

February 2012



Chesterfield Town Centre Healthcheck

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PART 1. EXECUTIVE SUMMARY

PURPOSE

To provide a summary of the health of Chesterfield Town Centre. This document provides background information on the vitality of Chesterfield Town Centre which can be used as background information for potential investors and for Chesterfield Borough Council's Economic and planning decisions. This document meets the requirements of Planning Policy Statement 4 ("Planning for Sustainable Economic Growth")

EXECUTIVE SUMMARY

Chesterfield is the largest town in Derbyshire and a key retail and administrative centre for North East Derbyshire. With a population of just over 100,000 in the borough, and potential catchment of over 1.1m (of whom around 100,000 will be regular shoppers) it is a centre that performs strongly against the surrounding major centres of Sheffield, Derby and Nottingham with its mix of independents, traditional market and high street names (capturing a 52.8% share of the core catchment¹). Strong transport links connect the town to the rural communities of North East Derbyshire and the Peak District, as well as to other major towns and cities via its modern Coach and Railway Stations.

Despite the wider Economic Downturn, Chesterfield continues to perform well. Vacancy rates are well below both the national and regional average, and interest from new retailers is high, both from national chains interested in new representation in the town and locally based new start ups. As of August 2010, Chesterfield is currently ranked 130th in CACI's ranking of over 4,000 Retail Footprint centres in Great Britain and 6th in the East Midlands region².

Chesterfield continues to look forward with a number of town centre development schemes coming forward. Key developments including the refurbishment of the town's historic Market Hall and the Northern Gateway project will provide much needed modern floorspace and facilities, increase choice, continue to give the town a competitive edge and lift it further up the retail rankings.

The council's town centre strategies are underpinned by a clear and up to date Town Centre Masterplan, prepared to guide future development and increase the range of uses and activities in the town. This strategy is supported by clear planning policy and the use of evidence such as retail studies by CACI and Nathaniel Lichfield and Partners.

Chesterfield's historic market continues to thrive at the heart of the town centre's unique offer, with plans to refurbish the Market Hall underway and a strong programme of events, including annual festivals as well as frequent specialist market days. A town centre conservation area and careful approach to heritage and conservation, including a successful Townscape Heritage Scheme, helps preserve the unique quality and character of the centre.

¹ Chesterfield's Retail Offer, August 2010; CACI

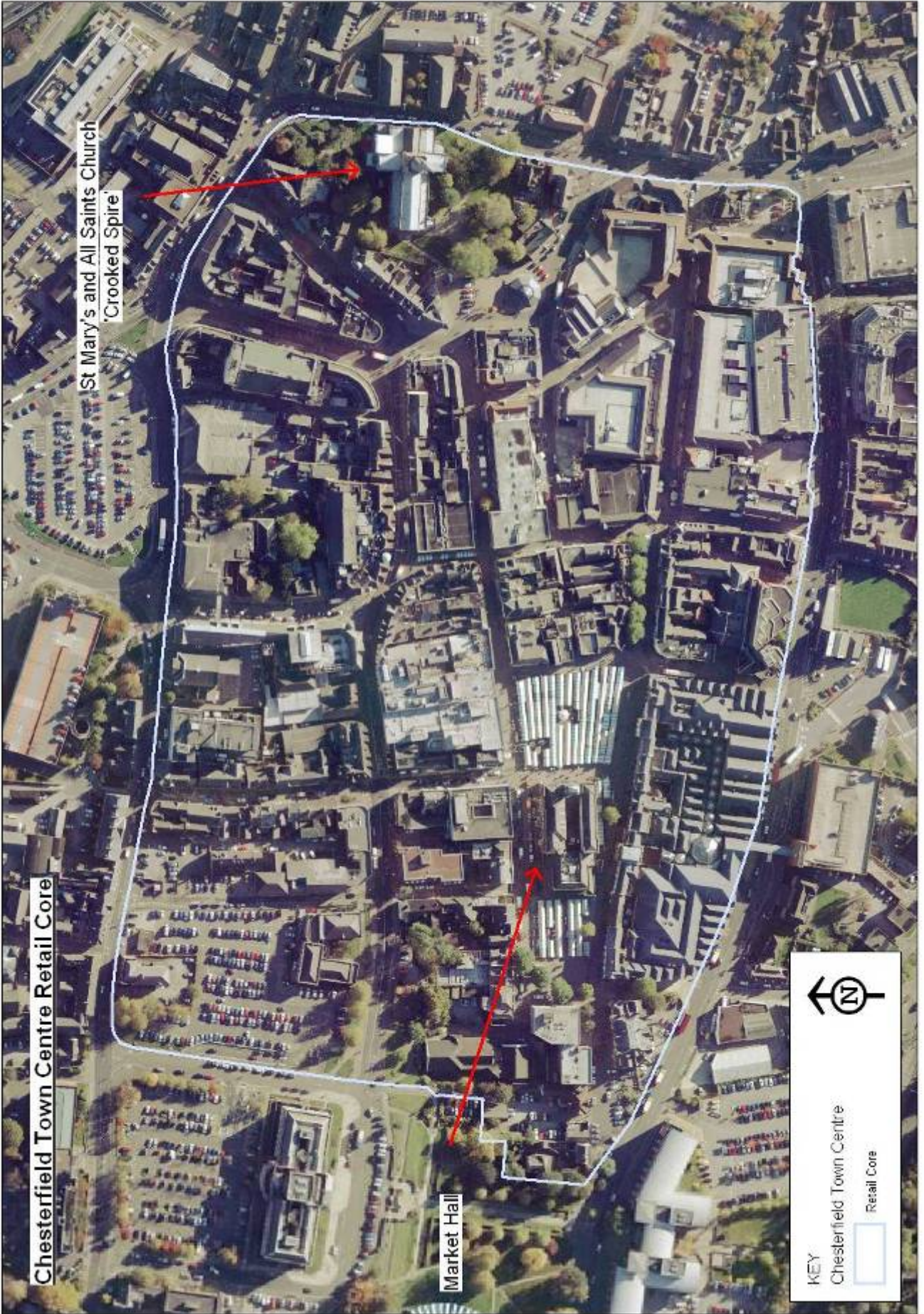
² Chesterfield's Retail Offer, August 2010; CACI

The town has a strong night-time economy, although this success brings with it a number of management challenges. The Pomegranate Theatre and Winding Wheel offer a wide range of entertainment, although this is tempered by a high proportion of bars and clubs. Recent changes to Local Licensing policy, the introduction of Street Pastors and joint working with Derbyshire County Council on taxi arrangements and temporary road closures is helping to tackle these concerns.

Chesterfield has also recognised that there is a need to raise the profile of the town. A new project, Destination Chesterfield was launched in October 2010 to develop a co-ordinated approach to promoting the town. Funded by ERDF, Chesterfield Borough Council and local businesses the aim is to raise the profile of Chesterfield by harnessing its location, potential and confidence to establish its position as a contemporary destination, nestled on the border of the world famous Peak District and close to Sheffield. Working with residents and business we want to make Chesterfield a desirable place to live, do business, invest, and visit. The project is supported by over 100 local businesses who act as Chesterfield Champions.

KEY FINDINGS

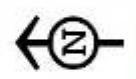
- Occupancy rates remain significantly above the national and regional averages
- A Town Centre Masterplan is in place with proposals for the refurbishment of Chesterfield Market Hall in 2012 and major retail extension currently being procured to raise the centre's offer
- Chesterfield's market continues to be a key draw, with stable occupancy levels which will be enhanced by refurbishment of the Market Hall. The quality of environment is good, with a strong heritage that adds character and distinctiveness
- The centre has a clear focus towards value and mass retail; The Northern Gateway proposals are intended to enhance this offer
- Prime retail rents have fallen in the last 12 months, but in the context of high occupancy rates and an overall decline in rents regionally
- Tourism is an increasingly important part of the town centre economy and plans are in place to enhance visitor accommodation
- The town has a strong 'Retail Park' offer which is well-integrated with the retail core of the town centre. Recent vacancies in this sector are now being backfilled, with plans approved for further expansion.
- Accessibility by a range of means of transport is good
- Difficulties associated with the night time economy are being addressed with clear signs of improvement, including a significant reduction in violent crime.



Chesterfield Town Centre Retail Core

St Mary's and All Saints Church
'Crooked Spire'

Market Hall



KEY
Chesterfield Town Centre
Retail Core

PART 2. INDICATORS

2.1 USES

Shops remain the predominant use in Chesterfield town centre, accounting for more than half (57%) of the total units and ground floor space, followed by financial and professional services (15%), concentrated around Glumangate and New Square. A number of new, quality independent restaurants have opened in the town in recent years, alongside increased representation from national coffee chains. Chesterfield has two main shopping centres, the indoor Pavements Centre (a 1970s development), and more recent Vicar Lane, opened in 2000. Both are popular and well-occupied, designed to have strong links to the Market Place.

The centre is also the main administrative centre for Northern Derbyshire. The main offices of both Chesterfield Borough Council and North East Derbyshire District Council are located in the town centre, as well other key services including the main library, police station and Royal Mail Sorting Office. Outside the retail core, around Corporation Street and Holywell Street, there is a strong emphasis on leisure, including restaurants and bars and the cultural offer of the Pomegranate Theatre, Chesterfield Museum and the Winding Wheel conference and entertainment venue.

Commercial office use in the town centre includes two large HQ administrative functions for CPP and Royal Mail, on Beetwell Street (just outside of the retail core), together with a range of smaller office premises and suites, mainly for financial and professional services along Saltergate, Glumangate and above shops within the retail core.

1. CHESTERFIELD TOWN CENTRE – USES AND OCCUPANCY, August 2011

Use Class (Use Classes Order 2010)	Number of Units	% of Units	Total GGFA Floorspace m ²	% of Total GGFA Floorspace
Shops (A1)	227	57.5	40,342	58.8
Financial and Professional (A2)	58	14.7	7,491	10.9
Restaurants and Cafes (A3)	21	5.3	2,673	3.9
Drinking Establishments (A4)	21	5.3	5,133	7.5
Hot Food Takeaways (A5)	9	2.3	574	0.8
Business – office and light industrial (B1)	6	1.5	2,288	3.3
Dwellings (C3)	6	1.5	191	0.3
Non-Residential Institutions (D1)	11	2.8	4,862	7.1
Assembly and Leisure (D2)	2	0.5	273	0.4
Sui-generis (no use class)	6	1.5	1,923	2.8
Vacant units	28	7.1	2,821	4.1
Total	395	100	68,571	

Source: Chesterfield Borough Council, August 2011

Chesterfield Market , with over 250 stalls, operates every Monday, Friday and Saturday selling a wide range of goods. A speciality market on Thursday each week sells bric-a-brac and antiques, second hand clothes and other unusual items. The indoor Market Hall also provides a range of retailers including speciality meat and fish produce.

On the second Thursday of each month there is a Farmers Market selling produce from North Derbyshire, Nottinghamshire and Staffordshire whilst special markets are held each Bank Holiday with events and entertainment.

2.2 OCCUPANCY AND VACANCIES

Chesterfield Retail Core

Within the retail Core of Chesterfield town centre the picture is a healthy one, despite the economic downturn. When fully surveyed in August 2011 occupancy was high, with only 7.1% of the 400 or so units within the centre vacant. Although on the face of it this is a slight increase from 2010 (when vacancy rates stood at 6.1%), surveys carried out by the council's Economic Development Unit (which are limited to recording vacancies only) in June and October actually showed vacancy rates of 4.6% and 4.8%. This indicates that the August rate was unusually high and that there is a rapid take up of vacant units.

When compared to national and regional rates of vacancies (a national average of 14.5% and East Midlands average of 12.9%³) it is clear that Chesterfield continues to perform strongly in terms of occupancy.

2. CHESTERFIELD TOWN CENTRE – VACANCIES, August 2011				
Use Class ⁴	Number of Units	% of Units	Total GGFA Floorspace m ²	% of Total GGFA Floorspace
Vacant units	28	7.1	2,821	4.1

Source: Chesterfield Borough Council, August 2011

Chesterfield Markets and Market Hall

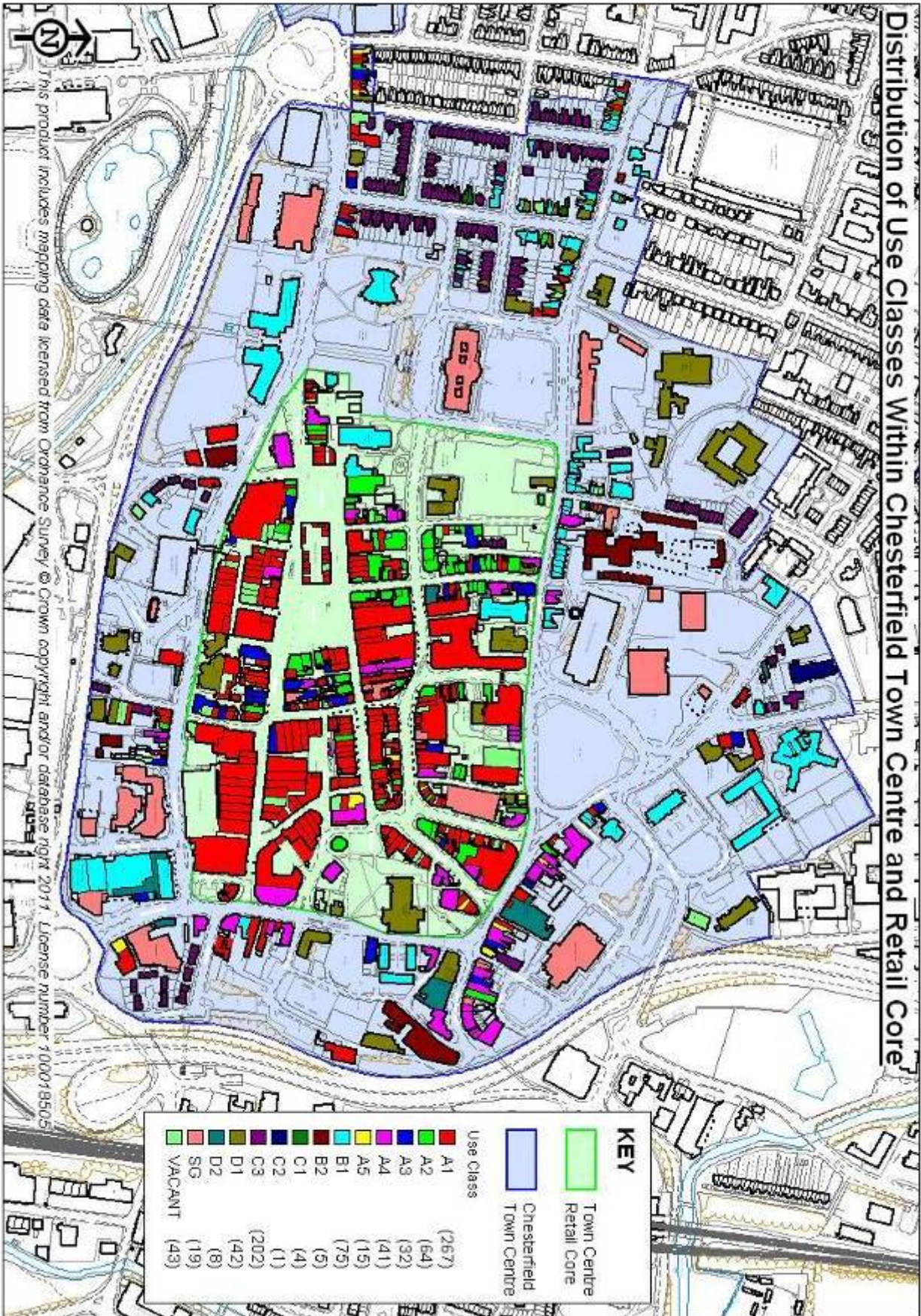
As of 2011, 70% of the retail floorspace within Chesterfield Market Hall is let. However it should be noted that vacant units are not currently being marketed for new lets, pending the major refurbishment of the Hall, starting in 2012

On average in 2010/2011 62.2% of the outdoor market stalls were occupied. Occupancy levels varied little across the year, although levels in January and February were significantly lower (at 54.6 and 54.9% respectively), coinciding with a period of exceptionally poor weather and heavy snow. Occupancy levels also vary across different market days, with Thursday and Saturday markets generally seeing the highest levels of occupancy.

³ source: The Local Data Company, September 2011

⁴ As defined in the Use Classes Order 2010

Distribution of Use Classes Within Chesterfield Town Centre and Retail Core



2.3 OPPORTUNITIES

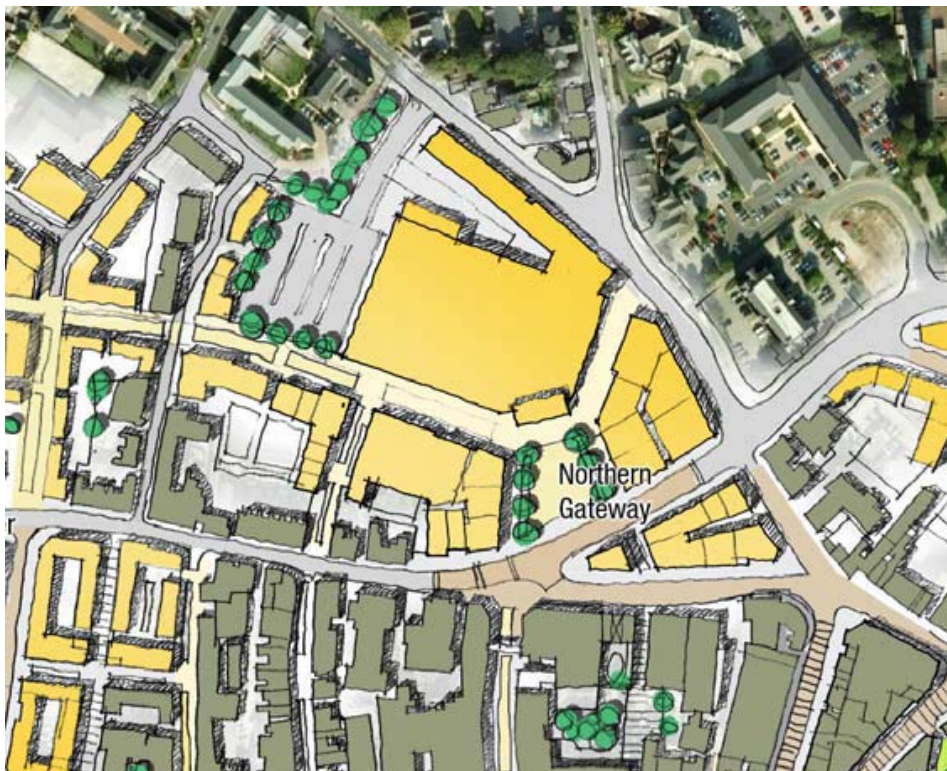
Whilst the Historic Market is, in many respects, the defining feature of the Town Centre's character, the town also has an eye to the future. The Chesterfield Town Centre Masterplan, produced in 2009 by URBED, provides a blueprint for the centre's future development. This highlighted the strength of the historic core, combined with the need to improve the edges of the town and take advantage of future development opportunities. Two major projects; the refurbishment of the Historic Market Hall and the Northern Gateway development will be the first elements in achieving the masterplan objectives.

The Northern Gateway Development

This site, covering the Holywell Cross surface and multi-storey car parks and adjacent land, is allocated in the Local Plan for a major mixed use expansion of Chesterfield Town Centre, to provide new retail, leisure, employment and housing opportunities and expand the role of the town as a sub-regional destination. The development is intended to include:

- A new town centre food store;
- High street shops, offices and homes;
- Restaurants and cafes;
- Changes to the road layout to improve pedestrian access to the town centre and market place;
- Replacement car parking;
- New urban open space.

Chesterfield Borough Council began the process of selecting a development partner in July 2011. At the time of writing (January 2011) two potential development partners have been shortlisted – Wilson Bowden and Muse Developments –from eight submissions. The Council is aiming to select a preferred development partner by March 2012.



Chesterfield Town Centre Masterplan, 2009, URBED

Chesterfield Market Hall Refurbishment

Chesterfield's iconic Victorian Market Hall is due for a major refurbishment, starting in 2012. Located right in the heart of the town centre, its last major refurbishment was in the early 1980s. Planning and Listed building consent have now been granted to completely refurbish the interior and a construction programme being prepared for work to start in March/April 2012, to be managed by Wates Construction.

The £4m refurbishment is being part funded by ERDF and the Heritage Lottery Fund with the remaining money coming from the Borough Council.



2.4 RETAILER REPRESENTATION

Chesterfield has retained a strong market town feel and has successfully integrated high street brands with retailers that are unique to Chesterfield. There is a clear focus toward value and mass retailers and this is further evidenced by the open air market that extensively houses a value and mass offer. Vicar Lane is the most recently developed part of Chesterfield and provides space for the town's mass multiple retailers with familiar names such as River Island, Waterstones, New Look and H&M joining the likes of Marks and Spencers, Primark, WH Smiths and Boots, who are already well established in the Pavements Centre and around the Market Place, and a Co-operative department store to the northern edge of the centre.

In terms of multiple fashion retailers, Monsoon is illustrative of the town's current level of premium retail offer. Falcon Yard is a destination for premium boutique shopping with other boutiques being dispersed such as Zebra on Holywell Street/ Corporation Street and Newport on Cavendish Street. Convenience retail needs are met by a Co-operative supermarket and Tesco Metro, as well as a good range of independent food retailers including butchers, Greengrocers (including regular and long established market stalls) and even a specialist Cheese Factor.

Improving the quality and breadth of the retail offer would broaden the appeal of Chesterfield as a retail destination, drawing in new customers from within the catchment as well as increasing the spend of existing customers in the town centre. This additional expenditure would help to sustain the vitality and viability of Chesterfield town centre, securing (and creating) employment and providing a better retail experience for residents and visitors alike – a key aspiration of the vision in the new Town Centre Masterplan and the driver behind the Northern Gateway development.

2.5 LEISURE AND TOURISM

Chesterfield's historic market, the unique and unusual 'Crooked Spire' of the Parish Church, the local Museum and Queen's Park, make it an attractive town to visit within the wider Peak District tourism offer. Its proximity to major attractions such as Chatsworth and Hardwick Hall increases its attractiveness as a tourist destination. The provision of cultural facilities such as the Pomegranate Theatre, the Winding Wheel, a cinema and a programme of town centre events add to its unique offer. There are a number of places to stay including 2 large hotels (the Ibis and Chesterfield Hotels) with 159 bedrooms, smaller hotels with 22 bedrooms and several guesthouses. In addition, there are a number of hotels within 3 miles of the town centre, including the recently opened Casa Hotel (4 Star) which has 100 bedrooms.

The town's award winning Visitor Information Centre has a throughput of just fewer than 150,000 per year, of which 40% are visitors to the town. The STEAM (Scarborough Tourism Economic Activity Monitor) report estimates that, in 2010, 2,877,700 people visited Chesterfield for the day and 289,400 people stayed overnight in the town. These visitors brought £122,480,000 into the local economy. The steady growth of tourism in Chesterfield is reflected in the number of day excursion coaches visiting the town which has more than doubled since 2006.

3. COACHES BOOKED VIA TIC INTO BEETWELL STREET COACH STATION.

	2006/7	2007/8	2008/9	2009/10	2010/11
Totals	188	330	345	458	478

Source: CBC TIC

2.6 EDGE OF CENTRE AND OUT OF CENTRE LOCATIONS

Excluding the other town, district and local centres in the borough, Chesterfield's out-of and edge-of centre retail offer is concentrated in four 'retail parks'; Lordsmill Street, Ravenside, Sheffield Road and Wheatbridge Road; and three out-of-centre Supermarkets; Tesco on Lockoford Lane, Sainsbury's on Rother Way and Morrisons on Chatsworth Road.

Between them the retail parks provide approximately 25,000 sqm (net)⁵ of retail floorspace, the majority of which is located within walking distance of Chesterfield Town Centre around the Ravenside and Lordsmill Retail Parks. The retail parks have been seen greater impacts from the economic downturn than the town centre, with over 8,000 sqm (gross) currently vacant, largely due to the demise of major national chains such as MFI and Focus, and restructuring in the expansion proposals of others such as B&Q. However the market remains relatively buoyant, with a number of vacant units being refilled by new entrants into Chesterfield (including Matalan into a former B&Q, and Toys r Us taking vacant space in a new B&Q unit). Most recently, the former Focus unit on Ravenside Retail park, which became vacant in mid 2011, has gained planning permission to be rebuilt for a Debenhams, the first of a new format store to be rolled out.

⁵ Source: Chesterfield Retail Capacity Update 2010

4. OUT OF CENTRE RETAIL LOCATIONS

Location

Lordsmill Street (including B&Q)

Ravenside Retail Park

Sheffield Road

Wheatbridge Road

Vacant

Tesco, Lockoford Lane

Sainsbury's, Rother Way

Morrisons, Chatsworth Road

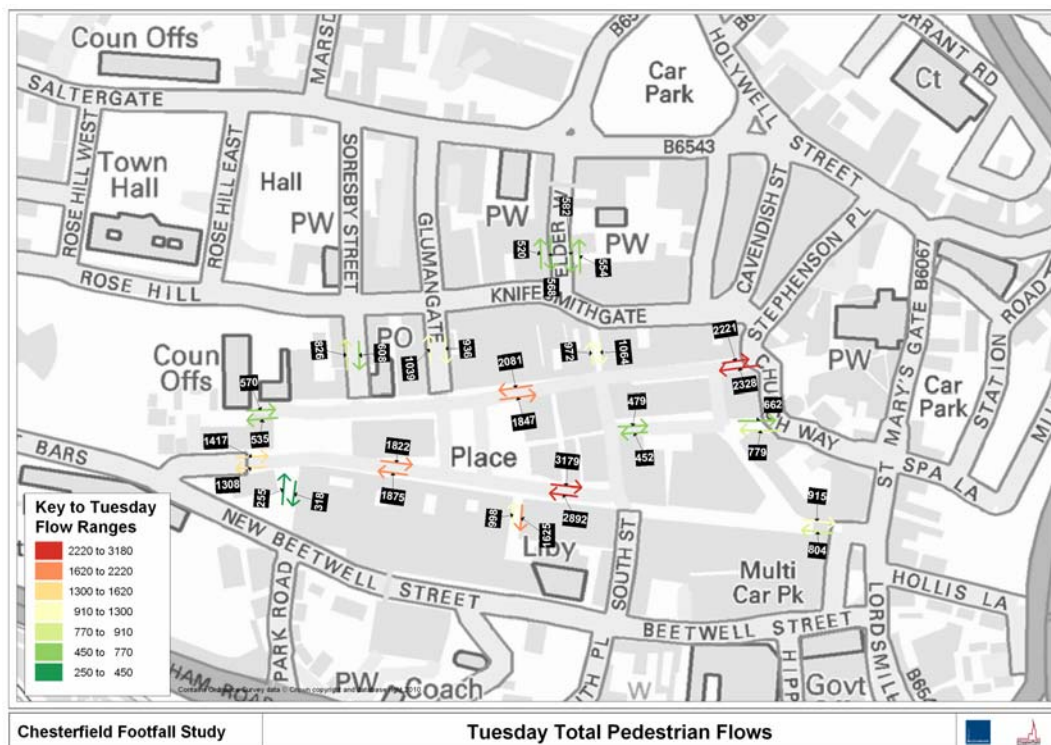
Planning permission is also in place for a further 2,500 sqm (gross) of additional floorspace in three units as an extension to Ravenside Retail park, expanding the amount of retail warehouse floorspace within walking distance of Chesterfield Town Centre.

2.7 SHOPPING RENTS AND LAND VALUES

Over the 12 months to June 2011, Chesterfield experienced a drop in prime retail rent of 16.7%⁶. Whilst disappointing, this needs to be viewed in the context of a national picture of falling retail rents, which have been particularly pronounced in the East Midlands (with a 6% fall overall, to an average of £91 per square foot) and against above average levels of occupancy (see section 2.2) and high take-up of vacant units.

Proposals for the Northern Gateway development, and the proposed opening of a new Debenhams store within the town, are expected to have an overall positive impact on the rental picture.

2.8 FOOTFALL SURVEYS



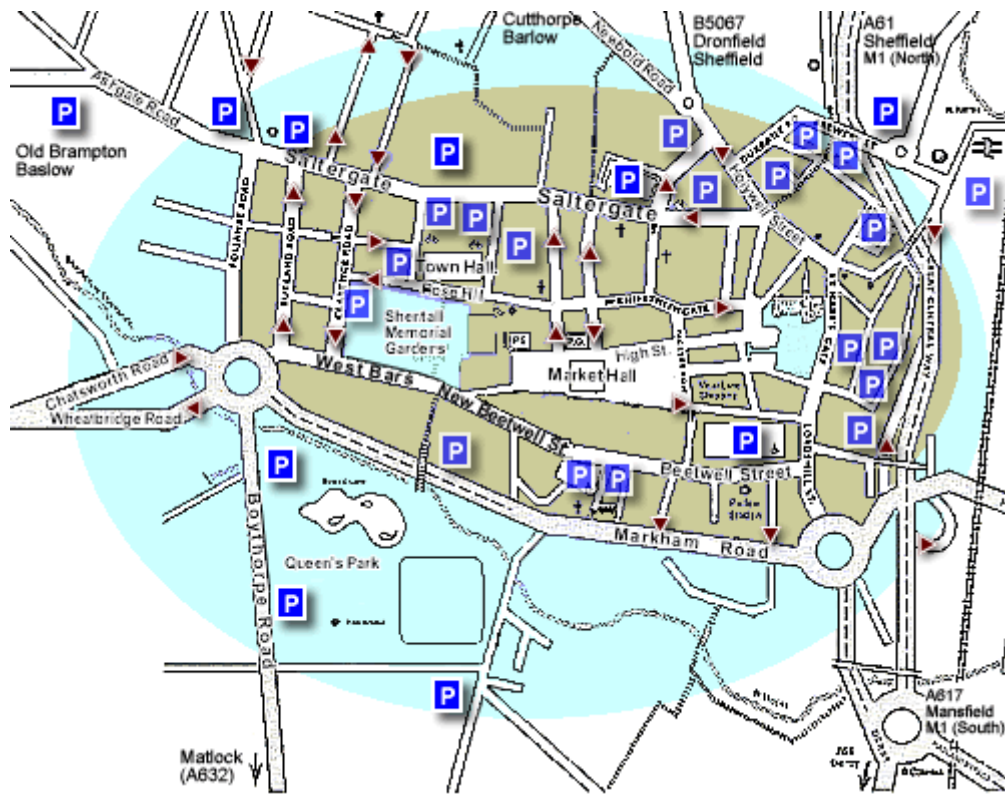
⁶ Source: Great Britain Retail, Autumn 2011; Colliers International

A footfall survey of Chesterfield Town Centre was carried out in April 2011 by Colin Buchanan. This highlighted the busiest locations as being along Low Pavement and Burlington/High Street, with the lunchtime period being the busiest.

2.9 ACCESSIBILITY

Vehicle Access

Chesterfield is closely linked to the M1, primarily via the A617, which makes it highly accessible by road. However its location on one of the main routes from the M1 to the Peak District and cross Pennine route to Manchester results in a significant element of through traffic. Vehicle access into the centre itself is limited by pedestrian areas, although there is extensive parking spread in a number of locations around the centre all within easy walking distance. The majority of parking (about 3000 spaces) is controlled by Chesterfield Borough Council, including multi storey car parks at Beetwell Street and Holywell Cross with some private parking, most notably the multi-storey car park for the Vicar Lane Shopping Centre.



Walking

Chesterfield is a relatively compact centre that is easy to walk around. Tourist signs provide navigation between key locations and services and the market square and main shopping areas are mostly pedestrianised for ease of access. Substantial residential areas exist to the west, north and south of the centre. Although in some locations major roads act as a barrier to pedestrian access, crossing improvements have been secured through new development and improved pedestrian access will be a key element of development proposals for the Northern Gateway development.

Cycling

A number of long distance cycle routes serve the town, including the Trans Pennine Trail, and more local Holmebrook Valley and Hipper Valley trails, all of which terminate in or near to the town centre but do not currently cross. Some secure cycle storage is available at the eastern end of the town centre but provision is generally limited. Chesterfield Borough Council and Derbyshire County Council have co-ordinated on producing a strategy for future cycling provision to tackle these issues and improve links between the town centre and other key destinations in the town.



Bus/Coach

The town's modern Coach Station is a short walk from the Market Place, and provides a facility for a range of national services as well as visitor Coaches. The steady growth of tourism in Chesterfield is reflected in the number of day excursion coaches visiting the town more than doubling since 2006 to 478 in 2010/11 (see section 2.5).

As transport hub for North East Derbyshire, Chesterfield is well served by bus services, which stop in a number of locations around the town centre, with Beetwell Street and Cavendish Street/Stephenson Place acting as the main hubs for interchange between services and pick up and drop off of passengers.

Rail

Chesterfield's modern Railway Station, whilst not in the town centre itself, is a 10 minute walk from the centre of the town. With regular, direct services to destinations including London St Pancras International (half hourly services in under 2 hours), Birmingham, Bristol, Edinburgh, Manchester and Liverpool, as well as more local destinations including Sheffield, Derby and Nottingham.

2.10 CUSTOMER AND RESIDENTS VIEWS

The Chesterfield Citizens Panel is a group of 1000 randomly selected residents who agree answer regular surveys about matters in the borough. The survey carried out in June 2011 included a number of questions about Chesterfield Market.

Of those who responded, nearly 90% of residents indicated that they used the market, over a third on a regular basis. The majority considered the market to be clean and tidy and said that they felt safe using it. 93% said that they would recommend Chesterfield Town Centre and market to friends and relatives from outside the borough.

Asked for comments about the market, respondents referred to its friendly and helpful atmosphere, accessibility, its attractiveness to visitors and the mix of stalls, especially fruit and vegetables. Concerns included car parking charges, difficulties cleaning up after market days, competition from other forms of retail and increased vacancy rates.



The market was seen as an asset to the town and the town centre, and positive comments made about the quality and attractiveness of the wider town centre.

2.11 COMMUNITY SAFETY

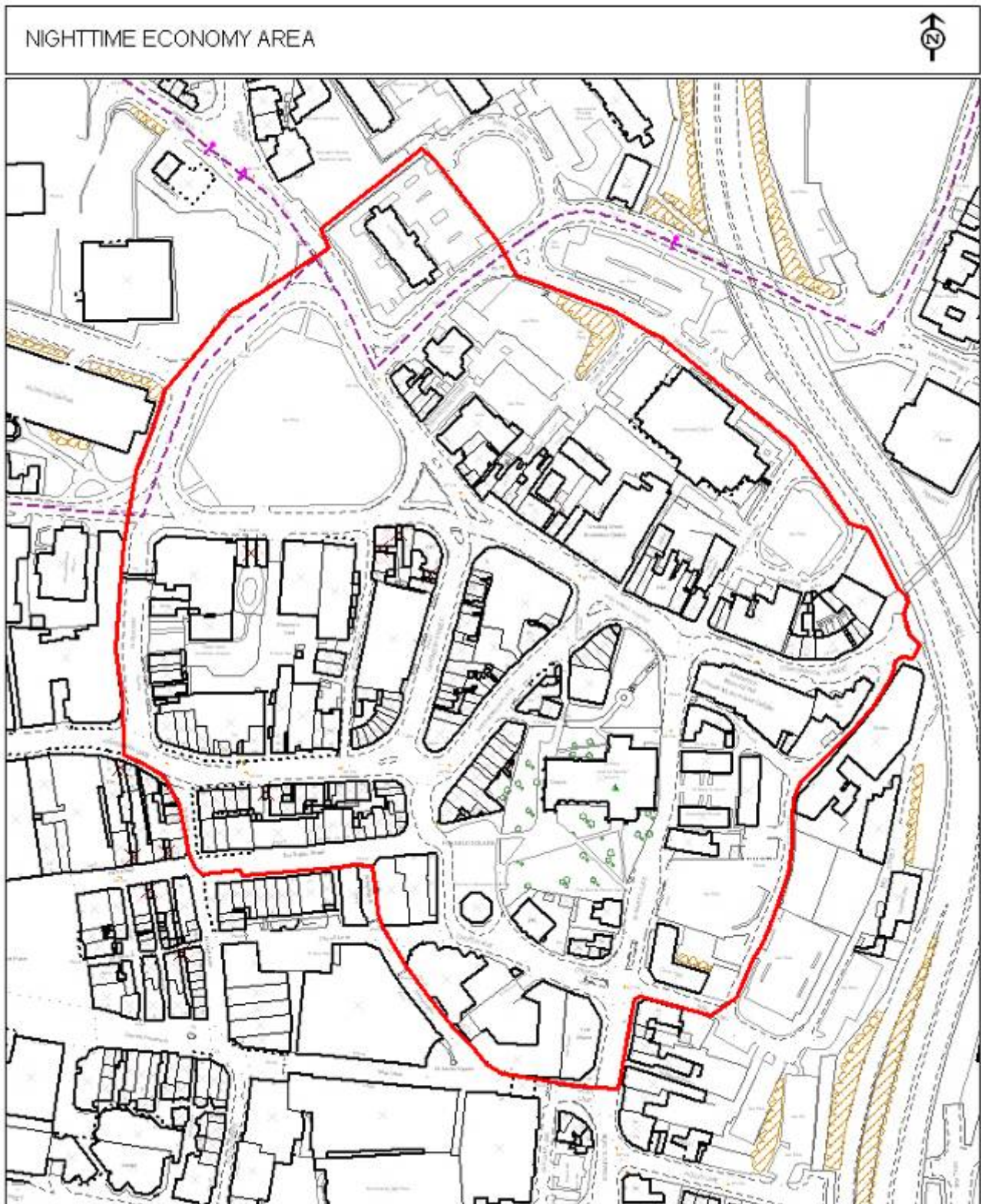
In March of last year all licence holders in the borough were invited to a seminar at the B2net stadium organised by the council; over 200 attended. Amongst other things they had inputs on the prevention of terrorism and reduction of violence.

The 'Pubwatch' scheme has gone from strength to strength in the last 18 months with a co-ordinator being funded by the borough council. This scheme provides a direct route of communication to and from the licensed trade in the town centre as well as District Centres at Whittington Moor and Chatsworth Road,

Chesterfield town centre continues to be a priority for the authorities due to the concentration of violent crime, mainly around its vibrant night time economy. As a result of a co-ordinated approach between public authorities and private businesses, assaults have fallen continuously for over three years in the town centre, contributing to a safer environment for all. The number of assaults recorded by the police fell from 143 in April - Oct 2010 to 95 in the same period this year, a reduction of 33%.

In addition the Designated Public Place Order, restricting the public consumption of alcohol, has been extended to cover all parts of the town centre and public parks to the south and a Cumulative Impact Policy has been approved by the council that could limit the number of new licensed premises within a specified area (as set out below). Co-

ordination with Derbyshire County Council on road closures and access has improved management of taxis. Since August 2011 Street Pastors have also been operating in Chesterfield Town Centre on Saturday evenings, supporting the police in managing late night activity.



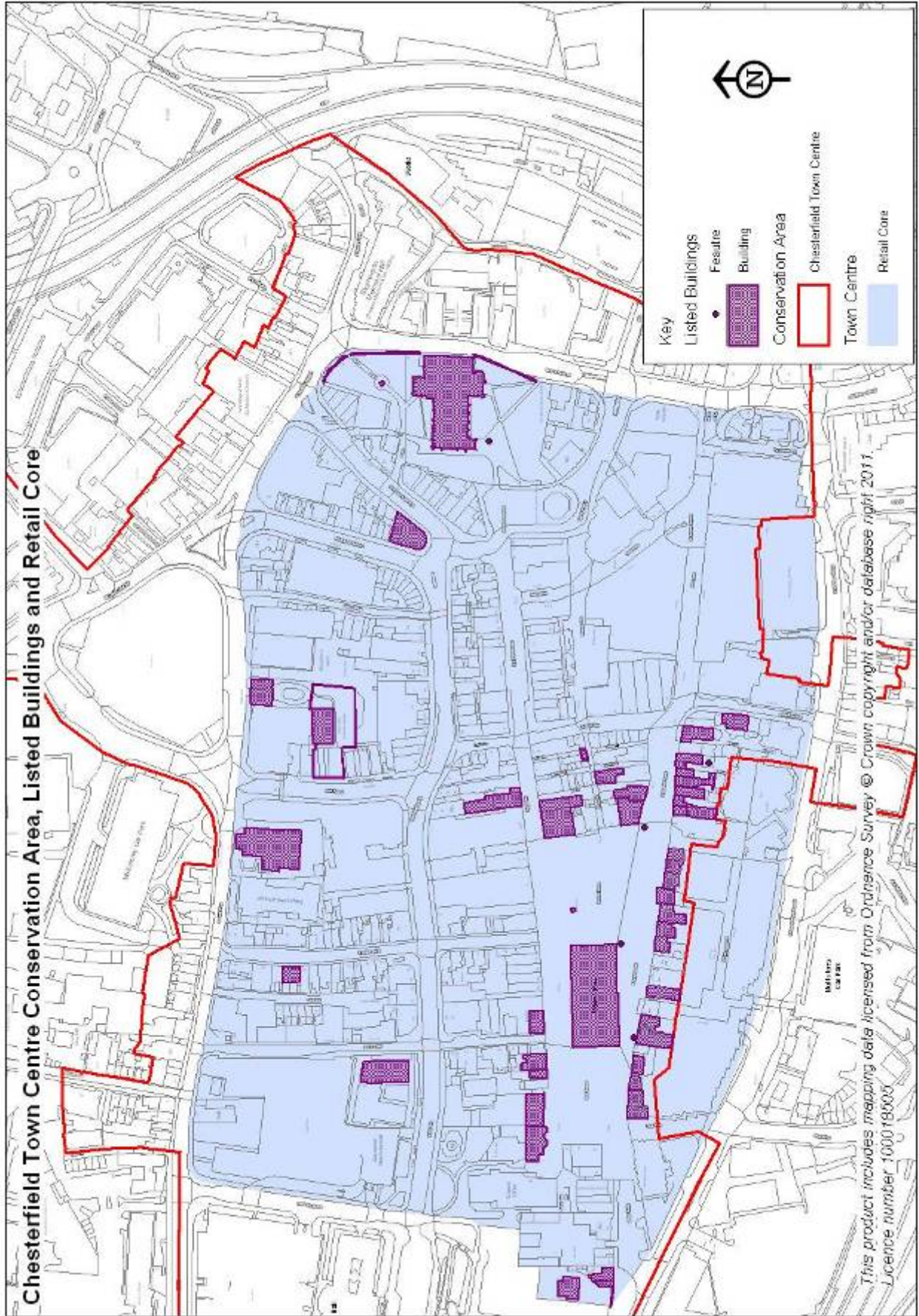
2.12 QUALITY OF ENVIRONMENT

The majority of Chesterfield Town Centre is covered by a Conservation Area and includes 44 listed buildings, ranging from the Grade 1 listed 13thc St Mary and All Saints to the 1965 courthouse. The central market place in particular retains much of its historic character, including cobbled streets and largely 19thc street fronts, presided over by the town's Listed Market Hall. 24 Tree Preservation Orders are also in place within the retail core of the town centre

5. LISTED BUILDINGS	
Grade I	1
Grade II*	41
Grade II	2
Tree Preservation Orders	24

Chesterfield Market Square and New Square provide large hard landscaped spaces, with New Square in particular frequently used for events. Significant parks are also available immediately outside the retail core at Shentall Gardens and Queen's Park (which is on the National Register of Historic Parks and Gardens and has been awarded Green Flag status).





3. SOURCES & FURTHER INFORMATION

Chesterfield Town Centre Masterplan; URBED, 2009

Replacement Chesterfield Borough Local Plan; Chesterfield Borough Council, 2006

Chesterfield Town Centre Conservation Area Appraisal; Chesterfield Borough Council, 2006

Chesterfield Retail Capacity Update; Nathaniel Lichfield and Partners, 2010

Chesterfield Town Centre Footfall Study; Colin Buchanan, 2011

Chesterfield's Retail Offer; CACI, August 2010

Great Britain Retail, Autumn 2011; Colliers International

