APPENDIX 3

ROYSTON HEALTH CHECK

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HEALTH CHECK – ROYSTON DISTRICT CENTRE

Introduction

1. Paragraph 23 of the National Planning Policy Framework ("NPPF") sets out the objectives by which the Government will seek to help promote competitive town centre environments, including:

    - Recognise town centres as the heart of their communities and pursue policies to support their vitality and viability; and
    - Define a network and hierarchy of centres.

2. Local authorities are to monitor the 'health' of their town centres and how they are changing over time. An assessment of the vitality and viability of existing centres provides an important understanding of their health in the context of assessing the impact implications arising from a proposed development.

3. In this case the key centre addressed in the context of the retail impact assessment is Royston Town Centre. Consequently, a detailed assessment has been carried out of the 'health' of the town centre.

4. In carrying out this assessment we have drawn on health check information provided by the November 2010 England & Lyle (E&L Study 2010) Smaller Centres Study commissioned by Barnsley MBC as well as carrying out our own update.

Settlement & Retail Hierarchy

5. The RSS designates five principal towns in Barnsley, but not including Royston. However, the Core Strategy (CS) allocates Royston as a 'Principal Town'. The CS sets out why the Council regards Royston as meeting the RSS criteria for a 'Principal Town'. Principal Towns are to be the main focus for housing, employment, shopping, leisure, education, health and cultural activities and facilities, and their role as accessible and vibrant places to live should be enhanced.

6. The Core Strategy sets out the Borough's settlement hierarchy under paragraph 7.4 and identifies Royston as one of six principal towns. Royston is regarded as providing significant housing and employment opportunities (paragraph 7.68).

7. Royston is identified as one of 6 District Centres in Barnsley in the E&L 2010 Study. It sits below Barnsley, which is the main centre in the borough and above 12 local centres. Other district centres include Cudworth, Hoyland, Penistone, Royston and Wombwell.

8. Royston is located in the northern part of the borough around 6 kms north of Barnsley. Wakefield lies to the north. It is the main town in the northern part of the Borough with Carlton and Cudworth to the south east.

Royston District Centre

9. Royston's district centre offer is provided by two separate areas based around the Wells, located at the western end of the centre and focussed on the main Station

Road/Midland Road/Church Street/High Street junction, and to the east along Midland Road. The overall centre is broadly linear in nature. The two areas are some distance apart with some town centre uses spread along the length of Midland Road.

10. The adopted UDP Proposals Map effectively shows two separate centres in Royston with the Midland Road end being the larger centre incorporating Asda (formerly Netto) in the west and the Sainsbury Local in the east.

Diversity and Amount of Main Town Centre Uses

11. Table 1 below sets out the number of outlets in the defined centre (including both Midland Road and The Wells to reflect presentation in the E&L 2010 Study).

Table 1

Number of Outlets – August 2011			
GOAD Categories	**Number**	**%**	**%UK**
Convenience	9	15.3	8.7
Comparison	14	23.7	33.4
Retail Service	8	13.6	13.2
Leisure/Financial/Business Services	12	20.3	32.7
Vacant	16	27.1	11.7
TOTAL	**59**	**100**	**100**

12. The centre's offer is characterised by its generally linear nature extending along Midland Road. The centre includes a variety of retail and service related uses typical of provision in a smaller town. Convenience provision is above the UK average in terms of numbers of units with a Co-op (615 m^2 net) store at The Wells and an Asda store at Midland Road (951 m^2 net), Sainsbury Local towards the eastern end of the centre, and a range of independent local shops including a butcher and newsagent. The convenience sector represents 15.3% of all units in the overall centre, nearly double the UK average of 8.7%.

13. Among the comparison sector there are a more limited range of retailers including Weldricks Pharmacy, located next to the Doctor's surgery near Asda, and other more specialist and locally based traders. Other retailers include a post office, two florists, computer shop, furniture store, charity shops, motorbikes & quad shop and Walkers Racing Karts store and the Royston Window Company. Apart from Weldricks pharmacy, the comparison retail offer is biased towards the independent sector offering a range of retailers. Table 1 above shows the proportion of comparison uses slightly below the GOAD national average. Among the service sector, there are a variety of uses including hairdressers, a bank, fish and chip shops, a public house, snooker club and a dentist.

14. Vacant units are located throughout the centre and include 14 units, representing around 27% of all units. This is clearly above the national average of 11.7%. Vacancies are therefore well above the national average, which may be a reflection of current economic conditions or the lack of attraction of Royston as a centre. The results of the land use survey show that when compared to the national average the choice of shopping in Royston is geared more to the convenience sector than comparison goods. Retail services are in similar proportion to the national picture

whilst vacancies are above the national average. However, the centre lacks pubs, cafes and restaurants as well as non food multiples. Whilst the centre provides a local shopping function, it does not benefit from a range of complementary uses, such as cafes, that would keep shoppers in the centre longer. It is also likely that the nature of the food offer is geared more towards top up rather than main food shopping.

15. A 2007 household telephone shopping survey examined shopping patterns in the Barnsley area including Zone 4, based on the Royston/Carlton/Staincross/Darton area. The survey asked about main food and top up shopping patterns. In relation to main food shopping the survey showed that only 1.7% shopped at Netto on Midland Road and 0.6% at Co-op in the town. The vast majority shopped at a range of destinations in the surrounding area (i.e. Asda at Old Mill Lane 44.5%, Morrisons Barnsley 15%, Tesco on Wombwell Lane 5.8% and Asda on Asdale Road in Wakefield 10.4%). This shows substantial outflow of shoppers to destinations in surrounding towns.

16. Those interviewed were also asked about non food shopping patterns. In relation to fashion goods, most people either shopped in Barnsley town centre (49%) with 16% using Meadowhall and 14% Wakefield.

17. The retail offer in Royston would benefit from enhancement in terms of both quantity and quality of retailers provided and the nature of that provision. Whilst there are a number of vacant units and these are spread throughout the centre, units are out dated and in many cases are unlikely to attract modern retailers given the nature and quality of the offer.

18. The centre includes a range of other uses such as places of Worship, the successful Community Campus on Station Road, doctor's surgery, dentist and office uses as well as residential uses within the defined centre.

Vacancies

19. As indicated above Table 1 shows relatively high vacancy levels in the centre with nearly 27% of units vacant compared to the UK average of around 12%. This could be for a number of reasons including the current economic recession, the lack of modern units attractive to retail investors and the more limited footfall in the centre as a result of the more limited offer in terms of range of retailers and other services.

Retailer Representation and Intentions to Change

20. Overall, retailer representation in Royston is reasonable and reflective of the size and nature of the centre based on the current range and choice of retailers. Food shopping is limited to smaller foodstores including the Co-op (615 m^2 net) and Asda (951 m^2 net). Other convenience provision includes Fulton Foods and a range of smaller retailers. The centre has a reasonable range and offer of comparison retailers with a number of specialist traders such as a motorbikes and quad bike shop, a kart shop and computer shop.

Shopping Rents and Centre Yields

21. There is no published data on shopping rents and yield information available for the centre of Royston.

Pedestrian Flows

22. Although no independent pedestrian flow counts have been carried out as part of this health check assessment, our observations of the centre suggest that pedestrian flows are reasonable and focussed around the Wells and Asda, which provide the largest car parks and main convenience stores in the centre.

Accessibility

23. Buses access the town centre in a number of locations with services mainly running along Midland Road. Regular bus services link the town with surrounding settlements including the main town of Barnsley to the south and Wakefield to the north. Services include number 57, 59 and 194. Car parking within the centre is good with adequate parking at both Co-op and Asda on Midland Road. There is some on street parking with further parking to the front of the health centre by Weldricks Pharmacy. Other parking proximate to the centre includes parking at the Community Campus to the north, off Station Road.

24. The Midland Road and The Wells ends of the centre are both within easy walking distance of existing residential areas making access on foot convenient for a large part of the town. The main drawback in the centre is the distance to walk from the eastern end of Midland Road to the Wells resulting in residents perhaps using the area nearest where they live.

Customer and Residents' Views and Behaviour

25. An in centre survey was carried out as part of the council commissioned E&L 2010 Study. This was carried out in July 2010 when a survey of 75 respondents was carried out. Interviews were carried out on Thursday, Friday and Saturday. The results are produced in full in the E&L Study. The main findings are summarised below:

- 80% of people stated food shopping as their main reason for visiting Royston on the day interviewed whilst 7% were there for work;
- 17% stated window shopping/browsing as their second reason for visiting;
- 95% had started their journey to the centre on the day interviewed from home;
- Mode of access was predominantly by car (68%) but with a reasonable level of walk in visitors (28%);
- The majority of those arriving by car parked at Netto (now Asda) (37%), which is more central compared to the Co-op end of the centre;
- Most people visiting on the day interviewed travelled for less than 5 minutes (53%) with 25% taking 6 to 10 minutes and a further 8% between 11-15 minutes. 8% took 16-30 minutes;
- Respondents were also asked where they normally did their main food shop and responses included a number of destinations as follows;
    - Netto (now Asda), Royston 38.7%
    - Asda, Old Mill Lane, Barnsley 18.7%
    - Co-op, Royston 14.7%
    - Asda, Wakefield 8%
    - Morrisons, Barnsley 1.3%
    - Morrisons, Cortonwood 2.7%
    - Don't know/varies 6.7%
    - Other destinations 9.2%

(it should be remembered that those respondents from the in-centre survey are using the centre already when compared to the telephone survey which examines more broader shopping behaviour)

- In terms of non food shopping, those visiting Royston town centre mainly shopped in Barnsley (54.7%) for fashion goods with Wakefield town centre (16%) and Meadowhall (10.7%) the other main destinations;
- Respondents were asked about their likes and dislikes in Royston. Those aspects liked by respondents included:
  - Easy access from home (27%);
  - Good shops (15%); and
  - Other aspects (17.3%) including 'it is quiet' and goods at discounted rates/cheaper goods/bargains;
  - 28% indicted there was nothing particular they liked.
- In terms of dislikes:
  - 11% disliked the range of restaurants/cafes in Royston
  - 31% disliked 'other' aspects which included 'lack of atmosphere' and 'little to do'.
  - 53% suggested there was very little or nothing they particularly disliked
- When asked about improvements the main factors mentioned included:
  - Clean shopping streets (19%)
  - Attract larger retailers (6%)
  - Improved play areas for children (15%)
  - 24% of respondents suggested there was nothing or nothing in particular they would like to see improved in Royston
- Respondents were also asked for their views on what shops, services and leisure facilities they would like to see in Royston centre. The main answers included:
  - Clothes/Shoe shops (27%)
  - Bank (11%)
- In terms of leisure facilities, 17% wanted to see a bowling alley, 16% a cinema, 8% more cafes/restaurants and 8% a swimming pool;
- Respondents were asked how often they visited the centre for shopping. 36% visit everyday/most days, 40% 2-3 times a week and 15% once a week.

26. The above survey results represent those using the district centre and do not take account of those already regularly travelling elsewhere for shopping and leisure activities. It shows that currently the centre is used very much by local residents on a regular basis for day to day goods with top up food shopping a main reason for visiting the centre.

27. The E&L 2010 Study refers to the results of a household survey carried out in 2007. Zone 4 covers the Royston/Carlton area. The results of this survey showed a high outflow of food shopping trips to surrounding superstores in Barnsley and south Wakefield.

Perception of Safety and Crime

28. The centre is focussed on the main road through Royston (Midland Road and The Wells). Main car parks are well lit and shopping areas are in the busier parts of the town where there is passing traffic and more activity. Access around the centre is reasonable along pedestrian footways. With adequate street lighting the centre is reasonably safe and secure.

State of Town Centre Environmental Quality

29. The general environmental quality of the centre is reasonable. The Asda car park and area around Asda is relatively modern and of reasonable quality. The Wells includes a pedestrian area in the north-west quadrant of the signalised junction with some street furniture including seating. The Midland Road end of the centre is not as good quality as The Wells. The quality of buildings and pedestrian areas along the road are not as attractive as the Wells end of the centre. Overall, we conclude the centre to provide a reasonable level of environmental quality.

Conclusion

30. Having regard to the various indicators identified and evidence available, Royston district centre provides a reasonable range and choice of retailers for the size of town and nature of the centre. Convenience goods shopping is the main reason for people visiting the centre although the in centre survey will only pick up those using the centre and does not measure those who live in the area but chose to shop elsewhere.

31. The quality of the centre is reasonable with environmental quality of the centre better at The Wells end than the eastern part of the Midland Road. Vacancy levels are relatively high compared to the national average and this could in part reflect current economic conditions but could also reflect the nature of those vacant units including their size, age and limited attractiveness to national retailers. Overall, the centre is in reasonable health although it would benefit from further investment and higher pedestrian footfall. It would also benefit from additional food shopping provision of sufficient size to attract people to the town to carry out their main food shop rather than travelling to more distant stores.