	129	21.0%	25.9%
Convenience	25,048	13.6%	15.4%	46	7.5%	9.4%
Financial Service	7,612	4.1%	6.0%	40	6.5%	7.8%
Leisure Service	39,771	21.6%	27.9%	148	24.1%	26.7%
Retail Service	13,203	7.2%	7.3%	77	12.5%	15.9%
Vacant	46,358	25.2%	14.3%	175	28.5%	14.0%
Total	183,777	100.0%	100.0%	615	100.0%	100.0%

Source: Composition of centre derived from Nexus Planning survey of March 2026; UK Average from Experian Goad report of September 2025

- 4.6 The layout of the town centre is broadly centred on Market Place shopping centre, which opened in 1988 and anchors the principal retail offer, and the historic civic core around Victoria Square and Bolton Town Hall. Deansgate forms the main pedestrianised high street running north from the Market Place. To the south, the Bolton Shopping Park on Trinity Street provide an out-of-centre retail offer. Bolton Market occupies a large purpose-built market hall on Ashburner Street to the north-west of the centre, complemented by the award-winning Bolton Market Food Hall.
- 4.7 Bolton's retail core is undergoing a significant period of structural change. The Crompton Place shopping centre, which faces the Town Hall across Victoria Square, was purchased by Bolton Council in 2018 and has been progressively vacated. Primark completed its relocation from Crompton Place to a new unit in Market Place in late 2024, and Bolton Council applied for planning permission to demolish Crompton Place in 2025, with MEPC (the development arm of Federated Hermes) appointed as development partner in early 2026. Demolition and redevelopment of the site, which could deliver a large mixed-use scheme, represents Bolton's flagship regeneration project.
- 4.8 In keeping with its role as the Borough's principal centre, Bolton accommodates a wide range of comparison retailers and remains one of Greater Manchester's most significant shopping destinations outside Manchester city centre. Market Place contains a strong representation of national multiple retailers, including Primark, H&M, New Look, River Island, JD Sports and Boots, while independent operators continue to contribute to the offer along Deansgate and adjoining streets. Comparison floorspace is broadly aligned with national averages and provides a good level of choice across a range of sectors, supported further by retailers located at Bolton Shopping Park and Ravenside Retail Park.
- 4.9 The convenience offer is a particular strength of the centre and wider centre (including edge of centre provision). Bolton Market continues to generate substantial footfall and acts as an important draw for both residents and visitors. Together with Morrisons, Sainsbury's and Aldi, it provides a strong and diverse food shopping offer that serves different parts of the town and edge of centre but which provide an important overarching offer meeting the needs of the surrounding catchment and ultimately benefitting the centre as a whole. The market's role extends beyond convenience shopping, helping to support independent businesses and contributing to the distinct character of the centre.
- 4.10 Bolton also benefits from a varied leisure and cultural offer. The Octagon Theatre, Albert Halls, Grosvenor Casino and Mecca Bingo all contribute to the town centre's appeal, while restaurants, cafés, pubs and bars are distributed throughout the centre, particularly around Bradshawgate, Churchgate and Nelson Square. Although these uses

generate activity beyond traditional shopping hours, the evening economy lacks a clearly defined focal point and can feel fragmented in places. The proposed redevelopment of Crompton Place provides an opportunity to strengthen this aspect of the offer by introducing new leisure and hospitality uses within a more coherent town centre environment.

- 4.11 The centre retains a strong service function, including a comprehensive range of banks, building societies, professional services, opticians and health and beauty operators. However, vacancy remains one of the town centre's most visible challenges. At over a quarter of all units and floorspace, vacancy rates are substantially above national averages. That said, the figures are heavily influenced by the planned clearance of Crompton Place and therefore do not necessarily reflect wider market conditions across the centre. Vacancies are also concentrated along Bradshawgate and within the Gates Shopping Centre, where weaker footfall and changing shopping patterns have contributed to reduced occupancy and a noticeable decline in activity.
- 4.12 Bolton benefits from excellent accessibility. Bolton Interchange provides extensive rail and bus connections across Greater Manchester and the wider North West, while the town centre is well connected to the strategic road network via the A666 and M61. Pedestrian activity is strongest around Market Place, Deansgate and Bolton Market, where the quality of the environment and concentration of attractions help to sustain footfall throughout the day. In contrast, activity falls away around Bradshawgate and the Crompton Place area, highlighting the importance of ongoing regeneration proposals aimed at improving movement and reconnecting different parts of the centre.
- 4.13 The town centre contains a number of high-quality civic and heritage assets, including Bolton Town Hall, Victoria Square and Bolton Parish Church, which contribute positively to its character and sense of place. Recent investment in Bolton Market Food Hall, public realm improvements and cultural facilities has further enhanced the visitor experience. However, extensive vacant frontages and inactive units continue to detract from parts of the centre, particularly around Crompton Place and Bradshawgate. The removal of Crompton Place presents a significant opportunity to improve the setting of Victoria Square and create a more attractive and active town centre environment.
- 4.14 Despite the challenges associated with vacancy and the ongoing restructuring of the retail sector, Bolton remains the Borough's dominant retail, leisure and service destination. Importantly, many of the issues currently affecting the centre are being addressed through a substantial programme of regeneration and investment. If successfully delivered, projects such as Crompton Place and Church Wharf have the potential to strengthen the centre's vitality and viability and reinforce its role at the heart of the Borough for years to come.

Farnworth Town Centre

- 4.15 Farnworth is a key town centre within Bolton, located approximately 2.2 miles south-east of Bolton town centre. The centre benefits from strong strategic connectivity, with the A6053 and A575 passing through the town and Junction 3 of the M61 located less than one mile to the south. The centre has a largely linear form focused around Market Street and comprises 186 retail, leisure and service units providing approximately 36,600 sq.m of commercial floorspace.

Table 4.2: Composition of Farnworth Town Centre

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	9,759	26.6%	28.6%	41	22.0%	25.9%
Convenience	9,705	26.5%	15.4%	29	15.6%	9.4%
Financial Service	1,036	2.8%	6.0%	11	5.9%	7.8%
Leisure Service	9,773	26.7%	27.9%	46	24.7%	26.7%
Retail Service	4,324	11.8%	7.3%	40	21.5%	15.9%
Vacant	2,026	5.5%	14.3%	19	10.2%	14.0%
Total	36,623	100.0%	100.0%	186	100.0%	100.0%

Source: Composition of centre derived from Nexus Planning survey of March 2026; UK Average from Experian Goad report of September 2025

- 4.16 The retail offer is anchored by Asda and Lidl, which provide the principal convenience destinations within the centre and generate a significant proportion of footfall. The remainder of the centre is characterised by a mixture of independent retailers, service businesses and leisure operators, together with a limited representation of national multiple retailers.
- 4.17 Farnworth's convenience offer is one of its principal strengths, exceeding national averages in both floorspace and unit representation. In addition to Asda and Lidl, the centre benefits from a range of smaller food retailers and independent businesses, including bakeries, butchers and convenience stores, which contribute to meeting the day-to-day shopping needs of local residents. The comparison offer is more modest and remains below national averages. Whilst Home Bargains and Card Factory provide some national multiple representation, much of the comparison sector is made up of independent traders. Nevertheless, the range of businesses present provides a reasonable level of consumer choice for a centre of Farnworth's size and role.
- 4.18 Leisure provision is broadly in line with national averages and includes Farnworth Leisure Centre, Kings Gym and Farnworth Little Theatre, alongside a variety of cafés, public houses and food and drink operators. However, the sector is heavily influenced by takeaway uses, which account for a significant proportion of leisure units within the centre. Whilst these operators contribute to activity throughout the day and evening, there may be opportunities to diversify the leisure offer through additional cafés, restaurants and family-oriented leisure uses that encourage longer dwell times and strengthen the evening economy.
- 4.19 Retail service provision performs strongly and exceeds national averages in both floorspace and unit representation. Health and beauty operators form a substantial component of this offer, although a range of other services, including travel agents, vehicle repair businesses and dry cleaners, also contribute to the centre's function. Financial and professional services are more limited, with the absence of a traditional banking presence representing a noticeable gap in provision, particularly given the continued vacancy of former bank premises within the centre.
- 4.20 Vacancy levels are relatively low when compared with national averages and are generally dispersed throughout the centre rather than concentrated within any one location. As a result, vacant units have a limited impact on the overall vitality of the centre. The recent Farnworth Green development has made a particularly positive contribution, introducing new public realm, commercial units and a transport hub which have helped strengthen activity around Brackley Street and improve the overall appearance of the town centre.

- 4.21 Farnworth benefits from good accessibility by both public and private transport. The town centre is served by Farnworth bus station, nearby rail stations and a well-connected local road network. Pedestrian movement is strongest around the principal supermarkets and Farnworth Green, where recent investment has improved the quality of the environment. However, parts of the centre remain vehicle dominated, particularly around Lidl and some peripheral areas, which can detract from the pedestrian experience. Similarly, whilst Farnworth Green provides an attractive modern environment, the quality of shopfronts and public realm along sections of Market Street is more variable. Areas of litter, graffiti and limited green infrastructure reduce the overall quality of the environment and highlight opportunities for further public realm improvements.
- 4.22 Overall, Farnworth continues to perform an important local role, supported by a strong convenience offer, relatively low vacancy levels and the positive contribution made by the Farnworth Green development, which has improved the quality of the public realm, strengthened accessibility and helped reinforce activity within the centre.

Horwich Town Centre

- 4.23 Horwich is located approximately six miles north-west of Bolton town centre. The centre benefits from a strategic location close to Junction 6 of the M61, providing convenient access to Bolton, Chorley and the wider North West. Horwich has a compact layout focused primarily around Lee Lane and Winter Hey Lane and comprises 171 retail, leisure and service units providing approximately 19,900 sq.m of commercial floorspace.

Table 4.3: Composition of Horwich Town Centre

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	3,458	17.4%	28.6%	37	21.6%	25.9%
Convenience	5,082	25.6%	15.4%	21	12.3%	9.4%
Financial Service	1,222	6.1%	6.0%	14	8.2%	7.8%
Leisure Service	5,645	28.4%	27.9%	46	26.9%	26.7%
Retail Service	3,317	16.7%	7.3%	42	24.6%	15.9%
Vacant	1,158	5.8%	14.3%	11	6.4%	14.0%
Total	19,881	100.0%	100.0%	171	100.0%	100.0%

Source: Composition of centre derived from Nexus Planning survey of March 2026; UK Average from Experian Goad report of September 2025

- 4.24 The centre benefits from a strong convenience offer, anchored by Aldi and Iceland on Mason Street and supplemented by other national operators including Co-op Food and Sainsbury's Local. These retailers are supported by a range of independent convenience businesses, including butchers, bakers, greengrocers and delicatessens, which contribute to the centre's character and help meet the day-to-day shopping needs of local residents.
- 4.25 Comparison retailing is more limited and falls below national averages in terms of both floorspace and unit representation. Nevertheless, Horwich accommodates a diverse range of independent retailers selling clothing, gifts, homewares, books, antiques, pet supplies and other specialist goods. Whilst the independent sector contributes positively to the centre's distinct identity, there may be opportunities to strengthen the comparison offer through additional national multiple representation and higher-quality independent retailers.
- 4.26 Leisure provision performs relatively strongly and exceeds national averages in terms of both floorspace and unit numbers. The offer is centred largely around food and drink uses, including cafés, bars, restaurants, public houses

and takeaways, most of which are independently operated. This helps to support activity beyond traditional shopping hours and contributes positively to the town centre's vitality. However, the leisure offer remains heavily focused on food and beverage uses and could benefit from greater diversity, particularly through the introduction of additional family-oriented and health-focused leisure facilities.

- 4.27 Retail service provision is also well represented and exceeds national averages. Whilst health and beauty businesses account for a significant proportion of operators, the centre also accommodates a range of complementary services including a post office, travel agent, optician, launderette and pet grooming business. Financial and professional services are broadly appropriate for a centre of Horwich's size.
- 4.28 Vacancy levels are low when compared with national averages and are generally dispersed throughout the centre. As a result, vacant units have only a limited impact on the overall appearance and vitality of the town centre. Given the relatively low levels of vacancy and the established nature of surrounding development, opportunities for major redevelopment within the centre are limited. Current regeneration priorities are therefore focused on public realm enhancements and improving connectivity, which have the potential to further strengthen the centre's attractiveness and long-term resilience.
- 4.29 Horwich benefits from good accessibility by both public and private transport. The centre is well connected to the strategic road network via the M61 and is served by regular bus services linking the town to Bolton and surrounding areas. Whilst Horwich Parkway railway station is located some distance from the town centre, it provides wider regional connections. Pedestrian accessibility is generally good, although the narrow pavements along sections of Winter Hey Lane can create constraints for movement and detract from the overall pedestrian experience.
- 4.30 The environmental quality of the town centre is generally positive. Views towards the West Pennine Moors contribute to the town's distinctive character, whilst recent public realm improvements, including planting, seating and cycle parking, have enhanced parts of the centre. However, shopfront quality is variable and some peripheral areas, including side streets and car parks, appear less attractive than the primary shopping streets. Small areas of graffiti and litter were observed during the survey, although these do not significantly detract from the overall environment.
- 4.31 Overall, Horwich performs well as a local town centre, benefiting from low vacancy levels, a strong convenience offer and a healthy independent business sector. Whilst opportunities exist to diversify the leisure and comparison retail offer and further enhance the public realm, the centre remains an attractive and accessible destination that continues to meet the needs of its local catchment.

Westhoughton Town Centre

- 4.32 Westhoughton is located approximately four miles south-west of Bolton and five miles east of Wigan. The centre occupies a largely linear form focused on Market Street, with additional retail and service provision extending into Pavilion Square and adjoining side streets. The town benefits from strong road connectivity via the A58 and nearby Junctions 5 and 6 of the M61, whilst Westhoughton railway station provides direct services to Bolton, Manchester and Southport. The centre comprises 107 retail, leisure and service units providing approximately 20,200 sq.m of commercial floorspace.

Table 4.4: Composition of Westhoughton Town Centre

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	4,842	23.95%	28.6%	25	23.36%	25.9%
Convenience	8,275	40.93%	15.4%	10	9.35%	9.4%
Financial Service	734	3.63%	6.0%	6	5.61%	7.8%
Leisure Service	3,976	19.67%	27.9%	31	28.97%	26.7%
Retail Service	1,787	8.84%	7.3%	28	26.17%	15.9%
Vacant	602	2.98%	14.3%	7	6.54%	14.0%
Total	20,216	100.00%	100.00%	107	100.00%	100.0%

Source: Composition of centre derived from Nexus Planning survey of March 2026; UK Average from Experian Goad report of September 2025

- 4.33 The retail offer is anchored by Aldi and Sainsbury's, which generate a significant proportion of footfall and support the centre's convenience function. These operators are complemented by Co-op Food and a range of smaller independent retailers, helping to provide a strong convenience offer that exceeds national averages in terms of floorspace representation. The presence of Westhoughton Market also contributes positively to the retail offer, providing a permanent location for independent traders and reinforcing the town's historic market function.
- 4.34 Comparison retail provision falls below national averages but remains appropriate for a centre of Westhoughton's size and role. The offer is concentrated around Pavilion Square, where operators including B&M, Pep&Co and Card Factory are located, and is supplemented by a range of independent retailers selling clothing, household goods, flowers, jewellery and pet products. Whilst the comparison offer is relatively modest, it provides a reasonable degree of consumer choice and contributes to the centre's overall vitality.
- 4.35 Leisure provision represents a particular strength of the centre and plays an important role in supporting activity beyond traditional shopping hours. The town accommodates a good range of cafés, restaurants, bars, public houses and takeaways, many of which are independently operated. This concentration of food and drink uses contributes to a relatively vibrant evening economy for a centre of this scale, particularly along Market Street where activity remains visible after many retail units have closed. Whilst the leisure offer is generally strong, there may be opportunities to broaden provision further through additional health, fitness or family-oriented leisure uses.
- 4.36 Retail service provision exceeds national averages and includes a wide range of health and beauty businesses alongside a post office, travel agency and optician. Financial and professional services are more limited, however, with only a small number of solicitors and estate agents represented within the centre. The centre also includes a Banking Hub, run by the Post Office. This reflects a broader trend seen across many smaller centres but does represent an area where the overall offer could be strengthened.
- 4.37 One of Westhoughton's most notable strengths is its low vacancy rate. Vacant units account for only a small proportion of floorspace and are generally dispersed throughout the centre rather than concentrated in any particular location. Most vacant premises appear well maintained, helping to preserve the overall quality of the shopping environment. Given the limited level of vacancy and the established residential context surrounding the centre, opportunities for large-scale redevelopment are relatively limited. Current investment is instead focused on incremental improvements, including the restoration of the Town Hall building and wider town centre enhancement projects.

- 4.38 Accessibility is another key strength. The town centre benefits from good road connections, a range of centrally located car parks and regular public transport services. Westhoughton railway station lies within walking distance of the centre and provides convenient access to surrounding towns and cities. The largely flat topography, wide footways and availability of seating contribute to a generally accessible environment, and numerous visitors using mobility scooters and pushchairs were observed during the survey.
- 4.39 Environmental quality is generally high and contributes positively to the centre's overall appeal. Heritage assets, including the Grade II listed war memorial, St Bartholomew's Church and a number of historic buildings along Market Street, help create a distinctive sense of place. Green spaces such as Ditchfield Gardens further enhance the environment, while the majority of shopfronts appear well maintained. Unlike many comparable centres, there was little evidence of litter, graffiti or poorly maintained vacant units during the survey, contributing to a positive overall impression of the town centre.
- 4.40 Overall, Westhoughton performs strongly against most health check indicators and remains a healthy and attractive town centre. A strong convenience offer, low vacancy levels, good accessibility and an established food and drink sector all contribute positively to its vitality and viability. Whilst there are opportunities to broaden the leisure offer and continue investing in the public realm, the centre is well placed to continue serving the needs of its local catchment over the long term.

Little Lever Town Centre

- 4.41 Little Lever is a town centre located approximately 2.5 miles south-east of Bolton town centre. The centre has a largely linear form focused on Market Street and serves a predominantly local catchment. Retail provision is anchored by Tesco on Crossley Street, whilst the remainder of the centre comprises a range of independent retailers, service businesses and community facilities. The survey area contains 53 retail, leisure and service units providing approximately 9,850 sq.m of commercial floorspace.

Table 4.5: Composition of Little Lever Town Centre

	Floorspace (sq.m)	Floorspace (%)	Floorspace UK Average (%)	Units	Units (%)	Units UK Average (%)
Comparison	1,405.20	14.3%	28.6%	8	15.1%	25.9%
Convenience	4,701.20	47.7%	15.4%	8	15.1%	9.4%
Financial Service	1,453.60	14.8%	6.0%	13	24.5%	7.8%
Leisure Service	1,538.30	15.6%	27.9%	18	34.0%	26.7%
Retail Service	445.90	4.5%	7.3%	3	5.7%	15.9%
Vacant	306.30	3.1%	14.3%	3	5.7%	14.0%
Total	9,850.50	100.00%	100.00%	53	100.00%	100.0%

Source: Composition of centre derived from Nexus Planning survey of March 2026; UK Average from Experian Goad report of September 2025

- 4.42 The centre performs a clear local shopping and service function, reflected in the composition of uses. Convenience retailing represents almost half of all floorspace, significantly above the national average, with Tesco accounting for a substantial proportion of this provision. Smaller convenience operators and independent food retailers further support the day-to-day needs of local residents, ensuring that the centre remains an important destination for routine shopping trips.

- 4.43 The centre's retail offer is strongly geared towards convenience shopping, reflecting its role as a local service centre rather than a major shopping destination. Tesco acts as the principal anchor and generates a significant proportion of footfall, whilst a number of smaller convenience retailers and independent food businesses complement the offer. Together, these operators provide a strong range of day-to-day shopping opportunities and help support activity across the centre.
- 4.44 Comparison retailing is relatively limited and is primarily made up of independent businesses. Whilst the range of comparison goods available is modest, this is consistent with the centre's role and catchment. Residents are likely to rely on larger nearby centres, including Bolton and Farnworth, for higher-order comparison shopping needs.
- 4.45 Retail service businesses are particularly well represented and form an important part of the centre's function. Health and beauty operators, personal services and other day-to-day businesses generate regular footfall throughout the week and help reinforce Little Lever's role as a local service hub. Financial and professional services are more limited, although this is typical of a centre of this scale.
- 4.46 Leisure provision is focused largely on cafés, takeaways and other small-scale food and drink operators. These uses contribute positively to daytime activity, particularly around lunchtime when footfall is at its highest. However, there is limited evidence of a developed evening economy, with many businesses closing relatively early and activity levels declining noticeably later in the day. Whilst this is not unusual for a centre of Little Lever's size, there may be opportunities to broaden the leisure offer and encourage a greater range of activity outside traditional shopping hours.
- 4.47 One of Little Lever's key strengths is its low level of vacancy. Vacant units are few in number, dispersed throughout the centre and have little impact on its overall vitality or appearance. This contributes positively to perceptions of the centre and helps maintain active frontages along Market Street. Given the compact nature of the centre and the surrounding residential context, opportunities for large-scale redevelopment are limited, with future improvements more likely to focus on enhancing the existing environment and supporting local businesses.
- 4.48 Accessibility within the centre is generally good. Market Street forms the focus of activity and is served by regular bus services connecting Little Lever with Bolton, Bury and surrounding settlements. The centre's compact layout and relatively flat topography make it easy to navigate on foot, whilst community facilities such as the library, health centre and memorial gardens strengthen its role as a local destination. The main exception is the area between Tesco and the memorial gardens, where vehicle movements associated with the supermarket create a less attractive pedestrian environment.
- 4.49 Environmental quality is generally positive and benefits from a number of well-maintained community assets. The library, health centre and memorial gardens provide attractive public spaces, greenery and seating, all of which contribute positively to the character of the centre. Active frontages and low vacancy levels further enhance the street scene. However, there are opportunities to improve the consistency of shopfronts, signage and public realm treatments, particularly around the precinct area on Market Street where the quality of the environment is more variable.
- 4.50 Overall, Little Lever performs well in its role as a local district centre. A strong convenience offer, low vacancy levels and a substantial service sector help to support healthy levels of daytime activity, whilst community facilities make a positive contribution to the centre's character and function. Although the comparison and leisure offers are relatively limited, this is largely reflective of the centre's scale and role within the wider hierarchy of centres. Future improvements are therefore likely to focus on environmental enhancements and strengthening the leisure offer, rather than fundamental changes to the role of the centre.

District Centres

4.51 In addition to the town centres, Nexus has also visited and surveyed the district centres within the authority area, comprising Astley Bridge, Broughton, Chorley Old Road and Harwood district centres. A copy of the healthchecks is provided at Appendix 4 and a summary is provided below.

Table 4.6: District Centre Summary

Centre	Summary
Astley Bridge	Astley Bridge is a well-established district centre that plays an important role in meeting the day-to-day shopping needs of the surrounding area. Anchored by Asda, Lidl and The Range, the centre benefits from a strong retail offer, supported by a good mix of independent retailers, service businesses and food and drink operators along Blackburn Road. Vacancy levels remain low and the centre is generally accessible and well used. Whilst the centre benefits from a strong retail offer, there are opportunities to enhance the environment along Blackburn Road through targeted public realm improvements, including upgraded street furniture, landscaping and paving. Overall, Astley Bridge continues to function effectively and remains an important destination within the Borough's network of centres.
Broughton	Broughton has a clear retail function centred on the Bury Road Retail Park, where Aldi, The Food Warehouse by Iceland, B&M and Home Bargains provide a strong value-led shopping offer. The centre attracts regular footfall from across eastern Bolton and performs particularly well in terms of occupancy, with no vacant units identified during the survey. Community facilities at Broughton Fold Lane add an important local service role, although links between these facilities and the retail park are not always well connected. Despite its car-oriented layout, Broughton remains a healthy and successful district centre that continues to serve its catchment effectively.
Chorley Old Road	Chorley Old Road performs an important local shopping and service function, anchored by Morrisons and complemented by a broad range of independent businesses. The centre benefits from a diverse mix of convenience retailers, food operators and service uses, which help maintain activity throughout the day and support the needs of the surrounding community. Vacancy levels are relatively modest and do not currently present a significant concern. However, the quality of the environment along parts of Chorley Old Road and Victory Street is variable, with some vacant units, ageing shopfronts and a fragmented mix of uses reducing the overall attractiveness of the centre. Looking ahead, assets such as Bolton Steam Museum strengthen the centre's appeal.

Centre	Summary
Harwood	Harwood is a compact and attractive district centre that combines a strong convenience offer with a good range of independent shops, cafés, restaurants and community facilities. Morrisons acts as the principal anchor, generating consistent footfall and supporting a range of complementary businesses along Lea Gate. The presence of the library, medical practice and community facilities adds to the centre's role as a local hub, while its village-like character gives it a distinctive identity. Vacancy levels are low and the centre is generally well maintained. Although there is scope to improve the pedestrian environment around the Morrisons car park, Harwood remains a vibrant and successful district centre that continues to serve local residents well.

Local Centres

- 4.52 Finally, in terms of the local centres in Bolton, Nexus has produced a matrix which is included at Appendix 6. The matrix provides an overview of the composition of uses, key amenities and provides an overview of the overarching health of the centres.

5. Population and Expenditure

Study Area and Household Survey

- 5.1 A survey of 1,630 households was undertaken by NEMS Market Research in April 2026 in order to ascertain where residents go to undertake a range of shopping and leisure activities.
- 5.2 The below Table 5.1 identifies the postcode sectors which define each of the zones. A plan defining the geographic extent of the Study Area and the below zones is provided at Appendix 1.

Table 5.1: Study Area Zones by Postcode Sector

Survey Zone	Postcode Sectors
1	BL1 5, BL1 6, BL1 7
2	BL1 1, BL1 2, BL1 3, BL1 4, BL1 8
3	BL2 3, BL2 4, BL2 5, BL8 3
4	BL2 1, BL2 2, BL2 6
5	BL3 3, BL3 4, BL3 5, BL3 6
6	BL3 1, BL3 2
7	BL8 2, M26 1, M26 3, M26 4
8	BL4 0, BL4 7, BL4 8, BL4 9
9	M28 0, M28 3, M29 8, M38 0, M38 9
10	M46 0, M46 9, WN7 1, WN7 5
11	BL5 1, BL5 2, BL5 3
12	WN2 1, WN2 2, WN2 3, WN2 4
13	PR7 1, PR7 2, PR7 3, PR7 4, PR6 0
14	BL6 4, BL6 5, BL6 6, BL6 7, PR6 9
15	BL7 0, BL7 8, BL7 9
16	M27 0, M27 4, M27 5, M27 6, M27 9, M28 2, M28 7

- 5.3 The above zones were used as the basis for the NEMS household survey, which underpin the quantitative retail capacity assessment which follows at Section 6 of the report and the quantitative leisure capacity assessment at Section 7.
- 5.4 To identify the expenditure claimed by retail destinations (and the capacity which is potentially available to support additional retail and leisure development), the first step is to estimate the population and future convenience and comparison goods expenditure associated with the Study Area.

Study Area Population

- 5.5 It is important to state at the outset of this study that any medium to long term forecasts should be treated with caution. They are influenced by the dynamic changes in economic, demographic, lifestyle and market trends; including the rise of online shopping over the last decade, and wider implications on the market across the country and further afield.

- 5.6 The population within each postcode sector and each zone at 2026 has been calculated using Experian Micromarketer G3 data (2025 estimate, which was issued in March 2026).
- 5.7 Table 5.2 below sets out Experian's population projections for each zone in the Study Area. Based on Experian's population projections, we estimate that the Study Area population will increase from 587,232 persons at 2026 to 611,990 persons at 2042. This equates to an increase of 24,758 persons (or 4.2% over the 16-year period).

Table 5.2: Estimated Study Area Population by Survey Zone

Zone	2026	2031	2036	2041	2042
1	30,203	30,324	30,342	30,439	30,451
2	40,992	41,468	42,181	43,212	43,438
3	31,621	31,741	31,763	31,878	31,899
4	24,894	25,029	25,205	25,347	25,398
5	46,223	46,711	47,429	48,470	48,716
6	23,894	24,173	24,506	24,882	24,969
7	41,617	42,012	42,554	43,253	43,394
8	36,367	36,614	36,970	37,469	37,616
9	45,671	46,942	48,098	49,380	49,624
10	45,161	45,770	46,461	47,248	47,401
11	28,288	28,378	28,463	28,576	28,602
12	42,761	43,197	43,682	44,186	44,298
13	46,365	47,770	48,944	50,202	50,444
14	40,892	41,314	41,533	41,784	41,792
15	15,269	15,217	15,096	14,908	14,872
16	47,014	47,867	48,452	49,002	49,076
Total	587,232	594,527	601,679	610,236	611,990

Source: Table 1 of Appendix 4

Retail Expenditure

- 5.8 In order to calculate per capita convenience and comparison goods expenditure, we have utilised Experian Micromarketer G3 data, which provides detailed information on local consumer expenditure that takes into consideration the socio-economic characteristics of the local population. The base year for the Experian expenditure data is 2024. Our methodology takes account of the fact that some special forms of trading expenditure¹⁸ is not available to support retail floorspace, and then allows for increases in per capita expenditure growth on an annual basis.
- 5.9 Figure 5 of Appendix 3 of ERPBN23 provides estimates in respect of the proportion of convenience and comparison goods expenditure that will be committed through special forms of trading both now and in the future. We have 'stripped out' any survey responses which relate to expenditure committed via special forms of trading and have

¹⁸ Identified as comprising sales via the internet, mail order, stalls and markets, door-to-door and telephone sales (i.e. all non-store sales).

instead made an allowance derived from Experian's recommendations (which we consider to be the most appropriate means by which to account for such expenditure).

- 5.10 In considering special forms of trading, many products which are ordered online are actually sourced from a store's shelves or stockroom in practice (this is particularly the case with convenience goods). As such, expenditure committed in this manner acts to sustain shops and can be considered 'available' to support floorspace within the Study Area.
- 5.11 Accordingly, in order not to overstate the influence of special forms of trading on retailers, our methodology utilises Experian's 'adjusted' allowance for special forms of trading (which is provided at Figure 5 of ERPBN23). This allowance indicates that 5.4% of convenience goods expenditure and 26.1% of comparison goods expenditure is 'lost' to shops at base year 2024 through special forms of trading purchases.
- 5.12 Having made an allowance for special forms of trading, we then take account of projected changes in expenditure in accordance with the recommendations provided by Figure 6 of Appendix 3 of ERPBN23. Experian provides overall growth rates and 'adjusted' rates, which account for any additional increases in expenditure lost to special forms of trading. The latest growth rates suggest that growth in comparison goods expenditure should pick up in the next few years as confidence in the economy returns, with this following a number of turbulent years following the start of the Covid-19 pandemic in 2020.
- 5.13 This Study utilises the most up to date Experian expenditure data and growth forecasts. However, longer term growth forecasts (beyond the next ten years) should be treated with caution given the inherent uncertainties associated with predicting the performance of the economy over time (particularly in the current economic, health and political climates). As such, assessments of this nature should be reviewed on a regular basis to ensure that forecasts over the medium and longer term reflect changing circumstances.

Convenience Goods Expenditure

- 5.14 Taking into account the Study Area resident population and the available per capita convenience goods expenditure, we estimate that £1,538.1m¹⁹ of convenience goods expenditure originates within the Study Area at 2026. The below Table 5.4 indicates that available Study Area convenience goods expenditure is forecast to reduce to £1,515.7m at 2042.

Table 5.4: Total Available Study Area Convenience Goods Expenditure

2026 (£m)	2031 (£m)	2036 (£m)	2041 (£m)	2042 (£m)
1,538.1	1,521.7	1,516.6	1,516.1	1,515.7

Note: In 2024 prices

- 5.15 Table 5.5 indicates that this represents a reduction in the level of convenience expenditure available by -£22.4m across the Study Area between 2026 and 2042.

¹⁹ In 2024 prices, as is every subsequent monetary reference.

Table 5.5: Growth in Available Study Area Convenience Goods Expenditure

Growth 2026-2031 (£m)	Growth 2026-2036 (£m)	Growth 2026-2041 (£m)	Growth 2026-2042 (£m)
-16.4	-21.5	-22.0	-22.4

Note: In 2024 prices

- 5.16 We have assumed that 75% of available convenience goods expenditure would take the form of main food shopping and that 25% would take the form of top-up shopping (which relates to smaller purchases often made using a basket rather than a shopping trolley).²⁰

Comparison Goods Expenditure

- 5.17 For comparison goods, Table 5.6 sets out our estimate that the resident population of the Study Area will generate £1,823.5m of comparison goods expenditure at 2026. Available comparison goods expenditure is then forecast to increase to £2,607.0m at 2042.

Table 5.6: Total Available Study Area Comparison Goods Expenditure

2026 (£m)	2031 (£m)	2036 (£m)	2041 (£m)	2042 (£m)
1,823.5	2,020.0	2,267.0	2,549.1	2,607.0

Note: In 2024 prices

- 5.18 The identified increase in comparison goods expenditure growth is substantial, but it represents a level of annual growth that is more circumspect than that which has been achieved in the past. This is due to both a reduction in the overall level of growth when compared to that achieved in the early part of this millennium, and as a result of further forecast increases in expenditure committed via special forms of trading (most obviously, internet shopping).
- 5.19 As the below Table 5.7 identifies, our assessment estimates that there will be an increase of £783.5m (equating to 43.0%) in respect of Study Area comparison goods expenditure between 2026 and 2042.

Table 5.7: Growth in Available Study Area Comparison Goods Expenditure

Growth 2026-2031 (£m)	Growth 2026-2036 (£m)	Growth 2026-2041 (£m)	Growth 2026-2042 (£m)
196.5	443.5	725.6	783.5

Note: In 2024 prices

- 5.20 We sub-divide comparison goods expenditure into eight categories, these being: 'DIY', 'Electrical' and 'Furniture' (collectively referred to as bulky goods); and 'Clothing and Footwear', 'Books, CDs and DVDs', 'Health, Beauty and Chemist Goods', 'Small Household Goods', and 'Toys, Games, Bicycles and Recreational Goods' (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zonal basis. Experian's estimates are reflected in the detailed expenditure tables set out at Table 7b of Appendix 4 of this report.
- 5.21 In considering expenditure growth, it should be noted that not all growth arising within the Study Area is available to support additional floorspace in the Bolton authority area. Instead, account needs to be taken of:

- the market share of expenditure secured by retailers within the Bolton authority area (and the fact that many needs are successfully met outside the Borough);
- the claim made by existing retailers on expenditure growth (the future efficiency of retail floorspace); and

²⁰ This is a standard split applied in undertaking this exercise.

- the expenditure that will be claimed by committed retail developments.

5.22 These issues are addressed in the assessment of retail capacity provided in Section 7 of this report.

6. Market Research – Household Surveys

Market Share Analysis: Household Survey Results

- 6.1 The NEMS household survey identifies where residents travel to undertake a range of shopping and leisure activities. The summary of results provided in this section focuses on the market share of shopping trips secured by retail venues for various types of shopping.
- 6.2 In reviewing the Study Area, it is important to recognise that the vast majority of convenience goods expenditure generated within a given area is generally claimed by local foodstores. This is because shoppers look to source convenience goods close to home. Comparison goods shopping is more likely to result in longer trips to source goods at higher order destinations. As such, it is to be expected that a substantial proportion of comparison goods shopping trips 'leak' outside of the Study Area to shopping venues offering greater choice.
- 6.3 The household survey is reproduced as part of Appendix 2 of this Study. In retail terms, the principal purpose of the survey is to establish:
- patterns of convenience goods spending, based on the location of:
 - the shops or shops respondents last visited and visited 'the time before last' to undertake their main food shop; and
 - the shop or shops respondents last visited and visited 'the time before last' to undertake their main top-up food shop.
 - patterns of comparison goods spending, based on the local of the respondent's last shopping trip to purchase the following types of comparison goods:
 - clothing and footwear;
 - books, CDs, DVDs and stationery;
 - small household goods, such as home furnishings, clocks, jewellery, glass and china;
 - toys, games, bicycles and recreational goods;
 - chemist goods, including health and beauty items;
 - electrical goods, such as televisions, washing machines and computers;
 - DIY and gardening goods; and
 - furniture, carpets and floor coverings.
- 6.4 The analysis which follows considers market share for the above sub-sectors. Our assessment is based on the market share of expenditure to particular 'bricks and mortar' retail destinations. For comparison goods, the zonal market share secured by each retail destination for each of the above eight sub-sectors is taken directly from the corresponding household survey question responses.
- 6.5 For convenience goods, the methodology differs. We have found that retail assessments of this nature can often overstate the turnover of discount foodstores and understate the turnover of larger format stores operated by the 'big four'. This is because apportioning 'main food' convenience goods expenditure in accordance with a household survey fails to account for the fact that goods are generally cheaper at discount foodstores. Such foodstores are also typically of a lesser scale and may not sell all products (for example, they may have a lesser range in respect of ingredients and in respect of ready meals). The consequence of this is that trips to a discount foodstore may often result in a lesser level of expenditure than trips to a large food superstore.

- 6.6 For convenience goods, our household survey asks respondents the shop they last visited and visited ‘the time before last’ to undertake their main food shop.

Non-Store Retailing or Special Forms of Trading

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

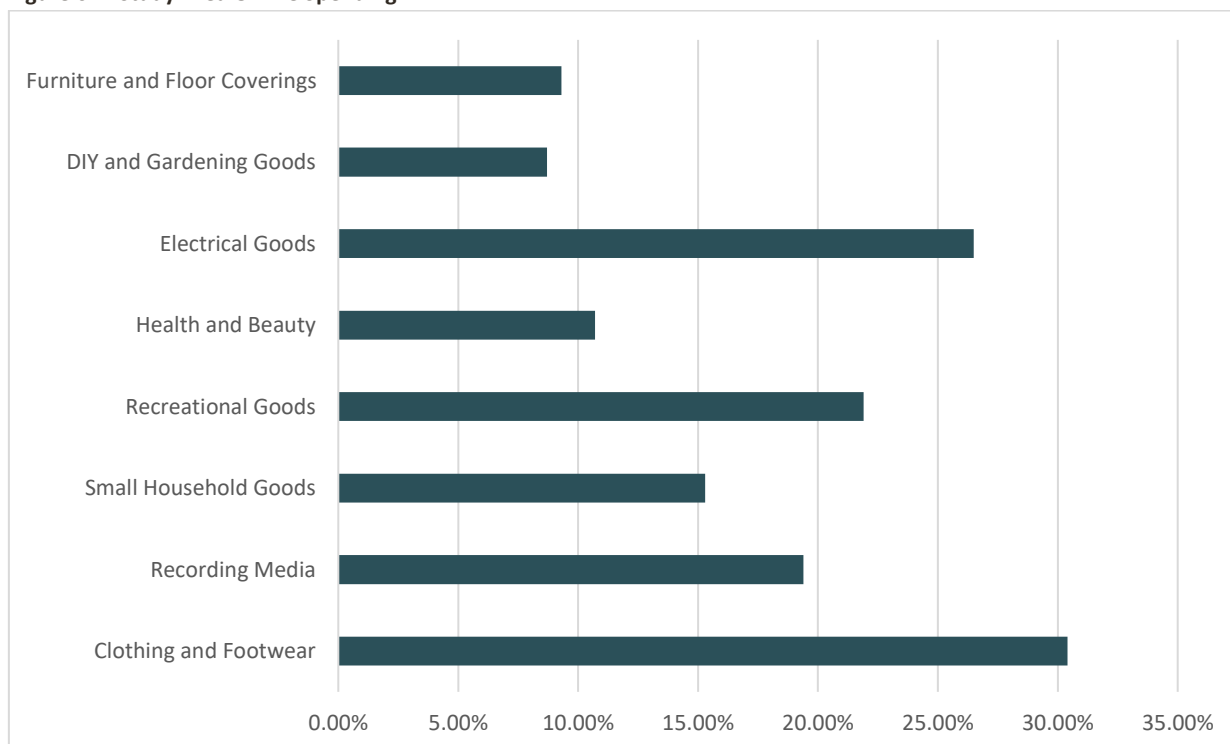
Convenience Goods Online Shopping

- 6.8 The household survey asked residents of the Study Area where they normally undertake their main food and grocery shopping.
- 6.9 Across the Study Area, 8.0% of respondents usually shop online for their main food shop (Question 1 of the Household Survey). As set out in Section 3, the UK average for online convenience shopping in 2024 is 17.3%. As such, the take-up of online convenience shopping in the Study Area is considerably below that of the UK average. This is likely to be indicative of both ease of access to local foodstores and the make-up of the local catchment within which residents prefer to shop in store, rather than online.

Comparison Goods Online Shopping

- 6.10 The household survey asked where respondents usually shop for different types of comparison goods. The findings are presented in the figure below which shows that the take-up for online shopping varies across the categories, from 8.7% (DIY and Gardening goods) to 30.4% (clothing and footwear). On average, within the Study Area, 17.8% of respondents shop online for comparison goods, which is below the UK average of 32.5%.

Figure 6.1: Study Area Online Spending



Source: NEMS Household Survey

Retail Goods Market Share Analysis

Convenience Goods Market Share

- 6.11 Our analysis begins by reviewing the retention of convenience goods expenditure within each of the 16 Study Area zones (i.e. the proportion of expenditure originating within a given zone which is claimed by retailers located within that same zone).
- 6.12 This enables an understanding of whether residents are having to travel to meet their convenience goods shopping requirements, or if they are typically able to meet their needs in proximity to where they live. It is accepted that some respondents will live towards the boundary of their respective zones and some trips will therefore be able to be undertaken to nearby zones in a sustainable manner.
- 6.13 Table 6.1 indicates that, in terms of convenience goods shopping, the highest main food convenience goods retention rates are within Zones 2, 13 and 14, where over 70% of corresponding residents' expenditure on main food shopping is being spent at destinations also located in the same respective zones. Within Zone 13, the main food retention rate is 86.4%, and is the highest across the Study Area.
- 6.14 Looking at Zone 2 in particular, we can see that the Morrisons on Morningson Road and the Asda in Astley Bridge both attract high proportions of expenditure from residents in Zone 2, at 23.4% and 22.3% respectively. Indeed, these two foodstores are also key main food destinations for residents in Zone 1 too (23.3% and 25.7% respectively).
- 6.15 For Zone 14 residents, the principal stores are the Tesco Extra in Horwich (31.8%), followed by the Aldi in Horwich (22.6%) and the Asda at Middlebrook Retail Park (19.3%).
- 6.16 Across the Study Area as a whole, the principal main food shopping destination is the Tesco Extra at Mansell Way in Horwich, attracting 4.5% of the available main food shopping expenditure, followed by the Sainsbury's on Trinity Street in Bolton (3.5%) and the Morrisons at Lea Gate in Harwood (2.9%).

Table 6.1: Zonal Convenience Goods Retention Rates Across the Study Area at 2026

Zone	Main Food Shopping Zonal Retention Rate 2026 (%)	Top-Up Food Shopping Zonal Retention Rate 2026 (%)
1	0.0%	2.5%
2	74.5%	79.1%
3	33.6%	32.8%
4	29.3%	60.1%
5	39.8%	40.1%
6	55.0%	60.7%
7	53.6%	58.6%
8	63.9%	71.6%
9	60.6%	64.4%
10	55.8%	64.4%
11	69.2%	73.6%
12	52.6%	47.7%

Zone	Main Food Shopping Zonal Retention Rate 2026 (%)	Top-Up Food Shopping Zonal Retention Rate 2026 (%)
13	86.4%	85.6%
14	78.7%	81.8%
15	27.1%	71.0%
16	57.0%	58.9%

Source: Table 4 of Appendix 4 of this Study for 2026 market shares

- 6.17 In terms of top-up shopping retention rates, the highest levels are within Zones 2, 8, 11, 13, 14 and 15, where over 70% of respective residents' top-up expenditure is retained, with the highest again being within Zone 13.
- 6.18 It is expected that residents will often choose destinations closer to home to meet their top-up shopping needs, and therefore top-up shopping zonal retention rates should be higher than those identified for the main-food shopping trips. In this regard, residents will often choose the smaller, local convenience facilities to purchase their day-to-day products such as a loaf of bread, a pint of milk and other items which would typically fit into a basket.
- 6.19 As we can see above, the top-up shopping zonal retention rates are higher than the main-food shopping retention rates in all but three zones across the Study Area.
- 6.20 Accordingly, we find that the broad zonal retention rates identified appear to appropriately reflect the geography of current provision.
- 6.21 The below Table 6.2 provides a different assessment of shopping patterns, this time setting out the proportion of zonal convenience goods expenditure which is claimed by operators located within the authority area. As such, this Table shows us the proportion of residents choosing destinations within the authority area as a whole to meet their needs.
- 6.22 Table 6.2 identifies that high levels of expenditure for both main and top up shopping is attracted to facilities located within the Bolton area across the majority of the key zones covering the authority area. This indicates a positive sign of convenience expenditure retention in the majority of the zones, and that existing facilities are retaining expenditure within the borough.

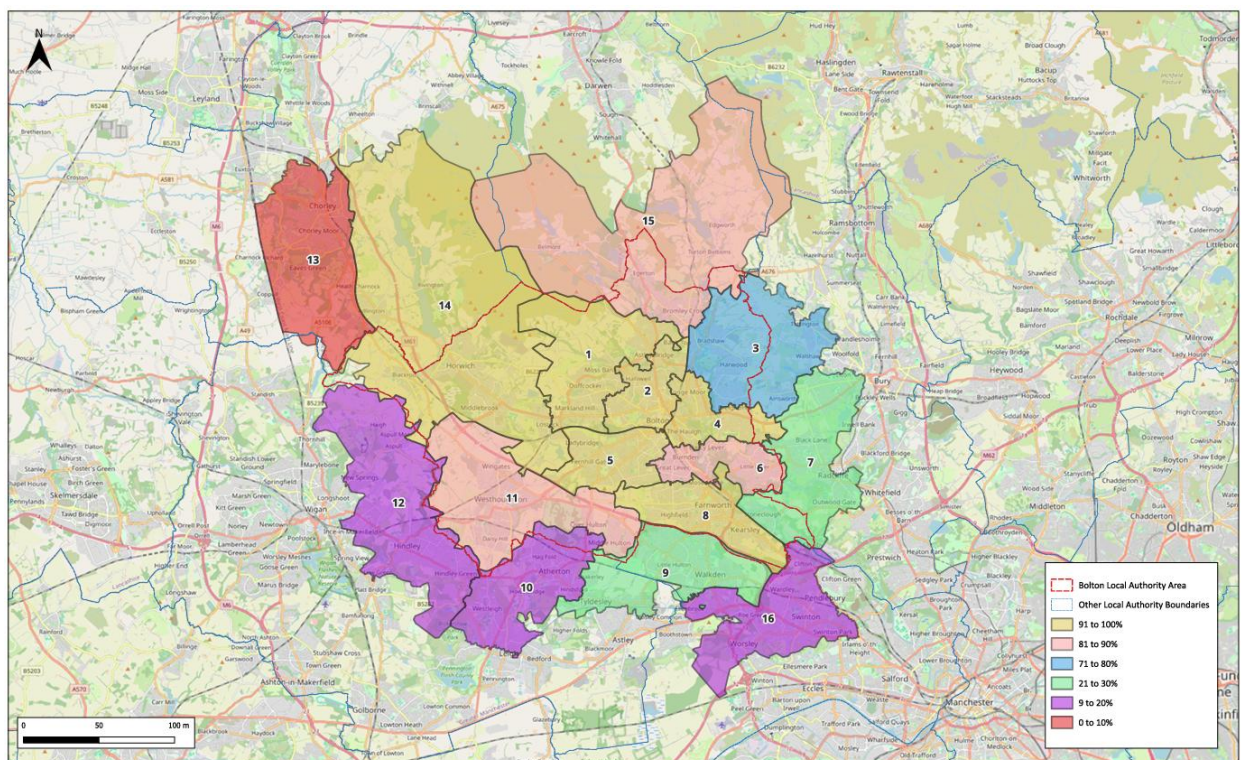
Table 6.2: Bolton Convenience Goods Market Share by Zone at 2026

Zone	Main Food Shopping Bolton Market Share 2026 (%)	Top-Up Food Shopping Trips Bolton Market Share 2026 (%)
1	97.6%	94.5%
2	98.7%	97.0%
3	80.3%	83.9%
4	95.6%	91.6%
5	99.8%	93.0%
6	90.3%	94.1%
7	21.6%	33.3%
8	94.1%	90.3%
9	25.7%	18.6%
10	15.2%	14.5%

Zone	Main Food Shopping Bolton Market Share 2026 (%)	Top-Up Food Shopping Trips Bolton Market Share 2026 (%)
11	87.7%	92.0%
12	14.2%	11.2%
13	3.6%	6.4%
14	91.7%	87.9%
15	86.1%	97.9%
16	10.0%	13.1%
Total Study Area	58.1%	55.6%

Source: Table 4 of Appendix 4 of this Study for 2026 market shares

Figure 6.2: Bolton Authority Area Main Food Convenience Shopping Retention



Comparison Goods Market Share

6.23 The below Table 6.3 identifies comparison goods shopping patterns, relating to the proportion of zonal comparison goods expenditure which is claimed by operators located within the authority area.

6.24 Table 6.3 indicates that the highest proportion of comparison goods expenditure retained by Bolton's facilities is within Zone 5 at 80.8%, followed by Zone 1 at 69.4% and Zone 4 at 63.6%.

Table 6.3: Bolton Comparison Goods Market Share by Zone at 2026

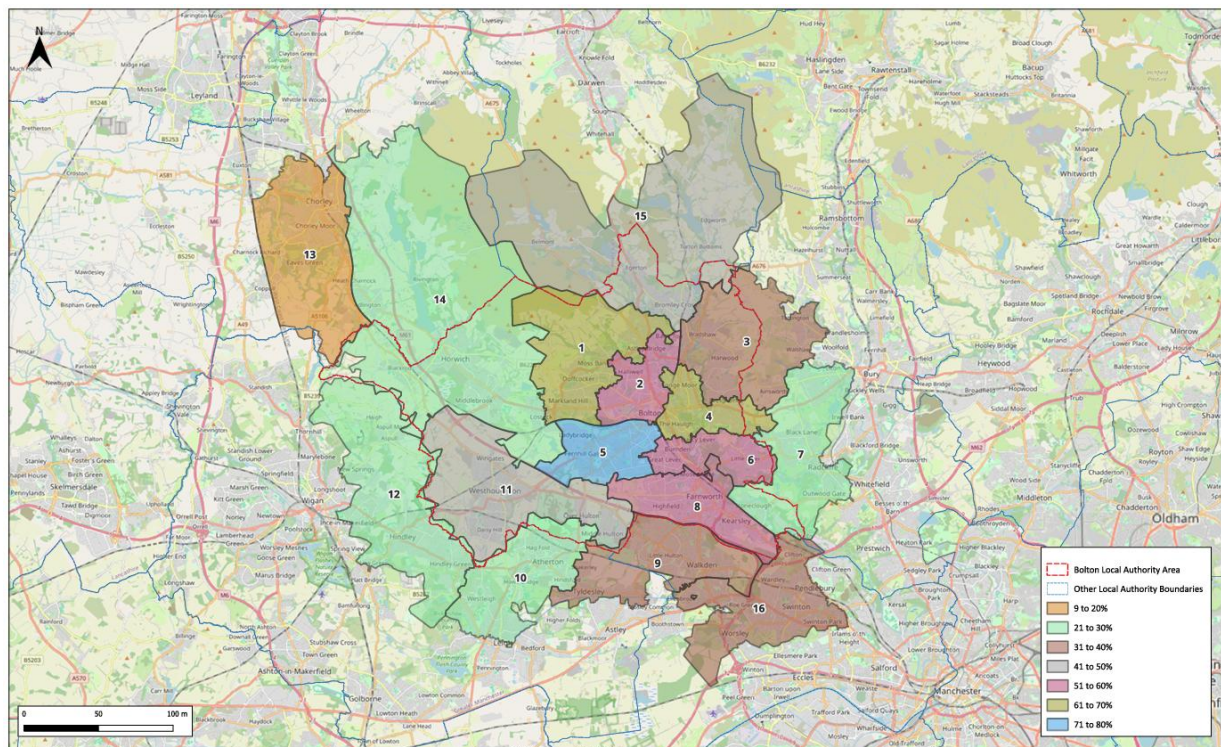
Zone	Comparison Goods Bolton Market Share 2026 (%)
1	69.4%
2	55.5%

Zone	Comparison Goods Bolton Market Share 2026 (%)
3	39.4%
4	63.6%
5	80.8%
6	59.4%
7	29.9%
8	55.9%
9	38.9%
10	22.6%
11	45.1%
12	28.2%
13	11.6%
14	29.7%
15	45.8%
16	31.0%
Authority Area	40.3%

Source: Table 4 of Appendix 4 of this Study for 2026 market shares

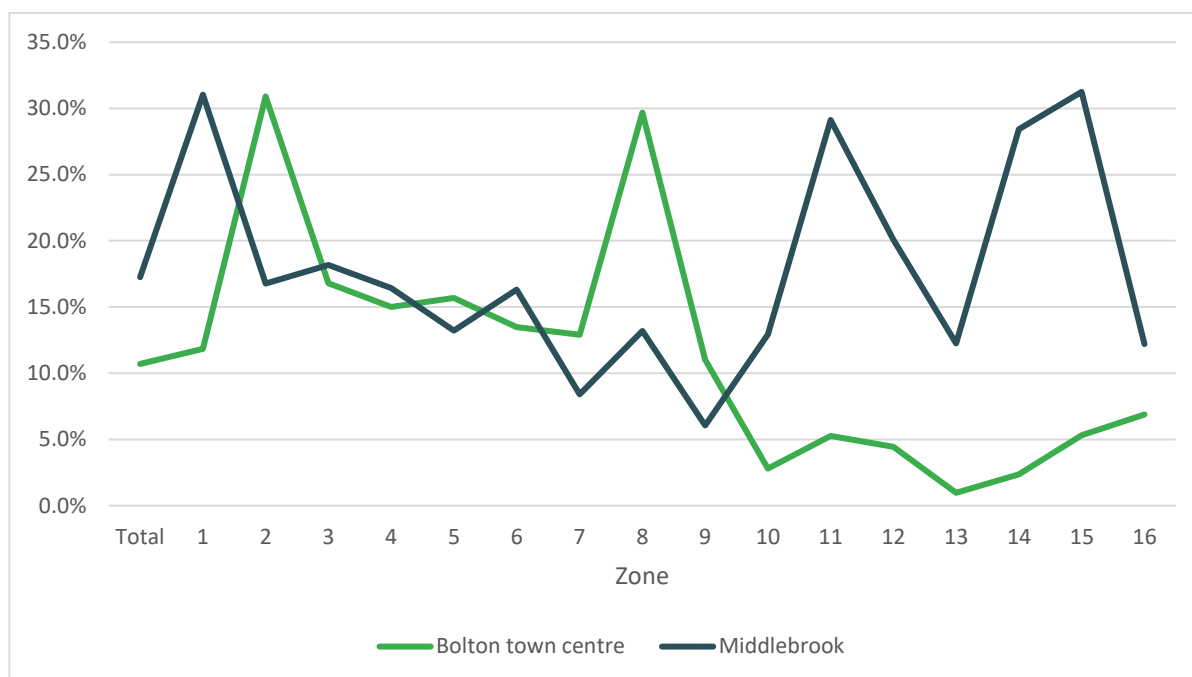
6.25 Figures 6.3 and 6.4 below provides a comparison of the total comparison expenditure market shares attracted to Bolton town centre facilities and the facilities at Middlebrook Retail and Leisure Park.

Figure 6.3: Bolton Authority Area Comparison Shopping Retention



6.26 We can see that both Bolton town centre and Middlebrook play important roles in meeting residents' comparison shopping patterns across the Study Area, but it is residents within Zones 2, 5, 7, 8 and 9 who are spending more on average within Bolton town centre when compared to Middlebrook.

Figure 6.4: Bolton Town Centre and Middlebrook Comparison Market Shares Based on Available Expenditure



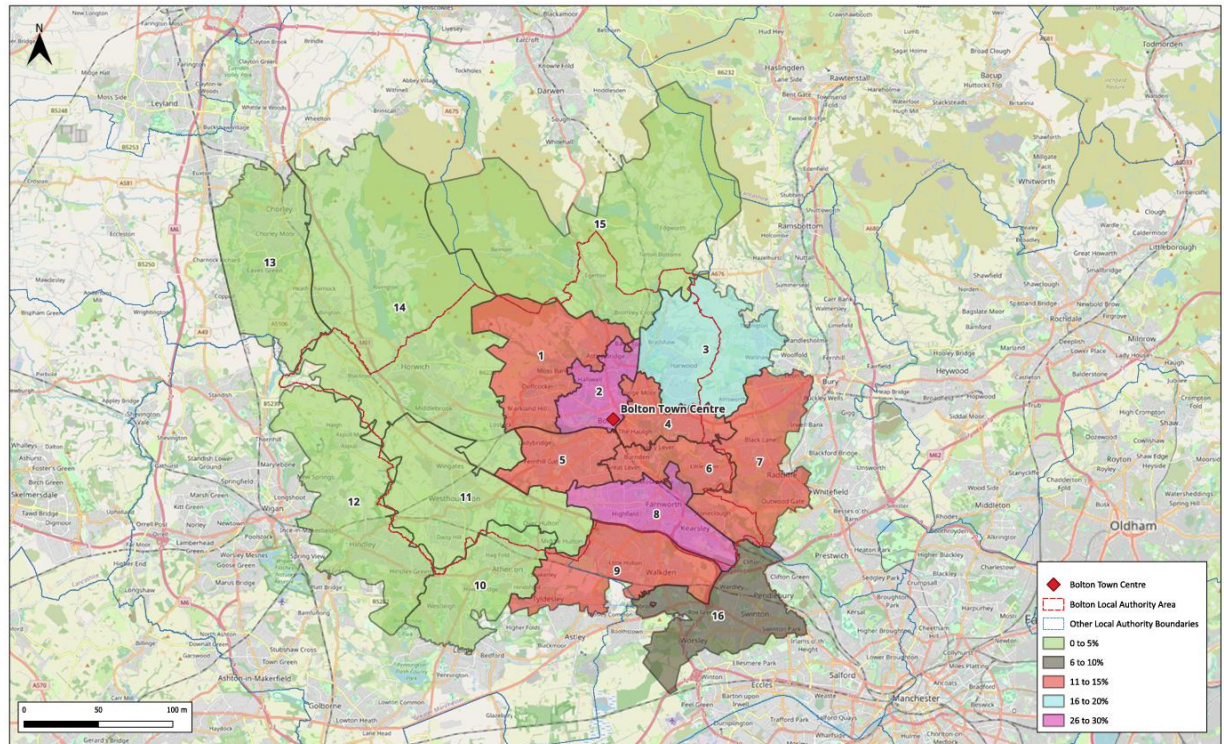
6.27 We provide below a comparison of the market shares firstly for Bolton town centre from 2008 and 2026 to understand how shopping patterns have altered over the past nearly 20 years.

Figure 6.5: Bolton Town Centre Comparison Market Shares Based on Available Expenditure at 2008 and 2026



- 6.28 We can see that across all the zones, the level of comparison expenditure spent at Bolton town centre destinations has reduced, with a particular reduction in Zones 1 to 6 and again Zones 14 to 16.

Figure 6.6: Bolton Town Centre Comparison Market Share Retention Based on Available Expenditure at 2026

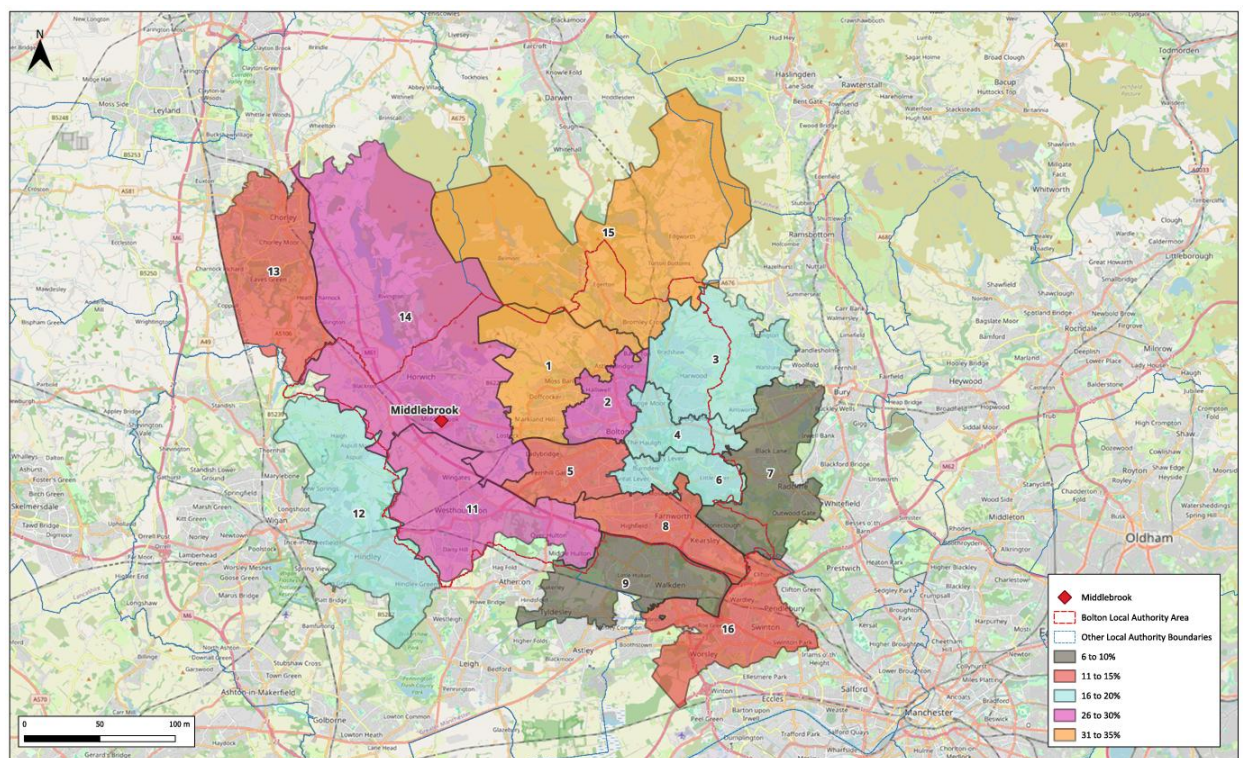


- 6.29 Figure 6.7 below shows the same comparison but in respect of Middlebrook Retail and Leisure Park. We can see from Table 6.4 that market shares have increased relatively consistently across the zones of the Study Area but not to the same extent as the reduction in market share to Bolton town centre. This indicates that there are other key comparison destinations which have also played a part in reducing the level of expenditure being spent in Bolton town centre, along with wider commercial market influences (as we set out in Section 2 above).

Figure 6.7: Middlebrook Comparison Market Shares Based on Available Expenditure at 2008 and 2026



Figure 6.8: Middlebrook Comparison Market Share Retention Based on Available Expenditure at 2026



Market Share Summary and Identification of Expenditure Claimed by Bolton Retailers

6.30 We identify the convenience goods, comparison goods, and overall market share of Study Area expenditure claimed by retailers located in Bolton in the below Table 6.6.

- 6.31 Bolton's convenience goods market share of 54.5% is marginally higher than its comparison goods market share of 51.2%. This demonstrates that the convenience operators within Bolton have a marginally stronger pull in terms of retaining convenience expenditure available within the Study Area.

Table 6.4: Comparison Goods Expenditure Retention and Leakage

Type of Expenditure	2026 Residents' Expenditure (£m)	2026 Market Share (%)
Study Area Convenience Goods Expenditure	£838.8m	54.5%
Study Area Comparison Goods Expenditure	£933.1m	51.2%

Source: Table 25 of Appendix 4

Note: Both presented in a consistent 2024 Prices

- 6.32 In conclusion, the household survey demonstrates that overall, Bolton's convenience goods retailers are able to appropriately serve residents of the authority area and those who live in a wider catchment area.
- 6.33 In respect of comparison goods, Bolton's retailers both within the town centres and at the out of centre facilities provide a good range of operators and attract relatively high levels of expenditure from the key central zones of the Study Area.
- 6.34 In our view, the identified survey results reflect the geography of the Study Area and the relative attraction of other nearby retail venues. Accordingly, where expenditure 'leaks' to destinations outside of Bolton this is still generally reflective of logical and sustainable travel patterns.

7. Assessment of Retail Capacity

- 7.1 Our retail capacity tables set out our step-by-step approach to estimating the expenditure surplus which is available to support additional retail floorspace and are provided at Appendix 4. A summary of our methodology, together with our findings, is provided below.

General Approach to Estimating Quantitative Capacity

- 7.2 Retail capacity modelling follows the basic principle that:

Available Expenditure minus Expected Turnover of Existing and Committed Floorspace equals Expenditure Surplus or Deficit.

- 7.3 An identified quantitative expenditure surplus indicates that there is capacity to support additional retail floorspace. We summarise the key considerations relating to each component of the equation below.

Methodology

- 7.4 We turn first to a description of the methodology we have employed in assessing quantitative need in both the comparison and convenience goods sectors in the period up to 2042. It is important to recognise, however, that the effects of expenditure growth over time become exponential. Thus, in looking to the period beyond 2036, the Council should adopt a plan, monitor and manage approach, so as to ensure that the forecast floorspace requirements are kept in line with changes in expenditure and changing methods of retailing.
- 7.5 There is no detailed guidance as to how to assess the quantitative need for retail development in the NPPF, or in the PPG. As a consequence, we have applied an eight step approach which has been tested at Examination.
- 7.6 The eight broad steps to calculating the quantitative need are as follows:
- i) The first step is to establish the appropriate overall retail catchment area for the hierarchy of centres in Bolton, which is shown at Appendix 1. This catchment area covers the whole of the administrative area of Bolton, together with parts of the surrounding administrative areas.
 - ii) The second step is to assess the existing level of population and the existing volume of retail expenditure of those who reside within the overall catchment area.
 - iii) The third step is to establish where the retail expenditure of residents of the overall catchment area is currently spent, through the use of an empirical telephone survey of households and thereby establish the proportion of the retail expenditure of catchment area residents which is currently retained by town centres, retail parks and freestanding stores located within the overall catchment area – that is the aggregate retention rate within the borough.
 - iv) The fourth step is to apply forecasts of population change and per capita expenditure change, so as to establish the overall level of projected growth in expenditure for residents of the overall catchment area, and an assessment of growth in retained expenditure, based, initially, on a constant retention scenario.
 - v) The fifth step is to make an allowance for growth in inflows of expenditure into the catchment area from those who reside outside in the catchment area. This can be achieved through the analysis of retail studies of adjacent authority areas.
 - vi) The sixth step is to make an allowance for under-trading, or over-trading in the base year, but only if this is justified on the basis of the clear empirical evidence.

- vii) The growth in retained expenditure (step iv), is added to the growth in inflows (step v), and an allowance for under / over-trading (step vi), so as to derive an initial expenditure surplus. Thus, the seventh step is to make allowance for 'claims' on the initial expenditure surplus, as a result of:
- Floorspace Efficiency Change for Existing Retailers (growth over time in turnover per sq. m sales area).
 - Growth Over Time in Special Forms of Trading (SFT), which we derive from the final two columns of Figure 5 of Experian's Retail Planner Briefing Note 23 of March 2026.
 - Planning Commitments, for which information has been provided by Bolton Council and neighbouring authorities
- viii) The culmination of steps i) to vii) is the calculation of the residual expenditure pot, which is potentially available for new retail floorspace, under a constant retention assumption. Thus, the final step, where appropriate, is to develop alternative scenarios for calculating growth in residual expenditure, based on:
- increases or decreases in the projected retention level; and
 - sensitivity testing of key assumptions, such as projected population change.

7.7 Our methodology in calculating comparison goods capacity necessarily departs from that used in considering convenience goods needs. This is because it is difficult to accurately estimate a benchmark turnover for comparison goods floorspace due to the large number of operators and the variation in the trading performance of floorspace, depending on its location, character, and the nature of the catchment.

7.8 As a consequence, we adopt the position for comparison goods floorspace that it is trading 'at equilibrium' at base year 2026 (i.e. our survey-derived turnover estimate effectively acts as benchmark). This is a standard industry approach.

Future Quantitative Convenience Goods Capacity

7.9 In identifying the requirement for additional convenience goods floorspace at this interim stage, we have assumed that the convenience destinations are performing in line with current expectations.

7.10 As Table 7.1 demonstrates, convenience goods floorspace has an expected benchmark turnover of £750.1m at 2026, and a survey derived turnover of £838.8m at 2026. As a consequence, an expenditure surplus of £88.7m is evident across the authority area at 2026.

Table 7.1: Quantitative Capacity for Additional Convenience Goods Floorspace in the Bolton Authority Area

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Surplus Expenditure (£m)
2026	750.1	838.8	88.7
2031	750.1	829.9	79.8
2036	748.6	827.1	78.5
2041	744.9	826.8	82.0
2042	742.6	826.6	84.0

Source: Table 6a of Appendix 4

Notes: Assumes constant market share (54.5%) of Study Area expenditure claimed by facilities within Bolton authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 4b of Experian Retail Planner Briefing Note 23; in 2024 prices.

- 7.11** The next step is to consider extant consents within the authority area, and how the turnover of these could potentially absorb any capacity identified. In this regard, we have consulted with the Council in respect of the relevant commitments for additional convenience floorspace within the authority area.
- 7.12** In this regard, the key commitments comprise the erection of a new foodstore at Paragon Business Park (reference 20163/25), a new Lidl foodstore at Bromley Cross (reference 07518/19) and commercial floorspace proposed as part of the Horwich Loco Works redevelopment. There are also two smaller extant schemes at Longcauseway Service Station and at Church Wharf in Bolton town centre, which will both deliver a small level of additional convenience floorspace.
- 7.13** In each case where operators have not been named and proposals have been submitted on a speculative basis; we have applied assumptions in respect of the potential sales density and resultant turnover. This is particularly of relevance to the assumptions applied in respect of the Horwich Loco Works scheme.
- 7.14** There have been a series of outline and subsequent reserved matters consents at Horwich Loco Works, with the intention of delivering commercial floorspace to meet the needs of the new residents. For the purposes of this study, we have made an assumption that the scheme will deliver approximately 3,000 sq.m (gross) of additional convenience floorspace, which allows for the provision of a new medium-scale foodstore and a smaller, local foodstore as part of a more 'typical' local centre format.
- 7.15** The commitments and their turnovers are presented at Appendix 4. Table 7.2 below therefore sets out the capacity following commitments, and identifies a monetary surplus throughout the plan period. In practice, our assessment suggests that there will be effectively a quantitative undersupply of floorspace (equating to between 3,200 sq.m and 3,800 sq.m of convenience goods floorspace at 2036). This remains broadly consistent throughout the plan period, rising slightly to between 3,700 and 4,500 sq.m by 2042.

Table 7.2: Quantitative Capacity for Convenience Goods Floorspace in the Bolton Authority Area After Commitments

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2026	88.7	42.5	46.3	4,100	4,900
2031	79.8	42.5	37.3	3,300	3,900
2036	78.5	42.4	36.1	3,200	3,800
2041	82.0	42.2	39.8	3,500	4,200
2042	84.0	42.0	51.9	3,700	4,500

Source: Table 6d of Appendix 4

Notes: Assumes constant market share (57.0%) of Study Area expenditure claimed by facilities within Bolton authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 4a of Experian Retail Planner Briefing Note 23; in 2024 Prices

Future Quantitative Comparison Goods Capacity

- 7.16** For comparison goods, we assume that floorspace is 'in equilibrium' at the start of an assessment (i.e. its turnover is in line with expectations, and that the sector has evolved to meet local/regional needs).
- 7.17** As identified by the below Table 7.3, our assessment estimates that the comparison goods turnover of the authority area at 2026 is £933.1m.

- 7.18 Experian anticipates that improvements in the sales efficiency of existing comparison goods floorspace will outstrip per capita comparison goods expenditure growth in the very short term. As such, the capacity identified below is due to the increase in population across the Study Area.

Table 7.3: Quantitative Capacity for Comparison Goods Floorspace in the Bolton Authority Area

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Surplus Expenditure (£m)
2026	933.1	933.1	0.0
2031	1,030.1	1,033.6	3.5
2036	1,154.2	1,160.0	5.8
2041	1,293.2	1,304.3	11.2
2042	1,353.3	1,334.0	-19.3

Source: Table 26a of Appendix 4

Notes: Assumes constant market share (51.2%) of Study Area expenditure claimed by facilities in the authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 4b of Experian Retail Planner Briefing Note 23; in 2024 Prices

- 7.19 As is the case for calculating the convenience capacity, the next step is to consider extant consents within the authority area, and how the turnover of these could potentially absorb any capacity identified. In this regard, we have consulted with the Council in respect of the relevant commitments for additional comparison floorspace within the authority area. In this regard, the key commitments comprise the erection of a new foodstore at Paragon Business Park (reference 20163/25), a new Lidl foodstore at Bromley Cross (reference 07518/19) and commercial floorspace proposed as part of the Horwich Loco Works redevelopment. The proposed comparison floorspace element is small in each case.
- 7.20 There have been a series of outline and subsequent reserved matters consents at Horwich Loco Works, with the intention of delivering commercial floorspace to meet the needs of the new residents. For the purposes of this study, we have made an assumption that the scheme will deliver approximately 1,000 sq.m (gross) of additional comparison floorspace, which allows for the provision of a new medium-scale foodstore and smaller, local facilities as part of a more 'typical' local centre format.
- 7.21 Table 7.4 identifies a monetary deficit throughout the plan period. In practice, our assessment suggests that there will be effectively a quantitative oversupply of floorspace (equating to between 600 sq.m and 1,000 sq.m of comparison goods floorspace at 2036).

Table 7.4: Quantitative Capacity for Comparison Goods Floorspace in the Bolton Authority Area

Year	Surplus (£m)	Commitments (£m)	Residual (£m)	Floorspace Requirement	
				Minimum (sq.m)	Maximum (sq.m)
2026	0.0	8.3	-8.3	-1,400	-2,400
2031	3.5	9.2	-5.7	-900	-1,500
2036	5.8	10.3	-4.5	-600	-1,000
2041	11.2	11.5	-0.4	0	-100
2042	-19.3	12.3	-31.7	-3,600	-6,200

Source: Table 26d of Appendix 4

Notes: Assumes constant market share (51.2%) of Study Area expenditure claimed by facilities in the authority area; allows for changes in benchmark turnover sales efficiency in accordance with Table 4a of Experian Retail Planner Briefing Note 23; minimum floorspace requirement based on an assumed sales density of £6,000 per sq.m at 2025; maximum floorspace requirement based on an assumed sales density of £3,500 per sq.m at 2026; in 2024 Prices

- 7.22 The capacity identified is likely to be absorbed in the short and longer term through the reoccupation of currently vacant floorspace, and therefore there is no requirement to allocate sites for the delivery of additional comparison floorspace.

Convenience and Comparison Qualitative Requirements

- 7.23 In examining the performance of specific stores, it is evident that Aldi and Lidl's discount supermarkets are performing particularly strongly and that the performance of food superstores²¹ is more variable.
- 7.24 In this regard it should be noted that, whilst household survey respondents have in the past perhaps been slightly reluctant to acknowledge that they undertake their main food shop at a discounter, this no longer appears to be the case. In addition, our methodology apportions convenience goods expenditure to foodstore destinations according to their identified market share. The methodology does not take into consideration that similar items are generally cheaper in Aldi and Lidl than in one of the 'big four' operators' stores. As such, the performance of discount operators is probably overstated and the performance of the 'big four' operators is probably understated.
- 7.25 The moderate performance of some existing food superstores is not particularly surprising, given that across the country shoppers are frequently foregoing the previously dominant 'big four' foodstore operators in favour of discounters.
- 7.26 As a consequence of this, we believe that it is highly unlikely that there will be any requirement in the foreseeable future for any further large food superstores in the area. This is consistent with the current strategy of the 'big four' who are currently very circumspect in terms of their appetite to bring forward additional large superstores.
- 7.27 Both Aldi and Lidl have substantially improved their share of the national grocery market in recent years. Notwithstanding this, the very strong performance of the Aldi and Lidl stores in particular, suggests that the market could support more discount foodstore provision. In this regard, we note that Lidl specifically have further requirements for new stores across Bolton, and therefore additional proposals for such development could come forward in the short term.
- 7.28 It is our view that any additional proposed food supermarkets should be considered on their merits in accordance with relevant policy tests. Most particularly, planning applications which seek to provide additional food retail provision should be considered having regard to potential sequential alternative sites, and with reference to the magnitude of impacts arising at any defined centre. The potential qualitative benefits associated with any improvement in customer choice can also be afforded weight in the decision-making process.
- 7.29 In terms of the spatial distribution of convenience goods facilities, we believe that existing large-scale main food shopping facilities are generally sited in a sustainable manner across the authority area and there are no obvious 'gaps' in terms of provision which need to be planned for.
- 7.30 Turning to the qualitative requirements of comparison retailing, it is clear that Bolton town centre does and will continue to be the principal comparison destination across the Study Area. However, there is a clear dominance of the out of centre facilities, which will continue to have the potential to draw trade from the defined centres, and particularly those which provide for a more diverse comparison offer including selling clothing and footwear.

²¹ Defined as having a net sales area of more than 2,500 sq.m.

7.31 As such, continuing to encourage comparison retailing into the defined centres and particularly the principal town centre and other, smaller town centres will be key to encouraging footfall and expenditure and policies which seek to protect the defined centres from out of centre development are key to realising this.

8. Assessment of Leisure Capacity

- 8.1 Our approach in considering leisure capacity is in two parts.
- 8.2 For food and beverage floorspace, we adopt a similar approach as to that set out in respect of retail floorspace in the preceding Section 6 of this report. For large format commercial uses, we adopt a 'benchmarking' approach where we consider the typical population required to support different types of facilities.
- 8.3 The benchmarking exercise reflects the fact that large format commercial uses are relatively limited in number and residents may be prepared to travel to watch a film or to go ten pin bowling. The current Study Area market share may not be instructive in respect of identifying future large format leisure requirements and therefore our preference is to undertake a benchmarking exercise.

Participation Rates

- 8.4 We begin by looking at the participation rates of each principal leisure activity across the 16 zones of the Study Area. The household survey enables us to see which leisure activities residents of Bolton typically participate in and which are the most popular across the 16 zones. Table 8.1 below provides the participation rates on a zonal basis.

Table 8.1: Participation Rates by Zone

Leisure Activity	T'tal	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Restaurant	48.3%	61.1%	22.0%	59.8%	53.9%	52.6%	65.9%	50.5%	42.0%	49.5%	45.2%	44.8%	46.0%	54.4%	53.1%	47.3%	37.8%
Pub / bars / nightclubs / social club	35.8%	41.7%	51.2%	23.9%	45.8%	28.1%	39.7%	40.1%	24.0%	32.8%	35.2%	35.3%	30.0%	34.3%	45.8%	52.1%	29.7%
Cinema	30.6%	35.0%	17.9%	30.5%	35.3%	30.9%	25.0%	40.5%	39.7%	37.5%	21.6%	33.9%	27.2%	28.1%	41.2%	24.9%	22.3%
Cultural Facilities	26.5%	40.9%	12.7%	45.0%	36.7%	13.0%	34.8%	35.3%	7.5%	27.4%	30.1%	25.2%	31.2%	26.3%	26.1%	31.7%	18.6%
Indoor sports or health and fitness activity	22.0%	20.1%	11.0%	29.0%	33.2%	17.0%	25.0%	21.7%	23.7%	26.6%	22.1%	22.1%	29.6%	12.0%	24.1%	17.1%	22.5%
Other competitive social activities	6.2%	7.9%	1.7%	6.5%	10.2%	12.0%	9.0%	7.9%	7.3%	5.1%	2.4%	5.2%	8.7%	11.8%	0.8%	0.7%	1.5%
Ten pin bowling	6.1%	15.0%	1.7%	6.4%	8.9%	7.1%	2.3%	10.3%	3.2%	5.2%	7.8%	6.0%	6.4%	5.0%	8.0%	6.6%	0.7%
Bingo	4.0%	8.7%	0.3%	0.4%	0.9%	4.8%	6.3%	3.5%	2.1%	7.7%	4.2%	2.1%	5.1%	1.6%	4.1%	0.3%	7.3%

- 8.5 Table 8.1 is clear that the most popular leisure activity across all of the 16 zones is visiting restaurants, followed by 'pubs/bars/nightclubs/social clubs'. In addition, visiting the cinema, theatres and other cultural venues are also popular leisure activities, along with health and fitness activities.
- 8.6 We can therefore see that providing facilities for a number of these leisure activities is important for the residents of Bolton, and therefore gaining an understanding of the future needs of the types of leisure uses is a valuable exercise.

Food and Beverage Requirements

Leisure Expenditure Growth

- 8.7 To calculate per capita food and beverage expenditure, we have again utilised Experian Micromarketer G3 data. The base year for this expenditure data is also 2024. Experian provides separate per capita expenditure estimates on a zonal basis for 'restaurant and café meals per person' and 'alcoholic drinks (away from home) per person'.
- 8.8 There is no need to make allowance for special forms of trading expenditure (given that all food and beverage expenditure identified by Experian relates to eating and drinking in bars, pubs, cafes, and restaurants).
- 8.9 ERPBN23 provides annual leisure expenditure growth forecasts which we set out at the below Table 8.2. These growth rates are used to estimate increases in per capita food and beverage expenditure across the plan period to 2042.

Table 8.2: Experian Retail Planner Briefing Note 23 Leisure Expenditure Annual Per Capita Growth Rates

Year	Leisure Per Capita Annual Growth
2023	0.7%
2024	0.8%
2027	0.6%
2028-32	1.1%
2033-40	1.0%

Source: Figure 1a of Appendix 3 of Experian Retail Planner Briefing Note 23 (March 2026)

- 8.10 We again recognise that growth in expenditure forecasts in the longer-term should be treated with caution given the difficulties in predicting economic performance over such an extensive timeframe.
- 8.11 Accepting this caveat, we are able to use Experian's recommendations in respect of annual expenditure growth to calculate expenditure across the food and beverage sectors at 2026, 2031, 2036, 2040 and 2042.

Restaurant and Café Floorspace Requirements

- 8.12 Based on the assumed Study Area resident population and the available per capita restaurant and café expenditure, we estimate that £433.2m of such expenditure originates within the Study Area at 2026.
- 8.13 The below Table 8.3 indicates that available Study Area restaurant and café expenditure is forecast to increase to £528.1m at 2042.

Table 8.3: Total Available Study Area Restaurant and Café Expenditure

2026 (£m)	2030 (£m)	2035 (£m)	2040 (£m)	2042 (£m)
433.2	460.5	489.8	521.5	528.1

Source: Table 2 of Appendix 5

Note: In 2024 prices

- 8.14 Table 8.4 indicates that this represents an increase of £96.2m (or 22.2%) across the Study Area between 2026 and 2042.

Table 8.4: Growth in Available Study Area Restaurant and Café Expenditure

Growth 2025-42 (£m)
94.9

Source: Table 2 of Appendix 5

Note: In 2024 prices

- 8.15 Our methodology accounts for the fact that existing operators will look to increase their turnover going forward to remain viable. On this basis, we identify an expenditure surplus of £10.9m at 2031. Due to subsequent expenditure and population increases, this surplus increases to £20.5m at 2036.
- 8.16 As with retail capacity, this monetary surplus can be converted into a floorspace requirement. The average sales density of UK floorspace was around £8,584 per sq.m at 2026.²²
- 8.17 Based on this sales density (and allowing for future increases in the sales efficiency of leisure floorspace going forward), we estimate that 1,300 sq.m of additional café and restaurant floorspace could be supported at 2031, increasing to 2,400 sq.m at 2036.

Table 8.5: Quantitative Capacity for Restaurant and Café Floorspace in the Authority Area

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Surplus Expenditure (£m)	Floorspace Requirement (sq.m)
2026	167.3	167.3	0.0	0
2031	167.0	177.8	10.9	1,300
2036	168.6	189.1	20.5	2,400
2041	170.3	201.4	31.1	3,600
2042	171.0	203.9	32.9	3,800

Source: Table 5a and Table 5b of Appendix 5

Notes: Assumes constant market share (38.6%) of Study Area expenditure claimed by facilities in the authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 2 of Experian Retail Planner Briefing Note 23 - Leisure; in 2024 prices

Licensed Premises Floorspace Requirements

- 8.18 Based on the assumed Study Area resident population and the available per capita alcoholic drinks expenditure, we estimate that £169.3m of alcoholic beverage expenditure originates within the Study Area at 2026.
- 8.19 The below Table 8.6 indicates that available Study Area restaurant and café expenditure is forecast to increase to £206.9m at 2042.

Table 8.6: Total Available Study Area Licensed Premises Expenditure

2026 (£m)	2031 (£m)	2036 (£m)	2041 (£m)	2042 (£m)
169.3	180.0	191.6	204.3	206.9

Source: Table 7 of Appendix 5

Note: In 2024 prices

- 8.20 Table 8.7 indicates that this represents an increase of £37.6m (or 22.2%) across the Study Area between 2025 and 2042.

²² As identified by Figure 2 of Experian Retail Planner Briefing Note 22 – Leisure.

Table 8.7: Growth in Available Study Area Licensed Premises Expenditure

Growth 2025-42 (£m)
37.6

Source: Table 7 of Appendix 5

Note: In 2024 prices

- 8.21 Our complete licensed premises quantitative assessment model is provided at Appendix 5 of this Study. Table 10 of Appendix 5 identifies that £88.9m (equating to 52.5%) of Study Area alcoholic drink expenditure is directed to licensed premises in the authority area at 2026. Our methodology accounts for the fact that existing operators will look to increase their turnover going forward to remain viable. On this basis, we identify an expenditure surplus of £5.8m at 2031. Due to subsequent expenditure and population increases, the identified surplus increases to £10.9m at 2036.
- 8.22 Once again, this monetary surplus can be converted into a floorspace requirement. Based on the average UK leisure sales density of £8,584 sq.m at 2024 (and allowing for future increases in the sales efficiency of leisure floorspace going forward), we estimate that 700 sq.m of additional licensed premises floorspace could be supported at 2031, increasing to 1,300 sq.m at 2036.

Table 8.8: Quantitative Capacity for Licensed Premises in the Authority Area

Year	Benchmark Turnover (£m)	Available Expenditure (£m)	Surplus Expenditure (£m)	Floorspace Requirement (sq.m)
2026	88.9	88.9	0.0	0
2031	88.7	94.5	5.8	700
2036	89.6	100.6	10.9	1,300
2041	90.5	107.2	16.7	1,900
2042	90.9	108.6	17.8	2,000

Source: Table 10a and Table 10b of Appendix 5

Notes: Assumes constant market share (52.5%) of Study Area expenditure claimed by facilities in the authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 2 of Experian Retail Planner Briefing Note 23 - Leisure; in 2024 prices

- 8.23 In terms of all food and beverage floorspace capacity identified above, we note that the Council's and other stakeholder's aspirations for the future regeneration of the principal centres within Bolton will include the provision of additional leisure floorspace. In particular, the redevelopment of Crompton Place will see not only temporary 'meanwhile' leisure uses and more permanent solutions once constructed.
- 8.24 This will not only provide for a more diverse offer for residents and visitors, but also help to encourage dwell time throughout the day and into the evening. This in turn will also help to encourage town centre living and improve safety perceptions through the encouragement of activity.
- 8.25 We therefore recommend that town centre policies continue to encourage a diverse range of uses within the defined centres to include leisure uses, to help to attract footfall and expenditure and help to protect the future vitality and viability of these centres.

Commercial Leisure: Bingo, Cinemas, Ten Pin Bowling and Casinos

- 8.26 Our approach in identifying the potential for large format commercial uses as part of the assessment of commercial leisure needs departs from the above monetary capacity assessment. This is because the commercial leisure sector is different to the retail and food and beverage sectors; large-scale leisure uses are relatively limited in number and customers often expect to travel at least some distance in order to access them. As such, we

believe it is sensible to consider the general appropriateness of provision on a Study Area basis, with reference to the typical number of persons required to support particular uses.

- 8.27 Our assessment considers the typical population required to support bingo halls, casinos, cinema screens and ten pin bowling alleys, and is based around three key stages.
1. We firstly calculate the expected Study Area and local authority populations for the relevant reporting years.
 2. We then calculate the number of persons required to support a bingo hall, casino, cinema screen and bowling alley nationally, across the UK.
 3. We then apply the respective ratio to the Study Area population and to the population of the Bolton authority area to gauge the benchmark level of provision, based on the position evident across the UK.
- 8.28 We supplement our assessment with an overview of current patterns of commercial leisure trips throughout the Study Area (as identified by the NEMS household survey) to help identify any qualitative deficiencies in provision.
- 8.29 We recognise that some of these facilities are not as important as they perhaps once were in underpinning the local leisure economy. However, all four uses generally occupy large format premises and, as such, if a requirement were to be identified then there are potential land use implications.

Bingo

- 8.30 Gala (now Buzz Bingo) and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose-built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. However, the significant increase in on-line gambling has, and will continue to affect this sector.
- 8.31 The Gambling Commission indicates the number of bingo premises fell by over 15% between 2014 to 2020, due in part to the increase in on-line bingo. The Gambling Commission latest figures indicates the UK currently has 582 bingo halls, equating to approximately one facility per 93,000 adults.
- 8.32 The below Table 8.9 confirms bingo hall capacity within Bolton over the period to 2042.

Table 8.9: Bingo Hall Capacity in the Authority Area

Year	Study Area Population	Typical Population Required to Support Hall	Percentage of Population in Bolton Authority Area	Potential Number of Halls Supported in the Authority Area	Existing Provision	Outstanding Potential Capacity in the Authority Area
2026	587,232	93,000	51.1%	3.2	1	2.2
2031	594,527	93,000	50.8%	3.2	1	2.2
2036	601,679	93,000	50.6%	3.3	1	2.3
2041	610,236	93,000	50.4%	3.3	1	2.3
2042	611,990	93,000	50.4%	3.3	1	2.3

Note: Typical population to support bingo hall calculated with reference to the Mintel Casinos and Bingo UK 2019 report and to the ONS 2023 population forecasts for the UK

- 8.33 The bingo sector has been significantly affected by the ban on smoking in enclosed workplaces which came into force in 2007 following the enactment of the Health Act 2006. Subsequent to the Act being enforced, new bingo

hall openings have been rare, and we consider it highly unlikely that there will be any proposals to provide additional facilities in the authority area in the foreseeable future. The provision available in the authority area at the Mecca Bingo on the edge of Bolton town centre, alongside smaller independent facilities, provides for the population sufficiently and therefore we do not recommend that the Council plans for the growth of the sector in the local plan.

Cinemas

- 8.34 The UK Cinema Association website estimates that there are 4,637 cinema screens in the UK²³, which equates to one screen for every 14,801 persons or thereabouts.
- 8.35 As Table 8.10 indicates below, the provision within Bolton is higher than the identified capacity. Residents therefore have good access to provision both within the borough, and within neighbouring authority areas (which are not accounted for in the capacity assessment below). It is therefore considered that generally, trips to such cinemas considered to be generally reflective of sustainable travel patterns and many Study Area residents' relative proximity to existing cinemas. The overprovision of cinema screens identified can be in part attributable to the offer at the Vue at Middlebrook, which has a far wider draw than just from residents within the Bolton authority area. As such, although the provision is above that which could technically be supported by residents in the Bolton authority area, the provision at Middlebrook in particular is seeking to serve a much wider catchment.
- 8.36 In light of the existing provision within Bolton, we recommend that a flexible approach is applied in respect of future aspirations and that should it be that the commercial market indicates additional cinema screens could be viably accommodated, such a scheme should be explored further.

Table 8.10: Cinema Screen Requirement in Authority Area

Year	Study Area Population	Typical Population Required to Support Cinema Screen	Percentage of Population in Bolton Authority Area	Potential Number of Cinema Screens Supported by Authority Area	Existing Provision (No. of Screens)	Outstanding Potential Capacity in the Authority Area
2026	587,232	14,984	51.1%	20.0	36.0	-16.0
2031	594,527	14,984	50.8%	20.2	36.0	-15.8
2036	601,679	14,984	50.6%	20.3	36.0	-15.7
2041	610,236	14,984	50.4%	20.5	36.0	-15.5
2042	611,990	14,984	50.4%	20.6	36.0	-15.4

Note: Typical population to support a cinema screen calculated with reference to data provided by the UK Cinema Association website and to the ONS 2023 population forecasts for the UK

Ten Pin Bowling

- 8.37 The national average for the provision of ten pin bowling lanes is one lane per 12,000 people.
- 8.38 As Table 8.11 below indicates, the authority area provides for just one formal 'national multiple' bowling facility, being the Hollywood Bowl located at The Linkway in Horwich. This facility provides for 26 lanes and is therefore a relatively extensive provision for the authority area.
- 8.39 Whilst very few new ten-pin bowling alleys were built in the early part of this century, the market has picked up in recent years. However, the upturn in the sector has been driven by smaller facilities which are generally supplemented by a strong food and beverage offer and are located within larger urban centres. We do not

²³ At 2022.

envisage that there will be a strong demand for additional facilities, but that there may be an opportunity to encourage a boutique-style facility within one of the principal town centres.

Table 8.11: Ten Pin Bowling Lane Requirement in the Authority Area

Year	Study Area Population	Typical Population Required to Support Bowling Lane	Percentage of Population in Bolton Authority Area	Potential Number of Bowling Lanes Supported by the Authority Area	Existing Provision (No. of Bowling Lanes)	Outstanding Potential Capacity in the Authority Area
2026	587,232	12,000	51.1%	25.0	26.0	-1.0
2031	594,527	12,000	50.8%	25.2	26.0	-0.8
2036	601,679	12,000	50.6%	25.4	26.0	-0.6
2041	610,236	12,000	50.4%	25.7	26.0	-0.3
2042	611,990	12,000	50.4%	25.8	26.0	-0.2

Note: Typical population to support ten pin bowling alley calculated with reference to the Mintel Ten Pin Bowling UK 2017 report and to the ONS 2023 population forecasts for the UK

Casinos

8.40 Mintel's Casinos and Bingo UK 2018 report identifies that there are 145 casinos across the UK, which equates to a casino for every 471,600 persons or thereabouts.

8.41 Accordingly, we estimate that the authority area could support around 0.6 casinos at 2026, a figure which would not change materially throughout the Study period. There are two formal casino facilities within the authority area, being the Genting Casino in Bolton town centre and the Grosvenor Casino on the edge of Bolton town centre.

8.42 There is therefore no requirement for the Council to plan for a new facility within the new local plan.

Table 8.12: Casino Requirement in the Authority Area

Year	Study Area Population	Typical Population Required to Support a Casino	Percentage of Population in Bolton Authority Area	Potential Number of Casinos Supported by the Authority Area	Potential Number of Casinos Supported in the Authority Area	Outstanding Potential Capacity in the Authority Area
2026	587,232	469,063	51.1%	0.6	2	-1.4
2031	594,527	469,063	50.8%	0.6	2	-1.4
2036	601,679	469,063	50.6%	0.6	2	-1.4
2041	610,236	469,063	50.4%	0.7	2	-1.3
2042	611,990	469,063	50.4%	0.7	2	-1.3

Note: Typical population to support casino calculated with reference to the Mintel Casinos and Bingo UK 2018 report and to the ONS 2023 population forecasts for the UK, England and Wales, Scotland and Northern Ireland

Health and Fitness Centres

8.43 Despite the current uncertainties associated with available household income, the most recent research shows that the UK health and fitness industry is stronger than it has ever been as measured by number of gyms, membership and market value. The State of the Fitness Industry Report 2024, produced by the Leisure Database Company, finds overall, the UK health and fitness industry is performing strongly, with data indicating that member numbers, market value and penetration all surpassing pre-pandemic levels and reaching all-time highs. The report identifies that as of 2024, the number of gym members increased to 10.7m from 10.3m in 2023.

- 8.44 Gyms and health and fitness facilities of course make an important contribution to the health of the local authority's population across the complete spectrum of ages. The range of operators and brands within the health and fitness sector are now relatively broad, with a number of budget brands topping the market in terms of number of clubs open and who have experienced the most significant growth in recent years. Indeed, Puregym was hoping to add an additional 60-70 gyms to their portfolio by the end of 2025²⁴.
- 8.45 Looking across the authority area, there appears to be a good choice of health and fitness facilities, with a number of national multiples, independents and community run gyms and fitness facilities.
- 8.46 The Table 8.13 below provides the details of the top health and fitness facilities within the Study Area.

Table 8.13: Health and Fitness Clubs by Zone (Where the Total Equates to Over 3% of Responses)

Leisure Activity	T'tal	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Farnworth Leisure Centre, Brackley Street, Farnworth, BL4 9DZ	6.3%	0.0%	0.0%	0.0%	0.0%	0.0%	13.5%	9.8%	39.8%	7.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	15.6%
Pure Gym, Castle Street, Tyldesley, Manchester, M29 8EW	6.2%	0.0%	0.0%	0.0%	8.7%	9.6%	0.0%	0.0%	0.0%	25.9%	20.7%	0.0%	0.0%	0.0%	0.0%	0.0%	12.2%
Nuffield Health Gym, Eagley Brook Way, Bolton, BL1 8TS	5.4%	20.6%	0.0%	32.2%	10.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	12.0%	17.3%	0.0%
Bolton Town Centre	5.0%	2.2%	41.2%	9.8%	3.1%	9.6%	13.5%	0.0%	0.0%	7.0%	0.0%	0.0%	0.0%	0.0%	0.0%	15.4%	0.0%
Horwich Town Centre	4.5%	21.6%	0.0%	0.0%	0.0%	2.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	24.6%	36.6%	0.0%	0.0%
JD Gyms, Morston Point, Manchester Road, Bolton, BL2 1HA	4.0%	0.0%	0.0%	6.7%	10.3%	0.0%	0.0%	0.0%	9.0%	16.1%	0.0%	0.0%	0.0%	0.0%	9.3%	0.0%	0.0%
Leverhulme Park Community Leisure Centre, Long Lane, Bolton, BL2 6EB	3.6%	0.0%	0.0%	0.0%	47.2%	0.0%	13.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Westhoughton Town Centre	3.2%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	47.3%	11.3%	0.0%	0.0%	0.0%	0.0%
The Jason Kenny Centre, Moor Lane, Bolton, BL3 5BN	3.2%	0.0%	0.0%	0.0%	10.6%	36.8%	0.0%	0.0%	4.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

- 8.47 In terms of capacity, the results of the household survey indicate that a total of 22.0% of the population regularly participate in indoor sports or health fitness activities. The results also indicate that facilities within the authority area retain approximately 53.6% of trips.
- 8.48 The authority area population is estimated to increase by 24,758 people by 2042. Assuming that a similar gym/health club participation level would apply to the new population as has been identified for the Study Area (i.e. 22.2%) this would equate 5,889 potential new gym members over the plan period. Based on average membership levels for major gym operators (2,897 members) and budget gym operators (3,452 members), the anticipated uplift in the population in the authority over the period to 2042 could potentially support two additional gyms.

²⁴ <https://www.puregym.com/blog/uk-fitness-report-gym-statistics/>

- 8.49 Bringing forward new gym and health and fitness facilities will be dependent on market demand from operators seeking space in local authority areas. Proposals for new health and fitness facilities should be directed to defined centres in the first instance, in accordance with national policy. We do not however recommend the allocation of specific sites for such uses within the local plan, and that demand will very much be market-led.

Other Commercial Leisure

- 8.50 There has been a growth in recent years in other more specialist commercial leisure attractions, including facilities such as trampoline parks, indoor soft play centres, ninja courses and a range of competitive social destinations. The latter is a fast-paced sector and is still continuing to grow, with new formats becoming present in the market. Such uses include urban golf, bar and game formats, which include games such as axe-throwing, shuffleboard, table tennis and so on, virtual reality gaming and escape rooms. All of these commercial leisure uses fall within the defined town centre use bracket, and typically require large floorplates.
- 8.51 Calculating a quantitative need for such uses is not possible, particularly given the evolving market and relative infancy of such uses. However, we are able to review the existing offer and consider whether there may be a qualitative requirement to increase the offer across the authority area.
- 8.52 Overall, the Bolton authority area is not particularly well catered for in terms of wider commercial leisure uses, and instead, residents will be looking to surrounding higher-order centres, particularly Manchester City Centre and the Trafford Centre to meet their commercial leisure needs in this context.
- 8.53 Although the market for such commercial leisure uses is still evolving, and alternative operators may still continue to require new premises across the authority area, these should be assessed on a case-by-case basis, ensuring that such uses are directed towards defined centres in the first instance. This is particularly important given the wider benefits such uses can have in terms of encouraging longer dwell-times and increasing footfall and associated expenditure within centres.
- 8.54 However, it is noted that opportunities for larger format leisure uses within the defined centres in the Bolton authority area will be limited due to the average size of the units being small scale and there being limited opportunity to expand the offer in the centres.
- 8.55 The Town Centres Practice Guidance states at paragraph 012 that the use of the sequential test should recognise that certain town centre uses have particular market and locational requirements, which meant that they may only be accommodated in specific locations. It goes on to state that robust justification will be needed where this is the case. Whilst the guidance does not circumnavigate the need for a robust assessment, it does provide scope for proposals to be situated in alternative non-town centre locations should there be no sequentially preferable locations in centre.

9. Summary, Conclusions and Policy Recommendations

Context

- 9.1 The principal purpose of the Study is to understand future retail and leisure needs, and to provide policy recommendations to assist the Council in its preparation of the forthcoming Local Plan.
- 9.2 The Local Plan will set out the Council's strategy in respect of delivering new future growth in respect of a range of new developments, including housing, jobs, and main town centre uses. To ensure that commercial uses are delivered in sustainable locations, the Local Plan will provide up to date policies in respect of town centre boundaries, the hierarchy of defined centres, and local impact thresholds of relevance to retail and leisure developments.
- 9.3 This concluding section of our report summarises the key findings of the Study and addresses planning policy requirements of relevance to retail, leisure, and town centres.

Key Findings: Retail

Quantitative and Qualitative Capacity

- 9.4 As identified at Section 7, we identify a moderate capacity for convenience goods floorspace across the authority area across the plan period, but no capacity for additional comparison goods floorspace.
- 9.5 Overall, the quantitative figures for convenience goods are not substantial and in particular in respect of the convenience goods surplus, could realistically accommodate one additional larger format stores across the plan period. The quantitative capacity identified is not of a sufficient scale to support the allocation of sites as part of the local plan, other than to support wider allocations.
- 9.6 It is important to note that the capacity findings are based on an assumption that the market share attracted to existing facilities within the authority area remains consistent across the plan period.

Table 9.1: Quantitative Capacity for Convenience Goods and Comparison Goods Floorspace in the Bolton Authority Area

Year	Convenience Goods Floorspace Requirement		Comparison Goods Floorspace Requirement	
	Minimum (sq.m)	Maximum (sq.m)	Minimum (sq.m)	Maximum (sq.m)
2026	4,100	4,900	-1,400	-2,400
2031	3,300	3,900	-900	-1,500
2036	3,200	3,800	-600	-1,000
2041	3,500	4,200	0	-100
2042	3,700	4,500	-3,600	-6,200

Source: Table 6d and 26d of Appendix 4

Note: In 2024 prices

Key Findings: Commercial Leisure

- 9.7 Our assessment of future leisure needs is in two parts.

- 9.8 In terms of food and beverage floorspace, we have undertaken a quantitative assessment which identifies available expenditure and takes account of the need for existing businesses to increase their turnover to remain viable.
- 9.9 Our assessment has identified that at 2036 there is a requirement for 2,400 sq.m of restaurant and café floorspace and for 1,300 sq.m of licensed premises floorspace (this equating to a total of 3,700 sq.m of food and beverage floorspace).
- 9.10 We anticipate that this floorspace will comprise of relatively small-scale cafés, restaurants and bars which would generally be accommodated within the principal centres and which will likely come forward as part of the town centre regeneration initiatives coming forward.

Table 9.2: Quantitative Capacity for Restaurant and Café Floorspace and Licensed Premises Floorspace in the Authority Area

Year	Restaurant and Café Floorspace Requirement (sq.m)	Licensed Premises Floorspace Requirement (sq.m)	Total Food and Beverage Floorspace Requirement (sq.m)
2026	0	0	0
2031	1,300	700	2,000
2036	2,400	1,300	3,700
2041	3,600	1,900	5,500
2042	3,800	2,000	5,800

Source: Tables 5a, 5b, 10a and 10b of Appendix 5

Note: Assumes constant market share of Study Area expenditure claimed by facilities in the authority area; allows for changes in benchmark turnover sales efficiency in accordance with Figure 2 of Experian Retail Planner Briefing Note 23 - Leisure; in 2024 prices

- 9.11 In terms of all food and beverage floorspace capacity identified above, we note that the Council's aspirations for the future regeneration of the principal centres within Bolton will include the provision of additional leisure floorspace. This will not only provide for a more diverse offer for residents and visitors, but also help to encourage dwell time throughout the day and into the evening, particularly for centres which otherwise typically go very quiet at night. This in turn will also help to encourage town centre living and improve safety perceptions through the encouragement of activity.
- 9.12 We therefore recommend that town centre policies continue to encourage a diverse range of uses within the defined centres to include leisure uses, to help to attract footfall and expenditure and help to protect the future vitality and viability of these centres. In this regard, we note that the Bolton Town Centre Framework is aiming to reshape the town centre around a more focused retail core, a stronger food-and-drink offer, leisure attractions, events, and mixed-use development in response to changing shopping patterns, which have been clearly identified as part of this study.
- 9.13 A major theme of the Framework for the town centre is the expansion of leisure uses to increase visitor numbers and dwell time, through the creation of new food and beverage destinations around Cheadle Square and Crompton Place, encouraging a stronger evening economy, and the provision of family-oriented leisure uses.
- 9.14 The capacity identified above should therefore be used to directly support the wider aspirations for the town centre, and therefore policies to help protect the future of the centre will be key.

9.15 The Study has identified quantitative capacity which equates to a requirement across the authority area at 2042 for:

- 2.3 bingo halls;
- -15.4 cinema screen;
- -0.2 ten pin bowling lanes;
- -1.3 casinos; and
- 2 new health and fitness club.

9.16 We do not anticipate there to be operator demand to bring forward larger format leisure uses in the authority area over the plan period to 2042.

Future Retail and Centres Strategy

9.17 The provision of main food shopping destinations within and around defined centres is a key strength of centres across the authority area and the benefit of retaining this should be given substantial weight when considering future convenience goods retail proposals.

9.18 In terms of service sectors, financial and business transactions have increasingly moved online and 'bricks and mortar' financial service provision has significantly reduced as a consequence. This trend will not be reversed. It will be important to ensure that premises previously put to such use are repurposed and brought back into active use. By way of example, former bank and building society premises can often be made into attractive bars and restaurants which are able to enhance a centre's wider offer (including the evening economy).

9.19 Whilst the economic picture is currently challenging for hospitality operators, we consider that further potential exists to expand the leisure sector offer within the authority's principal centres across the medium to longer term. This ties in with the current aspirations to diversify the defined centres within the authority area, and the town centre framework schemes which further encourage this.

9.20 It is highly unlikely that there will be substantial comparison goods retail development coming forward within the local authority area across the plan period. In practice, some such in-centre retailers may close. This could open up town centre space for convenience retailers, and for the growth of the leisure and retail service sectors.

9.21 In particular, food and drink operators are a critical component of a modern town centre, and the future success of these operators is inextricably linked to the centres' overall vitality. Improved local leisure provision will mean a reduced need to travel further afield to eat, drink and socialise. This reduces carbon emissions and accords with sustainable development principles (particularly as a rounded retail and service offer should encourage linked trips and reduce travel).

Meeting Retail Needs

9.22 The retail capacity assessment identified a relative limited quantitative capacity for convenience floorspace within the authority area across the plan period, and no requirement for additional comparison floorspace.

9.23 While the out-of-centre retail parks contribute to meeting some of the comparison goods needs of the Borough's residents, we consider that there is no requirement to develop any further facilities outside of defined centres.

- 9.24 It will therefore be important to continue to encourage non-bulky comparison retailing, in particular, within the town centres in order to protect and enhance its role as a shopping destination that meets the day-to-day needs of its local residents.
- 9.25 However, we do not recommend that the Council allocates any sites within the defined centres to accommodate additional floorspace within the local plan and that instead, planning policy should be focused on ensuring that new retail and leisure developments are directed to the defined centres in the first instance.
- 9.26 In particular, we do not anticipate a need to build out any further comparison goods floorspace over the plan period and recommend that any planning applications which support such a use are carefully considered in respect of their compliance with the sequential and impact town centre policy tests.

Meeting Commercial Leisure Needs

- 9.27 As Section 8 demonstrates, we do not identify any capacity for large format leisure floorspace within the authority area. We do, however, identify a floorspace capacity for restaurants, cafés and other licenced premises but this is not at a level which we consider should be reflected in policy.
- 9.28 In this regard, the quantum of floorspace identified is less than the total quantum of vacant floorspace identified across the authority area's principal centres. Accordingly, we recommend that this floorspace requirement is directed towards the defined centres in order to secure the re-use and repurposing of vacant floorspace and the continued encouragement of commercial leisure floorspace as part of the wider town centre regeneration initiatives as set out above.
- 9.29 Commercial leisure continues to be an important element of the overarching offer of centres and is one of the key attractors which draws in footfall both during the daytime and evening.
- 9.30 Therefore, a recognition that such uses play an important role in helping to support the future vitality and viability of centres should be included in planning policy.

Planning Policy Recommendations

General Policy Approach

- 9.31 The adopted and emerging local plan promotes a 'town centre first' policy approach, which is broadly consistent with the general requirements of Section 8 of the NPPF.
- 9.32 Overall, the Study identifies that the proportion of vacant floorspace in the borough's town and district centres is below the national average. The principal anomaly to the findings is Bolton town centre, which is suffering from vacancy rates in terms of both floorspace and units, substantially above the national averages.
- 9.33 However, it is important to note that the elevated vacancy rate is in large part a direct consequence of the Crompton Place situation due to the deliberate clearance of the shopping centre's tenants as a precursor to demolition and regeneration. Bolton Council's strategy to consolidate the retail offer around Market Place, and the appointment of MEPC to deliver a mixed-use redevelopment of Crompton Place, provides a credible pathway to reducing vacancy rates materially over the medium term. The current use of the cleared Crompton Place site for events, markets and pop-up uses will also help sustain activity in this part of the town centre during the transition period.

- 9.34 As is the case across the country, there will always be a benefit in maintaining the occupancy rate in the centres and, where possible, reducing the level of vacancies to improve centres' offer and visual attractiveness, and to support additional activity. Accordingly, it will be important to try to direct additional development within centres (or, failing that, in sustainable locations which are able to support linked trips to defined town centres).
- 9.35 In this regard, we note that paragraph 018 of the Town Centres PPG indicates that proposals for edge and out-of-centre retail and leisure developments should be considered with reference to the health of centres that would be impacted by development. Paragraph 018 states that:
- 'A judgement as to whether the likely adverse impacts are significant can only be reached in light of local circumstances. For example, in areas where there are high levels of vacancy and limited retailer demand, even very modest trade diversion from a new development may lead to a significant adverse impact.'**
- 9.36 In this context, it will be important for the emerging plan to clearly set out the importance of the sequential and impact tests and explain the local circumstances that frame how they will be applied in practice. The sequential and impact tests will need to be applied in a robust manner in order to provide for the re-use of vacant units and to support centres which retain a strong retail function as well as a diverse range of other uses. Whilst non-retail uses will be an important component of the mix of land uses in principal centres moving forward, there is still a requirement to accommodate new retailers and secure additional retail floorspace within defined centres wherever possible in accordance with the requirements of the NPPF.
- 9.37 In terms of the borough's principal centre, it is clear that the regeneration of Crompton Place, Bolton's flagship project, is now decisively in motion. The appointment of MEPC (the developer behind NOMA Manchester, Wellington Place Leeds and Paradise Birmingham) as Bolton Council's development partner signals genuine momentum, and the planned mixed-use redevelopment could deliver transformational change to the heart of the town centre over the coming decade. The Church Wharf development, the completed Deansgate Gardens, the ongoing residential scheme at Moor Lane, and the already-delivered Towns Fund investments Bolton Market Food Hall, Elizabeth Park, the Wellsprings Innovation Centre and Bolton Central Library together represent a credible and maturing regeneration framework.
- 9.38 This proactive approach by the Council acknowledges the importance of diversifying centres to better meet residents' needs, whilst encouraging activity throughout the day and evening, and thereby supporting existing and future businesses. There is also an emerging need to grow residential opportunities within the centre to increase activity and diversify the offer further.
- 9.39 Therefore, as set out above, whilst the focus should be on not locating retail away from the centre, this should not restrict the establishment of a range of uses within Bolton town centre, and the other town centres to achieve a diverse mix, and increase activity (e.g. at an upper storey).
- 9.40 In terms of the district centres (Astley Bridge, Breightmet, Chorley Old Road and Harwood), whilst not providing the quantum of convenience and comparison units to be considered significant hubs of retail, the district centres continue to provide a good range of retailers (generally focused around day-to-day household comparison goods shopping and independent retailers). This offer must be maintained within these centres to ensure that they continue to perform their roles in meeting the needs of the local catchments and communities that they serve. Indeed, the district centres each have important and unique offers which directly serve the needs of their catchments (including the tourism inflow), and this needs to be protected moving forward.
- 9.41 In the context of the current vacancy rate and national planning policy requirements, we recommend that emerging plan policies are sufficiently flexible to allow for an appropriate range of town centre uses beyond retail,

and reflect the need to repurpose historic, sometimes outdated retail stock in order to accommodate new residential, leisure, and community uses. To this end, we note that Policy TC1(b) of the NPPF states that planning policies set out policies for areas particularly suitable for a greater diversity of use, including residential uses.

- 9.42 The emerging plan should also consider the effects of the expanded Use Class E and the consequences of the additional flexibility which Class E provides outside of town centres. The authority may wish to consider applying restrictive conditions to planning permission for Class E development, which is delivered outside of town centres, to restrict the authorised use to that which has been justified in the application submission. This will help ensure that unacceptable impacts do not arise within the town centre as a consequence of future Class E development.
- 9.43 With the above context in mind, we now turn to our assessment of specific policy options for the out of centre provision across the authority area.

Overarching Policy Options for Middlebrook

- 9.44 With the above context in mind, we now turn to our assessment of specific policy options for the Middlebrook Retail and Leisure Park. In doing so, we have given consideration to the current approach as set out within the adopted policy which seeks to control additional retail and leisure uses so as to protect the defined centres, and specifically Bolton town centre, or alternatively, whether designating Middlebrook as a defined centre would better meet the thrust of national planning policy. We have also given further consideration to whether there is a mid-policy position which achieves an element of both.
- 9.45 Additionally, consideration is given to the nature of uses which may be considered appropriate at the Middlebrook Retail and Leisure Park which would seek to complement the existing offer, whilst continuing to accord with the 'town centre first' principle as set out within national guidance.
- 9.46 In this regard, national planning policy is clear that protection should be given to defined centres in order to ensure residents have a good mix of amenities available. It is acknowledged that Middlebrook has an important role to play in serving residents of the authority area in terms of providing retail and leisure facilities but also has a much wider role and wider draw from an extensive catchment. The current offer does not provide for a 'traditional' town centre and does not provide for the range of uses typically required to meet the definition of a defined centre. It is our recommendation therefore, that this role of Middlebrook should be recognised in the local plan, but a clear differentiation between Middlebrook and defined centres within the borough should be continued in the updated planning policy.
- 9.47 Middlebrook Retail and Leisure Park has developed as one of Greater Manchester's principal out-of-centre retail and leisure destinations. The park accommodates large-format retail and leisure units and it is acknowledged that the out of centre destination has increasingly required a degree of operational flexibility to respond to changing consumer expectations and evolving retail and leisure business models. The pragmatic acceptance of the local authority is that the destination is an important facility within the context of the wider retail and leisure offer of the authority area, which draws in considerable footfall and trade.
- 9.48 As has been witnessed at Middlebrook, large-format out of centre retail and leisure destinations have increasingly evolved to incorporate cafés, customer services, collection facilities, health services and other complementary uses that improve convenience and increase visitor dwell time. However, as Middlebrook evolves, further competition has inevitably been placed on the offer in Bolton and Horwich town centres. As a result, Bolton town centre has evolved in a different direction, with the two increasingly complementing each other instead of directly competing with each other. Horwich continues to provide for a more localised offer, meeting the needs of the local walk-in catchment in particular. Therefore, the retail and leisure destinations are seeking to provide for qualitatively

different offers for their catchments and continue to function alongside each other. Given this, controlling the diversification and growth of Middlebrook will be key to ensuring the health of the defined centres is maintained or improved over the plan period.

- 9.49 Unrestricted diversification has the potential to alter the established retail and leisure function of Middlebrook and create unnecessary competition with Bolton, Horwich and other designated centres. National planning policy places significant emphasis on maintaining the vitality and viability of town centres and ensuring that out-of-centre locations do not undermine the planned hierarchy of centres.
- 9.50 Accordingly, ancillary uses should remain as the secondary offer to the retail and leisure activity and should enhance, rather than replace, the primary shopping function of the park. The policy recommendations below therefore adopts a balanced approach that allows commercial flexibility whilst safeguarding the strategic retail role of Middlebrook and supporting sustainable patterns of development.
- 9.51 The NPPF and associated Town Centres NPPG provides a useful tool upon which to appropriately differentiate defined centres and out of centre development. Indeed, Annex 2 of the NPPF states that: '...existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres'. The NPPG also states that a wide range of uses, including residential, healthcare, educational development, employment and offices can all help to support the vitality and viability of a centre.
- 9.52 On this basis, the qualitative benefits of the existing defined centres within the borough are their provision of smaller units to meet the needs of a wide range of operators, including independents across a range of commercial sectors. Middlebrook Retail and Leisure Park is qualitatively different insofar as it provides larger scale units to predominantly meet the needs of national multiple retail and leisure operators, but does not, in the most part, provide space which is comparable to that which is provided for within the defined centres. Ensuring that this difference in the offer is retained within the borough is imperative to securing the future vitality and viability of centres.
- 9.53 There has been some growth at Middlebrook and new or expanded operators continue to increase the draw and overarching attractiveness of the destination to residents. There is a risk that designating Middlebrook as a town centre would enable the circumnavigation of the planning policy tests, resulting in the further diversification, which could erode the function and offer of the defined centres. Ensuring that Middlebrook and the defined centres retain their qualitative benefits and differences through appropriate policy controls and the sequential and impact tests in particular, is key and in accordance with national policy.
- 9.54 Given the above, whilst a recognition of Middlebrook within the local plan can be provided, this should not allow for future applicants to avoid the requirement to demonstrate compliance with planning policy. We note that the current adopted local plan seeks to control growth at Middlebrook, to ensure that any growth is complementary to the achievement of the extensive regeneration aspirations within Bolton town centre.
- 9.55 One of the key threats to the existing defined centres will be the future provision of smaller units and a more diverse offer at Middlebrook which could directly impact on the more localised offer within the centres in Bolton. As such, it is important that in particular, the Council retains control over the future sub-division of units and the provision of new, smaller units across the commercial area.
- 9.56 It is considered that a continued emphasis in respect of the protection of existing defined centres in the authority area is important, with separate controls over Middlebrook to help support the future success of the commercial destination, whilst continuing to protect centres.

9.57 This policy framework provides a balanced and proportionate approach to managing ancillary uses at Middlebrook Retail Park. It recognises the need for commercial flexibility within an evolving retail sector whilst ensuring that the retail park continues to fulfil its strategic retail role. By maintaining ancillary uses as subordinate to the primary retail function and requiring careful assessment of town centre, transport and amenity impacts, the framework supports sustainable economic growth without compromising the wider retail hierarchy within Bolton.

9.58 Turning to ancillary uses at Middlebrook Retail and Leisure Park, the policy should resist unrestricted changes of use that would fundamentally alter the character or function of the park but should support ancillary uses that improve customer experience, increase dwell time and contribute to the long-term sustainability of existing businesses. The overarching objective should be to ensure that diversification remains complementary rather than transformational.

9.59 We are of the view that the following uses are considered appropriate in principle where they support the wider retail and leisure function:

- click-and-collect facilities;
- parcel collection and return services;
- children's play areas associated with shopping trips;
- seasonal or temporary promotional space;
- customer information facilities; and
- electric vehicle charging hubs with associated waiting facilities.

9.60 In assessing applications for alternative uses at the Retail and Leisure Park, applicants should seek to demonstrate that proposals:

- enhance the attractiveness and commercial resilience of Middlebrook Retail and Leisure Park;
- do not result in significant adverse impacts on the vitality and viability of Bolton and Horwich town centres, or other designated centres;
- do not generate unacceptable highway, parking or servicing impacts;
- safeguard pedestrian movement and accessibility; and
- do not adversely affect neighbouring occupiers or environmental quality.

West of Wingates Policy Approach

9.61 The West of Wingates Strategic Allocation is identified as a major industrial and warehousing development area. The strategic purpose of the allocation is to support economic growth, inward investment and job creation within Bolton and the wider Greater Manchester City Region. Consequently, any retail and leisure and other ancillary commercial provision should be carefully controlled to ensure that it supports the primary employment function of the site and does not undermine the vitality and viability of established centres, particularly Westhoughton town centre and nearby district and local centres.

9.62 The allocation has been identified through the Places for Everyone Joint Development Plan as a strategic employment location capable of accommodating approximately 440,000 sq.m of industrial and warehousing floorspace. The site is expected to become one of the largest employment locations within Bolton and Greater Manchester, supporting substantial job creation over the plan period. As a consequence, a degree of supporting retail and leisure provision is likely to be necessary. However, such provision should be carefully controlled to ensure that it remains ancillary to the employment function of the site and does not compete with established centres, particularly Westhoughton town centre and other nearby centres.

- 9.63 The scale of ancillary retail and leisure provision required is intrinsically linked to the level of employment expected to be generated by the development. It is suggested that the development could support up to 6,000 jobs over the long term, whilst earlier phases of development have been estimated to generate approximately 1,500 jobs. In order to provide a robust basis for assessment, a range of employment scenarios has been considered.
- 9.64 It is clear therefore that the role of supporting commercial uses should therefore be limited to meeting the day-to-day needs of employees, visitors and occupiers within the employment area. Retail and leisure floorspace should be considered ancillary to the principal employment uses and should contribute to creating an attractive and sustainable working environment rather than functioning as independent destinations.
- 9.65 Retail floorspace should remain proportionate to the employment function of the allocation. Individual units should generally be small format and should not compete directly with nearby town centres.
- 9.66 The most appropriate approach is therefore to provide:
- Limited convenience retail facilities;
 - Cafés, restaurants and food and beverage uses serving employees;
 - Small-scale health, fitness and wellbeing facilities;
 - Supporting service uses associated with the employment function of the site.
- 9.67 Conversely, large-scale retail, retail warehousing and destination leisure uses should be resisted as they would conflict with the strategic employment role of the allocation and risk diverting expenditure and activity away from the defined centres. This approach would ensure that retail and leisure floorspace supports, rather than competes with, the principal economic objectives of the West of Wingates Strategic Allocation.
- 9.68 Modern strategic employment locations commonly incorporate a limited amount of convenience retail floorspace to meet the day-to-day needs of employees. Such provision typically comprises small convenience stores, pharmacies, newsagents, parcel collection facilities and similar services that support the operation of the employment area. The purpose of these facilities is not to attract expenditure from a wider catchment but to provide practical services for employees during the working day.
- 9.69 Food and beverage facilities are likely to represent the most significant component of ancillary commercial floorspace required within the allocation. Large employment developments increasingly incorporate cafés, coffee shops, restaurants and food halls to provide facilities for employees and improve the attractiveness of the workplace environment.
- 9.70 Accordingly, planning policy should support the provision of small-scale convenience retail, food and beverage facilities, health and wellbeing uses and other ancillary services that serve employees, occupiers and visitors. Conversely, large-scale retail development, retail warehousing and destination leisure uses should be resisted, as they would not be necessary to support the employment function of the allocation and could adversely affect the vitality and viability of nearby centres.
- 9.71 A quantitative assessment of the Class E floorspace requirement for the West of Wingates allocation (Policy JPA6, Places for Everyone) is therefore based on the scale of employment development envisaged by the adopted allocation and the expected land-use composition of a strategic logistics and industrial site.
- 9.72 The West of Wingates allocation comprises approximately 184 hectares of employment land west of the existing Wingates Industrial Estate and is identified to deliver approximately 440,000 sq.m of employment floorspace by

2037. The allocation is intended primarily for industrial, logistics and related employment uses, specifically Class E(g)(iii), B2 and B8 uses.

9.73 The adopted allocation is expected to deliver up to 6,000 jobs and approximately 440,000 sq.m of industrial and warehousing floorspace. The SPD identifies the site as a major employment hub rather than a mixed-use destination and refers only to ancillary facilities supporting occupiers and employees.

9.74 Although the recommendations are focused on the new development associated with the West of Wingates masterplan, any new commercial provision and amenities will also have the ability to provide for the existing workers within the Wingates Industrial Estate to the east.

9.75 In order to calculate the potential quantitative requirements in terms of convenience, food and beverage and other facilities within the West of Wingates area, we begin below by estimating the average spend of each worker, per day. We then make an assumption in respect of how this could calculate to available expenditure to support additional floorspace. The calculations undertaken are estimates based on existing provision in the local area, and therefore the opportunity for new facilities to 'retain' the expenditure generated. Of course, not all workers will spend money in the local area as part of their working day, or travel to and from their place of work.

Table 9.3: Typical Daily Spending

Category	Average Spend per Worker per Day
Food & drink (cafés, coffee shops, sandwich bars)	£6–£8
Convenience retail	£1–£3
Leisure/fitness	£0.50–£1.50
Total on-site expenditure potential	£8–£12

9.76 Using the above figures, and adopting the following assumptions, we can then calculate the level of available expenditure for each type of good:

- 6,000 jobs
- 220 working days per annum
- Average spend

Table 9.4: Approximate Level of Available Expenditure to Support Floorspace

Category	Average Spend per Worker per Day	Number of Jobs Created	Working Days Per Annum	Total Available Expenditure (Average from the Range)
Food & drink (cafés, coffee shops, sandwich bars)	£6–£8	6,000	220	£9.2m
Convenience retail	£1–£3	6,000	220	£2.6m
Leisure/fitness	£0.50–£1.50	6,000	220	£1.3m

9.77 As is the case in existing employment areas and indeed existing defined centres, not all of the expenditure generated by those working in the area will be retained at West of Wingates commercial facilities. Employees will continue to use facilities in Westhoughton, Horwich, Bolton town centre and at home. However, given that the existing centres are some distance from the development, we do consider that the level of expenditure which could

be retained could be high. Furthermore, as we set out above, we are also of the view that the proposed commercial floorspace could also meet the needs of workers in the existing adjacent Wingates Industrial area.

9.78 We therefore have to make an assumption of the level of expenditure retained at Wingates, and the proportion spent within nearby centres and existing facilities.

9.79 We provide below three scenarios in respect of the level of expenditure retention within Wingates.

Table 9.5: Expenditure Retention Levels Scenarios

Category	Total Available Expenditure	Assumes 70% Retention	Assumes 80% Retention	Assumes 90% Retention
Food & drink (cafés, coffee shops, sandwich bars)	£9.2m	£6.4m	£7.4m	£8.3m
Convenience retail	£2.6m	£1.8m	£2.1m	£2.3m
Leisure/fitness	£1.3m	£0.9m	£1.0m	£1.2m

9.80 As is the case in calculating the demand for retail and leisure floorspace across the authority area, we can then apply an average sales density to calculate the level of floorspace needed to support the workers.

9.81 We therefore apply typical sales densities for each category of goods, as set out below.

Table 9.6: Average Sales Densities

Use	Typical Sales Density
Convenience retail	£8,000 per sq.m
Cafés and food outlets	£6,000 per sq.m
Leisure/fitness uses	£5,000 per sq.m

9.82 This produces a realistic requirement of the following floorspace figures.

Table 9.7: Floorspace Range Requirements

Use	Floorspace Requirement
Retail (convenience and services)	195 – 293 sq.m
Food and beverage	920 – 1,380 sq.m
Leisure/fitness	156 – 234 sq.m
Total Class E retail and leisure floorspace	1,483 – 1,907 sq.m

Recommendations

9.83 For commercial floorspace to viably operate, it is likely that ‘clustering’ the facilities into a combined offer would sustainably meet the employees’ needs.

9.84 This level of provision would be sufficient to serve the day-to-day needs of a workforce of 6,000 employees whilst remaining ancillary to the site's primary industrial and logistics function. It would also be consistent with the SPD's objective of providing ancillary facilities that support employee wellbeing without creating a competing town-centre destination. As such, planning for approximately 1,500 – 2,000 sq.m of retail, service and leisure floorspace would appropriately meet the needs of West of Wingates.

- 9.85 It will also be important to enable sufficient flexibility in terms of the level of floorspace and types of uses to ensure any proposal can respond appropriately to market conditions and ensure that any space brought forward meets the needs of the employees in the local area.

Other Employment Allocations

- 9.86 In addition to the West of Wingates strategic allocation, Places For Everyone also allocates two additional large employment allocations at Bewshill Farm (JPA 4) and Chequerbent North (JPA 5). The allocations allow for 21,000 and 25,000 sq.m of additional industrial and warehousing floorspace to complement existing provision in the authority area, whilst providing high quality transport and highways connectivity, landscaping and wider compensatory development.
- 9.87 Although wider infrastructure and design matters are covered within the Places for Everyone allocations, no specific reference is made to the wider ancillary uses which would be considered to be appropriate within the wider allocation.
- 9.88 In undertaking this exercise, we are mindful of the 'sustainable' element of large allocations i.e. that the proposals should offer sustainable retail and service provision, minimising the need for extensive travel outside the employment area (and other allocations) and maximising self-sufficiency wherever possible. This is usually taken to mean that allocations should principally cater for the large proportion of their own 'top-up' food shopping and service provision. It is expected that residents in most cases would still travel farther afield to higher order defined centres for the majority of their larger shops and less-frequent service, leisure and other trips.
- 9.89 However, importantly, any ancillary uses must be complementary to the existing offer of defined centres, and not compete directly with the existing provision in the local area.
- 9.90 National planning policy and its associated guidance acknowledge that there will be certain main town centre uses which have particular market and locational requirements which mean that they may only be accommodated in specific locations (see paragraph 012 of the Town Centres NPPG). This does not mean that proposals for main town centre uses do not need to accord with the impact and sequential policy tests, but that there is a recognition that an assessment may need to take account of the specific business model requirements of the proposed development.
- 9.91 There will be circumstances where development for main town centre uses is proposed in out of centre locations, including predominantly employment areas and other existing out of centre commercial destinations. In such instances, proposals should be supported by an appropriate assessment which demonstrates compliance with the relevant retail policy tests, but which sets out clearly the intended catchment area, the specific business model requirements and the associated justification as to why it could not be accommodated within a defined centre. Such examples may include small-scale food and beverage uses which serve the working catchment in an employment area, or where the retail element of a business is directly related to the wider use on the site and therefore locating it elsewhere would not serve its intended purpose or catchment.
- 9.92 In light of the above, within the employment allocations at JPA4 Bewshill Farm and JPA5 Chequerbent North, no specific allowances will be made within the policy for ancillary uses.

Recommended Approach

- 9.93 Limited ancillary uses can play an important role in supporting workforce needs, improving the attractiveness of the sites to employers and investors, and reducing the need for employees to travel elsewhere for day-to-day services.

- 9.94 However, such uses should remain clearly subordinate to the primary employment function of the allocations and should not undermine their role in delivering industrial, logistics, manufacturing, and other employment-generating development.
- 9.95 In such instances, proposals should be supported by an appropriate assessment which demonstrates compliance with the relevant retail policy tests, but which sets out clearly the intended catchment area, the specific business model requirements and the associated justification as to why it could not be accommodated within a defined centre.
- 9.96 Consideration will be given to the cumulative impact of ancillary uses to ensure that they do not evolve into independent commercial destinations that would be more appropriately located within established centres.

Hierarchy

- 9.97 By way of background, Policy TC1(b) of the NPPF explains that planning policies should:

‘Set out the hierarchy of centres, and any areas within them where specific policies on the nature and scale of development apply, including:

- i. **The location and extent of town centres and primary shopping areas;**
- ii. **Areas particularly suitable for a greater diversity and/or intensification of use, including through residential development; and**
- iii. **Areas within which infrastructure and public realm improvements are proposed.’**

- 9.98 The hierarchy determines how the sequential test is applied under a 'town centre first' regime. By way of example, a proposal for an out-of-centre foodstore near a Local Centre would be expected to pass the test of having first examined the availability, suitability and viability of central or edge-of-centre sites in nearby higher order centres (i.e. a Town Centre).
- 9.99 We provide below the currently adopted hierarchy for Bolton, as set out in the adopted Local Plan.

Table 9.8: Table of existing town centre hierarchy as set out in Adopted Bolton Local Plan

Classification	Centres	Definition
Sub-Regional Town Centre	Bolton	Area including the primary shopping area and area predominantly occupied by main town centre uses within or adjacent to the primary shopping area.
Town Centres	Farnworth Westhoughton Horwich Little Lever	Area predominantly occupied by main town centre uses.
District Centres	Chorley Old Road Astley Bridge Broughton Harwood	Comprises a group of shops often containing at least one supermarket or superstore and a range of non-retail services such as banks, building societies and restaurants, community facilities such as libraries and other retail uses that all contribute to meeting the day-to-day needs of the community that would be served by the centre
Local Centres	Deane Road Derby Centre Tonge Fold	Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket,

Classification	Centres	Definition
	Daubhill and St Helens Road Halliwell Road Tonge Moor Road Blackrod Bromley Cross Kearsley	a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette

- 9.100 The centres assessed across the Borough have been categorised by the different levels in the hierarchy by considering a range of factors to ensure that they are proportionate to the function in which they perform. Factors considered in respect of the hierarchy include: the mix of uses provided; the social and community uses in the centres; the number of units and amount of floorspace present; along with the overall role and function that the centres play within their locality, including the location of the centres within the administrative area.
- 9.101 We have reviewed the size, offer and overarching nature of the Borough's town, district and local centres, and have sought to define them accordingly based on the definitions as provided above.
- 9.102 The district centres are clearly of a lesser role and function, and although they still provide an important retail, service and leisure offer to the surrounding catchments, this is on a smaller scale than the town centres. Each of the four district centres has appropriate provision of uses, including a supermarket, service uses, and community facilities, in line with the definition above.
- 9.103 In terms of the local centres, these provide for more localised role, serving residents' day to day needs and providing amenities which provide for retail, leisure and service needs of the local community and catchment. In each case, the centre provides for at least a convenience offer which provides a 'top-up' shopping function, alongside wider commercial uses such as cafes, hairdressers and so on.
- 9.104 In summary, in consideration of the above, we are therefore content that the retail hierarchy as defined remains appropriate.

Boundaries

- 9.105 Policy TC1(b) of the NPPF states that local authorities should define the location and extent of town centres and primary shopping areas.
- 9.106 National planning policy no longer explicitly prescribes the designation of primary and secondary frontages. The Government has confirmed that the removal of this requirement reflects the general need to be flexible in planning for the future of town centres due to the rapid changes taking place in the retail and leisure industries.
- 9.107 Whilst the removal of the requirement does not preclude local planning authorities from identifying primary and secondary shopping frontages where supported by local circumstances, we do not believe that this is merited in this instance in relation to the centres across the borough.
- 9.108 The Study has generally identified across the centres that there is a need to repurpose and reoccupy floorspace in the manner that Use Class E generally provides for. In this context, the separate designation of both primary and secondary frontages serves no useful purpose.

9.109 Annex 2 of the NPPF indicates that a primary shopping area is the: ‘Defined area where retail development is concentrated’.

9.110 Annex 2 also identifies that a town centre is the:

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

9.111 Annex 2 further defines the main town centres’ uses as:

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

9.112 We have undertaken a review of the most recent iterations of the town centre and primary shopping area boundaries as provided within adopted policy documents.

9.113 As identified above, we do not believe that there are any requirements for primary and secondary frontages to be adopted going forward, given the provisions of Class E of the Use Classes Order and the Government’s general objective that there should be greater flexibility on the high street. Use of a core frontage can be useful for orienting spatial plans, but do not necessarily need to serve a purpose in policy.

9.114 The definition of ‘edge of centre’ is proposed to be streamlined to be a location that is well connected and within 300 metres of a town centre boundary for all main town centre uses. This would mean that the designation of a primary shopping area, whilst still an option, is no longer required for the application of the sequential test. It may, though, serve other development management functions.

9.115 In consideration of this, we have reviewed Bolton’s internal boundaries and have the following recommendations.

Table 9.9: Table of Summary of Boundary Recommendations in Bolton Town Centre

Boundary	Boundary Recommendations
Town Centre Boundary	We recommend revising the town centre boundary to exclude the College and University and starting the boundary along Moor Lane/Marsden Road/ Ormrod Street to the west and Trinity Street to the south, excluding the Central Retail Park. We do not recommend a separate primary shopping area within the town centre boundary due to the diverse offer and the spread of uses within the centre.
Primary Shopping Area	We do not recommend the separate designation of a primary shopping area within Bolton town centre in light of changing and more diverse offer of the town centre, with no particular area being retail-focused.
Primary Shopping Frontage and Secondary Shopping Frontage.	We do not recommend that any primary or secondary frontages are designated within Bolton town centre (or indeed, any of the other defined centres).

9.116 The following change is proposed to the boundary for the smaller town centres:

Table 9.10: Table of Summary of Boundary Recommendations for other Defined Town Centres in Bolton

Centre	Boundary Recommendations
Farnworth Town Centre	We do not recommend any changes to the existing adopted Farnworth Town Centre Boundary. We are comfortable that the current boundary appropriately defines the area within which the main town centre uses are focused. We do not recommend the separate designation of a primary shopping area within Farnworth in light of the dispersed nature of the overarching composition of uses across the centre.
Horwich Town Centre	We recommend drawing the Town Centre Boundary tighter around the main town centre uses within Horwich. This would result in removing the predominantly residential uses to the west of the centre, and drawing the boundary a lot tighter along Lee Street and Church Street. This would better meet the definition as provided within the NPPF in respect of town centre uses. We have also updated the boundary to better reflect the OS Base Map. We do not recommend the separate designation of a primary shopping area within Horwich town centre due to the general mix of uses spread across the centre.
Little Lever Town Centre	We do not recommend any changes to the existing adopted Little Lever Town Centre Boundary. We do not recommend the separate designation of a primary shopping area within Little Lever in light of the dispersed nature of the overarching composition of uses across the centre.
Westhoughton Town Centre	We recommend drawing the Town Centre Boundary tighter around the main town centre uses within Westhoughton, and excluding town centre uses which in our view, do not function as part of the overarching town centre offer. In this regard, this would result in removing the predominantly residential uses to the east of the centre, and drawing the boundary a lot tighter around Victoria Street and the B&M retail store. We also recommend removing both the Sainsbury's and Lidl foodstores from the town centre boundary to the south of Cricketers Way. It is our view that these are sufficiently divorced from the wider offer of the town centre and the main road acts as a barrier between the two. We do not recommend the separate designation of a primary shopping area within Westhoughton town centre due to the general mix of uses spread across the centre.

Thresholds

9.117 In accordance with Policy TC3 of the NPPF, retail and leisure developments greater than 2,500 sqm proposed in edge-of-centre and out-of-centre locations will be subject to the assessment of the impact criteria set out in the same paragraph of the NPPF.

9.118 Planning Practice Guidance²⁵ explains that, where appropriate, Local Planning Authorities are entitled to identify local thresholds in accordance with the following considerations identified in the PPG:

- scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;

²⁵ (Town Centres and Retail) Planning Practice Guidance, Paragraph: 015, Reference ID: 2b-015-20190722

- whether local town centres are vulnerable;
- likely effects of development on any town centre strategy; and
- impact on any other planned investment

9.119 It is considered that 2,500 sq.m is a substantial size for any retail unit, which could reasonably be expected to draw trade from any of the centres.

9.120 In considering the setting of a local impact threshold, it is relevant to consider the scale of development (relating to convenience and comparison goods retail uses, and leisure uses) which would divert a material level of expenditure away from a defined centre or potentially remove a key tenant from that centre.

Scale of Proposals Relative to Town Centres

9.121 We have floorspace data provided by Experian Goad for the five town centres, and Valuation Office data for all other centres. Applying that composition analysis to the PPG test, we can contrast below the relative scales of the main convenience retailer units in the centre, as well as the average size of all other units.

Table 9.11: Table of average unit size, and convenience retailer units with Bolton's designated town and district centres

Centre	Average unit size	Average convenience unit size	Average comparison unit size
Town Centres			
Bolton	299 sq.m	545 sq.m	401 sq.m
Farnworth	196 sq.m	335 sq.m	238 sq.m
Horwich	116 sq.m	242 sq.m	93 sq.m
Little Lever	186 sq.m	588 sq.m	176 sq.m
Westhoughton	189 sq.m	828 sq.m	194 sq.m
District Centres			
Astley	230 sq.m	707 sq.m	421 sq.m
Brightmet	297 sq.m	531 sq.m	476 sq.m
Harwood	272 sq.m	2,270 sq.m	72 sq.m
Chorley Old Road	117 sq.m	86 sq.m	223 sq.m

9.122 The analysis of unit sizes in Bolton town centre points to a prevalence of larger retail units when compared with the four other town centres; the average unit size and average comparison unit size are contained between 299 and 401 sq.m. The convenience retailers occupy on average the largest units within the centre, with an average of 545 sq.m. This is predominantly owed to the size of the Aldi, Morrisons and Sainsbury's units which are all large-format convenience operators, tempered by a number of smaller convenience stores/off licences and specialised bakeries and grocers.

9.123 Bolton's lower-order town centres present much smaller units on average. Average unit sizes for the smaller town centres range from 116 sq.m in Horwich to 196 sq.m in Farnworth town centre and average comparison units range from 93 sq.m in Horwich to 238 sq.m in Farnworth. The convenience provision provides for a higher average unit size, ranging from 242 sq.m in Horwich to 828 sq.m in Westhoughton. It is clear that Westhoughton benefits from a particularly strong convenience offer through the provision of a large-format Sainsbury's on the edge of the

centre, alongside an Aldi (also on the edge of the centre) and Co-op foodstore. The large scale Sainsbury's is therefore reflected in Westhoughton's average convenience unit size.

9.124 Bolton town centre is established as the convenience and comparison retail hub for the borough, as is brought through into its sub-regional role. There is, however, a threat of out-of-centre retail parks and further trade leakage to these, in particular, the growth of Middlebrook Retail Park. The establishment of an out-of-centre retail or leisure unit may not impact the larger-scale retailers in the centre. However, the presence of these retailers is likely to be a considerable draw for visitors to the centre to undertake other shopping and activities, leading to critical spin-off trade to other units. From a review of the GOAD survey for Bolton, approximately 80% of all units in the centre are 300 sq.m or smaller, and such units are vulnerable to loss of trade.

9.125 Looking at the district centres, although average unit sizes are broadly the same as the smaller town centres, due to the overarching offer of these centres being focused and very dependent on the large format convenience foodstores, there is a clear vulnerability should any of these individual stores close.

The Existing Vitality and Viability of Town Centres

9.126 A full healthcheck for each centre has been carried out. Interventions are recommended for each of the centres to improve the overall cohesion of the centres, and to ensure future viability and vitality. Detailed healthchecks will be presented to the Council as part of the full Draft Study.

Whether Local Town Centres are Vulnerable

9.127 The town and district centres are considered to be relatively healthy. As set out above however, Bolton town centre has a vacancy rate of 28.5% in terms of the commercial units and 25.2% in terms of the floorspace, which is above average. The number of vacant units has increased from 81 to 175 (an increase of 94) since 2007. Vacant units are only one factor in assessing health, and it is considered that other factors (diversity of uses, pedestrian flows, and community investment) present a broadly healthy centre. Indeed, as we set out above, extensive regeneration schemes are underway within the centre which will rebalance this vacancy rate.

9.128 Bolton town centre has an established role in providing a range of comparison units, including national retailers such as Primark, Boots, H&M, Next, JD and B&M. From our healthcheck, this comparison provision remains strong. The emerging strength of Bolton town centre is its leisure provision through both food and beverage units, and other leisure facilities, along with the new office floorspace provision. Potential vulnerability arises from some established out-of-centre retail competition, including Middlebrook, particularly due to its provision of major comparison retailers (JD, Next, Clarks, Boots, Home Bargains, River Island), alongside a Marks and Spencer unit.

9.129 In general, the town centres benefit from the location of a national multiple convenience retailer, and it is considered that any loss to these retailers would have an impact on the centre as a whole. Accordingly, we consider that a heavy reliance on existing anchor retailers provides a proper context for its district centres to be considered 'vulnerable' to out-of-centre trade.

Likely Effects of Development on any Town Centre Strategy and the Impact of Planned Investment

9.130 The Bolton Town Centre Masterplan, including the envisioned delivery of public realm improvements, leisure, entertainment and food, and new housing developments, is expected to provide an increased interest in the centre. Delivery of the proposals would inject significant investment and draw to the existing businesses in the centre, alongside new footfall associated with the residential development. This can have flow-on impacts for investor confidence and the commitment of future potential occupiers. As such, any out-of-centre development could have

the ability to jeopardise any planned investment, which is intrinsically tied to the delivery of the town centre investment.

- 9.131 Due to the smaller scale of the other town and district centres, and the relatively modest size of most of their commercial units, we consider it appropriate for a lower impact threshold of 300 sq.m to apply to potential development proximate to these centres. This is in keeping with their more localised role and function but demonstrate the potential implications out of centre developments could have on these centres.
- 9.132 The district centres are generally anchored by a national multiple convenience store (typically operated by Co-op, Sainsbury's or Tesco). These operators underpin the function of such smaller centres, drawing in custom and encouraging linked trips to the other parts of the centre. Should the viability of such stores be impacted, there is a real risk of the role of the wider centre being undermined. There are relatively few units substantially larger than 300 sq.m in any of the town and district centres; as such, to lose an occupier of this magnitude could have a significant adverse impact on the centre as a whole.
- 9.133 The proposed thresholds at local centre level are considered to reflect the relatively small size of some of the centres at the lower end of the retail hierarchy and their consequent potential susceptibility to alternative 'out-of-centre' provision. In practice, it is envisaged that a proposal of just greater than 200 sq.m adjacent to a local centre would generally require an impact assessment of proportionate length (i.e. for development of such a scale, impact may on occasion be able to be dealt with as part of the covering letter accompanying the application).
- 9.134 Where an application proposal is above the respective stated impact threshold, we would recommend that the applicant discusses and agrees the scope of the retail and leisure impact assessments (dependent on the nature of the proposal) prior to submission. The lower threshold of 200 sq.m for local centres is considered appropriate due to potential for convenience stores of even a relatively small nature to substantially impact upon the performance of existing operators, due to the potential higher sales densities of such proposals. This would ensure that particular protection of these smaller centres is considered appropriately.
- 9.135 For the purpose of drafting future planning policy, it is important to qualify the area to which each local impact threshold will apply. We recommend that the lower impact threshold of 300 sq.m would be applicable within 800 metres of the boundary of the relevant centre. The distance of 800 metres is broadly commensurate with the potential walk-in catchments of smaller centres and is identified by Guidelines for Providing for Journeys on Foot (The Institution of Highways & Transportation, 2000) as being the 'preferred maximum' acceptable walking distance to a centre. We consider it to be appropriate for the higher threshold of 500 sq.m to apply authority-wide across Bolton (i.e. beyond 800 metres of these centres), due to the lesser likelihood of significant adverse impacts being concentrated on one centre when the development is more distant.
- 9.136 It is important to emphasise that, whilst the locally set threshold would require the submission of an impact assessment for all edge-of-centre and out-of-centre developments exceeding the thresholds, national guidance states that the impact test should be undertaken in a proportionate and locally appropriate way, commensurate to the scale of development proposed. The level of detail would typically be agreed with Officers during the pre-application process in order to avoid overly onerous requirements that may otherwise restrict and delay development opportunities from coming forward.
- 9.137 Based on the above, we are of the view that an impact assessment will be necessary to accompany proposals for retail and leisure uses (including those relating to mezzanine floorspace and the variation of restrictive conditions) which are not located within a defined centre where:

- the proposal provides a gross floorspace in excess of 500 sq.m gross; or
- the proposal is located within 800 metres of the boundary of Bolton town centre and is in excess of 500 sq.m gross; or
- the proposal is located within 800 metres of the boundary of another town and district centre and is in excess of 300 sq.m gross; or
- the proposal is located within 800 metres of the boundary of a local centre and is in excess of 200 sq.m gross.

9.138 In our experience, it will only generally be the development of a scale greater than these thresholds that could lead to a 'significant adverse' impact, which could merit the refusal of an application for town centre uses in accordance with the provisions of Policy TC4 of the NPPF.

9.139 In terms of the practical application of the impact policy threshold, the primary shopping area (where defined) comprises the relevant boundary in respect of retail proposals, and the wider centre boundary is the relevant boundary in respect of leisure applications.

9.140 The same approach in respect of the sequential and impact tests as set out above is to be applied to proposals for the extension of existing units (including the introduction of mezzanine floors). This means that all proposals will remain subject to the sequential assessment, which should consider the amount of floor space to be created by the extension.

9.141 An Impact Assessment will be required where the amount of new floor space, proposed to be created, exceeds the suggested thresholds. Where proposals are made to merge or sub-divide existing out of centre premises or to vary existing conditions which restrict the sale of particular goods, the proposals will be treated in the same way as if they were new units. This again reflects the sensitivity of floorspace provision and unit sizes across the authority area and the impact such changes in market offer could have on the wider centres' hierarchy. A prime example exists in a range of out of centre retail parks and lower order centres where the floor space of units and the sale of particular products are restricted to minimise direct competition with the centres.

9.142 This is also an important consideration in terms of functionality and the overall role of the centre or out of centre location.

Takeaway Uses

9.143 National planning policy recognises the role of planning in promoting healthy communities, including how the environment can impact on health and influence healthy lifestyle choices. Rising obesity rates are a nationally recognised problem. Obesity reduces life expectancy, and increases the risk of serious diseases like cancer, heart disease and diabetes. While the causes of obesity are complex, diet and environment are proven to be huge factors.

9.144 Public Health England (PHE) and the Local Government Association have provided a briefing on regulating the growth of hot food takeaway outlets. It acknowledges the complexity of the ways in which the environment promotes obesity and explains that actions can be taken by local authorities to reduce the extent of obesity promotion locally. It identifies that controlling the proliferation of hot food takeaway outlets has a role to play. It is acknowledged that a causal link between hot food takeaway outlets and obesity cannot be established but identifies that there is evidence of associations between obesity and the availability of fast food.

- 9.145 As well as health impacts, the new guidance recognises that hot food takeaways play a big role in town centres and other key areas across the authority area.
- 9.146 We understand that the proliferation of hot food takeaways is a concern across Bolton and although it is noted that such uses have their benefit in providing activity into the evening, there are potential wider negative impacts through closed shutters during the day, anti-social behaviour and other health matters. An important element of any future planning policy is the differentiation between hot food takeaways and other food and beverage uses which function differently, provide alternative offers and often have different opening hours.
- 9.147 Achieving an appropriate balance of uses within a centre should continue to be a priority for the local authority, and ensuring that centres provide a good mix of both daytime and evening economies and create safe and attractive environments for residents and visitors alike. Should the proportion of takeaways significantly increase within centres, then this balance of mix of uses and provision of amenities to meet the catchments' needs could decrease considerably, and residents could look elsewhere to meet their day-to-day retail, service and leisure needs. As such, future proposals to increase this provision should be monitored carefully.
- 9.148 Given the above, we are of the view that the following control within local planning policy is provided, and the specific criteria provided ensures that the Council retains control over any potential future planning applications for hot food takeaways within defined centres. In particular, we recommend that:
- In the defined centres, hot food takeaways will not be permitted where they would result in:
 - more than 10% of the ground-floor commercial premises in a block being used for hot food takeaways; and/or
 - more than two adjacent hot food takeaways.
 - Outside of the centres listed in (1), hot food takeaways will not be permitted:
 - in wards where the most recent National Child Measurement Programme data classifies 10% or more of Reception pupils or more of 15% of Year 6 pupils as obese (including severely obese); and/or
 - in within Local Super Output Areas (LSOA) which fall within the 30% most deprived areas in England i.e. Index of Multiple Deprivation Deciles 1, 2 and 3; and/or
 - within 800m of a secondary school entrance, unless opening hours are restricted during school opening times, lunchtimes, and school closing times.
- 9.149 We recommend that the criteria ensures that the Council can assess each application on its own merits, taking account of the current offer and health of the relevant centre and the impacts of allowing an additional takeaway use.
- 9.150 The policy should also identify possible amenity impacts on an area which will be taken into consideration when assessing a takeaway proposal, including:
- The impact of noise and general disturbance, fumes, smells, litter and late-night activity, including those impacts arising from the use of external areas;
 - The impact on highway safety;
 - The availability of refuse storage and disposal facilities; and
 - The appearance of any associated extensions, flues and installations.

Appendix 1 – Study Area

Appendix 2 - Household Survey Results

Appendix 3 – Town Centre Healthchecks

Appendix 4 – District Centre Healthchecks

Appendix 5 – Local Centre Matrix and Composition Plans

Appendix 6 – Quantitative Retail Tables

Appendix 7 – Quantitative Leisure Tables

Appendix 8 – Proposed Boundaries

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