

Appendix 4 – District Centre Healthchecks

Banner Cross District Centre

Description - Banner Cross is located in the west of the city, and runs in a linear fashion northwards away from the intersection of Ecclesall Road and Psalter Lane. Situated just to the south of Endcliffe Park, the district centre has a generally high standard of environmental quality, with a number of architecturally attractive buildings and characterful shopfronts lending a positive aspect, notwithstanding the volume of traffic movements along Ecclesall Road.

In respect of the retail composition, the centre is anchored by convenience goods operators, such as Co-op Food and Sainsbury's Local, and dominated by service operators. Banner Cross has a particularly strong range of retail service operators, far in excess of the current national average.



Figure 1: The district centre has a reasonable provision of convenience goods operators. The Co-op Foodstore, shown here, is one of the key anchor convenience operators.



Figure 2: Modern, purpose built units at Banner Cross provide attractive locations for business and retail operators. These units are of high quality, in keeping with the character of the surroundings.



Figure 3: Notwithstanding the more modern units in the district centre, the majority of retail units are converted former terrace dwellings, which offer more appealing retail accommodation to independent operators.



Figure 4: Public transport is easily accessible from within Banner Cross, with a number of bus stops and services located along Ecclesall Road.

Table 1 District Centre Floorspace Composition

| GOAD Category | Floorspace at 2022 (sq.m) | Floorspace at 2022 (%) | Floorspace UK Average at 2022 (%) |
|----------------------|----------------------------------|-------------------------------|--|
| Comparison | 754 | 9.0% | 30.4% |
| Convenience | 2,474 | 29.5% | 15.4% |
| Financial | 977 | 11.6% | 6.8% |
| Leisure | 2,002 | 23.8% | 25.7% |
| Retail Service | 1,965 | 23.4% | 7.2% |
| Vacant | 226 | 2.7% | 13.9% |
| TOTAL | 8,398 | 100 | 100 |

Source: Composition of District centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Table 2 District Centre Unit Composition

| GOAD Category | Units at 2022 | Units at 2022 (%) | Units UK Average at 2022 (%) |
|----------------|---------------|-------------------|------------------------------|
| Comparison | 11 | 14.5% | 27.0% |
| Convenience | 9 | 11.8% | 9.2% |
| Financial | 11 | 14.5% | 9.1% |
| Leisure | 16 | 21.1% | 24.7% |
| Retail Service | 25 | 32.9% | 15.7% |
| Vacant | 4 | 5.3% | 14.1% |
| TOTAL | 76 | 100 | 100 |

Source: District centre composition based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Uses - Banner Cross district centre is dominated by service operators, with 68.5% of all operators being categorised as either leisure, retail or financial and business service operators. Retail service operators are particularly well-represented in Banner Cross, with 25 such operators accounting for 32.9% of all units. This provision is far greater than the current national average. Retail service operators are diverse, and include dry cleaners, hairdressers, beauty salons, tattooists, an opticians, an undertakers, a Texaco petrol filling station and a Post Office. The leisure service offer is also strong at Banner Cross, with 16 leisure service operators accounting for 21.1% of all units and include cafés, public houses, restaurants and hot-food takeaways. The district centre also has a reasonably strong range of financial and business service operators, with 11 operators accounting for 14.5% of all units. These operators include estate agents, window showrooms and building suppliers, solicitors and financial advisors.

There are nine convenience goods operators in Banner Cross, equating to 11.8% of all operators in the district centre. Convenience goods operators are anchored by Co-op Food and Sainsbury's Local, alongside other operators including a butchers, a bakery, a shoe repair shop and tobacconist. Banner Cross has a comparison goods offer which is far less than the current national average, with 11 units equating to 14.5% of all units in the district centre. Comparison goods operators include shoe shops, a bathroom showroom, a pharmacy and a jewellers.

Vacancies - At the time of our visit, our survey recorded four vacant units in the district centre. These units account to 5.3% of all units in the district centre, a figure far lower than the current national average vacancy rate for units. Likewise, the vacancy rate in respect of floorspace at Banner Cross is significantly lower than the national average. As such, the current vacancy rate is not considered to represent cause for concern.

Pedestrian Flows- Pedestrian activity at Banner Cross was generally high at the time of our visit, with the greatest levels of pedestrian activity observed around the Sainsbury's Local and Co-op Foodstore. This concentration of activity clearly suggests that these operators anchor the district centre and are the key destinations for visitors. It is important to note that a number of linked trips were observed between these two convenience stores and other operators in the district centre. Notwithstanding this, pedestrian activity was generally lighter elsewhere in Banner Cross, with the lowest levels of activity observed at the southernmost part of the district centre towards the junction of Ecclesall Road and Psalter Lane. Ecclesall Road, a key arterial route, forms a barrier to pedestrian movement in the district centre. However, there are controlled crossing points located throughout the district centre.

Accessibility - Banner Cross district centre generally has a high standard of accessibility. Located in an area of dense residential development, there are few car parks located in Banner Cross. The

exception is a moderately sized surface level car park located adjacent to the Co-op Foodstore. In regard to the rest of the district centre, there is plentiful surface level car parking located along Ecclesall Road, which provides a significant amount of short term car parking, although there is a charge for on-street parking. There are also secure cycle parking spaces located throughout the district centre. Pedestrian accessibility is also generally good, despite the centre's proximity to Ecclesall Road, a key arterial route with a high volume of vehicle movements.

Bus services 6, 81 Sheffield, 82 Sheffield, 88, 181, 271, 272 Sheffield's Peak Link and 781 can be alighted from bus stops along Ecclesall Road, and provide frequent services to a range of destinations including Stannington, Ecclesfield, Castleton, Dore, Millhouses and into Sheffield City Centre. Although the district centre is not located on a train or tram line, the overall standard of public transport accessibility is considered to be good with bus services provided from the early morning into the late evening.

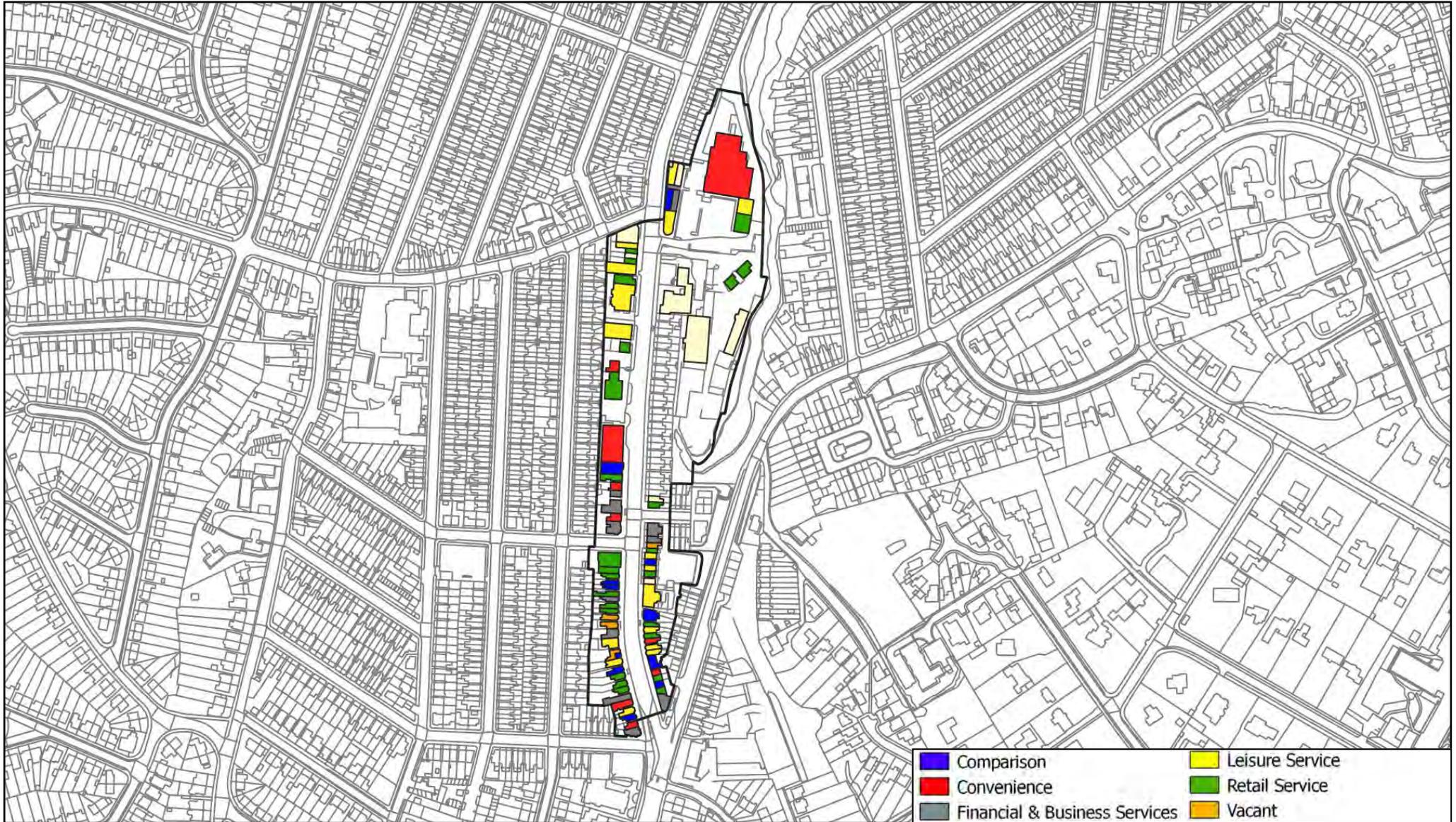
Perception of Safety - Banner Cross district centre felt safe and secure at the time of our visit. Retail units line both sides of Ecclesall Road and provide natural surveillance. The main carriageway of Ecclesall Road, which is a busy road and detracts from overall pedestrian safety, is set back from the pedestrian footway by on-street parking which improves the overall perception of safety. The traffic also moves relatively slowly through the centre, which improves overall safety.

According to the website ukcrimestats.com, there were 173 crimes recorded within a mile radius of the district centre at February 2022. This compares with 210 crimes at February 2021 and 155 crimes at February 2020.

Environmental Quality - Banner Cross has a generally high standard of environmental quality, both by virtue of the attractive appearance of the units themselves and the centre's location just to the south of Endcliffe Park. A number of the retail units have characterful shopfronts, which are both attractive and contemporary and indicative of the well-maintained nature of the district centre.

The public realm is also generally well-maintained and pleasant, although the district centre's location along Ecclesall Road results in the overall environmental quality being somewhat negatively impacted by the volume of traffic movements along this key arterial route.

Conclusions - Banner Cross is anchored by convenience goods operators, such as Co-op Food and Sainsbury's Local, and dominated by service operators. Banner Cross has a particularly strong range of retail service operators, far in excess of the current national average. The vacancy rate at the district centre is currently far lower than the current national average, and by virtue of this the centre is considered to be vital and viable.



Banner Cross district centre

Sheffield Retail and Leisure Study 2022

Survey Date - March 2022

Broomhill District Centre

Description - Broomhill district centre is located in the south-west of the city, approximately 2 miles from the City Centre. The centre is located in a primarily residential area, popular with families and students, and is located on the A57 (Fulwood Road and Whitham Road) which connects the wider suburbs to the city and the University of Sheffield.

Broomhill is an attractive and vibrant centre with a number of colourful and reasonably well maintained shop fronts and historic buildings associated with the Conservation Area to the north.

The retail offer in Broomhill is dominated by convenience and service uses. A Morrisons and Sainsburys Local are located in the precinct and a Tesco Express lies at the south. Comparison unit provision is lower than the national average yet Broomhill's leisure offering is particularly strong and comprises a number of independent restaurants, cafes and pubs.



Figure 1: The retail precinct which accommodates two of the anchor convenience shops - Morrisons and Sainsbury's Local.

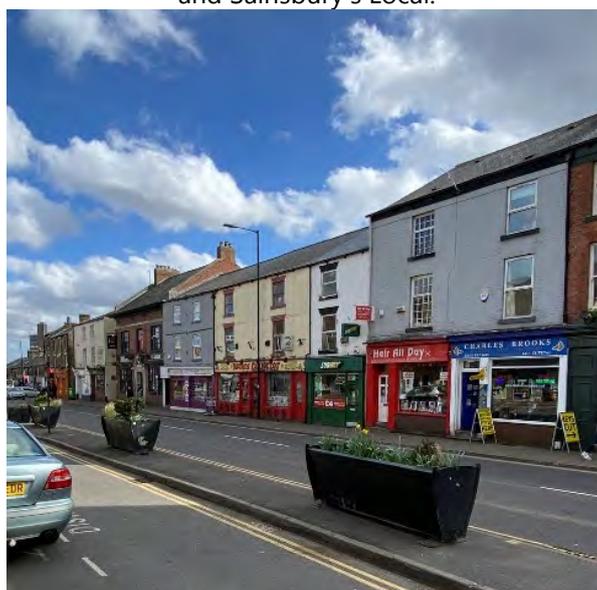


Figure 2: Broomhill is generally a pleasant centre with planters adding to the overall environmental quality.



Figure 3: A former bank - a long-standing vacant unit - detracts from the centre's appearance at the junction of Glossop Road and Fulwood Road.



Figure 4: Parade of shops and leisure services on Glossop Road, including a micropub, dental practice, comparison shop and financial advisors.

Table 1 District Centre Floorspace Composition

| GOAD Category | Floorspace at 2022 (sq.m) | Floorspace at 2022 (%) | Floorspace UK Average at 2022 (%) |
|----------------|---------------------------|------------------------|-----------------------------------|
| Comparison | 1,744 | 17.3% | 30.4% |
| Convenience | 1,561 | 15.5% | 15.4% |
| Financial | 473 | 4.7% | 6.8% |
| Leisure | 4,017 | 39.9% | 25.7% |
| Retail Service | 1,386 | 13.8% | 7.2% |
| Vacant | 888 | 8.8% | 13.9% |
| TOTAL | 10,069 | 100 | 100 |

Source: Composition of District centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Table 2 District Centre Unit Composition

| GOAD Category | Units at 2022 | Units at 2022 (%) | Units UK Average at 2022 (%) | Units at 2016 (%) |
|----------------|---------------|-------------------|------------------------------|-------------------|
| Comparison | 21 | 20.4% | 27.0% | 34.5% |
| Convenience | 7 | 6.8% | 9.2% | 10.3% |
| Financial | 8 | 7.8% | 9.1% | 46.4%* |
| Leisure | 35 | 34.0% | 24.7% | 46.4%* |
| Retail Service | 23 | 22.3% | 15.7% | 46.4%* |
| Vacant | 9 | 8.7% | 14.1% | 8.3% |
| TOTAL | 103 | 100 | 100 | 100.0% |

Source: District centre composition based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022; Units at 2016 taken from Sheffield & Rotherham Joint Retail & Leisure Study 2017. 2016 figures for financial, leisure and retail service operators represent a total of these uses.

Uses - The composition of Broomhill district centre is fairly typical for a centre of this size, and with this position in the retail hierarchy. Broomhill is anchored by a strong range of leisure service operators. Broomhill has a larger than usual proportion of leisure units than the current national average figure, with 35 such operators equating to 34.0% of all units in the district centre. The range of leisure service operators include bars, restaurants, cafés (including Costa), hot-food takeaways (including Subway), restaurants and pubs. The range of operators suggests that Broomhill performs a role supporting both the day and night time economy. The service offer at 2022 equates to 64.1% of all units, a figure greatly increased on the 46.4% of units at 2016. Alongside the strong leisure service offer, there are also 23 retail service operators (22.3% of all operators in the district centre) and a reasonably strong range of eight financial and business service operators (7.8% of all operators in the district centre).

The range of convenience operators is relatively limited for a district centre (a result of the robustness of the service sector). There are seven convenience operators in the district centre, equating to 6.8% of operators. This represents a lower figure than that at 2016, and the current national average. Convenience operators include Morrisons Local, Sainsbury's Local, two grocers, a convenience store and a key cutters.

There are 21 comparison goods operators in Broomhill, including charity shops, pharmacies, jewellers, phone shops, hardware shops and a florist. The 21 comparison goods operators equate to 20.4% of the total number of units in the district centre, a figure lower than the current national average and lower than the proportion of comparison goods retailers at 2016.

Vacancies - In comparison to the current UK national average vacancy rate of 14.1%, there were nine vacant units at the time of our visit, which equates to 8.7% of the total retail floorspace. The vacancies are not clustered in any particular location and overall it is considered that these represent natural 'churn'. The large vacant unit on Glossop Road/Fulwood Road, formerly occupied by a bank, does detract from the appearance of this junction. However overall, the current vacancy rate is not considered to represent cause for concern.

Pedestrian Flows - There were strong pedestrian flows during our visit. Pedestrian activity was high on both sides of Fulwood Road and Whitham Road. There appeared to be large numbers of students commuting to and from the universities along the A57. The proximity of the centre to educational establishments also boosted pedestrian flows around lunchtime.

Accessibility - Broomhill is reasonably well served by public transport. There are a number of bus stops throughout the centre, serving the 6, 51, 52, 120, 256, 257, 258, 751, 781 and 784 routes which connect Crosspool, Fulwood, Millhouse and Crookes to the city centre. The 51, 52 and 120 services are high frequency services. The centre is not served by tram or train.

There are two disabled parking spaces outside the 1960s precinct. A car park at Spooner Road has c. 18 spaces including a disabled space, and there is a private car park on the roof of the precinct which provides for approximately 65 spaces. Parker's Lane car park provides approximately 20 parking spaces and there is on-street parking on side streets including Lawson Road and Taptonville Road.

Pedestrian accessibility is good. There are a number of junctions within the centre which are relatively easy to cross by foot, although crossing from the north side of Fulwood Road to the south is limited. The pavement on the south from Manchester Road/Fulwood Road to Glossop Road is narrow and cluttered at points.

Perception of Safety - Broomhill district centre is considered to be safe and secure. There is a high level of passive surveillance from strong pedestrian flows, active ground floor uses and passing traffic.

According to the website ukcrimestats.com, there were 347 crimes recorded within a mile radius of the district centre at February 2022. This compares with 379 crimes at February 2021 and 421 crimes at February 2020.

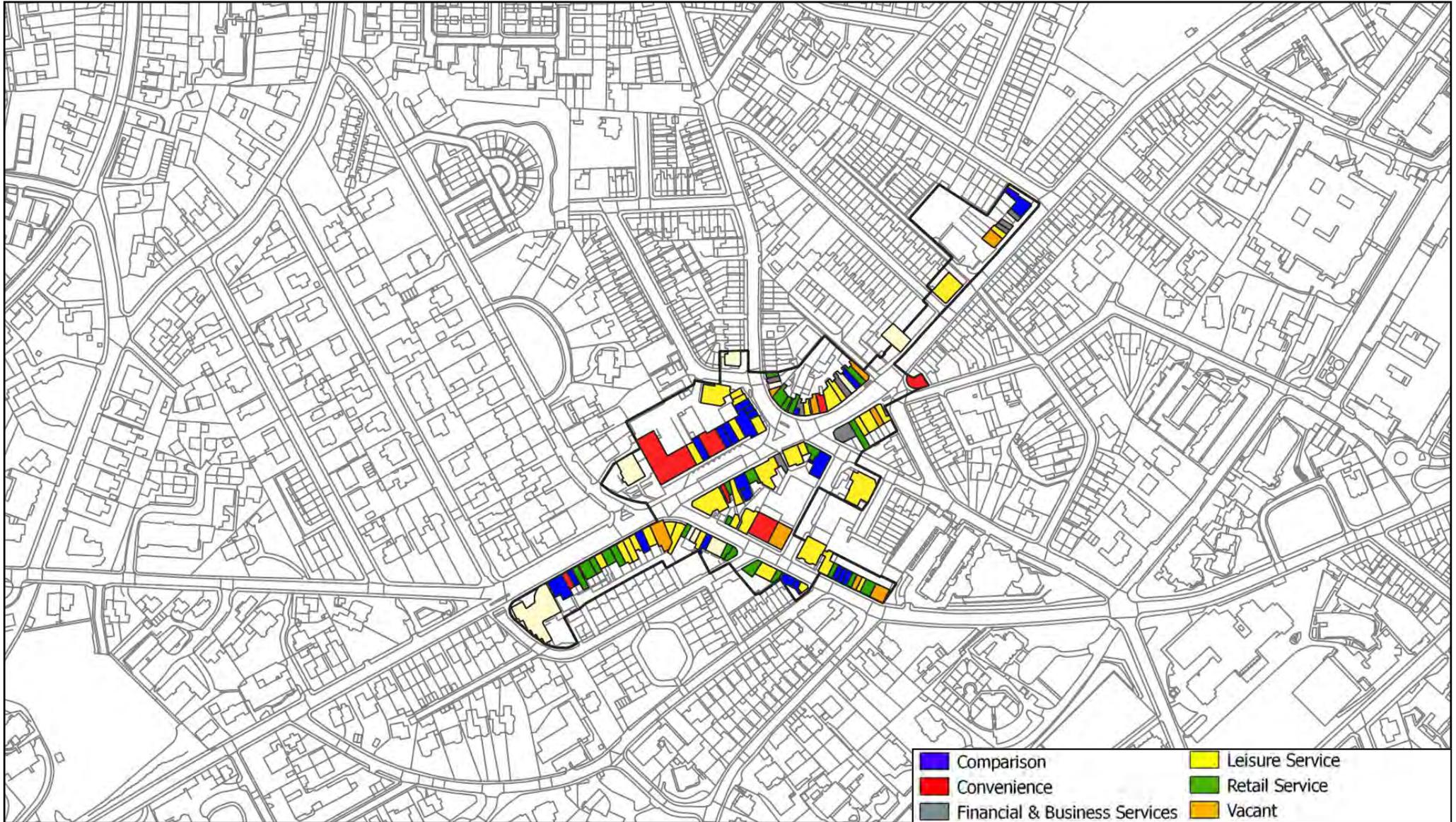
Environmental Quality - The A47 and other major roads which bisect the centre have a negative impact in terms of noise and the volume of traffic impacts the environmental quality of the centre.

The district centre has a number of attractive buildings associated with the Broomhill Conservation Area. Shop fronts are generally well maintained and there are few vacant units. Although the district centre benefits from planting boxes outside the precinct, and benches outside Costa Coffee, there is no other public space and the area is heavily built up.

In general Broomhill is considered to have a good environmental quality.

Conclusions - Broomhill District Centre has a strong range of convenience and retail service uses. While comparison uses are lower than the national average, this is compensated for by the strong leisure and night-time economy offering. The offer is considered suitable to serve the day-to-day needs of the local community.

The environmental quality of the centre is dominated by the A57, yet it is still considered good. The centre's relatively low vacancy level and high levels of activity mean it is considered a vital and viable district centre.



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Broomhill district centre

Sheffield Retail and Leisure Study 2022

Survey Date - March 2022

Chapelton District Centre

Description - Chapelton is a large district centre located in the north of the Sheffield authority area. It comprises 2 distinct areas, located to the east and west of the Sheffield to Barnsley train line. The district centre is anchored by a large Asda superstore and as such, convenience goods operators account for a significant proportion of floorspace at Chapelton. The district centre also has a range of comparison goods and service operators commensurate with the typical offer of such centres.

The A6135 passes through the centre in a north-south direction, and the centre is situated at the intersection of a number of arterial routes. Although divided by key arterial routes, Chapelton is a pleasant retail destination with a good standard of environmental quality and a generally high perception of safety.



Figure 1: Seasonal planters located in Chapelton help to bolster the centre's environmental quality and disguise the utilitarian appearance of metal railings at the Burncross Road roundabout.



Figure 2: On Lound Side looking south to Burncross Road. Chapelton is well integrated into the highway network, although the level of vehicle movements do impact environmental quality and pedestrian accessibility.



Figure 3: The Asda superstore on Market Street is the key anchor destination for the district centre. Alongside 10 other operators, the convenience goods sector at Chapelton is strong and diverse.



Figure 4: Chapelton train station. The district centre benefits from a high standard of accessibility, with both frequent bus and train services provided from Chapelton.

Table 1 District Centre Floorspace Composition

| GOAD Category | Floorspace at 2022 (sq.m) | Floorspace at 2022 (%) | Floorspace UK Average at 2022 (%) |
|----------------|---------------------------|------------------------|-----------------------------------|
| Comparison | 1,262 | 8.1% | 30.4% |
| Convenience | 4,602 | 29.6% | 15.4% |
| Financial | 2,882 | 18.6% | 6.8% |
| Leisure | 4,212 | 27.1% | 25.7% |
| Retail Service | 1,720 | 11.1% | 7.2% |
| Vacant | 847 | 5.5% | 13.9% |
| TOTAL | 15,525 | 100 | 100 |

Source: Composition of District centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Table 2 District Centre Unit Composition

| GOAD Category | Units at 2022 | Units at 2022 (%) | Units UK Average at 2022 (%) | Units at 2016 (%) |
|----------------|---------------|-------------------|------------------------------|-------------------|
| Comparison | 12 | 13.2% | 27.0% | 28.2% |
| Convenience | 11 | 12.1% | 9.2% | 11.3% |
| Financial | 11 | 12.1% | 9.1% | 52.1%* |
| Leisure | 25 | 27.5% | 24.7% | 52.1%* |
| Retail Service | 23 | 25.3% | 15.7% | 52.1%* |
| Vacant | 9 | 9.9% | 14.1% | 8.5% |
| TOTAL | 91 | 100 | 100 | 100.0% |

Source: District centre composition based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022; Units at 2016 taken from Sheffield & Rotherham Joint Retail & Leisure Study 2017. 2016 figures for financial, leisure and retail service operators represent a total of these uses.

Uses - Chapelton district centre is anchored by convenience goods operators, by virtue of Asda foodstore on Market Street. The 11 convenience goods operators account for 12.1% of all operators in the district centre, a figure only marginally different from the 11.3% recorded at 2016. Convenience operators include tobacconists, an off-licence, a butcher, a baker and Tesco Express.

There are 12 comparison goods operators, which include two pharmacies (including Asda Pharmacy), charity shops, a florist and gift shops. The proportion of comparison goods operators has greatly changed since 2016, from 28.2% to 13.2%. This change is similar to that observed at other district centres in Sheffield, and should be seen in the context of wider changes in the high street since that time, with comparison operators closing at centres diversifying with a greater leisure offer.

Accordingly, our survey recorded an increase in the proportion of the service offer (leisure, retail and financial and business service) from 52.1% at 2016 to 64.9% at 2022. At 2022 there were 25 leisure service operators in Chapelton, which equates to 27.5% of all units in the district centre, and 23 retail service operators, equating to 25.3% of all units in Chapelton. Although the proportion of financial and business service operators in Chapelton remains larger than the current national average, it should be noted that the composition of this offer has changed considerably since 2016 with the closure of the Yorkshire Bank branch on Lound Side.

Vacancies - Our survey recorded a total of nine vacant units in the district centre, with these units representing 9.9% of all units in Chapelton. Although this figure represents an increase on the 8.5% of vacant units recorded at 2016, it remains considerably lower than the current national average and as such is not considered to represent cause for concern.

Although the vacant units are located throughout the district centre some, such as the vacant former Yorkshire Bank branch, occupy prominent positions in Chapelton. Despite this, the proportion of vacant units does not significantly detract from the vitality and vibrancy of the district centre.

Pedestrian Flows - Pedestrian flows were observed to be relatively good and consistent throughout the centre on the day of our visit. Higher proportions of footfall were present outside of the convenience operators, such as the Asda superstore in particular. However, the location of the Asda and the fact that it 'turns its back' to the district centre in practice, reduces the potential for linked trips from the superstore to other facilities in the district centre.

Pedestrian flows were strong along Lound Side and around Chapelton train station, however the pedestrian flows in the part of the centre could be expected to be higher at different times of the day. The area to the north of the Coach and Horses public house on Station Road has notably lower pedestrian flows, perhaps indicative of the higher proportion of leisure service operators in this location which are generally not active during daytime hours and attract footfall during evening hours.

Accessibility - Chapelton is considered to have a good standard of accessibility, and is well served by both public transport and well integrated into the road network by virtue of the centre's location at a key road junction. Chapelton train station, which is located at the core of the district centre, provides direct access into Sheffield City Centre and other destinations, including Huddersfield and Leeds. Up to two services are provided per hour to Sheffield, which can be accessed within a 12-minute train journey. In respect of other modes of public transport, Chapelton is well served by bus services with Chapelton Station bus stop located just outside of the train station. From here, a range of bus services including 1, 1a, 29, 35a, 72, 72a, 86, 135, 135a, 728, 777, 784 and 790 provide frequent services to a range of destinations including Rotherham, Jordanthorpe, Ecclesfield, Hemsworth, Warren, Hillsborough and Sheffield City Centre, alongside a range of other destinations throughout the city.

In addition to on-street car parking located throughout the district centre, which is not very readily available, there are two surface level car parks. These are located at the Asda superstore on Market Street, which provide 2 hours of free parking to customers and 280 spaces, and 70 spaces at Lound Court. This is a pay and display car park and 2 hours of parking costs £2. There are also secure cycle parking stands located throughout the district centre.

In respect of pedestrian accessibility, there are a limited number of controlled pedestrian crossing points on the major arterial routes through Chapelton. As such, these key routes pose a challenge to easy pedestrian movements through the district centre. However, the centre is well laid out and generally legible from a pedestrian perspective.

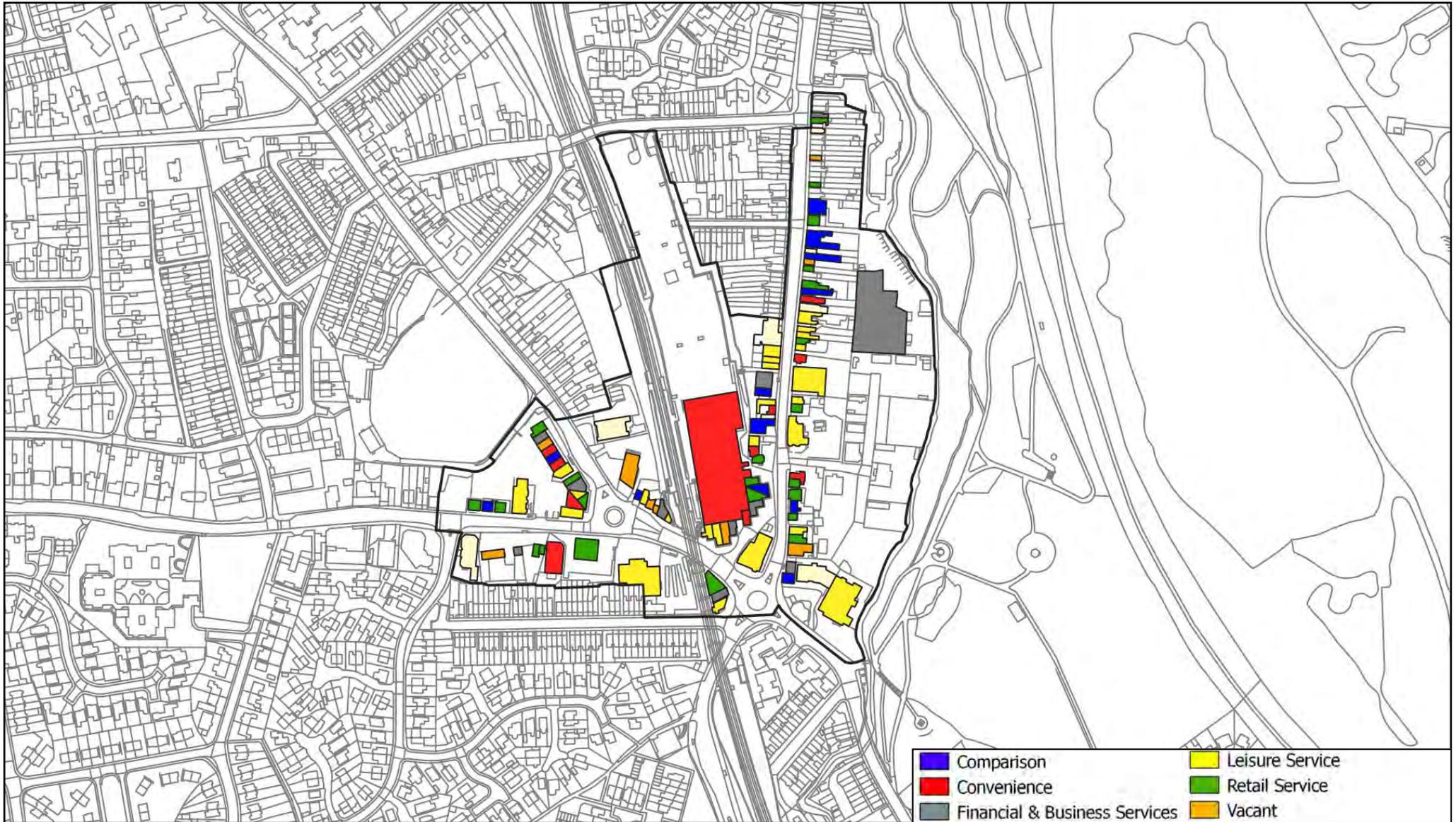
Perception of Safety - In general, Chapelton feels safe and secure, and the district centre benefits from a good perception of safety. The main retail areas are generally located along key arterial routes which attract a high volume of passing vehicle movements. This, combined with general active uses at ground floor, ensures that there is a high standard of both natural and passive surveillance. However, in more peripheral areas with lesser levels of activity, such as the northern part of Station Road and pedestrian walkways between the retail core of the district centre and the Asda superstore, the perception of safety is notably lower. The volume of traffic movements through the district centre also negatively impact the feeling of pedestrian safety. According to the website ukcrimestats.com, there were 104 crimes recorded within a mile radius of the district centre at February 2022. This compares with 103 crimes at February 2021 and 74 crimes at February 2020.

Environmental Quality - The environmental quality within the centre varies, but is generally reasonably good. A major influencing factor is the constant flow of traffic that passes through the shopping area, and the reasonably high level of footfall.

The shopfronts are generally attractive and of good quality throughout the centre. Some of the signs and facades could be of better quality but there were very few examples of particularly poor shop frontages. However, there were some instances around the roundabout at the core of the district centre where vacant units reduce the feeling of vitality, and efforts to bring these back into

economically viable use should be explored further. Seasonal planting throughout the district centre is well-maintained and attractive, which perhaps conveys some sense of civic pride.

Conclusions - Chapelton is comprised of two distinct areas, located to the east and west of the Sheffield to Barnsley train line. The district centre is anchored by a large Asda superstore and as such, convenience goods operators account for a significant proportion of floorspace at Chapelton. The district centre also has a range of comparison goods and service operators commensurate with the typical offer of such centres. The proportion of vacant units in the district centre is not considered to represent cause for concern at this time, given that it is lower than the current national average. By virtue of this, Chapelton is considered to be a vital and viable district centre.



Chapeltown district centre

Sheffield Retail and Leisure Study 2022

Survey Date - March 2022

Chaucer District Centre

Description - Located between Chapeltown and Hillsborough and approximately 3 kilometres to the north of the City Centre, Chaucer district centre is the smallest district centre in the authority area in terms of the total number of retail units. The district centre is anchored by a large Asda superstore and by virtue of this, is dominated by convenience operators in respect of floorspace. The district centre also has a clean, modern appearance and is generally well-maintained with an attractive public realm.

Alongside the Asda superstore, Chaucer district centre comprises a traditional retail parade on Buchanan Road, alongside a number of key community facilities. Chaucer School is also located alongside the district centre. These uses allow for a number of linked trips to occur between these community facilities and retail operators in the district centre.



Figure 1: On Buchanan Road there is a more traditional retail parade, with smaller units focused more around meeting service needs.



Figure 2: Chaucer also has a strong and diverse range of community uses. Parson Cross Library and Learning Zone are located within the district centre, and Chaucer School is located to the west of the district centre.



Figure 3: Farmfoods recently opened its store at Chaucer, and this unit augments the adjacent Asda superstore to provide a strong range of convenience uses.



Figure 4: The Asda superstore in Chaucer is the largest single unit in the district centre. By virtue of this, convenience uses dominate the floorspace composition at Chaucer.

Table 1 District Centre Floorspace Composition

| GOAD Category | Floorspace at 2022 (sq.m) | Floorspace at 2022 (%) | Floorspace UK Average at 2022 (%) |
|----------------|---------------------------|------------------------|-----------------------------------|
| Comparison | 488 | 6.1% | 30.4% |
| Convenience | 6,678 | 83.9% | 15.4% |
| Financial | 0 | 0.0% | 6.8% |
| Leisure | 604 | 7.6% | 25.7% |
| Retail Service | 194 | 2.4% | 7.2% |
| Vacant | 0 | 0.0% | 13.9% |
| TOTAL | 7,964 | 100 | 100 |

Source: Composition of District centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Table 2 District Centre Unit Composition

| GOAD Category | Units at 2022 | Units at 2022 (%) | Units UK Average at 2022 (%) |
|----------------|---------------|-------------------|------------------------------|
| Comparison | 3 | 23.1% | 27.0% |
| Convenience | 3 | 23.1% | 9.2% |
| Financial | 0 | 0.0% | 9.1% |
| Leisure | 5 | 38.5% | 24.7% |
| Retail Service | 2 | 15.4% | 15.7% |
| Vacant | 0 | 0.0% | 14.1% |
| TOTAL | 13 | 100 | 100 |

Source: District centre composition based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Uses - There are three convenience goods operators at Chaucer, with these including the Asda superstore and Farm Foods store. These three units equate to 23.1% of all units in the district centre, but by virtue of the Asda being a large convenience goods store, the convenience operators account for 6,678 sq.m of retail floorspace. This equates to 83.9% of the total stock of retail floorspace, clearly highlighting the key role that the Asda superstore plays in particular, in anchoring the retail offer in the district centre. The three comparison goods operators in the district centre account for 23.1% of all units, but a significantly smaller proportion of the total stock of retail floorspace at 6.1%. Comparison operators include a DIY store, furniture store and Asda pharmacy. In respect of units, the district centre is dominated by service operators. There are five leisure service operators (equating to 38.5% of all operators in Chaucer) which include three hot-food takeaways, a café and a betting office (Betfred). The retail service offer is comprised of two operators, a hair salon and Asda Opticians.

Vacancies - At the time of our visit, no vacant units were observed within the district centre.

Pedestrian Flows - At the time of our visit pedestrian activity throughout the district centre was generally light, with the greatest levels of activity observed around the Asda superstore. This suggests that, unsurprisingly, the Asda superstore anchors the district centre. Notwithstanding this, a number of linked trips were observed between the Asda and the other uses in the centre, particularly Parsons Cross Library and the retail parade on Buchanan Road. Pedestrian movements through the centre are generally considered to be relatively easy, with the controlled crossing points well located along pedestrian desire lines.

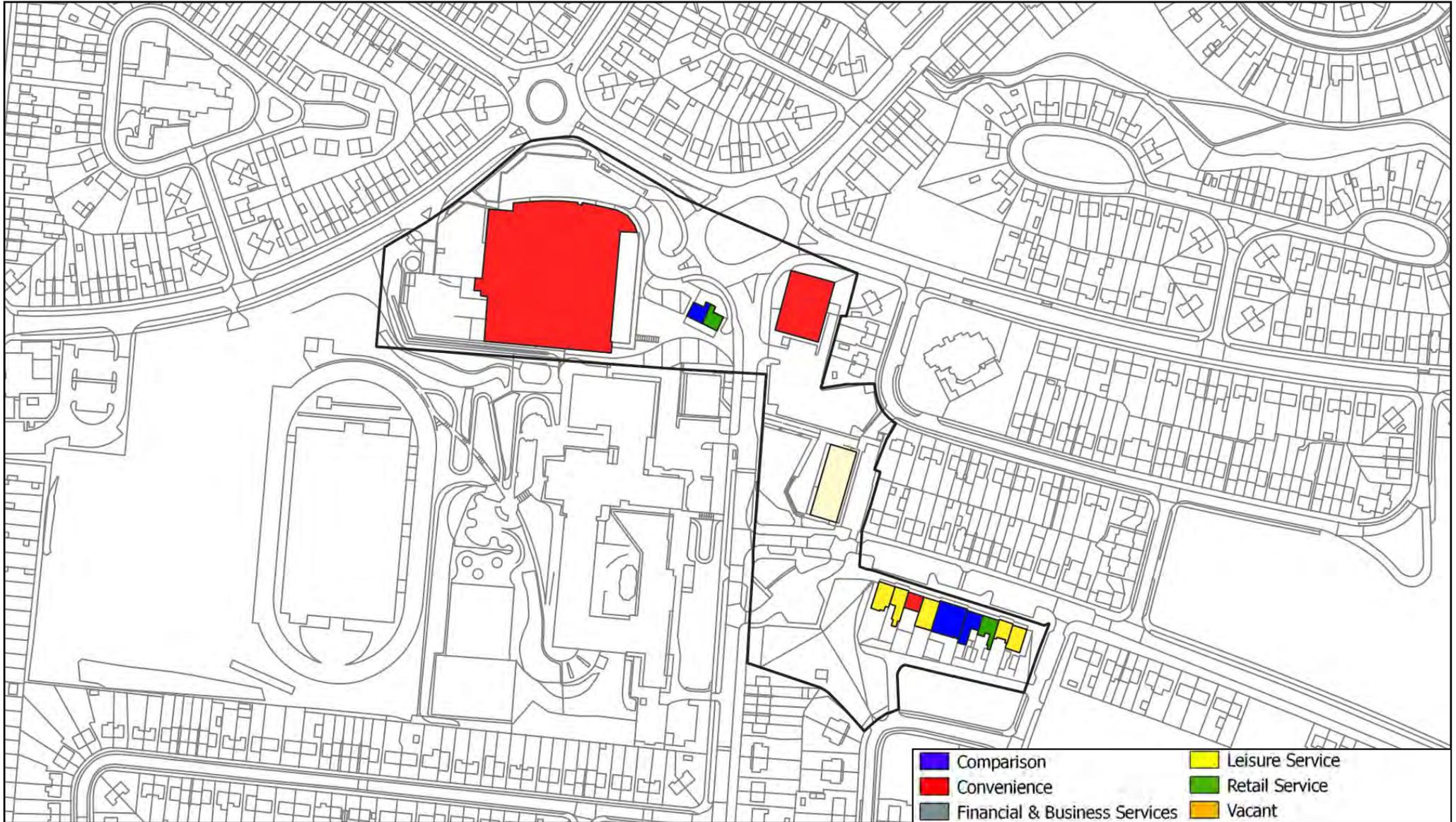
Accessibility - Chaucer district centre is considered to have a good standard of accessibility. Within the district centre there are bus stops located on Wordsworth Avenue adjacent to Parson Cross Library. From here, a number of bus services including 7, 8 Sheffield, 8a Sheffield, 20 Sheffield, 32 Sheffield, 86 and 784 can be alighted. These services provide access to destinations including Crystal Peaks, Woodhouse, Hemsworth, Birley, Chapletown and Ecclesfield. The City Centre can be reached by bus service 20 Sheffield in approximately 30 minutes. Pedestrian accessibility is good at Chaucer, with a number of crossing points located on Wordsworth Avenue and Deerlands Avenue. Secure cycle parking is also located throughout the district centre. Car parking provision is also good in the district centre, with surface level car parking available for customers to both Asda and Farm Foods. Parking is also available at the junction of Buchanan Road and Wordsworth Avenue, and outside the retail parade on Buchanan Road.

Perception of Safety - Chaucer district centre is a modern, clean and attractive retail environment and generally feels safe and secure. The centre's layout ensures that a high standard of both natural and passive surveillance are achieved. At the time of our visit, the general levels of vibrancy

observed throughout the district centre were felt to increase the overall safety for visitors and reduce the threat of instances of crime. The district centre provides attractive pedestrianised areas which ensure that a high standard of safety for pedestrians is achieved. According to the website ukcrimestats.com, there were 330 crimes recorded within a one mile radius of the district centre at February 2022. This compares with 482 crimes at February 2021 and 433 crimes at February 2020.

Environmental Quality - Chaucer district centre is a modern, purpose built and managed local centre and as such, the environmental quality is considered to be very high. The centre benefits from areas of landscaping and planting throughout which help to improve the centre's public realm. The centre itself is generally clean and free of litter, with no street clutter observed. Generally low levels of traffic were observed in the district centre too, thereby reducing any negative impacts that a high level of passing vehicles may have on the centre's environmental quality.

Conclusions - Although the composition of Chaucer is vastly different to that observed in comparable district centres in Sheffield, it is considered that the district centre is easily capable of meeting the day-to-day needs of the local community. Healthy levels of activity were observed at the time of our visit, as were a number of linked trips between the community facilities within the defined boundary. Given this, it is considered that Chaucer is a vital and viable district centre.



Chaucer district centre

Sheffield Retail and Leisure Study 2022

Survey Date - March 2022

Crookes District Centre

Description - Crookes is a suburb of Sheffield located approximately 2.5 kilometres to the west of the City Centre. Crookes district centre is tightly focused along the main road of the same name and is anchored by a strong range of convenience operators, namely Co-operative Food and Sainsbury's Local. The district centre also has a very strong range of leisure service operators which are varied and ensure that the district centre has both a daytime and early evening offer.

The district centre is composed of a number of historic and heritage buildings and by virtue of this, is a generally attractive retail location. The units are well-maintained, with a number of unique and contemporary shopfronts and the centre has a high standard of vibrancy. This is evidenced by the district centre having a lower level of vacant units than the current national average.



Figure 1: On-street car parking diminishes the environmental quality and impacts the retail environment of Crookes. However, with a lack of surface car parks, on-street car parking is the only feasible option for car users.



Figure 2: The convenience goods offer at Crookes is anchored by Co-operative Food and Sainsbury's Local. The range of such operators is commensurate with the centre's designation in the hierarchy.



Figure 3: There are a number of pedestrian crossing points located along Crookes, including raised and controlled crossing points.



Figure 4: The majority of retail units in Crookes district centre are converted former residential properties. These units therefore appeal to independent operators as opposed to national multiples.

Table 1 District Centre Floorspace Composition

| GOAD Category | Floorspace at 2022 (sq.m) | Floorspace at 2022 (%) | Floorspace UK Average at 2022 (%) |
|----------------------|----------------------------------|-------------------------------|--|
| Comparison | 1,379 | 19.5% | 30.4% |
| Convenience | 1,747 | 24.7% | 15.4% |
| Financial | 388 | 5.5% | 6.8% |
| Leisure | 2,737 | 38.6% | 25.7% |
| Retail Service | 621 | 8.8% | 7.2% |
| Vacant | 213 | 3.0% | 13.9% |
| TOTAL | 7,085 | 100 | 100 |

Source: Composition of District centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Table 2 District Centre Unit Composition

| GOAD Category | Units at 2022 | Units at 2022 (%) | Units UK Average at 2022 (%) |
|----------------|---------------|-------------------|------------------------------|
| Comparison | 13 | 19.4% | 27.0% |
| Convenience | 9 | 13.4% | 9.2% |
| Financial | 6 | 9.0% | 9.1% |
| Leisure | 26 | 38.8% | 24.7% |
| Retail Service | 11 | 16.4% | 15.7% |
| Vacant | 2 | 3.0% | 14.1% |
| TOTAL | 67 | 100 | 100 |

Source: District centre composition based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Uses - The service offer at Crookes is particularly strong, with the district centre having the second highest proportion of leisure service operators for any district centre in the authority area. There are 26 leisure service operators, which equate to 38.8% of all units in the district centre (a figure in excess of the current national average), and include restaurants, cafés, hot-food takeaways, public houses and a betting office. The retail service offer is also diverse and broadly commensurate in scale with the current national average, at 16.4% of all units. The 11 retail service operators include hairdressers, a tattooist, an opticians and a dry cleaners. The financial and business service sector is also reasonably strong in Crookes, with six operators equating to 9.0% of all units in the district centre. Operators include five estate agents and an insurance broker.

There are nine convenience goods operators which account for 13.4% of all units in Crookes. The convenience offer is anchored by Co-operative Food and Sainsbury's Local, alongside two grocers, two off-licences, a bakery and two smaller convenience stores - Fulton Foods and Londis. The district centre also has a strong range of comparison goods operators, with the 13 operators accounting for 19.4% of the total number of operators in Crookes.

Vacancies - Our survey recorded two vacant units in the district centre, a figure which equates to 3.0% of all retail units. This figure is substantially lower than the current national average for vacancies in respect of both units and floorspace. These units are located at different locations in the district centre, and by virtue of this no parts of the centre feels dominated by vacant units. Accordingly, the current vacancy rate is not considered to represent cause for concern.

Pedestrian Flows - At the time of our visit, a considerable amount of pedestrian activity was observed throughout the district centre. This was mostly concentrated around the convenience uses in the district centre, especially Sainsbury's Local and a number of linked trips between operators in Crookes were observed. Activity was lower towards the southern end of the district centre.

The levels of activity at cafés observed during daylight hours is considered a positive reflection that these units also perform a strong role in supporting activity in the centre of an evening, with a number of restaurants and public houses in the district centre likely to perform a key role as part of the evening economy.

Accessibility - Crookes has a reasonable standard of accessibility. For pedestrians, the centre is considered to be walkable, although the topography of the surrounding area could pose challenges for some. Crookes is a busy route, and there are a number of pedestrian crossing points located along Crookes, including raised and controlled crossing points.

Although the district centre is not located on a train or tram line, Crookes is well-served by bus routes with services 52, 52a Sheffield, 780 and 782 serving Crookes. Frequent services can be alighted along Crookes, with services provided to the City Centre, Woodhouse, Loxley, Walkley and Wisewood. The standard of public transport accessibility, whilst lower than at other district centres by virtue of the more limited offer at Crookes, is considered to be high.

Car parking is relatively limited in the district centre, with surface level car parks generally for use by customers only. Therefore, on-street car parking is the alternative for most visitors to the district centre, and there is a considerable amount of parking along Crookes.

Perception of Safety - The district centre is considered to have a relatively high perception of safety, with the public areas benefiting from a reasonable standard of natural and passive surveillance. The lack of vacant units, and the generally well-maintained units, also improves this sense of safety and security. Crookes, which is a busy road, is somewhat segregated from pedestrian areas and retail frontages by parked cars and as such, is not considered to negatively impact the centre's overall perception of safety.

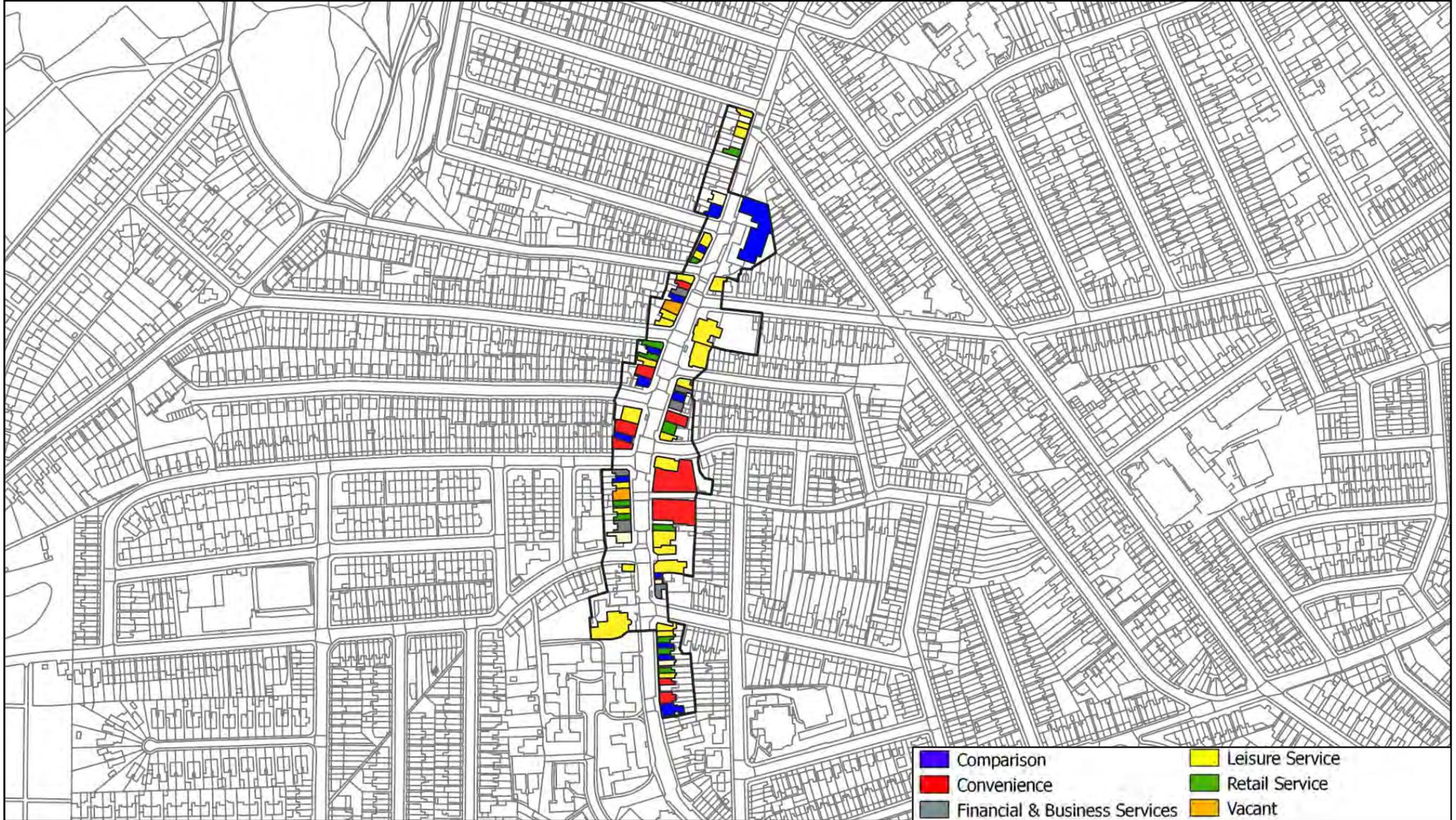
According to the website ukcrimestats.com, there were 286 crimes recorded within a mile radius of the district centre at February 2022. This compares with 263 crimes at February 2021 and 253 crimes at February 2020.

Environmental Quality - Crookes is considered to be an attractive and pleasant centre with a reasonably high standard of environmental quality, partially by virtue of the attractive architecture and a number of well-maintained and contemporary shopfronts. The low level of vacant units improves the centre's overall vitality and vibrancy. Public areas in the local centre are generally well maintained, although the number of parked vehicles within the centre increase the 'cluttered' feel and lend a negative aspect to Crookes.

However, the overall vibrancy and general cleanliness throughout the district centre and attractive and well-maintained units, ensure that the standard of environmental quality in Crookes is high.

Conclusions - Crookes is anchored by a strong range of convenience operators, namely Co-operative Food and Sainsbury's Local. The district centre also has a very strong range of leisure service operators which are varied and ensure that the district centre has both a daytime and early evening offer.

The district centre is considered to have a high standard of environmental quality, with a number of unique and contemporary shopfronts and the centre has an overall high standard of vibrancy. This is evidenced by the district centre having a lower level of vacant units than the current national average. Accordingly, Crookes is considered to be a vital and viable district centre.



Crookes district centre

Sheffield Retail and Leisure Study 2022

Survey Date - March 2022

Crystal Peaks District Centre

Description - Crystal Peaks district centre is located in the east of the Sheffield authority area, and is situated in an area of residential development. The centre is dominated by a purpose-built retail shopping centre, which was built in approximately 1988. The centre therefore provides a diverse range of comparison goods operators that are attracted to the modern, purpose built units at Crystal Peaks, along with the quantum of footfall from which the centre benefits. The centre also has a covered market, which is operated by Sheffield City Council.

In general, the managed nature of the centre ensures that it has a pleasant and essentially functional standard of environmental quality. There is a considerable level of surface level car parking dedicated to visitors and the district centre is well integrated into the public transport network.

To the north of the defined boundary of the district centre is Drakehouse Retail Park, which is a key out-of-centre shopping destination. Beighton Community Hospital is also located to the north of the centre.



Figure 1: Crystal Peaks district centre is dominated by a relatively modern, purpose-built shopping centre



Figure 2: The purpose-built nature of the shopping centre provides a generally attractive retail environment



Figure 3: Sainsbury's foodstore anchors the convenience food offer at the centre



Figure 4: Crystal Peaks is well served by public transport, including the Supertram. It is also well integrated into the road network

Table 1 District Centre Floorspace Composition

| GOAD Category | Floorspace at 2022 (sq.m) | Floorspace at 2022 (%) | Floorspace UK Average at 2022 (%) |
|----------------|---------------------------|------------------------|-----------------------------------|
| Comparison | 13,455 | 41.6% | 30.4% |
| Convenience | 11,653 | 36.1% | 15.4% |
| Financial | 1,399 | 4.3% | 6.8% |
| Leisure | 1,970 | 6.1% | 25.7% |
| Retail Service | 1,766 | 5.5% | 7.2% |
| Vacant | 2,081 | 6.4% | 13.9% |
| TOTAL | 32,324 | 100 | 100 |

Source: Composition of District centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Table 2 District Centre Unit Composition

| GOAD Category | Units at 2022 | Units at 2022 (%) | Units UK Average at 2022 (%) | Units at 2016 (%) |
|----------------|---------------|-------------------|------------------------------|-------------------|
| Comparison | 43 | 47.8% | 27.0% | 58.2% |
| Convenience | 6 | 6.7% | 9.2% | 8.1% |
| Financial | 9 | 10.0% | 9.1% | 28.6%* |
| Leisure | 12 | 13.3% | 24.7% | 28.6%* |
| Retail Service | 7 | 7.8% | 15.7% | 28.6%* |
| Vacant | 13 | 14.4% | 14.1% | 5.1% |
| TOTAL | 90 | 100 | 100 | 100.0% |

Source: District centre composition based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022. Units at 2016 taken from Sheffield & Rotherham Joint Retail & Leisure Study 2017. 2016 figures for financial, leisure and retail service operators represent a total of these uses.

Uses - Crystal Peaks accommodates a diverse range of operators and unlike other district centres in the city, it has a composition more reflective of 'traditional' retail centres which are orientated towards comparison goods retailers.

At the time of our survey, 41.6% of the floorspace in Crystal Peaks was occupied by comparison goods retailers (this compares to the current UK floorspace average of 30.4%). Retailers are diverse and include a number of national multiple operators such as M&S, Next, Peacocks and New Look. The range of retailers is therefore considered more than capable of serving the needs of the local community, as well as being likely to draw from a significantly wider catchment area. This offer is further augmented by a reasonably strong range of convenience goods operators, which are anchored by Sainsbury's. Convenience goods operators equate to 36.1% of floorspace, far in excess of the 15.4% national average. Other convenience operators include M&S Food and Iceland, alongside a large covered market, which is operated by Sheffield City Council and is open seven days a week.

By virtue of both comparison and convenience operators accounting for a greater proportion of floorspace than the current UK national average, the proportion of service operators is significantly lower than may otherwise be expected. In respect of leisure service operators, this is potentially due to the centre offering unattractive opening hours due to the shopping mall closing at 5:30pm. Leisure service operators account for 6.1% of the floorspace at Crystal Peaks, compared to 25.7% nationally. To some extent, the planned opening of Papa's Fish and Chips at the former Aagrah restaurant at the north of the district centre will remedy this. The proportion of retail service (5.5%) and financial service (4.3%) floorspace is more similar to the current national average (7.2% and 6.8%) respectively. Notwithstanding the relatively limited size of the service offer at Crystal Peaks, the offer is considered suitable to serve the day-to-day needs of the local community.

Vacancies - At the time of our visit, a total of 14.4% of units were vacant. This represents an increase on the 5.1% of vacant units recorded at 2016. The change to vacancy rates are emblematic of wider changes in the retail sector, to which Crystal Peaks is considered to be especially vulnerable for a district centre, due to the Shopping Mall's wide range of national multiple comparison goods retailers.

Although at the time of writing, the overall vacancy rate is not considered to represent cause for concern given that it is broadly similar to the national average in respect of units, it should be monitored in the future to ensure that there are no significant changes. Efforts should also be made to diversify the nature of the offer to ensure resilience to future changes in the comparison goods

retail sector. However, it should also be noted that the vacancy rate in respect of floorspace remains lower than the national average, at 6.4% of the quantum of retail floorspace. As such, the vacancy rate is not considered to be an issue at the current time.

Pedestrian Flows - Crystal Peaks is a vibrant centre, focused around a range of comparison and convenience goods. The district centre is focused around a covered shopping mall, and this helps to facilitate pedestrian movements.

The greatest pedestrian activity was observed around the Sainsbury's foodstore, and on the upper floor of the mall between the escalators and the bus stands. Lower levels of footfall and activity were observed at the eastern end of the mall, and in the areas within the district centre outside of the shopping mall. Limited levels of pedestrian activity were observed between the district centre and surrounding residential areas. This suggests that the barriers to movement (Eckington Way and the tramline) reduce the amount of pedestrian movement into and out of the district centre.

Accessibility - The centre is well served by public transport. There are a number of bus stands located to the west of the Shopping Mall. Frequent bus services are provided to a range of destinations, including the City Centre, Rotherham, Clowne, Chesterfield and locations throughout Sheffield such as Broomhill and Ecclesfield. Crystal Peaks district centre is also located along the Sheffield Supertram Blue line, with frequent services provided from both the Crystal Peaks and Beighton - Drake House Lane stops to destinations including the City Centre.

Pedestrian accessibility is generally very good, with the covered Shopping Mall being easily accessible to all users. Movements to and from the district centre are also generally easy, and are facilitated by a number of crossing points surrounding Crystal Peaks and linking in to surrounding residential areas.

In respect of vehicular parking, a total of 1,080 surface level car-parking is provided for customers to Crystal Peaks Shopping Centre. This parking is free for up to 4 hours, and is located on all sides of the shopping mall. There are also a number of Sheffield bike stands located throughout the district centre.

The centre therefore benefits from a high standard of accessibility.

Perception of Safety - By virtue of the managed nature of the shopping mall, Crystal Peaks has a generally high standard of safety. Areas with high levels of footfall and activity benefit from high standards of natural and passive surveillance, however this is more diminished in areas with lower levels of activity such as peripheral areas on the outside of the shopping mall.

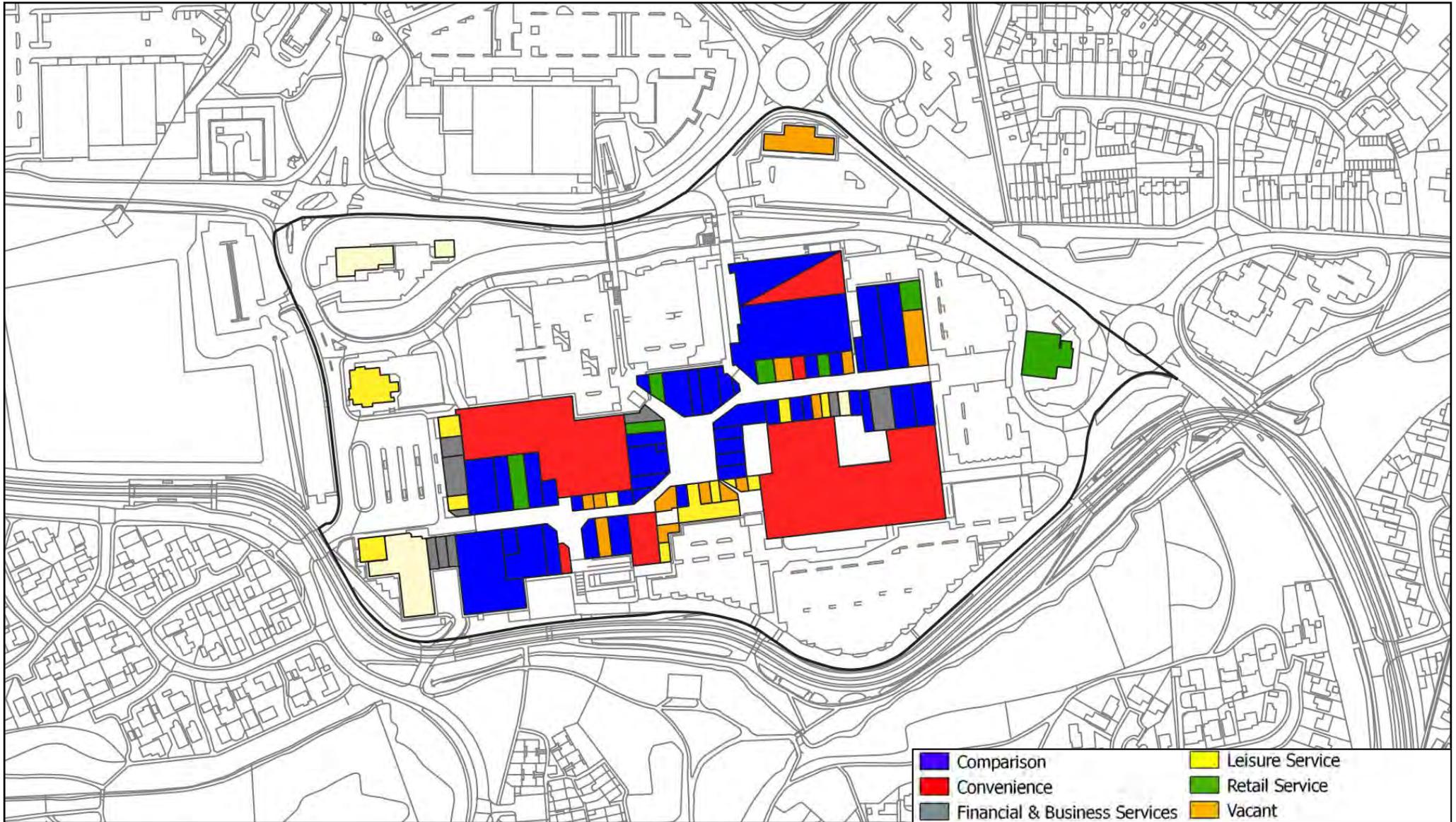
According to the website ukcrimestats.com, there were 173 crimes recorded within a mile radius of the district centre at February 2022. This compares with 154 crimes at February 2021 and 173 crimes at February 2020.

Environmental Quality - Once again, the managed nature of the shopping mall results in the district centre having a relatively high standard of environmental quality. There was little litter and graffiti noted at the time of our visit, and public areas appeared to be well-maintained and generally tidy.

Although the district centre is surrounded by significant amounts of surface level car parking, these are neatly landscaped and well-maintained. Tree lined boundaries surround the district centre on all sides and further add to the positive setting of the district centre. Notwithstanding this, the built form of the shopping mall does have the effect of the centre 'turning its back' to areas which lay beyond it, which negatively impact both vibrancy and safety during the evening hours and other times when the district centre is closed.

Conclusions - Crystal Peaks provides a range of retailers which are atypical for a district centre, however the modern, purpose built accommodation provided by the shopping mall provides an attractive destination for operators and shoppers alike. The centre has a strong range of comparison and convenience operators, although a lesser service offer than may otherwise be expected, particularly in respect of leisure service operators.

The centre's concentration on comparison operators, particularly clothing operators, is considered to be a weakness in the context of the changing picture of high street retailers and the difficulties that national multiple retailers have faced in recent times. Notwithstanding this, whilst Crystal Peaks is currently considered to perform an important role, it will be important to ensure that the vacancy rate does not increase further and that additional, good quality operators can be attracted to underpin its future vitality and viability.



Crystal Peaks district centre

Sheffield Retail and Leisure Study 2022

Survey Date - March 2022

Darnall District Centre

Description - Darnall district centre is located adjacent to a key arterial route (Greenland Road A6102) approximately 3 kilometres to the east of Sheffield City Centre. The centre provides a diverse range of operators, anchored around a strong range of convenience and comparison goods operators. This offer is bolstered by a diverse service sector. Given this, the current provision of the district centre is considered easily capable of serving the day-to-day needs of the local community in Darnall.

The centre has a reasonable standard of environmental quality, with few areas of greenery or planting but a generally well-maintained public realm. The concentration of leisure service operators in parts of Darnall reduces the overall impression of vibrancy during daytime hours, but generally the district centre benefits from reasonable levels of pedestrian activity.



Figure 1: Fulton Food on Staniforth Road is one of a number of key convenience goods operators in the district centre. Darnall has a strong range of convenience goods operators which serve the needs of the local community.



Figure 2: The majority of retail units in Darnall district centre are largely converted former terraced dwellings. The centre therefore lacks purpose built retail units which appeal to national multiple operators.



Figure 3: The vacant former HSBC bank on Staniforth Road. Darnall currently has a vacancy rate lower than the national average in respect of both floorspace and units.



Figure 4: At the time of our visit there was a walk-through testing site for Covid-19 located on a surface level car park on Station Road.

Table 1 District Centre Floorspace Composition

| GOAD Category | Floorspace at 2022 (sq.m) | Floorspace at 2022 (%) | Floorspace UK Average at 2022 (%) |
|----------------------|----------------------------------|-------------------------------|--|
| Comparison | 2,119 | 19.9% | 30.4% |
| Convenience | 3,844 | 36.1% | 15.4% |
| Financial | 229 | 2.2% | 6.8% |
| Leisure | 2,273 | 21.4% | 25.7% |
| Retail Service | 1,243 | 11.7% | 7.2% |
| Vacant | 927 | 8.7% | 13.9% |
| TOTAL | 10,635 | 100 | 100 |

Source: Composition of District centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Table 2 District Centre Unit Composition

| GOAD Category | Units at 2022 | Units at 2022 (%) | Units UK Average at 2022 (%) |
|----------------|---------------|-------------------|------------------------------|
| Comparison | 23 | 23.5% | 27.0% |
| Convenience | 16 | 16.3% | 9.2% |
| Financial | 2 | 2.0% | 9.1% |
| Leisure | 25 | 25.5% | 24.7% |
| Retail Service | 22 | 22.4% | 15.7% |
| Vacant | 10 | 10.2% | 14.1% |
| TOTAL | 98 | 100 | 100 |

Source: District centre composition based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Uses - Darnall is anchored by a strong range of service operators, with 25 leisure service operators accounting for 25.5% of all units in the district centre. Operators are diverse and include a betting office, amusement arcade, public house, hot-foot takeaways and cafés. Alongside the leisure service offer, there are 22 retail service operators. These account for 22.4% of all operators in the district centre, a figure greater than the current national average in respect of units. Retail service operators include hairdressers, barbers, opticians, travel agents and beauty salons. Darnall's financial and business service offer is much lower than the current national average, with two units equating to 2.0% of all units in the district centre. This low figure has been exacerbated by the closure of HSBC on Staniforth Road.

There are 16 convenience goods operators, anchored by Lidl. Convenience operators account for 16.3% of all units in the district centre, and include off-licences, bakeries, grocers and Fulton Foods. The 23 comparison goods operators in Darnall account for 23.5% of all operators, and include pharmacies, clothes shops, gift shops and gift shops, alongside specialist retailers such as AF Dobson Appliances.

Vacancies - At the time of our visit, a total of 10 vacant units were observed. These units were located throughout the district centre, and included the former HSBC Bank on Staniforth Road, which closed in May 2021. The 10 vacant units at Darnall account for 10.2% of all units in the district centre, a figure which is lower than the current national average. Likewise, in respect of floorspace, the current vacancy rate is also lower than the national average. Given this, the vacancy rate is not considered cause for concern.

However, given the impacts on vibrancy that closed roller shutters have on the district centre during daytime hours, efforts should be made to secure reoccupation for vacant units to ensure activity levels are maintained in Darnall.

Pedestrian Flows - Pedestrian activity was witnessed throughout the centre, with higher levels outside of key operators and service uses. Pedestrian flows were considerably lower around the eastern part of the centre, which appears to be a more peripheral part of the shopping area. This is the location of a concentration of restaurants and takeaways, many of which were closed at the time of our visit. It can therefore be expected that pedestrian activity would increase in this part of the centre at different periods of the day.

Within Darnall, there are relatively few safe pedestrian crossings located along pedestrian desire lines, with the controlled crossing points provided being located close to the junction of Main Road and Staniforth Road at the centre of the district centre. The effect of this is that there are no safe crossing points at the northern and western ends of the district centre.

Accessibility - Darnall has a high standard of accessibility, on foot, by car and by public transport. Although not located within the district centre, Darnall train station is located on Station Road to the south of the defined boundary. Frequent train services can be alighted, which run between Leeds and Lincoln via Sheffield (which can be reached in approximately 6 minutes). In respect of bus transport, there are a number of bus stops located throughout the district centre. These are located on Prince of Wales Road, Staniforth Road and Main Road. Bus services 9 Sheffield, 9a Sheffield, 18 Sheffield, 752, 52, 52a Sheffield and 718 provide frequent services to a range of destinations, including Hillsborough, Sheffield City centre, Woodhouse, Manor Top and a number of other destinations throughout Sheffield. Darnall district centre is therefore well served by public transport.

In respect of car parking, there is an area of surface car parking at Lidl on Catley Road and a car park on Station Road (which at the time of our visit was a walk-through testing site for Covid-19). Beyond these locations, there is a considerable amount of on-street car parking located throughout the district centre readily available and easily accessible.

Pedestrian accessibility is also generally good, with a number of crossing points located along Staniforth Road. However, it is felt that a greater standard of accessibility could be secured through the addition of further crossing points along Main Road and Staniforth Road.

Perception of Safety - There did not appear to be any particular concentrations of vandalism or graffiti and the general perception of safety was good on the day of our visit. The wider retail frontage appears to be in reasonably good condition. The buildings along Staniforth Road and Main Road are two storeys high and have plenty of windows. In addition, Main Road has good pedestrian flows, which collectively helps to create a good overall sense of natural surveillance within and around the shopping area. Peripheral areas, such as the western end of the district centre on Staniforth Road have lower levels of activity, resulting in lower levels of natural and passive surveillance.

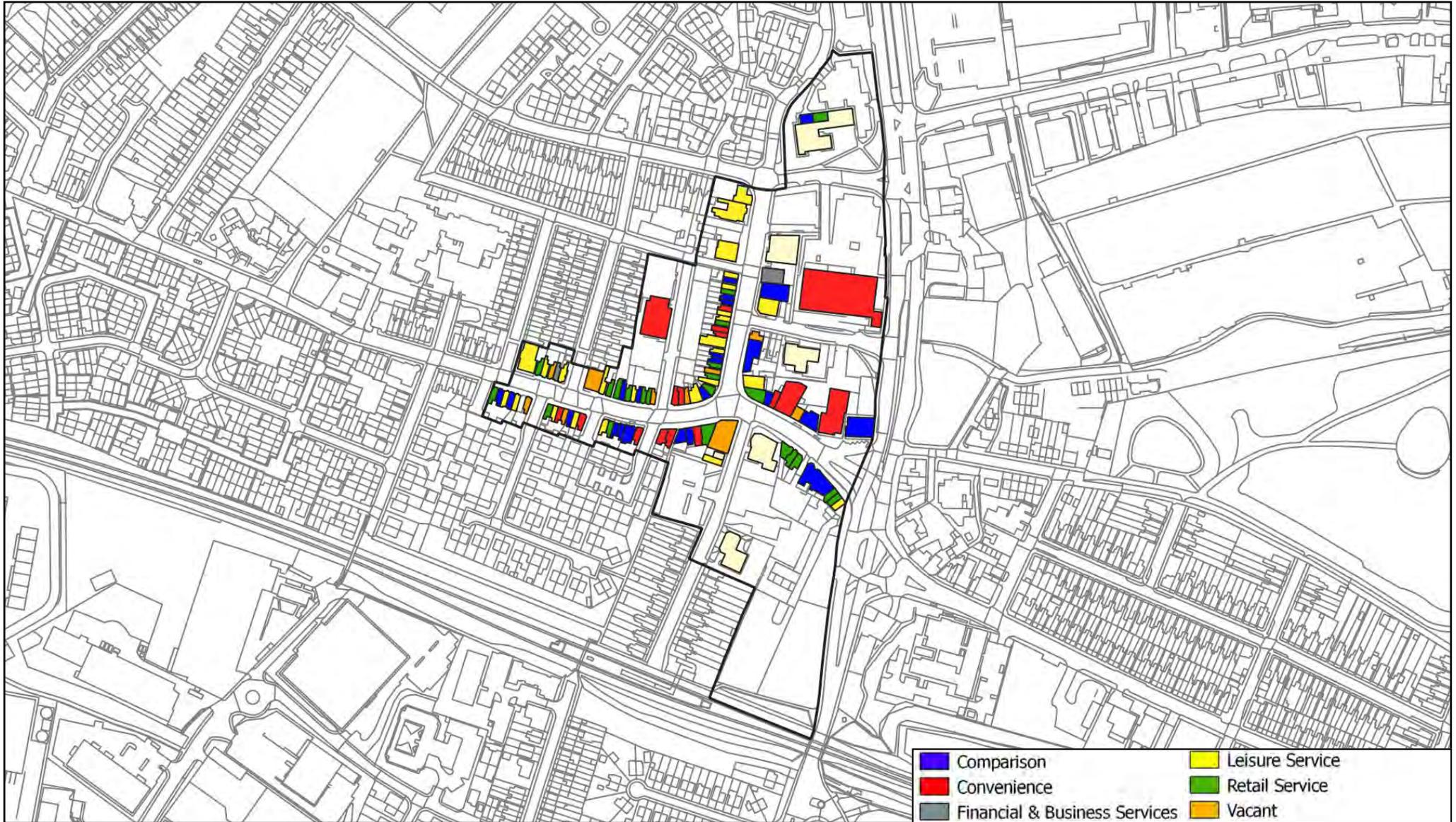
According to the website ukcrimestats.com, there were 221 crimes recorded within a mile radius of the district centre at February 2022. This compares with 162 crimes at February 2021 and 264 crimes at February 2020.

Environmental Quality - The quality of the shop frontages is generally of a reasonable standard. There are very few examples of notably good quality building facades, although the architecture of some buildings at the junction of Main Road and Staniforth Road is considered to contribute positively to the general street-scene. However, there are very few particularly poor examples of building facades, although the frontages of some units could be better maintained, particularly at a first floor level. Furthermore, the concentration of hot-food takeaways in parts of the district centres diminish the vibrancy and activity at Darnall during daytime hours, particularly impacting the environmental quality of the district centre when roller shutters are closed.

The public realm in Darnall is reasonably well-maintained, although it too lacks any distinguishing features. There was little litter observed at the time of our visit, although there were a number of bins and other street clutter located across pedestrian footways which negatively impacts the overall standard of environmental quality in the district centre.

Conclusions - Darnall district centre provides a diverse range of operators, anchored around a strong range of convenience and comparison goods operators. This offer is bolstered by a diverse service sector. Given this, the current provision of the district centre is considered easily capable of serving the day-to-day needs of the local community in Darnall. The concentration of leisure service

operators in parts of Darnall reduces the overall impression of vibrancy during daytime hours, but generally the district centre benefits from reasonable levels of pedestrian activity. Notwithstanding this, the centre is considered to be generally vital and viable.



Darnall district centre

Sheffield Retail and Leisure Study 2022

Survey Date - March 2022

Ecclesall Road District Centre

Description - Ecclesall Road is a large and varied district centre almost 2km in length, stretching from Hunters Bar at the west to St Mary's Gate adjacent the city centre in the east. It is focused on the south side of Ecclesall Road (the A625) and includes Sharrow Vale Road and Hickmott Road. The surrounding area is primarily residential. Endcliffe Park adjoins Hunters Bar and the Botanical Gardens are to the north.

The centre is dominated by leisure service and comparison goods retailers and its offer is atypical in terms of a standard district centre. It serves a large catchment area. Sharrow Vale Road in particular accommodates comparison goods units while the majority of national multiple leisure operators are located on the frontage of Ecclesall Road, benefitting from strong pedestrian flows and passing traffic. The centre's convenience offer is in line with national averages and is underpinned by M&S Food and Tesco Metro on Ecclesall Road, alongside a diverse range of other operators.



Figure 1: Looking east along Sharrow Vale Road. The units in this area are characterful converted former terraced houses and are occupied by independent operators.



Figure 2: A new development behind Sharrow Vale Road, known as Dyson Place, incorporating purpose built retail and leisure units and a high quality area of public realm (outside the defined centre).



Figure 3: Berkeley precinct accommodates national multiple comparison and convenience units, such as Tesco, Costa Coffee, Boots and KFC.

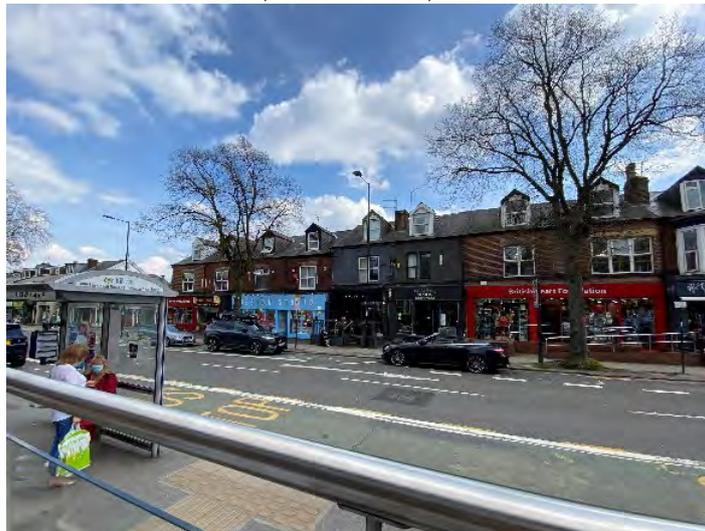


Figure 4: The majority of units along Ecclesall Road are converted former dwellinghouses, some of which have been merged into larger units.

Table 1 District Centre Floorspace Composition

| GOAD Category | Floorspace at 2022 (sq.m) | Floorspace at 2022 (%) | Floorspace UK Average at 2022 (%) |
|----------------------|----------------------------------|-------------------------------|--|
| Comparison | 5,119 | 20.3% | 30.4% |
| Convenience | 5,035 | 20.0% | 15.4% |
| Financial | 1,116 | 4.4% | 6.8% |
| Leisure | 8,410 | 33.4% | 25.7% |
| Retail Service | 3,262 | 12.9% | 7.2% |
| Vacant | 2,270 | 9.0% | 13.9% |
| TOTAL | 25,212 | 100% | 100% |

Source: Composition of District centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Table 2 District Centre Unit Composition

| GOAD Category | Units at 2022 | Units at 2022 (%) | Units UK Average at 2022 (%) | Units at 2016 (%) |
|----------------|---------------|-------------------|------------------------------|-------------------|
| Comparison | 57 | 25.1% | 27.0% | 34.5% |
| Convenience | 24 | 10.6% | 9.2% | 10.3% |
| Financial | 15 | 6.6% | 9.1% | 46.4%* |
| Leisure | 70 | 30.8% | 24.7% | 46.4%* |
| Retail Service | 42 | 18.5% | 15.7% | 46.4%* |
| Vacant | 19 | 8.4% | 14.1% | 8.3% |
| TOTAL | 227 | 100% | 100% | 100.0% |

Source: District centre composition based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022; Units at 2016 taken from Sheffield & Rotherham Joint Retail & Leisure Study 2017. 2016 figures for financial, leisure and retail service operators represent a total of these uses.

Uses - Ecclesall Road district centre is the largest district centre in the Sheffield authority area in respect of the total number of retail units. The centre is dominated by leisure service and comparison goods retailers, and the offer of the district centre is fairly atypical from what may be expected of district centres, which are usually focused on providing for the day-to-day needs of the local community. The offer at Ecclesall Road, particularly in respect of leisure service operators, is focused on providing for a wide catchment area.

Service operators equate to 55.9% of all retailers in the district centre at 2022, a figure which represents an increase on the 46.4% recorded at 2016. The leisure service sector is particularly strong at Ecclesall Road, with 70 operators equating to 30.8% of all operators, a figure which is in excess of the current national average. Operators are diverse, and include restaurants, bars, hot-food takeaways, cafés and pubs. The offer includes a number of national multiples, such as Papa John's, Dominos, Nando's and Starbucks. The leisure service offer is particularly concentrated on Ecclesall Road, potentially taking advantage of the high standard of accessibility offered. In addition, there are 42 retail service operators (equating to 18.5% of all units in the district centre, a figure slightly higher than the current national average of 15.7%) and 15 financial and business service operators (equating to 6.6%, a figure just lower than the current national average of 9.1%).

The convenience goods offer is relatively strong, with 24 operators equating to 10.6% of units (a figure almost the same as that recorded at 2016, and slightly larger than the current national average). The convenience offer is underpinned by M&S Food and Tesco Metro on Ecclesall Road, alongside a diverse range of other operators including off-licences, bakeries, butchers and delis. The comparison goods offer is relatively strong for a district centre, with 57 units equating to 25.1% of the total. This is only marginally less than the current national average, but much less than the 34.5% at 2016. Comparison goods operators are generally located along Sharrow Vale Road, and the sector in Ecclesall Road includes gift shops, charity shops, charity shops and national multiples such as Fat Face, Oliver Bonas, White Stuff and Boots.

Vacancies - At the time of our visit, we recorded a total of 19 vacant units within Ecclesall Road district centre. These 19 units equate to 8.4% of all units in the district centre, a figure largely unchanged from that recorded at 2016, and a figure substantially lower than the current national average of 14.1%. The overall vacancy rate in respect of both floorspace and units is not considered to represent cause for concern currently, and indeed is of a level that it enables 'churn' in the retail composition of the centre. However, there is a concentration of vacant units between Harland Road

and Pear Street and efforts should be made to reoccupy as many of these units to ensure this area remains vibrant.

Indeed, that the vacancy rate has hardly changed between the 2016 and 2022, the survey is considered to be representative of a vital and strong district centre.

Pedestrian Flows - Pedestrian flows were naturally stronger along Ecclesall Road, when compared to Sharrow Vale Road and Hickmott Road. Pedestrian flows were highest at the centre of the road, around Berkeley Precinct which includes Tesco foodstore and accommodates dedicated surface parking.

Accessibility - Bus services 65, 81 Sheffield, 82 Sheffield, 83a, 88, 272 Sheffield's Peak Link and 785 can be alighted from bus stops along Ecclesall Road, and provide frequent services to a range of destinations including Stannington, Ecclesfield, Fulwood, Castleton, Dore, Millhouses and into Sheffield City Centre. Although the district centre is not located on a train or tram line, the overall standard of public transport accessibility is considered to be good with bus services provided from the early morning into the late evening.

The district centre is naturally accessible from a large catchment via foot, due to its size and being bound by Sharrow Vale and Sharrow at the south and Broomhall at the north.

The A625 connects the city centre to the south-western suburbs. With respect to car parking in the district centre, there are two surface car parks, at the Berkeley Centre (c.80 spaces) and Stewart Road (c. 15 spaces). On-street parking bays are provided at the west of Sharrow Vale Road. Parking is limited on surrounding streets.

Perception of Safety - The district centre feels safe and secure, with a high level of passive surveillance from strong pedestrian flows and passing traffic. Hickmott Road is quieter. The far-western edge of the centre going to St Mary's Gate feels less safe, due to the lack of active frontages and natural surveillance.

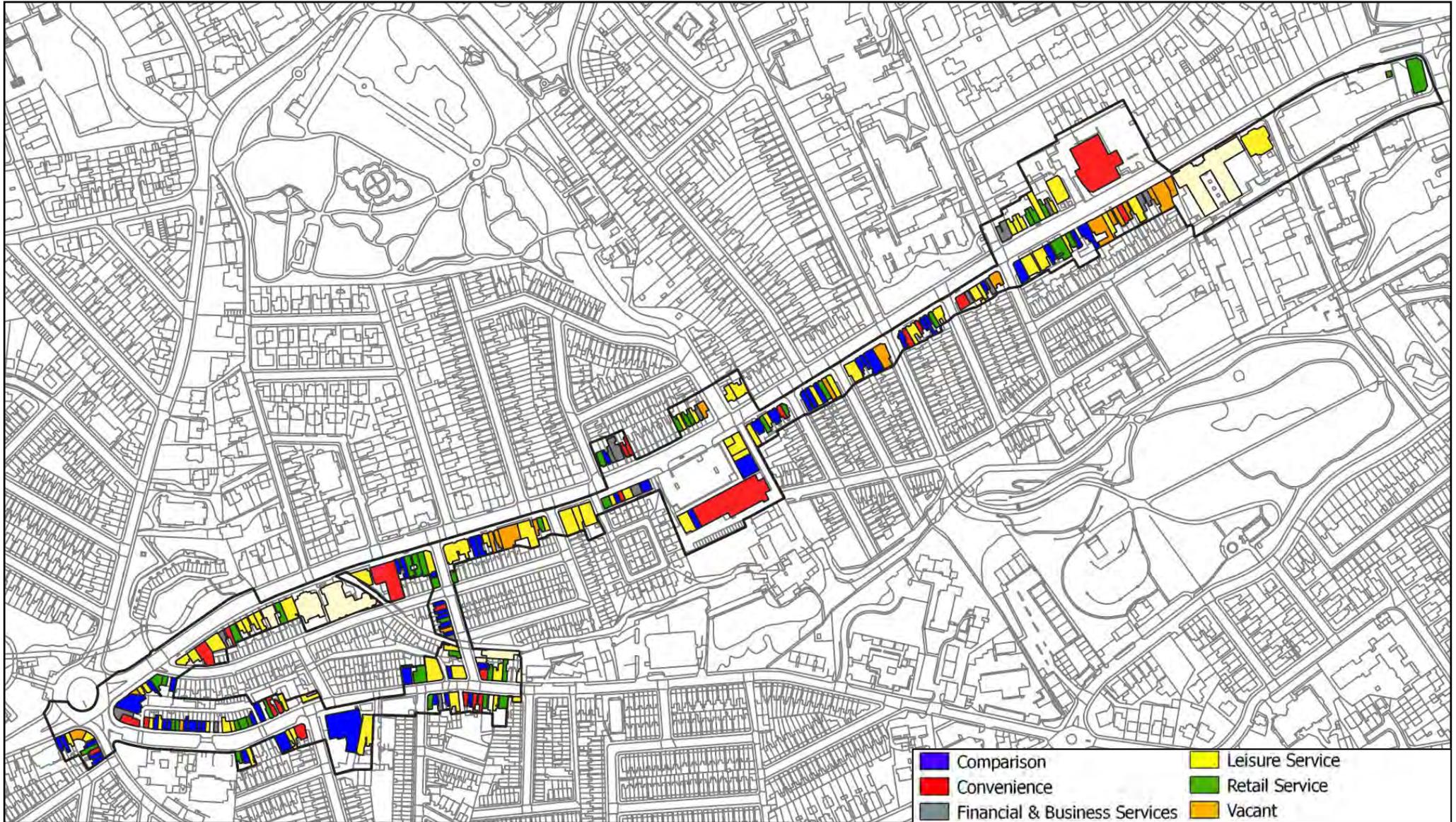
According to the website ukcrimestats.com, there were 580 crimes recorded within a mile radius of the district centre at February 2022. This compares with 470 crimes at February 2021 and 637 crimes at February 2020.

Environmental Quality - The district centre is primarily comprised of former residential dwellinghouses. Purpose built accommodation is located around the Berkeley precinct, including a recently built parade which reflects the character of the area. Units are for the most part well maintained. However, the quality of the environment deteriorates from Harland Road, where there are a number of vacant units and a large office building, The Portergate, which has a dead frontage. The large vacant and cleared site at 245 Ecclesall Road serves to end the district centre.

The environmental quality of the centre is, for the most part, good. The mature trees on Ecclesall Road improves the appearance of the area. Due to the vast majority of units being located on the south side of the road, the pavement often feels cluttered, and hemmed in by the road. Sharrow Vale Road has considerably less passing traffic and benefits from traffic calming features, which improves the environmental quality. The recently completed Dyson Place further improves Sharrow Vale and provides a high quality area of public realm.

Conclusions - Ecclesall Road District Centre has a strong range of service operators, particularly leisure units. As a consequence, it has a composition which is atypical of a district centre, and serves a diverse catchment which includes a high number of students and young professionals.

The centre also has a relatively strong range of convenience uses and a range of comparison shops too, with national chains represented. The centre clearly serves a wide catchment, and particularly with respect to the leisure uses and night-time economy offering. Vacancy levels are lower than average and activity levels were high on the day of our visit. Therefore the district centre is vital and viable.



Ecclesall Road district centre

Sheffield Retail and Leisure Study 2022

Survey Date - March 2022

Firth Park District Centre

Description - Firth Park district centre is located approximately 2 kilometres to the north of the City Centre, and is located at the centre of the residential area of the same name. The district centre is located just to the north of a public park, and as such is situated in a fairly attractive location with a number of key, community facilities (including Firth Park Library, a nursery and a place of worship) located within or just beyond the district centre.

With the exception of Heron Foods on Sicey Avenue, Firth Park district centre lacks a large scale convenience foods store. Notwithstanding this, the district centre offers a diverse range of comparison, convenience and service operators, which together are considered more than sufficient to serve the day-to-day needs of the local community in Firth Park.



Figure 1: Looking towards Stubbin Lane. Firth Park has a generally high standard of environmental quality, with areas of attractive and well-maintained landscaping and planting.



Figure 2: Retail units on Bellhouse Road. The district centre is dominated by smaller units which are largely converted former houses.



Figure 3: The former MFA Bowl on North Quadrant is the greatest single vacant unit in respect of floorspace. If an alternate operator could be found this would reduce the quantum of vacant floorspace significantly.

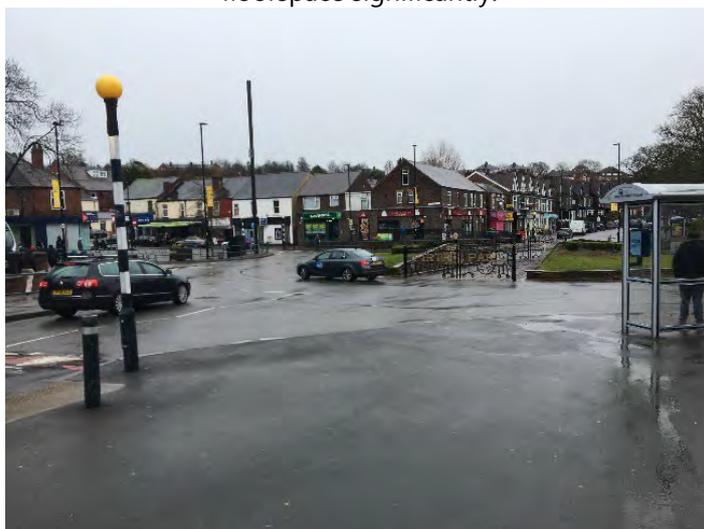


Figure 4: The central roundabout in Firth Park is a key focal point in the district centre. Around it are a number of key uses, and wide areas of public realm as well as the public park of the same name.

Table 1 District Centre Floorspace Composition

| GOAD Category | Floorspace at 2022 (sq.m) | Floorspace at 2022 (%) | Floorspace UK Average at 2022 (%) |
|----------------------|----------------------------------|-------------------------------|--|
| Comparison | 1,832 | 18.0% | 30.4% |
| Convenience | 1,960 | 19.3% | 15.4% |
| Financial | 311 | 3.1% | 6.8% |
| Leisure | 2,252 | 22.2% | 25.7% |
| Retail Service | 1,440 | 14.2% | 7.2% |
| Vacant | 2,372 | 23.3% | 13.9% |
| TOTAL | 10,167 | 100 | 100 |

Source: Composition of District centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Table 2 District Centre Unit Composition

| GOAD Category | Units at 2022 | Units at 2022 (%) | Units UK Average at 2022 (%) |
|----------------|---------------|-------------------|------------------------------|
| Comparison | 16 | 18.4% | 27.0% |
| Convenience | 16 | 18.4% | 9.2% |
| Financial | 4 | 4.6% | 9.1% |
| Leisure | 24 | 27.6% | 24.7% |
| Retail Service | 17 | 19.5% | 15.7% |
| Vacant | 10 | 11.5% | 14.1% |
| TOTAL | 87 | 100 | 100 |

Source: District centre composition based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Uses - Firth Park offers a range of retail and service operators which are considered to be sufficient to provide for the day-to-day needs of the local community. There are 16 convenience goods operators, which equates to 18.4% of all operators in the district centre. These operators are anchored by Heron Foods and a Premier convenience store, alongside a bakery, butcher, off-licence and grocer. Alongside the convenience offer, there are 16 comparison goods operators in Firth Park. This figure equates to 18.4% of all operators, a figure which is lower than the national average but is considered to be commensurate with the centre’s status as a district centre.

The district centre’s service offer is also considered commensurate with Firth Park’s position in the retail hierarchy. There are 24 leisure service operators in the district centre, which equates to 27.6% of all operators in Firth Park. Leisure service operators are diverse, and include hot-food takeaways, restaurant, a betting office, amusement arcade and café. The retail service offer is also diverse, with 17 operators equating to 19.5% of all units in the district centre. The proportion of both leisure and retail service operators is generally similar to the current UK national average figure. Firth Park also has a moderate financial and business service offer, with four such units. Operators include a retail bank, Lloyds on Stubbin Lane. However, it should be noted that since 2017 both the branches of The Nottingham Building Society and Natwest have closed in the district centre.

Vacancies - At the time of our visit, our surveyed recorded 10 vacant units. This equates to 11.5% of all units in the district centre, a figure lower than the current national average of 14.1%.

The quantum of vacant retail floorspace in the centre equates to 23.3% of the total stock of retail floorspace. This figure is significantly greater than the current national average for vacant floorspace, which is 13.9%. Although this figure represents cause for concern, it should be noted that the former MFA Bowl on North Quadrant is the greatest single vacant unit in respect of floorspace. If an alternate operator could be found this would reduce the quantum of vacant floorspace significantly. Efforts should therefore be concentrated on reoccupation of this unit.

Pedestrian Flows - At the time of our visit, high levels of pedestrian activity were observed throughout the district centre with particular concentrations noted on Sicey Avenue and along Bellhouse Road. The majority of operators which provide services to meet the day-to-day need of the local community are located in this location, as are the key transport interchanges and bus stops. Given this, it is not considered surprising that the northern half of the district centre attracted a greater level of pedestrian activity.

Activity was notably light on the southern side of Stubbin Lane and Firth Park Road, although some linked trips to this part of the district centre were observed, particularly to the community facilities (the Library and Park) in this location.

Accessibility - Firth Park district centre is located within a suburban residential area located to the north of the City Centre. By virtue of this, Firth Park is easily accessible to the residential areas which surround the centre and look to it to meet their day-to-day needs. In respect of pedestrian accessibility, this is generally of a high standard, and a number of pedestrian crossing points are located throughout the centre which provide for easy pedestrian movements and a good standard of accessibility. Car parking is also readily available in the district centre, although the centre lacks a sizeable surface level car park. Notwithstanding this, there is a considerable amount of on-street car parking available throughout the district centre.

Unlike a number of other district centres in Sheffield, Firth Park is not located on a tram or train line. Notwithstanding this, Firth Park is well integrated into the public transport network by virtue of the centre's location on a number of bus routes. Bus stops within the centre on Stubbin Lane, Firth Park Road, Sicey Avenue and Bellhouse Road bus services 1, 1a, 18 Sheffield, 32 Sheffield, 75 Sheffield, 76 Sheffield, 88, 95 Sheffield, 95a Sheffield, 779 provide frequent services to the City Centre and destinations throughout the City including Hillsborough, Meadowhead and Banner Cross.

Perception of Safety - According to the website ukcrimestats.com, there were 475 crimes recorded within a mile radius of the district centre at February 2022. This compares with 455 crimes at February 2021 and 358 crimes at February 2020. At the time of our visit, few instances of crime were noted and the centre generally felt safe and secure.

The linear nature of the centre provides few enclosed areas, and greatly increases the sense of surveillance, in terms of both passive and natural surveillance. Equally, the levels of activity further add to a sense of security by virtue of being a busy and vibrant district centre. However, areas with lower levels of activity (such as Stubbin Lane) do feel less secure compared to areas with greater activity, but in general the perception of safety at Firth Park district centre is considered to be good.

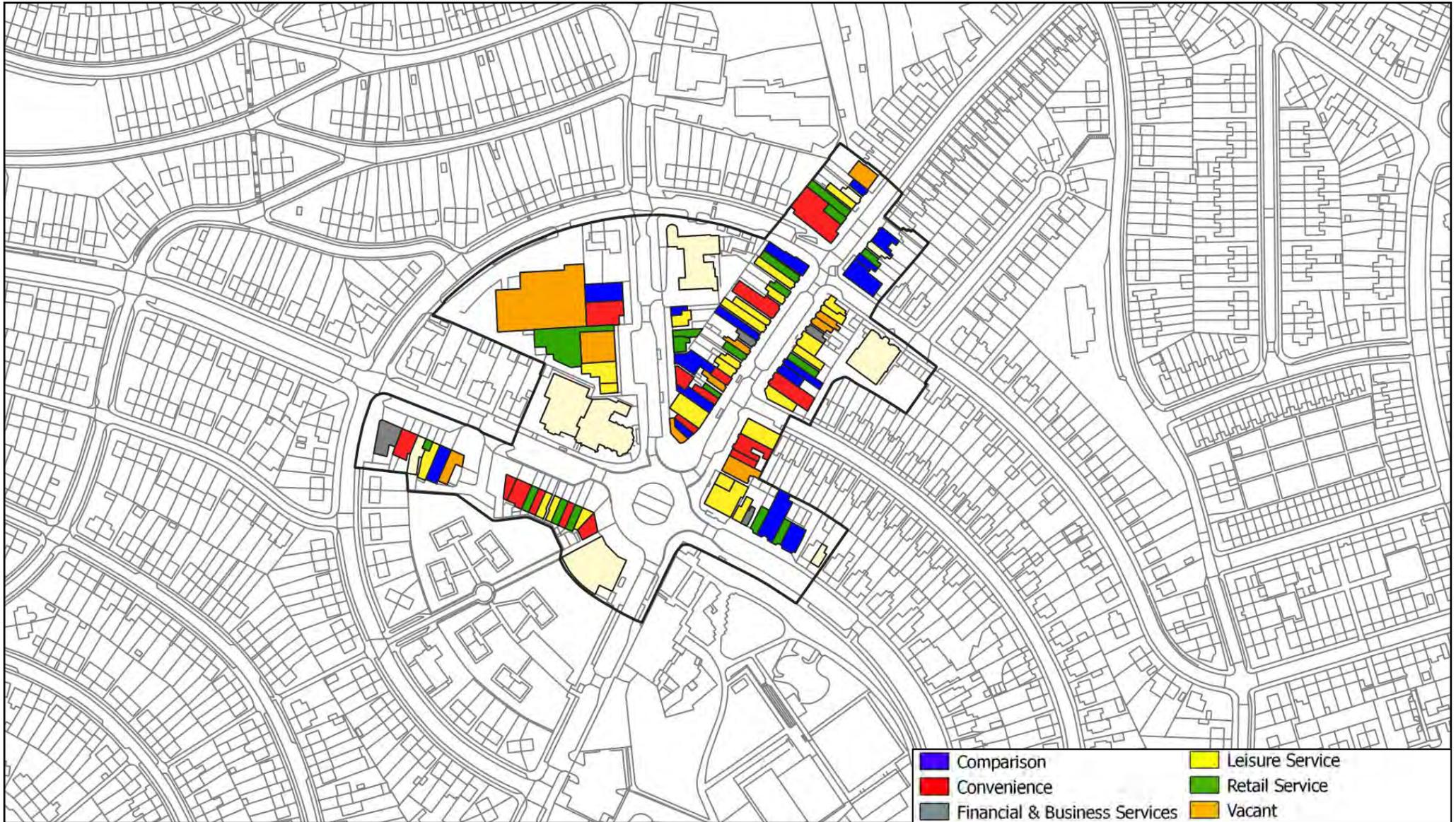
Environmental Quality - Located just to the north of Firth Park, the district centre is situated in a relatively attractive location with plentiful greenery, landscaped areas and planting throughout the district centre. To this end, it is noted that the Firth Park Community Forum is active in the area and seeks to make improvements to the centre and wider area.

At the centre of Firth Park is a roundabout, through which an old tramway route ran. This has been maintained and is an attractive feature, providing both a key focal point and landmark for the district centre. Alongside a number of attractive period buildings, Firth Park is generally well-maintained with a high standard of environmental quality.

Throughout the rest of the district centre, the retail units are generally well-maintained, although a few appear tired and in need of investment. The former MFA Bowl on North Quadrant negatively impacts the standard of environmental quality.

Conclusions - The district centre is located just to the north of a public park, and as such is situated in a fairly attractive location with a number of key, community facilities (including Firth Park Library, a nursery and a place of worship) located within or just beyond the district centre. Firth Park offers a diverse range of comparison, convenience and service operators, which together are considered more than sufficient to serve the day-to-day needs of the local community in Firth Park.

Although the vacancy rate (in respect of floorspace) is greater than the national average, this figure is inflated by the vacant former MFA Bowl on North Quadrant. Notwithstanding this, and allowing for efforts to reoccupy this vacant unit, the centre is considered to be generally vital and viable.



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Firth Park district centre

Sheffield Retail and Leisure Study 2022

Survey Date - March 2022

Heeley District Centre

Description - Situated to the north of Woodseats and approximately 1.5 kilometres to the south of the City Centre, Heeley is a long, linear district centre located along the A61 Chesterfield Road. The centre is comprised of a modern retail park (Heeley Retail Park) which dominates the southern half of the district centre, along with a number of large retail units on the western side of Chesterfield Road (occupied by Lidl, B&M and Porcelanosa). The eastern side of Chesterfield Road is lined by more traditional retail units, and includes a specialist furniture store, Ponsford.

The centre has a generally functional standard of environmental quality, with limited areas available for planting or landscaping by virtue of its location within an area of dense development. Although situated along a key arterial route, the impacts of this road are lessened by the large carriageways and wide footpaths. The main impact of the volume of passing traffic is in the barrier it poses to safe pedestrian movement.



Figure 1: Heeley Retail Park, located at the southern end of the district centre, provides purpose built accommodation which appeals to bulky-goods retailers such as Currys.



Figure 2: The eastern side of Chesterfield Road is a more 'traditional' retail parade, in comparison to the larger, purpose built retail units on the western side.



Figure 3: Ponsford furniture store at the northern end of the district centre is considered likely to appeal to a wider catchment than may otherwise look to the district centre.



Figure 4: The width of the London Road carriageway, along with the volume of traffic movements, represents a barrier to pedestrian movement in particular.

Table 1 District Centre Floorspace Composition

| GOAD Category | Floorspace at 2022 (sq.m) | Floorspace at 2022 (%) | Floorspace UK Average at 2022 (%) |
|----------------------|----------------------------------|-------------------------------|--|
| Comparison | 13,634 | 62.7% | 30.4% |
| Convenience | 3,672 | 16.9% | 15.4% |
| Financial | 814 | 3.7% | 6.8% |
| Leisure | 2,454 | 11.3% | 25.7% |
| Retail Service | 643 | 3.0% | 7.2% |
| Vacant | 512 | 2.4% | 13.9% |
| TOTAL | 21,729 | 100 | 100 |

Source: Composition of District centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Table 2 District Centre Unit Composition

| GOAD Category | Units at 2022 | Units at 2022 (%) | Units UK Average at 2022 (%) |
|----------------|---------------|-------------------|------------------------------|
| Comparison | 16 | 25.0% | 27.0% |
| Convenience | 8 | 12.5% | 9.2% |
| Financial | 2 | 3.1% | 9.1% |
| Leisure | 23 | 35.9% | 24.7% |
| Retail Service | 8 | 12.5% | 15.7% |
| Vacant | 7 | 10.9% | 14.1% |
| TOTAL | 64 | 100 | 100 |

Source: District centre composition based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Uses - By virtue of Heeley Retail Park being located within the defined district centre boundary, and this providing accommodation for bulky goods retailers, in respect of floorspace the district centre is dominated by comparison goods operators. There are 16 comparison operators, which equates to 25.0% of all units and 62.7% of the total stock of floorspace. Whilst the proportion of units is broadly similar to the current national average, the proportion of floorspace is substantially greater than the national average and is representative of the impact the large retail units at Heeley Retail Park have on the overall floorspace figures for the district centre. Operators include key national multiple retailers such as Matalan, Poundland and Boots. There are eight convenience goods retailers, which equate to 12.5% of all operators in the district centre. These operators are anchored by Lidl and Food Warehouse, along with Morrisons Daily, a tobacconist and a bakery.

Heeley is anchored by a strong of leisure service operators, with 23 such operators equating to 35.9% of all operators in the district centre. These operators include public houses, a betting office, hot-food takeaways, cafés (including Costa) and restaurants. The district centre also has a limited range of retail service operators, with eight operators equating to 12.5% of all operators in Heeley (a figure which is slightly lower than the 15.7% national average figure). Operators include a Texaco petrol filling station, alongside hairdressers and beauty salons. Heeley also has a limited range of financial and business service operators, with two operators (an auctioneer and window showroom) equating to 3.1% of all operators in Heeley.

Vacancies - The vacancy rate at Heeley, in respect of both the quantum of floorspace and the number of units, is lower than the UK national average. In respect of units, there are seven vacant units which equate to 10.9% of all units in the district centre (lower than the 14.1% of vacant units recorded nationally). Turning to floorspace, there is 512 sq.m of vacant floorspace, which equates to 2.4% of the total quantum of retail floorspace. Vacant units are predominately located along Chesterfield Road, between Valley Road and Albert Road. Given the difference between the vacancy rate at Heeley and the national average, the current vacancy rate is not considered to represent cause for concern.

Pedestrian Flows - At the time of our visit, relatively light pedestrian flows were observed throughout the district centre. Few linked trips were observed between the 'traditional' retail high street on the eastern side of Chesterfield Road and Heeley Retail Park at the south-west of the district centre. This suggests that, in practice, these two locations functional independently from each other and that, whilst the retail park may serve a wider catchment which arrive by car, the rest of the district centre primarily serves needs arising in the immediate vicinity of Heeley. The limited levels of pedestrian flows across Chesterfield Road is also indicative of the barrier to movement that the high level of vehicular movements along this key arterial route pose.

Accessibility - Heeley is well served by public transport and is located on a key arterial route through the south-west of the city. There are a number of bus stops located along Chesterfield Road, from which a number of services such as 20 Sheffield, 24 Sheffield, 25, 43, 44 and X17 Gold can be alighted. These services provide frequent links into Sheffield City Centre, and a range of destinations including Woodhouse, Ecclesfield, Chesterfield, Hemsworth and Matlock, as well as destinations throughout the Sheffield city area. Heeley district centre is not located in close proximity to a train station or tram stop. There are a number of secure bike stands located throughout the district centre. Although Chesterfield Road represents a significant barrier to safe pedestrian movements through the centre, there are a number of pedestrian crossing points which allow for safe pedestrian accessibility through Heeley.

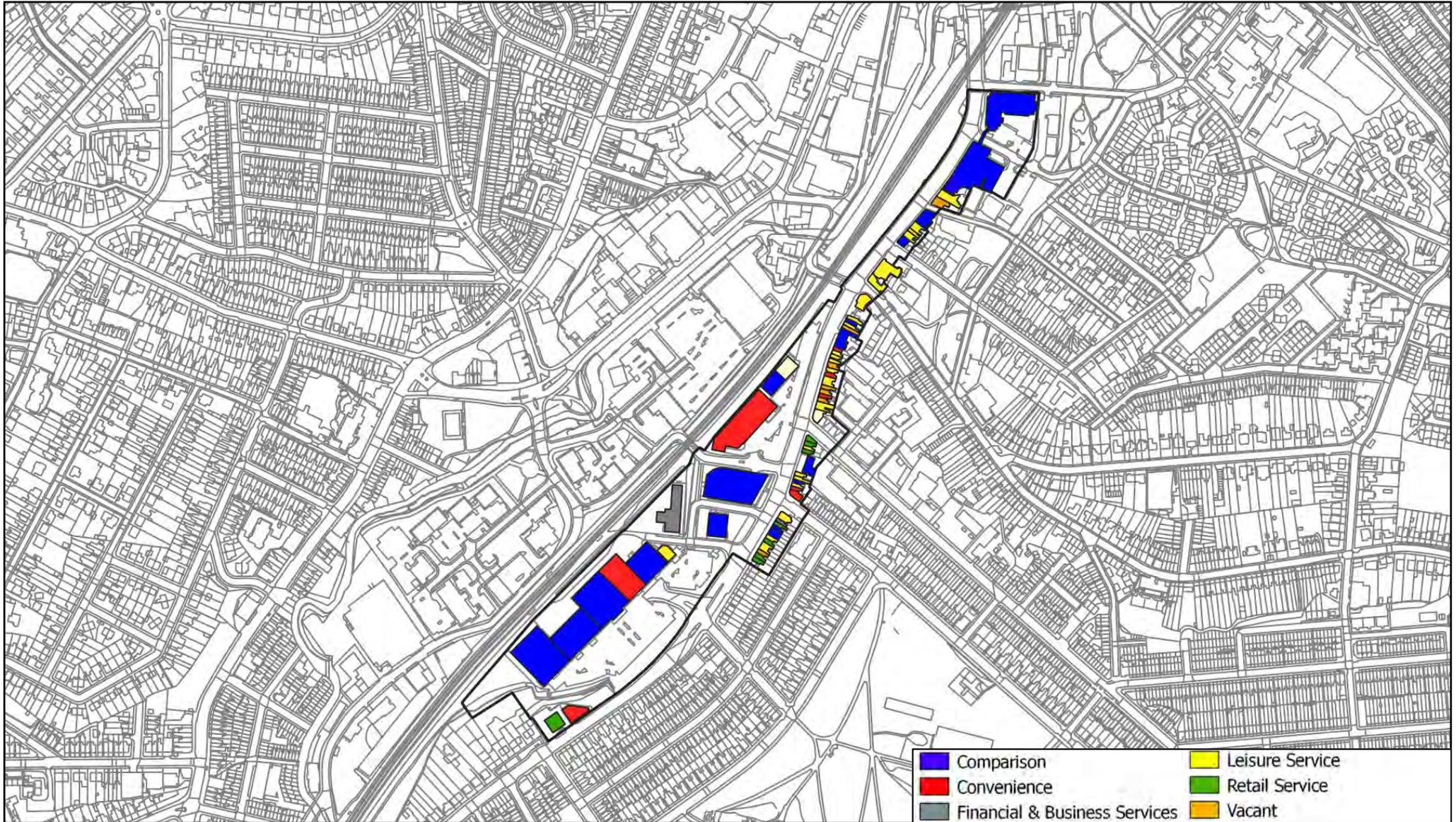
In respect of vehicle parking, the area large surface level car parks located at Heeley Retail Park and at the Lidl foodstore and Medical Centre. These are intended for use by customers only and so there is a considerable amount of on-street car parking available along Chesterfield Road and on side streets in the district centre.

Perception of Safety - Heeley benefits from a generally high perception of safety, and feels largely safe and secure. The linear nature of the district centre results in a high standard of natural surveillance, with passing vehicular traffic providing a good level of passive surveillance. The lack of a significant number of active ground floor frontages reduces the level of passive surveillance somewhat. According to the website ukcrimestats.com, there were 373 crimes recorded within a mile radius of the district centre at February 2022. This compares with 353 crimes at February 2021 and 365 crimes at February 2020.

As noted above, Chesterfield Road essentially divides the centre east to west and represents a key barrier to safe pedestrian movements through the centre, although there are a number of controlled pedestrian crossing points along Chesterfield Road. Notwithstanding this, the number of vehicular movements through the centre do negative impact the overall perception of safety.

Environmental Quality - Heeley has an essentially functional standard of environmental quality, in that it is generally well-maintained and of a standard that would be expected of a retail centre. In the south of the district centre around Heeley Retail Park, the standard of environmental quality is relatively good by virtue of the managed nature of the retail park. This is also the case for the other large retail units on the western side of Chesterfield Road which, whilst lacking any distinctive or distinguishing features, are generally well-maintained. The environmental quality on the eastern side of Chesterfield Road differs unit-by-unit, with some retail units being in need of a considerable amount of investment in order to improve their appearance. Elsewhere, a number of shopfronts appear somewhat tired. The passing traffic along Chesterfield Road also negatively impacts upon the standard of environmental quality at Heeley.

Conclusions - Heeley is a long, linear district centre located along the A61 Chesterfield Road. The centre is comprised of a modern retail park (Heeley Retail Park) which dominates the southern half of the district centre, along with a number of large retail units on the western side of Chesterfield Road (occupied by Lidl, B&M and Porcelanosa). The eastern side of Chesterfield Road is lined by more traditional retail units, and includes a specialist furniture store, Ponsford. The centre has a reasonable range of operators, which are considered capable of serving the day-to-day needs of the local community. Given this, and the current vacancy rate, Heeley is considered to be a vital and viable district centre.



Heeley district centre

Sheffield Retail and Leisure Study 2022

Survey Date - March 2022

Hillsborough District Centre

Description - Hillsborough district centre is one of the larger centres in Sheffield outside of the City Centre, and is located in the north-west of the city approximately 3 kilometres from the City Centre. The retail and service offer in Hillsborough is diverse, and is commensurate with the scale of the district centre. In particular, the comparison offer is strong, despite a significant decrease in the overall comparison offer since 2016. Notwithstanding this, the proportion of comparison goods floorspace remains higher than the current national average.

Hillsborough is centred around 'Hillsborough Corner', where Langsett Road, Middlewood Road, Holme Lane and Bradfield Road all meet. This junction has a key impact on the function of the district centre, both in respect of the overall ease pedestrian movement but also in the centre's general standard of accessibility, with Hillsborough benefiting both from frequent tram and bus services.



Figure 1: The interior of the Hillsborough Exchange Shopping Centre. Although the appearance of the centre is a little tired, it provides a key range of retail operators.



Figure 2: Along Middlewood Road is a more traditional retail parade, with smaller units which appeal to a greater number of independents rather than national multiple operators.



Figure 3: A key route for public transport, primarily trams and buses, a generally low level of private vehicles which move along Middlewood Road.

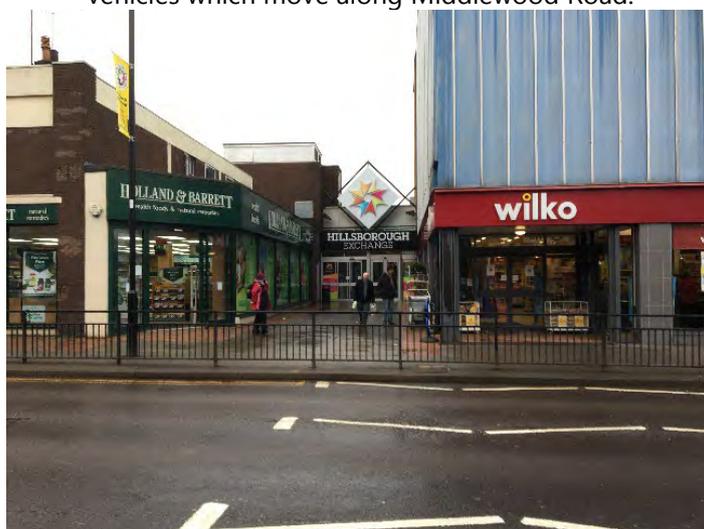


Figure 4: Hillsborough provides a diverse range of operators, considered suitable to serve both the day-to-day needs of the local catchment alongside appealing to a wider area.

Table 1 District Centre Floorspace Composition

| GOAD Category | Floorspace at 2022 (sq.m) | Floorspace at 2022 (%) | Floorspace UK Average at 2022 (%) |
|----------------|---------------------------|------------------------|-----------------------------------|
| Comparison | 17,705 | 41.7% | 30.4% |
| Convenience | 12,569 | 29.6% | 15.4% |
| Financial | 1,610 | 3.8% | 6.8% |
| Leisure | 5,381 | 12.7% | 25.7% |
| Retail Service | 3,161 | 7.4% | 7.2% |
| Vacant | 2,080 | 4.9% | 13.9% |
| TOTAL | 42,506 | 100 | 100 |

Source: Composition of District centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Table 2 District Centre Unit Composition

| GOAD Category | Units at 2022 | Units at 2022 (%) | Units UK Average at 2022 (%) | Units at 2016 (%) |
|----------------|---------------|-------------------|------------------------------|-------------------|
| Comparison | 46 | 26.7% | 27.0% | 38.4% |
| Convenience | 18 | 10.5% | 9.2% | 13.4% |
| Financial | 14 | 8.1% | 9.1% | 36.6%* |
| Leisure | 37 | 21.5% | 24.7% | 36.6%* |
| Retail Service | 36 | 20.9% | 15.7% | 36.6%* |
| Vacant | 21 | 12.2% | 14.1% | 11.0% |
| TOTAL | 172 | 100 | 100 | 100.0% |

Source: District centre composition based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022; Units at 2016 taken from Sheffield & Rotherham Joint Retail & Leisure Study 2017. 2016 figures for financial, leisure and retail service operators represent a total of these uses.

Uses - Hillsborough is one of the larger district centres in Sheffield indeed, it is the largest district centre in respect of the total quantum of retail floorspace, and has a strong base of comparison, convenience and service operators. The convenience goods sector is anchored by Morrisons at the former Hillsborough Barracks, and equates to 10.5% of all units in the district centre. This figure is broadly similar to the current national average, although the proportion of convenience goods floorspace is far in excess of the current national average. There are 18 convenience operators, including Heron Food, Londis, Fulton Food and Holland & Barrett, alongside butchers, bakeries, convenience shops and tobacconists.

The comparison goods offer is also reasonably strong at Hillsborough, with 46 operators equating to 26.7% of the total, a figure which once again is broadly similar to the current national average of 27.0%. Although this represents a significant decrease on the 38.4% of comparison goods operators recorded at 2016, the offer is still considered to be strong and capable of providing for the needs of the local community. Indeed, the decrease in comparison goods operators must be seen in the context of wider changes in the high street since that time, with comparison operators closing at centres diversifying with a greater leisure offer.

In this context, the proportion of service operators has greatly increased since 2016, from 36.6% to 50.5%. Service operators are diverse, and are underpinned by 37 leisure service operators and 36 retail service operators, accounting for 21.5% and 20.9% of units respectively. In respect of leisure service operators, this proportion is marginally lower than the current national average whereas the converse is true for retail service operators. The 14 financial and business service operators represent a proportion of units broadly similar to the current national average, at 8.1% compared to 9.1% nationally.

Vacancies - A total of 21 vacant units were recorded at March 2022. In respect of units, this represents a vacancy rate of 12.2%, a figure which represents a slight increase on the 11.0% of vacant units recorded at 2016. However, it should be noted that the vacancy rate, although greater than at 2016, remains lower than the current national average. Indeed, in respect of floorspace, the quantum of vacant retail floorspace (4.9%) is significantly lower than the current national average of 13.9%.

The difference between the proportion of vacant units and floorspace suggests that it is predominately smaller retail units which are vacant, units which are generally likely to appeal to independent operators as opposed to national multiples. This is borne out by the location of the

vacant units, which are located around 'Hillsborough Corner' and in the far north-west of the district centre on Middlewood Road.

Pedestrian Flows - At the time of our visit, generally high levels of activity were observed throughout the district centre. The greatest concentration of activity was observed along Middlewood Road and Langsett Road, particularly around between the 'Hillsborough Corner' and Hillsborough Interchange bus station. Generally lower levels of pedestrian activity were observed in more 'peripheral' areas of the district centre, such as the Hillsborough Barracks Shopping Mall and along Bradfield Street. In respect of Bradfield Street, the lower levels of activity are potentially the result of the proximity to a high number of vehicular movements along this route. Steady, although moderate in relation to levels of activity elsewhere noted in the district centre, were observed at the The Parade Shopping Centre.

Although there are a number of controlled pedestrian crossing points in the centre, the volume of vehicle (car, bus and tram) movements through the district centre does somewhat restrict pedestrian flows. Likewise, the volume and concentration of pedestrian activity in areas (such as at bus and tram stops) does prevent easy pedestrian movement along pavements in Hillsborough. However, the covered shopping centre and mall located in the district centre do provide a pedestrianised shopping environment which aids ease of movement.

Accessibility - The standard of accessibility, by a number of means of transport, is considered to be very good at Hillsborough. In respect of public transport, Hillsborough is also well served by trams, with two stops located in the district centre (Hillsborough Park and Hillsborough). These stops are served by the Blue and Yellow lines, and provide frequent services to destinations including the City Centre and other locations throughout the wider city area. Accessibility by bus is also very good, with Hillsborough Interchange located towards the eastern end of the district centre. A number of bus services, including 18 Sheffield, 52, 52a Sheffield, 57, 58, 61, 62, 97 Sheffield, 98 Sheffield, 135, 731, 752a, 780, 782 and M92, provide frequent services to a range of destinations including the City Centre, Rotherham, Woodhouse, Totley, Stannington and a number of other destinations throughout the City.

There are also a number of car parks located throughout Hillsborough district centre, including a roof-top car park above the Hillsborough Exchange Shopping Centre, and two car parks for customers at Morrisons and B&Q on Penistone Road. There is little available on-street car parking available throughout the district centre by virtue of the tram lines which run along Middlewood Road and Langsett Road.

Pedestrian accessibility is generally good, although movements across the key routes that run through the centre (Middlewood Road, Holme Lane, Bradfield Road and Langsett Road) can be challenging at times by virtue of passing trams and vehicular movements. There are bike stands located throughout the district centre.

Overall, Hillsborough district centre is considered to be a highly accessible district centre.

Perception of Safety - Hillsborough district centre is a key retail destination, with a considerable concentration of pedestrian activity and active ground floor uses. By virtue of this the district centre generally feels safe and secure. There is a considerable amount of visible CCTV, which adds to a feeling of security for those in the centre. The level of activity and general vibrancy of the district centre also ensure that there is a high standard of both natural and passive surveillance in the main areas of the centre. The standard of security is somewhat lesser in more peripheral parts of the

centre which have a generally lower level of activity and therefore less surveillance, increasing the chances of criminality in these locations. According to the website ukcrimestats.com, there were 268 crimes recorded within a mile radius of the district centre at February 2022. This compares with 283 crimes at February 2021 and 272 crimes at February 2020.

Generally, pedestrian safety is good. However, the volume of traffic does reduce the overall perception of pedestrian safety. Furthermore, the concentration of people at locations in the district centre (such as at bus and tram stops) does reduce the overall carriageway width, leaving a relatively narrow pedestrian carriageway often relatively close to the road and vehicle movements.

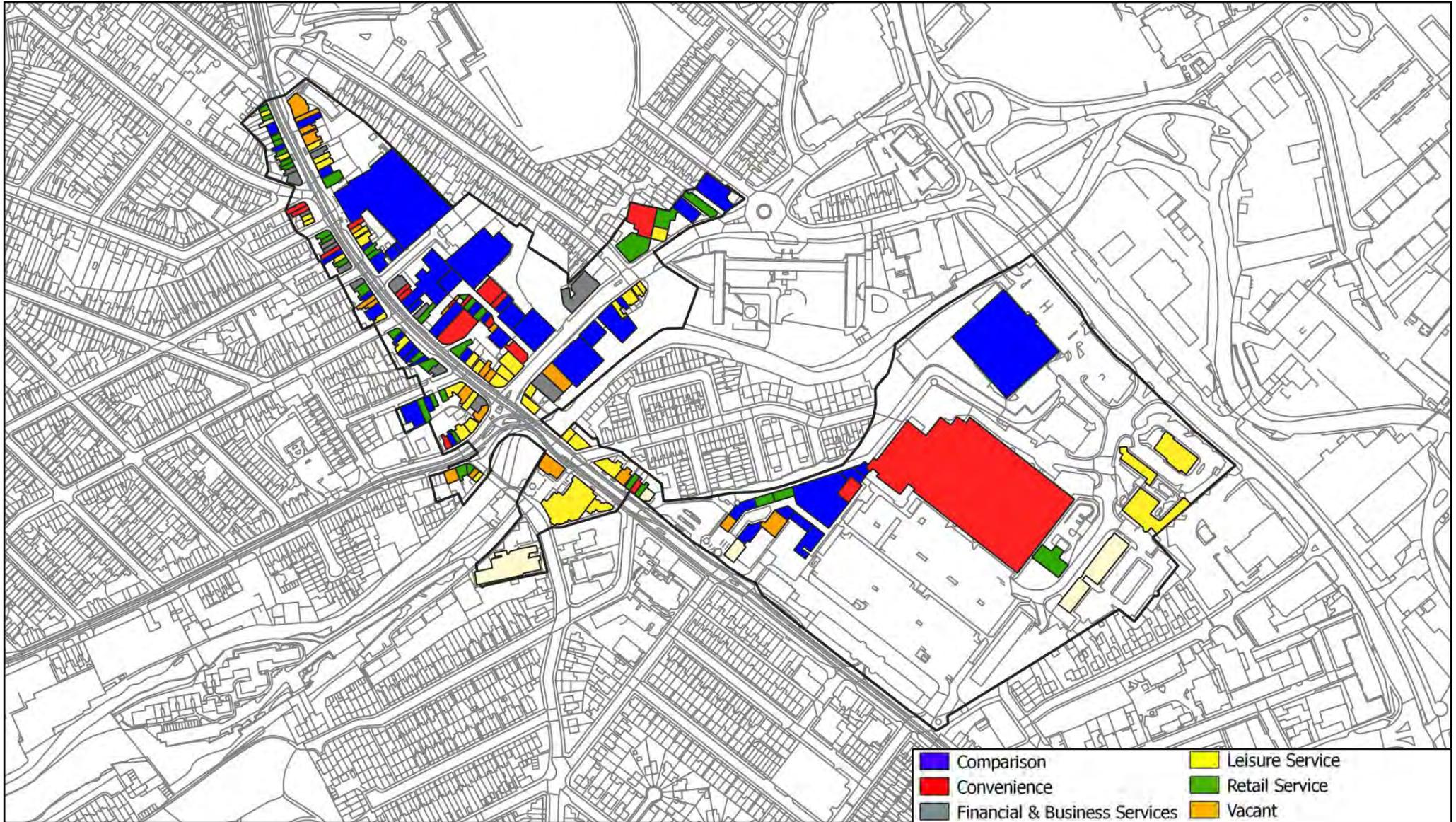
Environmental Quality - The appearance of Hillsborough, with a number of attractive designed modern and period buildings provides an attractive retail setting. The area around 'Hillsborough Corner' on Langsett Road is also considered to be an attractive area, with a number of landmark buildings which provide a sense of arrival. The River Loxley, which runs north to south through the district centre, is a positive feature to the appearance of the centre.

Despite a being generally attractive centre with a good standard of environmental quality, the volume of traffic movements through the centre do negatively impact the overall appearance of Hillsborough. Additionally, areas of concentrated pedestrian activity result in 'crowding' which further reduces the perceived appearance of the centre. In respect of the retail units, a number appear to be rather tired and in need of investment, indeed the overall lack of activity at the The Parade Shopping Mall reduces the environmental quality of this location, notwithstanding the overall attractive appearance of the Hillsborough Barracks site.

Conclusions - Hillsborough district centre is one of the larger centres in Sheffield, and as such the centre's retail and service offer is diverse, and is commensurate with the scale of the district centre. In particular, the comparison offer is strong, despite a significant decrease in the overall comparison offer since 2016. Notwithstanding this, the proportion of comparison goods floorspace remains higher than the current national average.

At March 2022 the vacancy rate in respect of units was 12.2%, a figure which represents a slight increase on the 11.0% of vacant units recorded at 2016. However, it should be noted that the vacancy rate, although greater than at 2016, remains lower than the current national average. Indeed, in respect of floorspace, the quantum of vacant retail floorspace (4.9%) is significantly lower than the current national average of 13.9%.

Given this, and noting the diverse range of convenience, comparison and service operators in the district centre, Hillsborough is considered to be a reasonably vital and viable centre. Although it will be important to ensure that the vacancy rate does not further increase.



Hillsborough district centre

Sheffield Retail and Leisure Study 2022

Survey Date - March 2022

London Road District Centre

Description - London Road district centre is located at the south of London Road (the B6833). The centre extends from St Mary's Gate adjacent the city centre, to the junction with Abbeydale Road. It is a linear centre and largely comprises converted terraced dwellings. London Road is dominated by leisure service uses, and has a reasonable offering of comparison stores. Its convenience goods offer is anchored by retailers including Sainsbury's Local, Waitrose supermarket and the Aldi foodstore near St Mary's Gate.

The centre has a reasonable environmental quality, although this is affected by passing vehicles and the lack of quality public space. The majority of units are well maintained. It is accessible to a large catchment and has a good public transport offering. Dedicated surface car parking is provided at Waitrose and on the street, which detracts from the appearance of the centre. The concentration of leisure service operators contributes to the performance of the district centre at night, however this reduces the overall impression of vibrancy during the day. Overall, there are reasonable levels of pedestrian activity.



Figure 1: On-street car parking dominates the environment and the quality of the public realm is reasonably poor.



Figure 2: The centre has narrow pavements which are cluttered at points.



Figure 3: The main retail parade on London Road



Figure 4: London Road has a strong leisure and night-time offering which contributes to the vibrancy of the area.

Table 1 District Centre Floorspace Composition

| GOAD Category | Floorspace Jat 2022 (sq.m) | Floorspace at 2022 (%) | Floorspace UK Average at 2022 (%) |
|----------------------|-----------------------------------|-------------------------------|--|
| Comparison | 2,054 | 8.9% | 30.4% |
| Convenience | 8,897 | 38.7% | 15.4% |
| Financial | 134 | 0.6% | 6.8% |
| Leisure | 7,606 | 33.1% | 25.7% |
| Retail Service | 1,470 | 6.4% | 7.2% |
| Vacant | 2,832 | 12.3% | 13.9% |
| TOTAL | 22,993 | 100% | 100% |

Source: Composition of District centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Table 2 District Centre Unit Composition

| GOAD Category | Units at 2022 | Units at 2022 (%) | Units UK Average at 2022 (%) | Units at 2016 (%) |
|----------------|---------------|-------------------|------------------------------|-------------------|
| Comparison | 17 | 11.7 | 27.0% | 25.2% |
| Convenience | 14 | 9.7 | 9.2% | 8.1% |
| Financial | 3 | 2.1 | 9.1% | 51.9%* |
| Leisure | 64 | 44.1 | 24.7% | 51.9%* |
| Retail Service | 22 | 15.2 | 15.7% | 51.9%* |
| Vacant | 25 | 17.2 | 14.1% | 14.1% |
| TOTAL | 145 | 100 | 100 | 100.0% |

Source: District centre composition based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022; Units at 2016 taken from Sheffield & Rotherham Joint Retail & Leisure Study 2017. 2016 figures for financial, leisure and retail service operators represent a total of these uses.

Uses - London Road is a diverse district centre, dominated by leisure service uses. There are 64 such operators in the district centre, a figure which equates to 44.1% of all operators at London Road. This figure is substantially greater than the 24.7% for leisure service units nationally. Operators are diverse, and include hot-food takeaways, restaurants, cafés and public houses, alongside betting offices. The strong leisure service offer is considered to be a strength, but the growth in this sector has come at the loss of vibrant, ground floor activities during daytime hours as a number of these operators are closed. Alongside the strong range of leisure service operators, there are 22 retail service operators. These equate to 15.2% of all units in the district centre, a similar figure to the current national average. Operators include hairdressers, barbers, photographers, tailors and dry cleaners. The centre also has a limited financial and business service offer, at 2.1% of operators. In total, the service offer equates to 61.4% of all units, a figure which represents an increase from the 51.9% of service units recorded at 2016.

In respect of convenience goods, London Road is well served with 14 such operators in the district centre. These equate to 9.7% of units, a similar figure to the national average and a marginally larger figure than the 8.1% recorded at 2016. The convenience goods sector is anchored by Sainsbury's Local, Waitrose supermarket and Aldi near St Mary's Gate, alongside smaller operators such as grocers and bakeries.

The proportion of comparison goods operators has declined significantly since 2016, from 25.2% to 11.7% at 2022. This figure is also considerably lower than the current national average. This change is potentially the result of the centre's proximity to Sheffield City Centre, located just to the north of the district centre, as well as to broader trends witnessed in town centres during that time. As such, although the offer has decreased the range of comparison operators (which includes pharmacies, phone shops, gift shops and clothing shops) is suitable given the centre's position in the retail hierarchy.

Vacancies - The vacancy rate in London Road is relatively high at 17.2%, with this figure representing an increase on the vacancy rate recorded at 2016 (14.1%). It is also higher than the current national average. Although vacant units are generally located throughout the district centre, there is a particular concentration of vacancies towards the northern end of the district centre. Furthermore, the lack of vibrancy during daytime hours (by virtue of roller shutters being down at restaurants and hot-food takeaways) further adds to a feeling of a vacant centre with generally low levels of activity. Consideration should be given to limiting further growth of hot-food takeaways in the district centre, as well as securing reoccupation of currently vacant units.

Pedestrian Flows - There were many pedestrians using the underpass to the city centre near St Mary's Gate which contributed to activity in this area. Around the Boston Street/London Road junction with Budgens comparison store were the highest levels of pedestrian flows during our visit. Elsewhere, the centre felt reasonably quiet.

Accessibility - London Road is well served by public transport due to its proximity to the city centre. It is served by bus routes on London Road, including 20 Sheffield, 43, 44, 75 Sheffield, 76 Sheffield, 76a Sheffield, 86, 97 Sheffield, 98 Sheffield, 218 Peakline and 798.

Sheffield train station is 1km from the centre. The centre is not served by tram.

The centre is within walking distance of the city centre via the underpasses under St Mary's Gate.

It is felt that a greater standard of pedestrian accessibility could be secured via improved crossing points at London Road/Boston Street junction.

Perception of Safety - The general perception of safety was reasonably good on the day of our visit. London Road at St Mary's Gate forms a barrier to movement and there was graffiti and evidence of vandalism on the corner units and surroundings near the underpass to the city centre. This area behind Waitrose felt somewhat unsafe.

Generally, pedestrian flows were such that the centre felt safe. Due to the high proportion of leisure service uses, there was a number of hot food takeaways which were closed during our visit. Particularly towards the southern end of London Road, the centre was reasonably quiet and there was a reduced level of natural surveillance.

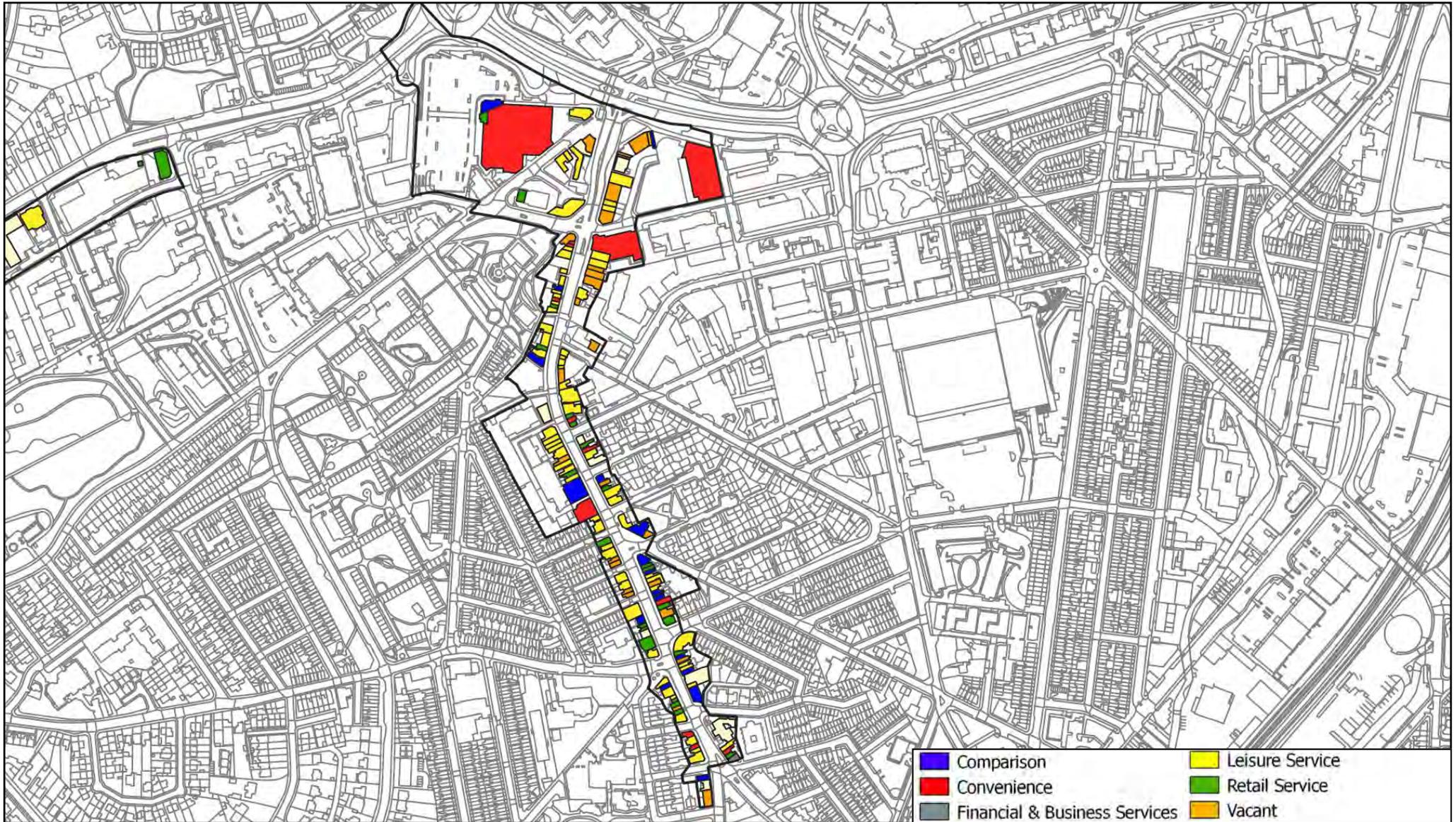
According to the website ukcrimestats.com, there were 944 crimes recorded within a mile radius of the district centre at February 2022. This compares with 578 crimes at February 2021 and 1,065 crimes at February 2020.

Environmental Quality - The centre is mixed and dominated by 'dead' frontages and some poorly maintained shopfronts. The quality of the shop frontages is mixed yet mostly the colourful nature of the facades contributes positively to the streetscene.

There is a lack of quality public realm and there was no greenery or planting observed during our visit. The passing cars on London Road and crossings which could be improved serve to diminish the pedestrian experience.

Conclusions - London Road District Centre has a strong range of leisure service uses and convenience shops, which anchor the centre. Although the proportion of comparison goods operators has declined significantly since 2016, the range of comparison operators is considered suitable due to the centre's position within the retail hierarchy. Furthermore, the centre lacks vibrancy during daytime hours.

Its current performance is only considered to be moderate as it would clearly benefit from greater diversity in respect of uses and a reduction in the vacancy rate.



London Road district centre

Sheffield Retail and Leisure Study 2022

Survey Date - March 2022

Manor Top District Centre

Description - Located approximately 2 miles to the southeast of the City Centre, Manor Top district centre is situated at the junction of the A6102 (Ridgeway Road) and A6135 (City Road). By virtue of this, Manor Top is easily accessible to a large catchment (including both by private vehicle, bus and tram), and benefits from a considerable level of passing trade. However the large, wide road carriageways which pass through the centre do reduce the ease of pedestrian movement and overall accessibility of Manor Top. The volume of traffic also negatively impacts the environmental quality and appearance of the district centre.

The district centre takes the form of a traditional retail parade, alongside a small Asda convenience foodstore and a number of community uses, including Manor Library and Manor Top Medical Centre.



Figure 1: Manor Top has a strong range of convenience operators, anchored by an Asda foodstore.



Figure 2: Public transport is readily available from the district centre, with both the tram and bus services providing frequent services to a range of destinations.



Figure 3: Alongside a strong convenience offer, Manor Top also provides a range of goods and services which are considered commensurate with the offer of a district centre.



Figure 4: There is a small parade of retail units located on the north side of City Road which are located outside of the defined boundaries of Manor Top.

Table 1 District Centre Floorspace Composition

| GOAD Category | Floorspace at 2022 (sq.m) | Floorspace at 2022 (%) | Floorspace UK Average at 2022 (%) |
|----------------------|----------------------------------|-------------------------------|--|
| Comparison | 1,319 | 30.3% | 30.4% |
| Convenience | 1,609 | 37.0% | 15.4% |
| Financial | 143 | 3.3% | 6.8% |
| Leisure | 551 | 12.7% | 25.7% |
| Retail Service | 693 | 15.9% | 7.2% |
| Vacant | 37 | 0.9% | 13.9% |
| TOTAL | 4,352 | 100 | 100 |

Source: Composition of District centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Table 2 District Centre Unit Composition

| GOAD Category | Units at 2022 | Units at 2022 (%) | Units UK Average at 2022 (%) |
|----------------|---------------|-------------------|------------------------------|
| Comparison | 5 | 18.5% | 27.0% |
| Convenience | 4 | 14.8% | 9.2% |
| Financial | 1 | 3.7% | 9.1% |
| Leisure | 8 | 29.6% | 24.7% |
| Retail Service | 8 | 29.6% | 15.7% |
| Vacant | 1 | 3.7% | 14.1% |
| TOTAL | 27 | 100 | 100 |

Source: District centre composition based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Uses - Manor Top has a strong range of both convenience and comparison operators, alongside a strong retail and leisure service offer.

In respect of convenience operators, Manor Top district centre is anchored by a relatively small-scale Asda foodstore, alongside three additional retailers (including Fultons Food, a convenience store and a tobacconist). The four convenience operators account for 14.8% of all units in the centre, a greater proportion than the 9.2% of units recorded nationally. There are five comparison goods operators, including Poundland and four other operators (a charity shop, a pharmacy, a florist and a gift shop). These units account for 18.5% of all units, a lesser proportion than the national average in respect of units but at 30.3% of floorspace, a figure broadly similar to the current national average.

As found at district centres of a similar scale, Manor Top has a reasonably strong range of service operators. There are eight leisure and retail service operators respectively, which equate to 29.6% of the units in the centre. For both categories, this represents a greater proportion than the current national average. Leisure operators include hot-food takeaways, a betting office and a sandwich bar, and the retail service operators include a petrol filling station, beauty salons, a gym, an opticians and a barbershop. There is a single financial and business service operator, Lloyds Bank on City Road.

Vacancies - In comparison to the current UK national average vacancy rate in respect of units of 14.1%, at the time of our visit we recorded just a single vacant unit in Manor Top. This equates to 3.7% of all units, and 0.9% of the total stock of retail floorspace. This unit is located on the small parade of retail units adjacent to the junction of City Road and Ridgeway Road. Accordingly, the current vacancy at Manor Top is not considered to represent cause for concern.

Pedestrian Flows - Pedestrian activity is generally good at Manor Top district centre, with the activity centred on the western sides of City Road and Ridgeway Road. Elsewhere in the district centre, with the exception of the Asda foodstore and its immediate environs, pedestrian activity is far more limited. This is likely the result of the high levels of vehicular movement in Manor Top, and the wide carriageways which limit pedestrian movement and make doing so challenging.

Accessibility - Manor Top is well served by public transport. The Manor Top Supertram stop (which is located on Ridgeway Road within the district centre) is located on both the Purple and Blue lines. These services provide frequent access to a range of destinations throughout the city, including the city centre. In respect of bus services, Manor Top Interchange is located within the district centre. From here a range of services, including 18 Sheffield, 718, 719, 10 and 10a, provide services to a range of locations throughout the south of Sheffield and the city centre. Other stops along City Road provide further services to a range of destinations.

There is a small amount of on-street parking located on the service road between City Road and Ridgeway Road, alongside two small surface level parking lots which provide approximately 85 spaces for customers to both Asda and Poundland.

However, in respect of pedestrian accessibility the centre is considered to have a poor standard of accessibility. The major routes which pass through the centre (Ridgeway Road and City Road) form key barriers to movement. Although there are controlled crossing points, the number of lanes of traffic that must be crossed takes a considerable period of time and is considered to prevent ease of movement. By virtue of this, the centre has the feeling of being separated and lacking a sense of cohesion. This is particularly the case for the area in which Asda is located, which is in effect 'islanded' from the rest of the centre.

Perception of Safety - In general, Manor Top district centre is considered to be safe and secure. The volume of passing vehicular movements, along with a generally high level of pedestrian activity and active ground floor uses, ensure that there is a high standard of natural and passive surveillance. According to the website ukcrimestats.com, there were 401 crimes recorded within a mile radius of the district centre at February 2022. This compares with 343 crimes at February 2021 and 382 crimes at February 2020.

Notwithstanding this, and noting the benefits provided in respect of natural and passive surveillance, the level of passing vehicular activity does reduce the overall feeling of security for pedestrians in particular. However, the presence of metal barriers and safe crossing points does act to support pedestrian safety and allow for safe pedestrian movements.

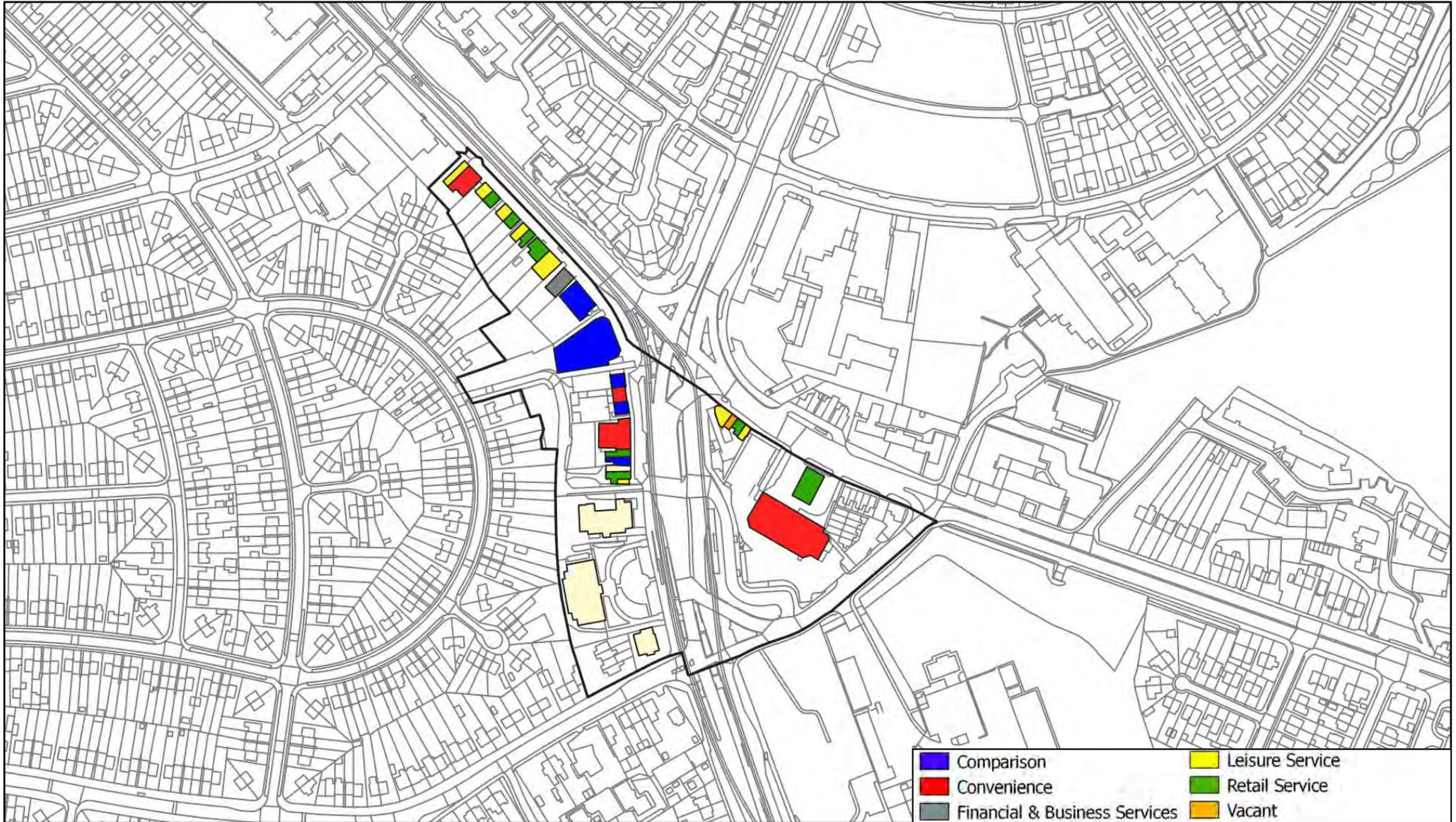
Environmental Quality - As noted above, the volume of passing vehicular traffic does negatively impact the standard of environmental quality of the district centre. Furthermore, the lack of a main 'focal' point in the centre provides nowhere for people to congregate, and the wide vehicle carriageways (which are extended by the tram line and bus interchanges) limit the possibilities for areas of landscaping, planting or seating.

Notwithstanding this, the centre is generally well-maintained and the units are neatly presented. There are few vacant units in the centre which further adds to a sense of vibrancy and activity, and limits the negative impacts that vacant units can have upon the appearance of a centre. In general, Manor Top is considered to have an acceptable standard of environmental quality.

Conclusions - Manor Top has a strong range of both convenience and comparison operators, alongside a strong retail and leisure service offer. It is anchored by Asda, and also provides a number of community uses, including Manor Library and Manor Top Medical Centre.

However, the centre's location adjacent to a major road junction (Ridgeway Road and City Road) results in there being a relatively poor standard of both pedestrian accessibility and environmental quality. Although, the centre is well served by a public transport.

In general, the centre's low vacancy level and relatively high standards of activity mean that it is considered to be a vital and viable district centre.



Manor Top district centre

Sheffield Retail and Leisure Study 2022

Survey Date - March 2022

Spital Hill District Centre

Description - Situated in Burngreave and located in close proximity to the City Centre (approximately 800 metres to the north of the City Centre), Spital Hill serves a diverse population catchment. The centre also provides a comprehensive range of community facilities, including a Library and Council Advice Centre.

Tesco Extra which, although not located on Spital Hill, anchors the centre's convenience goods offer. The supermarket does not in practice form part of the district centre by virtue of the store 'turning its back' to the district centre, but nevertheless is considered integral to the centre's retail offer. Along Spital Hill, the offer is more focused on providing for the day-to-day needs of the local community, with a number of service, convenience and comparison operators which provide a range of goods, including more specialist goods. The centre's overall vibrancy is reflected in its vacancy rate, which is lower than the national average.



Figure 1: The district centre has a diverse range of leisure and retail service operators, which sit alongside a number of specialist comparison goods operators.



Figure 2: Burngreave Library at Sorby House is a key community facility, alongside a Council Advice Centre. Spital Hill provides a number of key community facilities.



Figure 3: In general, the standard of the public realm in Spital Hill is considered to be high and attractive in areas, particularly around Ellesmere Green.



Figure 4: The Tesco Extra foodstore is located at the south-east of the district centre and anchors the convenience goods provision in the district centre.

Table 1 District Centre Floorspace Composition

| GOAD Category | Floorspace at 2022 (sq.m) | Floorspace at 2022 (%) | Floorspace UK Average at 2022 (%) |
|----------------------|----------------------------------|-------------------------------|--|
| Comparison | 1,540 | 10.0% | 30.4% |
| Convenience | 9,860 | 64.1% | 15.4% |
| Financial | 99 | 0.6% | 6.8% |
| Leisure | 1,162 | 7.6% | 25.7% |
| Retail Service | 2,408 | 15.6% | 7.2% |
| Vacant | 321 | 2.1% | 13.9% |
| TOTAL | 15,390 | 100 | 100 |

Source: Composition of District centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Table 2 District Centre Unit Composition

| GOAD Category | Units at 2022 | Units at 2022 (%) | Units UK Average at 2022 (%) |
|----------------|---------------|-------------------|------------------------------|
| Comparison | 13 | 22.0% | 27.0% |
| Convenience | 12 | 20.3% | 9.2% |
| Financial | 1 | 1.7% | 9.1% |
| Leisure | 15 | 25.4% | 24.7% |
| Retail Service | 13 | 22.0% | 15.7% |
| Vacant | 5 | 8.5% | 14.1% |
| TOTAL | 59 | 100 | 100 |

Source: District centre composition based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Uses - By virtue of the district centre being dominated by Tesco Extra, the proportion of convenience goods floorspace equates to 64.1% of the total stock at Spital Hill. This is significantly greater than the current national average of 15.4%. However, in respect of units, there are 12 convenience goods operators. These equate to 20.3% of the total, and include a number of convenience shops and two bakeries. The comparison goods offer is also reasonably strong and diverse for a district centre, with 13 such operators equating to 22.0% of all units in Spital Hill. This figure represents a smaller proportion than the national average of 27.0% for comparison goods operators. Comparison operators include two pharmacies, household goods shops, clothes shops, a phone shop, a fragrance shop and a carpet shop.

The service offer is also diverse and strong at Spital Hill. There are 15 leisure service operators in the district centre, which equate to 25.4% of all operators in the district centre. This figure is similar to the current national average for leisure service units, at 24.7%. Leisure service operators include hot-food takeaways, cafés and restaurants. The retail service offer is also strong, and represents a greater proportion of units than the current national average at 22.0% in Spital Hill, compared to 15.7% nationally. Retail service operators include a petrol filling station, barbers, a gym, a car garage and a Post Office. There is also a single financial and business service operator in Spital Hill, a solicitor.

Vacancies - Our survey recorded a total of five vacant units in the district centre, a figure which equates to 8.5% of all units in Spital Hill. This figure is considerably lower than the current national average of vacant units, which is 14.1%. The district centre's vacancy rate is even lower when floorspace is considered, with the total stock of vacant retail floorspace equating to 2.1% of the total. Given that the proportion of both vacant floorspace and units is lower than the national average, the vacancy rate in Spital Hill is not considered to represent cause for concern at this time.

Pedestrian Flows - At the time of our visit, pedestrian activity was strongest along Spital Hill itself. Activity was also noted around Ellesmere Green, and on the northern side of Gower Street. There were a number of linked trips observed at the time of our visit, particularly to the community facilities at Sorby House and adjacent leisure service and convenience uses. Pedestrian movements throughout the district centre are also generally good, with a number of controlled crossing points located along Spital Hill.

It is important to note that the Tesco Extra foodstore, although located within the district centre, appeared to attract limited numbers of linked trips between the retail and community units along Spital Hill. This is potentially the result of the Tesco foodstore 'turning its back' and not easily being visible from the district centre. At the time of our visit, the street-level access from Spital Hill was closed with access only being possible via the lower car park. This route is not wholly direct and as a result in practice the Tesco Extra store is functionally separate to the rest of the district centre.

Accessibility - Spital Hill district centre is located approximately 800 metres to the north of the city centre, and as such is well-integrated into the public transport network. There are a number of bus stops located along Spital Hill, from which a number of bus services can be alighted. Bus services 1, 1a, 2, 4, 5, 20 Sheffield, 29, 32 Sheffield, 32a Sheffield, 75 Sheffield, 76 Sheffield, 88, 97 Sheffield, 98 Sheffield, 779 and 790 providing frequent services to the City Centre, Barnsley and destinations throughout the Sheffield city area such as Chapeltown and Hillsborough.

In respect of car parking, with the exception of on-street car parking along Ellesmere Road and Spital Hill, there is a limited amount of car parking within the district centre (discounting the large surface level car park for use by customers to Tesco Extra). The centre's close proximity to the City Centre ensure that the district centre well linked to the wider road network. Pedestrian accessibility is also reasonably good, with the district centre being located within the Burngreave area and having good links to its residential areas. Controlled crossing points throughout the district centre also ensure a high standard of pedestrian accessibility.

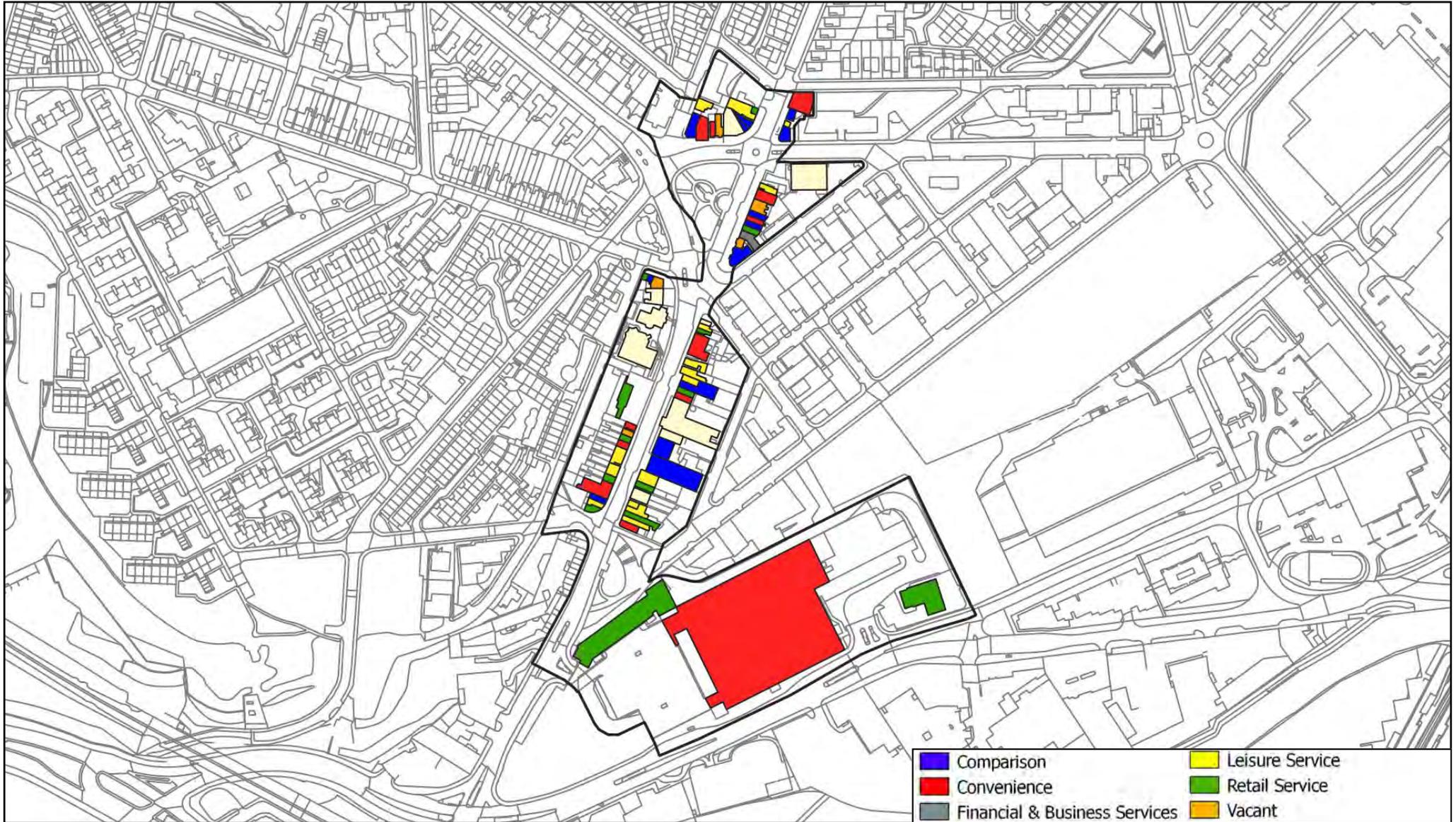
Perception of Safety - In general, the perception of safety at Spital Hill is high. At the time of our visit, no evidence of criminality was observed, nor was any anti-social behaviour witnessed. The public areas are generally well overlooked, reducing the instances for crime and also increasing both natural and passive surveillance. This is further increased by the amount of passing traffic through the district centre which, although relatively high in number, is sufficiently removed from the pedestrian footways to not pose risks to pedestrian safety. Parked vehicles which line Spital Hill also provide a buffer between pedestrians and the road carriageway.

According to the website ukcrimestats.com, there were 694 crimes recorded within a mile radius of the district centre at February 2022. This compares with 480 crimes at February 2021 and 787 crimes at February 2020.

Environmental Quality - Throughout Spital Hill there is evidence of recent and considerable investment in the public realm, particularly around Ellesmere Green. These areas of public realm are also well-maintained and of a high quality, which positively impact the appearance of the district centre. Moreover, Ellesmere Green provides an attractive area of public space which provides a key location for the district centre, as well as a prominent landmark.

Towards the southern end of the district centre, lower levels of pedestrian activity and fewer active uses at ground floor level (partly due to a prominence of leisure service operators which have roller shutters closed during daytime hours) negatively influence the perception of environmental quality. A number of units in Spital Hill also appear to be rather tired and in need of investment. There is also a considerable amount of street clutter, including bins scattered across pavements and pedestrian footways which restrict pedestrian movements and also negatively influence the centre's overall standard of environmental quality. However, generally Spital Hill has a reasonable standard of environmental quality.

Conclusions - With the exception of Tesco Extra (which in practice operates separately to the rest of the district centre), Spital Hill is focused on providing for the day-to-day needs of the local community, with a number of service, convenience and comparison operators which provide a range of goods, including more specialist goods. The centre's overall vibrancy is reflected in its vacancy rate, which is lower than the national average. Given this, Spital Hill is considered to be a vital and viable district centre.



Spital Hill district centre

Sheffield Retail and Leisure Study 2022

Survey Date - March 2022

Stocksbridge District Centre

Description - Stocksbridge is a town located in the far west of the Sheffield authority area, and serves a functionally separate catchment when compared to almost any other district centre in Sheffield, being located approximately 14 kilometres to the north-west of the City Centre.

Stocksbridge district centre comprises a traditional retail parade (along Manchester Road) and a retail and shopping park (Fox Valley Shopping Park) located to the north of Manchester Road. These two distinct destinations, although both located within the defined centre, operate independently from one and other. Accordingly, the centre lacks a clear 'core', and there was little pedestrian movement between the two areas at the time of our visit.

Within the district centre, there are a diverse range of operators which are considered easily capable of providing for the day-to-day needs of the local community.



Figure 1: Fox Valley Shopping Park provides a variety of convenience, comparison and service operators, which serve the needs of both the local community and a wider catchment.



Figure 2: The Co-op Foodstore on Manchester Road in the west of the district centre is one of the key convenience goods destinations in the district centre.



Figure 3: The retail offer along Manchester Road is varied, and is the primary location for vacant units in the district centre.



Figure 4: The public realm around the Fox Valley Shopping Park is generally well-maintained and of a high quality.

Table 1 District Centre Floorspace Composition

| GOAD Category | Floorspace at 2022 (sq.m) | Floorspace at 2022 (%) | Floorspace UK Average at 2022 (%) |
|----------------------|----------------------------------|-------------------------------|--|
| Comparison | 9,677 | 40.6% | 30.4% |
| Convenience | 6,968 | 29.2% | 15.4% |
| Financial | 481 | 2.0% | 6.8% |
| Leisure | 2,754 | 11.6% | 25.7% |
| Retail Service | 1,602 | 6.7% | 7.2% |
| Vacant | 2,358 | 9.9% | 13.9% |
| TOTAL | 23,840 | 100 | 100 |

Source: Composition of District centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Table 2 District Centre Unit Composition

| GOAD Category | Units at 2022 | Units at 2022 (%) | Units UK Average at 2022 (%) |
|----------------|---------------|-------------------|------------------------------|
| Comparison | 28 | 31.1% | 27.0% |
| Convenience | 13 | 14.4% | 9.2% |
| Financial | 3 | 3.3% | 9.1% |
| Leisure | 19 | 21.1% | 24.7% |
| Retail Service | 17 | 18.9% | 15.7% |
| Vacant | 10 | 11.1% | 14.1% |
| TOTAL | 90 | 100 | 100 |

Source: District centre composition based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Uses - Stocksbridge district centre comprises a traditional retail parade (along Manchester Road) and a retail and shopping park (Fox Valley Shopping Park) located to the north of Manchester Road. These two distinct destinations, although both located within the defined centre, operate independently from one and other. Both areas also serve separate purposes, and as such Stocksbridge has both a retail park focused around bulky goods retailing and a retail core providing for the day-to-day needs of the local community.

Within Stocksbridge, the proportion of comparison goods operators equate to 31.1% of all units (a greater figure than the 27.0% of units observed nationally). Comparison goods operators equate to a greater proportion of the total stock of floorspace, with this greater amount of floorspace demonstrating that the comparison operators in Stocksbridge are generally located at larger, purpose built retail units at Fox Valley Shopping Park. Comparison operators are diverse, and include national multiples such as Home Bargains, Sports Direct and The Range, alongside two pharmacies, charity shops, a jewellers and a pet store. Aldi, Lidl and Iceland anchor the convenience goods offer in the district centre. The 13 convenience goods operators account for 14.4% of all units in the district centre, a figure which equates to a greater proportion than the current national average.

The service offer in Stocksbridge is considered to be strong, and broadly commensurate with the typical offer that would be expected in a district centre of this size. There are 19 leisure services operators, which equate to 21.1% of all units in the centre (this figure is slightly lower than the UK national average of 24.7%). Leisure operators are diverse and typical for a district centre, and include cafés, restaurants, hot-food takeaways and a pub. Stocksbridge also has a strong retail service sector, with 17 operators accounting for 18.9% of all operators in the district centre. The financial and business service offer at Stocksbridge equates to 3.3% of all units, a figure which is considerably lower than the 9.1% of such units found nationally.

Vacancies - The vacancy rate in respect of both floorspace and units is lower at Stocksbridge district centre than the UK national average. For floorspace, the vacancy rate equates to 9.9% of the total stock of retail floorspace (compared to 13.9% nationally), and for units the vacancy rate equates to 11.1% (compared to 14.1% nationally).

Vacant units in Stocksbridge are generally located along Manchester Road, with this area benefiting from generally lower levels of footfall and pedestrian activity than the Fox Valley Shopping Park at the time of our visit. The concentration of vacant units in this location has the effect of reducing the vibrancy and level of activity in this area, thereby resulting in an overall increase in the vacancy rate. Given this, efforts should be made at securing occupation of vacant units on Manchester Road.

Pedestrian Flows - At the time of our visit, the greatest concentration of pedestrian activity was observed around the Fox Valley Shopping Park. As noted above, the Shopping Park serves the needs of both the local community as well as the retail needs of a wider catchment area. As such, the quantum of footfall that is directed to the Shopping Park is unlikely to be found elsewhere in the district centre.

This is evidenced by our observations, in that pedestrian activity was generally more limited elsewhere in the district centre with the exception of a concentration of activity around the Co-op Foodstore on Manchester Road and the Valley Medical Centre. Activity along Manchester Road was generally lower, perhaps reflective of the greater number of vacant units in this location negatively impacting vibrancy but also in that the uses in this location may not generate significant levels of footfall.

Accessibility - In terms of accessibility, Stocksbridge is easily accessible by private vehicle. There is a considerable amount of short-term on-street car parking available along Manchester Road, in addition to surface level car parking lots at Johnson Street (for both Co-op Food customers and members of the public). Additionally, there are car parks at the Aldi foodstore and a significant amount of car parking located at the Fox Valley Shopping Park.

In respect of public transport, there are a number of frequent bus services provided along Manchester Road. Bus services 23, 23a, 26, 26a, 57, 201, 757, 777 and SL1 provide frequent access to destinations throughout Sheffield (including the City Centre). Pedestrian accessibility is also considered to be good, with a number of controlled crossing points being located along Manchester Road. The volume of traffic which moves through the district centre is also considered to be relatively limited, and therefore does not represent a barrier to pedestrian movement.

Perception of Safety - Stocksbridge district centre feels generally safe and secure. Around the Fox Valley Shopping Park, the retail areas are generally overlooked with little evidence of crime and anti-social behaviour observed. Throughout the rest of the centre the perception of safety is also generally high, although the concentration of vacant properties or hot-food takeaways (with roller shutters down during the day) does reduce the overall perception of vibrancy, and passive surveillance in these locations along Manchester Road. According to the website ukcrimestats.com, there were 53 crimes recorded within a mile radius of the district centre at February 2022. This compares with 67 crimes at February 2021 and 79 crimes at February 2020.

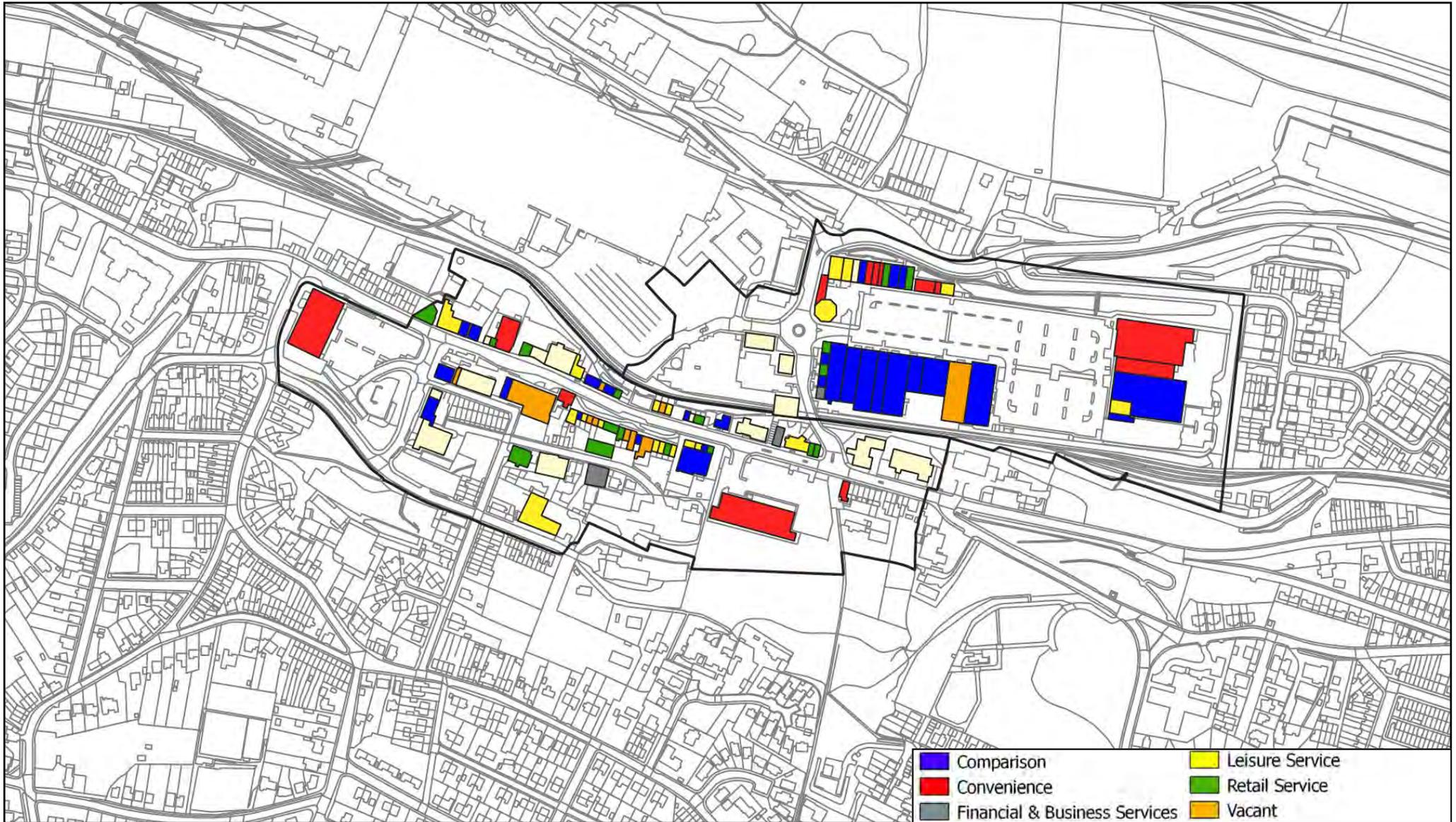
In respect of pedestrian safety, this is also generally good throughout the entire district centre with pedestrian crossing points provided to ensure safe movements can be made.

Environmental Quality - As with other elements, the divided nature of the centre (between Fox Valley Shopping Park and the retail area along Manchester Road) leads to the centre having distinctly differing standards of environmental quality.

At Fox Valley Shopping Park, the retail park appearance is reflective of managed, out-of-centre retail parks with clean areas of public realm and attractive, managed landscaping. The buildings in this location are uniform in appearance, but use attractive materials which form an attractive character and appearance. Along Manchester Road, generally the appearance is good with distinct buildings of varying styles providing a unique appearance. The units along Manchester Road vary considerably in terms of appearance and levels of upkeep, with some units appearing to be more tired than others. Notwithstanding this, there was evidence at the time of our visit of landscaping and planting (which is well-maintained and attractive) along Manchester Road. This positive impacts the centre and

demonstrates that there is an engaged community who are invested in the appearance and continued success of Stocksbridge district centre.

Conclusions - Stocksbridge district centre comprises a traditional retail parade (along Manchester Road) and a retail and shopping park (Fox Valley Shopping Park) located to the north of Manchester Road. Accordingly, the centre lacks a clear 'core', and there was little pedestrian movement between the two areas at the time of our visit. Notwithstanding this, within Stocksbridge there are a diverse range of operators which are considered easily capable of providing for the day-to-day needs of the local community. Its vacancy rate is below national average level and the centre is considered vital and viable.



Stockbridge district centre

Sheffield Retail and Leisure Study 2022

Survey Date - March 2022

Woodhouse District Centre

Description - Woodhouse district centre is located on the eastern boundary of the Sheffield authority area, approximately 4 miles to the east of the City Centre.

The centre is situated in an area of residential development, which has become a suburb of the city over time. Woodhouse's historic development is mirrored in a number of its buildings, such as the Tythe-Barn Community Centre on Chapel Street. These add a positive impression to the centre, and along with areas of attractive landscaping throughout Woodhouse improve the centre's overall standard of environmental quality.

The retail offer in Woodhouse is commensurate with the anticipated provision for a district centre. It is dominated by convenience and services uses, with Co-op Food anchoring the western end of the centre. The range of service retailers is also considered to be good. This provision is further augmented by a number of comparison operators which, although the provision is lower than the national average, are considered suitable to serve the day-to-day needs of the local community.



Figure 1: The retail precinct at Market Square has a tired appearance which overlooks a key location in the centre,



Figure 2: On the southern side of Market Square, is a building which has long been vacant. It is understood to have been vacant since approximately 2012.



Figure 3: There are attractive, landscaped areas throughout the district centre such as here on Chapel Street,



Figure 4: Cross Street hosts a number of key uses, including Lloyds Bank. It is also a busy thoroughfare and bus route.

Table 1 District Centre Floorspace Composition

| GOAD Category | Floorspace at 2022 (sq.m) | Floorspace at 2022 (%) | Floorspace UK Average at 2022 (%) |
|----------------|---------------------------|------------------------|-----------------------------------|
| Comparison | 1,015 | 14.1% | 30.4% |
| Convenience | 2,596 | 36.0% | 15.4% |
| Financial | 97 | 1.3% | 6.8% |
| Leisure | 2,025 | 28.1% | 25.7% |
| Retail Service | 1,018 | 14.1% | 7.2% |
| Vacant | 466 | 6.5% | 13.9% |
| TOTAL | 7,217 | 100 | 100 |

Source: Composition of District centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Table 2 District Centre Unit Composition

| GOAD Category | Units at 2022 | Units at 2022 (%) | Units UK Average at 2022 (%) |
|----------------|---------------|-------------------|------------------------------|
| Comparison | 8 | 16.7% | 27.0% |
| Convenience | 8 | 16.7% | 9.2% |
| Financial | 1 | 2.1% | 9.1% |
| Leisure | 16 | 33.3% | 24.7% |
| Retail Service | 13 | 27.1% | 15.7% |
| Vacant | 2 | 4.2% | 14.1% |
| TOTAL | 48 | 100 | 100 |

Source: District centre composition based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Uses - The composition of Woodhouse district centre is considered to be fairly typical for a centre of its size. Woodhouse is anchored by convenience operators, including national multiples such as Co-op Food, Fultons Food and Nisa Local as well as two tobacconists, a butcher, grocer and a convenience store. Convenience operators account for 16.7% of all units in the district centre, which compared to a national average of 9.2%. Although the comparison offer at Woodhouse is lower than the current UK national average (at 16.7% of units compared to an average of 27.0%), it is considered to be commensurate with the typical offer of a district centre. The comparison offer includes two pharmacies, two charity shops, a mobile phone shop and gift shop, alongside more specialist retailers such as a carpet and flooring shop.

At district centres, it is usual that there should be a proportionally larger service offer in order to serve the day-to-day needs of the local community. Indeed, at Woodseats district centre both the proportion of leisure service units (33.3%, compared to a national average of 24.7%) and retail service (27.1%, compared to a national average of 15.7%) is greater than the current national average. The centre also has a single financial and business service operator, Lloyds Bank, which accounts for 2.1% of all units in the centre.

Vacancies - At the time of our visit, two vacant units were recorded in the district centre both of which were located on the southern side of Market Square. This level of vacancy equates to a rate of 6.5% of the total stock of retail floorspace and 4.2% of units. Both figures are lower than the current national average in respect of vacancies, at 13.9% of floorspace and 14.1% of units. Although these figures suggest that the centre as a whole remains vital and viable, the concentration of the vacant units at Market Square have the effect of reducing the feeling of vibrancy in this location.

Pedestrian Flows - Within Woodhouse district centre, pedestrian activity is concentrated around the Co-op Foodstore on Chapel Street and around the bus stops on Cross Street. These two features are clearly the main pedestrian focal points in the district centre. However, little pedestrian activity was noted between the eastern end of the district centre (around Cross Street) and the western end around the Co-operative Foodstore. This is possibly due to the lower number of units with active frontages in between these two areas providing little or no reason for movement along Chapel Street. The lowest levels of pedestrian activity were observed around Market Square and Market Street, potentially due to the more limited retail offer in these locations.

Throughout the district centre, pedestrian movement is somewhat inhibited by the volume of passing vehicular traffic as well as the limited number of safe pedestrian crossing points.

Accessibility - Woodhouse district centre is situated at the centre of a residential area, and as such is well integrated into the surrounding areas. This integration has led to the centre being easily walkable and accessible to the local community. Pedestrian activity is generally good, although the volume of passing vehicular traffic through the district centre and along Tannery Street to the south

does restrict pedestrian flows. Notwithstanding this, there are some crossing points located within the centre, although none along either Chapel Street or Cross Street.

Vehicular accessibility is also considered to be good, with a small surface level car park located adjacent to the Co-op Foodstore (for the use of customers only) and a reasonable level of on-street car parking provided elsewhere. Woodhouse train station is located approximately 1 kilometre to the east of the district centre, and can be accessed in around 15 minutes on foot. Frequent services can be alighted here, and provide access to Lincoln, Leeds and into Sheffield city centre in approximately 23 minutes. Within the district centre, there are bus stops along Chapel Street and Cross Street. The centre is served by bus services 7, 24 Sheffield, 25, 30 City Line, 30a, 52 and 655 which provide frequent access to destinations including Sheffield city centre and throughout the east of the city, including to Crystal Peaks.

Perception of Safety - In general, the perception of safety throughout Woodhouse district centre is high. Pedestrian activity and passing vehicular traffic, as well as active uses at ground floor levels, ensure that levels of natural and passive in Woodhouse are high. Away from areas of high activity, such as around Market Square and Market Street, the perception of safety is generally lower. Moreover, the level of vehicular activity at the southern end of Cross Street (near to the junction with Tannery Street and the bus stops) does represent a barrier to safe pedestrian movements in this location.

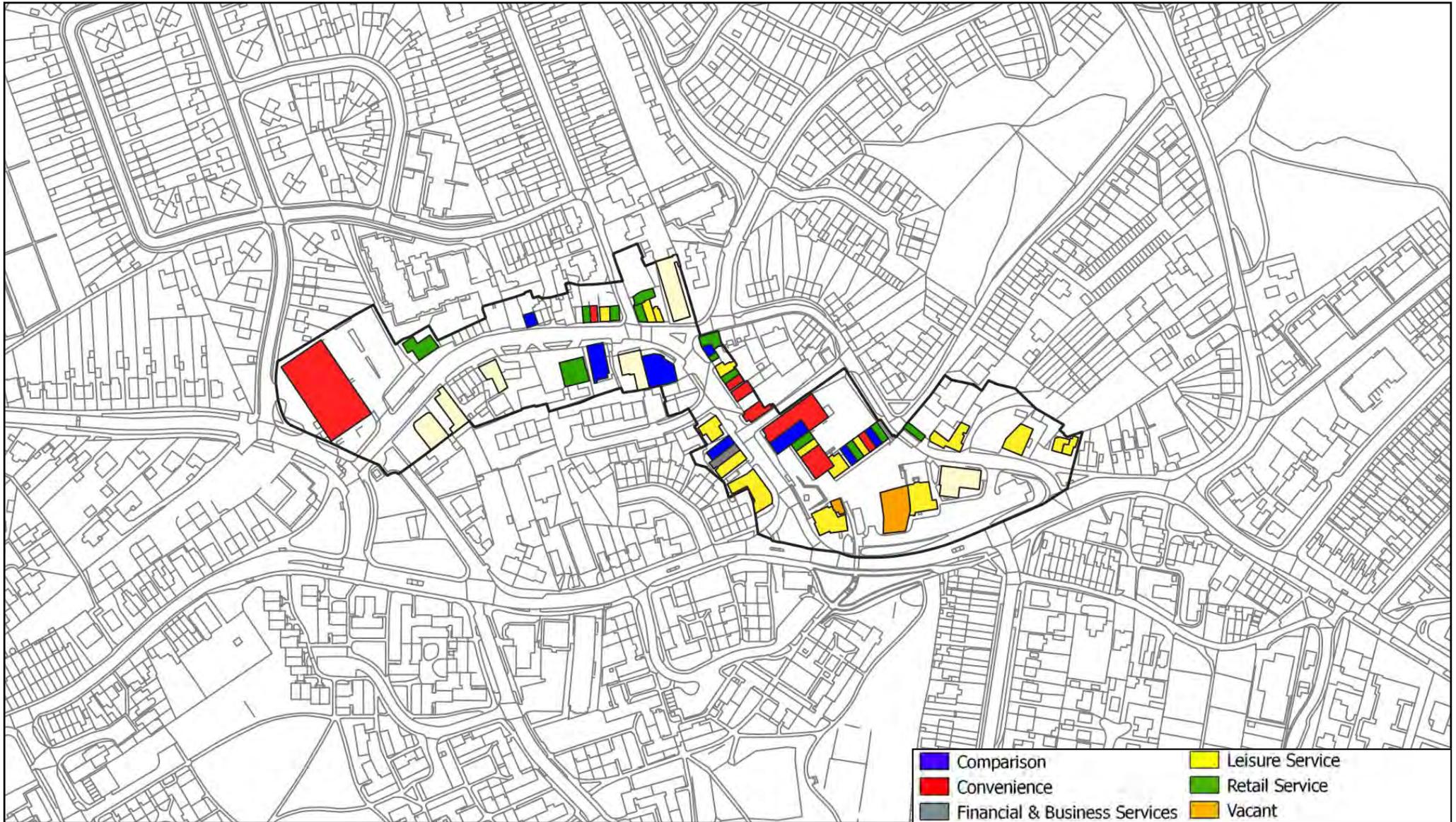
According to the website ukcrimestats.com, there were 200 crimes recorded within a mile radius of the district centre at February 2022. This compares with 206 crimes at February 2021 and 236 crimes at February 2020.

Environmental Quality - By virtue of Woodhouse's historic development, first as a village before becoming a suburb of Sheffield, the district centre has a number of historic and landmark buildings which provide an attractive setting to the district centre. Listed buildings, located at the eastern and western ends of the district centre, provide a sense of arrival into the district centre as well as helping to establish an identity for Woodhouse.

Throughout Woodhouse, there is evidence of planting and landscaping. This is generally well-maintained, and the pocket park on Chapel Street provides an attractive destination for those in the district centre to rest and relax. It is noted that the Woodhouse Community Forum are active in the area, and have sought to ensure that local facilities are improved. As such, Woodhouse is generally an attractive and pleasant retail environment. Notwithstanding this, the presence of vacant units and limited activity on Market Square do negatively impact the environmental quality in the south-eastern corner of the district centre.

Conclusions - The retail offer in Woodhouse is commensurate with the anticipated provision for a district centre. It is dominated by convenience and services uses, with Co-op Food anchoring the western end of the centre, alongside a range of service retailers. This offer is considered suitable to serve the day-to-day needs of the local community.

Woodhouse has a generally high standard of environmental quality, with the exception of the area around the vacant units at Market Square which lend a negative aspect to this part of the district centre. Notwithstanding this, by virtue of the low vacancy rates of the centre, Woodhouse is considered to be vital and viable.



Woodhouse district centre

Sheffield Retail and Leisure Study 2022

Survey Date - March 2022

Woodseats District Centre

Description - Woodseats is a large, linear district centre located in the south-west of the city, approximately 3 kilometres to the south of the City Centre. The district centre serves a wide catchment area, and as such provides a diverse range of retail and service operators which are considered easily capable of serving the day-to-day needs of the local community. There is a particularly strong range of service operators in Woodseats. Although the vacancy rate is higher than the national average in respect of units, it is not considered to represent cause for concern.

The centre is located along a major arterial route into the city centre, and is therefore easily accessible by both public and private transport. Although the centre is affected by high volumes of vehicular movement, the environmental quality is generally good by virtue of the well-maintained units. The centre's vibrancy is further strengthened by the annual Woodseats Festival, held over a weekend in July each year. The Festival is focused on a range of community events, aimed at bringing the community together.



Figure 1: The district centre is located along a main arterial road into the city centre, with the A61 Chesterfield Road linking the south-western part of the City.



Figure 2: Woodseats is well served by a diverse range of service operators, such as TSB on Abbey Lane.



Figure 3: Efforts have been made to provide a high standard of environmental quality and to ensure that the city is easily walkable. There are a number of crossing points in the centre.



Figure 4: The Asda foodstore and Iceland anchor the convenience goods offer in the district centre.

Table 1 District Centre Floorspace Composition

| GOAD Category | Floorspace at 2022 (sq.m) | Floorspace at 2022 (%) | Floorspace UK Average at 2022 (%) |
|----------------------|----------------------------------|-------------------------------|--|
| Comparison | 4,557 | 26.9% | 30.4% |
| Convenience | 2,457 | 14.5% | 15.4% |
| Financial | 1,427 | 8.4% | 6.8% |
| Leisure | 4,530 | 26.8% | 25.7% |
| Retail Service | 2,485 | 14.7% | 7.2% |
| Vacant | 1,465 | 8.7% | 13.9% |
| TOTAL | 16,921 | 100 | 100 |

Source: Composition of District centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022.

Table 2 District Centre Unit Composition

| GOAD Category | Units at 2022 | Units at 2022 (%) | Units UK Average at 2022 (%) | Units at 2016 (%) |
|----------------|---------------|-------------------|------------------------------|-------------------|
| Comparison | 35 | 21.9% | 27.0% | 39.7% |
| Convenience | 11 | 6.9% | 9.2% | 4.9% |
| Financial | 13 | 8.1% | 9.1% | 37.7%* |
| Leisure | 36 | 22.5% | 24.7% | 37.7%* |
| Retail Service | 39 | 24.4% | 15.7% | 37.7%* |
| Vacant | 26 | 16.3% | 14.1% | 12.1% |
| TOTAL | 160 | 100 | 100 | 100.0% |

Source: District centre composition based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of March 2022; UK Average from Experian Goad Report January 2022; Units at 2016 taken from Sheffield & Rotherham Joint Retail & Leisure Study 2017. 2016 figures for financial, leisure and retail service operators represent a total of these uses.

Uses - In respect of both floorspace and unit numbers, Woodseats is one of the larger district centres in the Sheffield authority area. The district centre provides a diverse range of uses, including a relatively strong range of comparison operators, with 35 such operators equating to 21.9% of all units in the district centre. Although this figure represents a significant increase on the 39.7% observed at 2016, it still remains one of the higher proportions for comparison operators at a district centre in the City. Comparison operators are diverse, and include retail art galleries, pharmacies, gift shops, florists and charity shops. There are also specialist retailers including a bathroom showroom and kitchen showroom. Woodseats also has a reasonably strong convenience goods offer which is considered to be commensurate with the centre's status. There are 11 convenience operators, equating to 6.9% of all operators. This is an increase on the 4.9% of convenience goods operators at 2016, but represents a lower proportion than the current national average. Convenience operators are underpinned by Asda, Farm Foods and Iceland, alongside a range of smaller, independent operators such as a butcher and fishmonger.

Since 2016, the proportion of service operators has increased significantly at Woodseats. At 2016, 37.7% of operators were categorised as 'service' operators and were therefore either leisure, retail or financial and business uses. Our survey of 2022 recorded 49.5% of operators as 'services'. This increased proportion is reflective of wider High Street trends found elsewhere in the country. There are 36 leisure service operators, which equates to 22.5% of all units in the centre. Operators include hot-food takeaways, restaurants, pubs and betting offices. Retail service operators account for 24.4% of operators, and include hairdressers, beauty salons, tattooists, opticians and dry cleaners. The financial and business service sector account for 8.1% of units, broadly similar to the current national average, and includes retail banks (TSB and Virgin Money) and estate agents.

Vacancies - The proportion of vacant units at Woodseats district centre has increased fairly markedly on 2016, from 12.1% to 16.3% at 2022. Although this is in the context of an increase in the national average vacancy rate in respect of units over this time, the vacancy rate at Woodseats is greater than the current UK average figure for vacant units.

Although the vacancy rate in respect of floorspace is considerably lower than the national average, the concentration of vacant units in parts of the district centre (particularly to in the northern most part of Woodseats) does negatively impact the overall level of vitality and vibrancy in these areas. Notwithstanding this, generally the vacancy rate is not currently considered to represent cause for concern as it provides for sufficient available units to enable new entrants into the district centre.

However, the vacancy rate should be monitored to ensure the rate does not significantly worsen from the current position.

Pedestrian Flows - Located within an established residential area, pedestrian movements to and from the district centre are relatively easy. At the time of our visit, there were no particular concentrations of pedestrian activity observed. Levels of activity were fairly consistent throughout the district centre, with people observed making linked trips between various operators in Woodseats.

Chesterfield Road is a key vehicle route into the city centre, and as such the volume of traffic is considered to represent a barrier to movement. However, there are a number of controlled crossing points located along Chesterfield Road which provide for easy pedestrian access and flows through the centre.

Accessibility - Woodseats district centre has a high standard of accessibility. In respect of public transport, this is readily available from the district centre, with a number of bus stops located along Chesterfield Road. Bus services 24 Sheffield, 25, 43, 44, 75 Sheffield, 76 Sheffield, 76a Sheffield, 719 and 723 provide frequent services to a range of destinations, including the City Centre (and other destinations throughout the city), Chesterfield and Dronfield.

Car parking is also readily available, with a number of on-street car parking spaces located along Chesterfield Road. This provides free-to-use, short term parking for those visiting the centre for a short duration. Surface level car parks are located at the Asda foodstore (for use by customers), and behind the western retail parade on Chesterfield Road. Pedestrian accessibility is also considered to be good, with wide pavements lining Chesterfield Road and controlled crossing points located along Chesterfield Road. Although the volume of pedestrian movements does somewhat restrict pedestrian accessibility, the provision of crossing points in the centre ensures that pedestrian movements can easily be made.

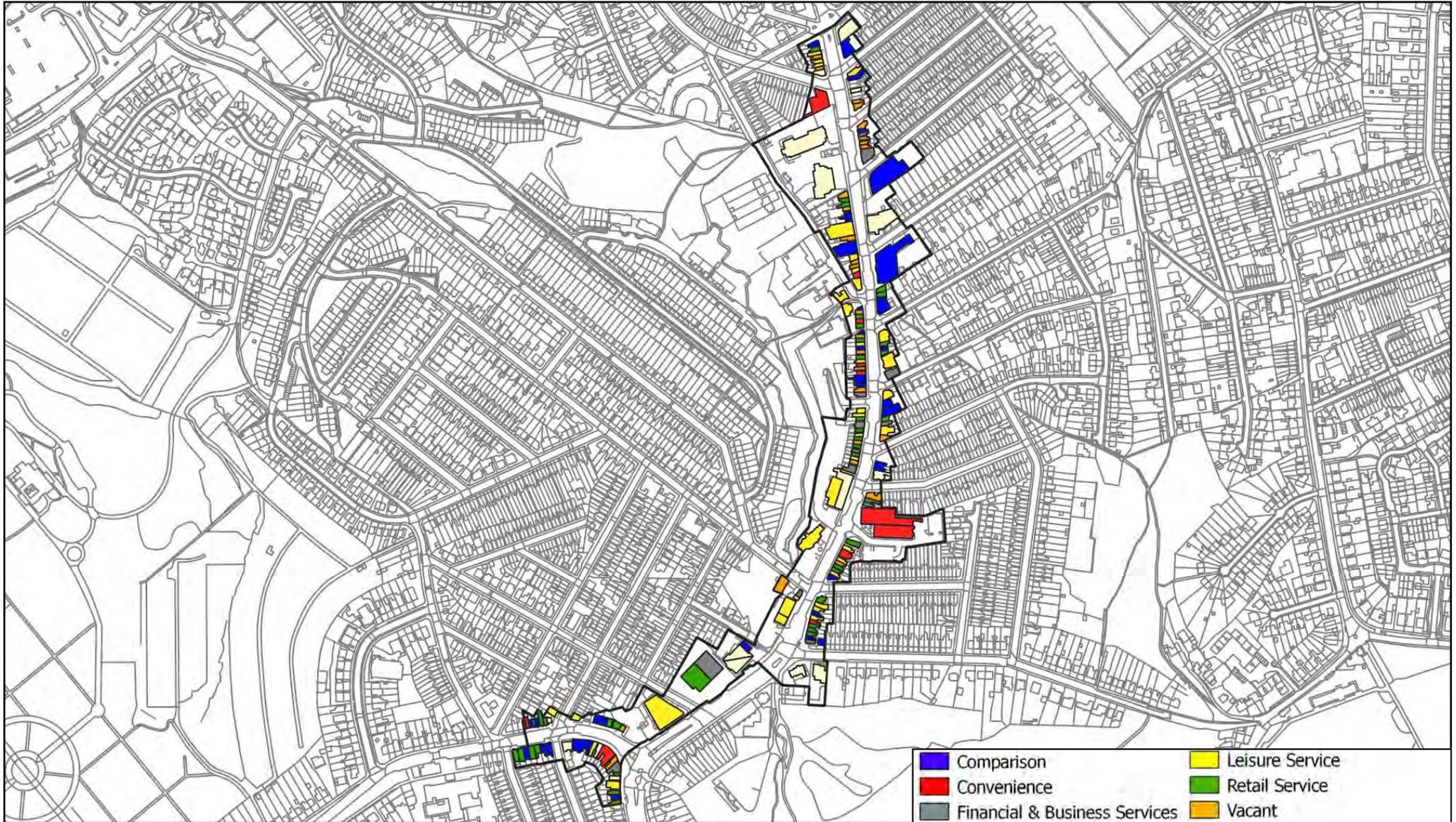
Perception of Safety - The linear nature of Woodseats district centre limits the locations which lack natural or passive surveillance, and therefore ensure that the centre benefits from a high perception of safety. This is further augmented by the centre being located along a key arterial route, with the passing traffic further increasing the levels of natural and passive surveillance. At the time of our visit, there was little evidence of crime or anti-social behaviour, although the concentration of vacant units in parts of the district centre does negatively impact the perception of safety in areas. Furthermore, the narrowness of the pedestrian carriageway in parts and the proximity of the pedestrian areas to vehicle movements detracts from the perception of pedestrian safety. According to the website ukcrimestats.com, there were 158 crimes recorded within a mile radius of the district centre at February 2022. This compares with 130 crimes at February 2021 and 158 crimes at February 2020.

Environmental Quality - Although the centre is located along a key road (and as such the overall appearance and environmental quality is negative impacted by the number of vehicular movements), at the time of our visit it is clear that efforts have been made to ensure the environmental quality of the centre is maintained to the highest possible standard. There are seasonal planters located throughout the centre, and a number of the retail units are well-maintained and have attractive frontages, which adds interest and gives a unique character to the district centre. The public areas are generally well-maintained and functional, with little evidence of litter or graffiti noticed at the time of our visit.

Whilst the environmental quality is generally of a high standard, towards the north of the district centre (near to the junction of Scarsdale Road) the concentration of vacant and poorly maintained

and generally tired units in this location negatively influences the overall appearance of the district centre, particularly at a key arrival point. The north-south differentiation in the appearance of the centre is potentially a result of the long, linear nature of the district centre and in it lacking a clearly defined retail 'core'.

Conclusions - Woodseats is a large, linear district centre located in the south-west of the city, approximately 3 kilometres to the south of the City Centre. The district centre serves a wide catchment area, and as such provides a diverse range of retail and service operators which are considered easily capable of serving the day-to-day needs of the local community. The vacancy rate is higher than the current national average. As such, it will be important that the vacancy rate is reduced in order to help underpin Woodseats' future vitality and viability.



Woodseats district centre

Sheffield Retail and Leisure Study 2022

Survey Date - March 2022