

# CENTRAL LANCASHIRE RETAIL AND LEISURE REVIEW



Volume I - Final Report

March 2010

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## VOLUME II – DISTRICT & LOCAL CENTRE PLANS

[SEPARATE COVER]

## 1. INTRODUCTION

- 1.1 GVA Grimley was appointed by the Central Lancashire Authorities (Preston City Council, Chorley Borough Council and South Ribble Borough Council) in February 2010 to prepare a Retail and Leisure Study. The study will primarily inform the preparation of a Joint Core Strategy between the local authorities, setting out the spatial vision and strategic objectives of the planning framework for Central Lancashire. It will also assist the respective local authorities in making informed development management decisions on retail and leisure development proposals.
- 1.2 The main terms of reference for the assessment can be summarised as follows:
- To understand the shopping and leisure behaviour of local residents living within and adjacent to the Central Lancashire area and to identify convenience and comparison goods expenditure patterns.
  - To undertake a healthcheck assessment of the principal centres within the Central Lancashire area.
  - To assess the future quantitative capacity and qualitative need for new retail and leisure provision through to 2026.
  - To provide strategic advice on the overall future retail need and confirm an appropriate forward development strategy to be taken forward by the Joint Authorities through the Core Strategy and wider LDF process.
- 1.3 The study is informed by two independent survey exercises; firstly a full in-centre shopper survey of visitors to the principal centres within Central Lancashire (Preston, Chorley and Leyland) and secondly a catchment-wide household telephone survey.
- 1.4 The in-centre shopper survey forms the findings of the qualitative need assessment and has been designed in conjunction with the Joint Authorities to determine:
- The profile of visitors and shoppers to the respective centres.
  - The strengths and weaknesses of the respective centres in terms of the existing retail offer, wider facilities and town centre environment.
  - Patterns of usage for the centre (i.e. frequency of visits, modal split, dwell times).

- Suggested qualitative improvements which would persuade shoppers to visit or stay in the centre more frequently.
- 1.5 The household telephone survey exercise informs the quantitative component of the study, identifying the market share performance of the principal centres and individual stores in the Central Lancashire area. The ability to quantify the survey results in monetary terms enables a detailed understanding of the implications for potential expenditure growth in relation to existing and planned retail floorspace provision.
- 1.6 The results of the full quantitative analysis and qualitative appraisal (including healthcheck assessment) are drawn together to provide a set of recommendations to enable the Joint Authorities to proactively plan for future development.
- 1.7 The conclusions of the assessment represent a '*point-in-time*' assessment which can be used to inform policy. The current economic conditions may however have a short-term impact on existing provision (e.g. store closures) and the deliverability of developments; the study has therefore sought to reflect the current economic situation.
- 1.8 It will however be important that the Joint Authorities continue to monitor the health of the principal centres in Central Lancashire through its forward planning function, adopting and revising particular town centre strategies where appropriate.

## REPORT STRUCTURE

- 1.9 In accordance with the terms of the Study Brief this report is structured as follows:

### PART 1 – BACKGROUND DETAIL

- **Section 2 – Planning Policy Framework;** sets out the emerging national, regional and local planning policy framework which will guide forward policy development.
- **Section 3 – Healthcheck Assessment;** assesses the performance of the main centres against the vitality and viability criteria set out in PPS4. The assessment seeks to comparatively assess and benchmark the centres against available local and regional data to provide a baseline for future monitoring.
- **Section 4 – In-Centre Shopper Assessment;** draws upon the qualitative results of the comprehensive in-centre surveys for Preston, Chorley and Leyland.
- **Section 5 – Retail Park Surveys;** summarises the results of on-site shopper surveys

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- **Section 6 - Retail Capacity Study Methodology;** sets out the methodology underpinning the quantitative capacity modelling exercise.

## PART 2 – ANALYSIS

- **Sections 7 and 8 – Quantitative Assessment;** reviews the current and future retail performance and market shares of the principal town centres within Central Lancashire in respect of convenience, comparison and bulky durable goods.
- **Section 9 – Leisure;** reviews the distribution of existing leisure facilities within the main centres of Central Lancashire, focusing on cinema, health and fitness and the evening economy.

## PART III – STUDY CONCLUSIONS AND RECOMMENDATIONS

- **Section 10 – Centre Hierarchy;** defines the hierarchy of centres for the Central Lancashire area.
- **Section 11 – Summary Conclusions;** sets out specific recommendations for each town centre in relation to the need for new retail and leisure development.

## 2. PLANNING POLICY FRAMEWORK

- 2.1 The primary purpose of the Study is to provide a forward-looking exercise which will inform the Local Development Framework (LDF) process and specific town centre and retail policies.

### NATIONAL PLANNING GUIDANCE

#### PPS4 – PLANNING FOR SUSTAINABLE ECONOMIC GROWTH

- 2.2 PPS4 was published in December 2009 and identifies the need for a more proactive approach to securing new investment in centres and achieving more sustainable patterns of development. The Government's key objective for town centres is to promote their vitality and viability by:
- Focussing new economic growth and development of main town centre uses in existing centres and remedying deficiencies in provision in areas with poor access to facilities;
  - Allowing competition between retailers and enhanced consumer choice through the provision of innovative and efficient shopping, leisure, tourism and local services in town centres which allow genuine choice to meet the needs of the entire community (particularly socially excluded groups).
- 2.3 The statement advises that local planning authorities (LPAs) should plan positively for growth and development by assessing the need for further main town centre uses and ensure there is capacity to accommodate them (taking account of the role of centres in the hierarchy); and to identify any deficiencies in the provision of local convenience shopping and other facilities which serve people's day-to-day needs. In assessing need for retail and leisure development LPAs should take account of both quantitative and qualitative need, giving additional weight to the latter in deprived areas.
- 2.4 In assessing quantitative need for retail and leisure development, LPAs are directed to have regard to relevant market information and economic data, including a realistic assessment of population and future growth, forecast expenditure and forecast improvements in retail sales density. In assessing qualitative need LPAs should assess whether provision and distribution of shopping, leisure and local services allows genuine choice to meet the needs of the whole community (particularly those in deprived areas), in light of the objective to promote vitality and viability of town centres and the application of the sequential approach. LPAs should also

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- take into account the degree to which shops may be overtrading and whether there is need to increase competition and retail mix.
- 2.5 PPS4 states that, in planning for centres, regional and local planning authorities should set out a strategy for the management and growth of centres over the plan period, setting flexible policies allowing centres to respond to changing economic circumstances. LPAs should define the network and hierarchy of centres that is resilient to anticipated future economic changes to meet the needs of their catchments. Choices should be made about which centres will accommodate any identified need for growth in town centre uses, considering their expansion where necessary and the need to avoid an over-concentration of growth in particular centres.
- 2.6 Identified deficiencies in the network of centres should also be addressed, giving consideration to the appropriateness of designating new centres; reclassifying existing centres; planning for extensions; or scope for consolidation. The need for any new, expanded or redeveloped out-of-centre regional or sub-regional shopping centre, or any significant change in the role or function of centres should be considered at the regional level.
- 2.7 In addition to defining the extent of the primary shopping area for their centres, LPAs are encouraged to distinguish between primary and secondary frontages (defined in Annex B). Having regard to the need to encourage diversification of uses in town centres as a whole, PPS4 states that primary frontages should contain a high proportion of retail uses, while secondary frontages provide greater opportunities for a diversity of uses. Where frontages are identified, the appropriate local development documents should include policies that make clear which uses will be permitted in such locations.
- 2.8 PPS4 encourages LPAs to proactively plan to promote competitive town centre environments and provide consumer choice by:
- Supporting a diverse range of uses (including complementary evening and night-time uses) which appeal to a wide range of age and social groups;
  - Planning for a strong retail mix so that the range and quality of the comparison and convenience retail offer meets the requirements of the local catchment area, recognising that smaller shops can significantly enhance the character and vibrancy of the area;
  - Supporting shops, services and other important small scale economic uses in local centres and villages;

- Identifying sites in the centre, or failing that on the edge of the centre, capable of accommodating larger format developments where a need for such development has been identified;
  - Retaining and enhancing existing markets and, where appropriate, re-introducing or creating new ones, ensuring that markets remain attractive and competitive by investing in their improvement; and
  - Taking measures to conserve, where appropriate, and enhance the established character and diversity of their town centres.
- 2.9 LPAs should identify an appropriate range of sites to accommodate at least the first five years identified need. Sites for main town centre uses should be identified through a sequential approach to site selection giving preference to locations in appropriate existing centres in the first instance, followed by edge-of-centre locations and out-of-centre sites, with preference given to those that are more accessible or have a higher likelihood of forming links with an existing centre.
- 2.10 The impact of proposed locations for development on existing centres will also need to be assessed by the LPA, taking into account impact considerations set out in Policy EC16 which include impact on town centre vitality and viability; in-centre trade/turnover; investment in centres; delivery of development on allocated sites; and any locally important impacts on centres identified by the LPA.
- 2.11 In the determination of planning applications for main town centre uses that are not in a centre and not in accordance with an up to date development plan, PPS4 requires applicants to demonstrate compliance with the sequential approach and impact assessment taking into account the impact considerations set out in Policy EC16. Assessments of impact should focus on the first 5 years after the implementation of a proposal and should be proportionate to the scale, nature and detail of the proposed development.
- 2.12 Policy EC17.1 directs LPAs to refuse planning permission where an applicant fails to demonstrate compliance with the sequential approach or the proposal is likely to lead to a significant impact. Judgements about the extent and significance of any impacts should be informed by the development plan (where this is up to date) or recent local assessments of the health of town centres and any other published local information e.g. a town centre or retail strategy.

## PPS4 PRACTICE GUIDANCE - NEED, IMPACT AND SEQUENTIAL APPROACH

- 2.13 The practice guidance was published alongside PPS4 in December 2009. The guidance does not constitute a statement of Government policy but forms guidance to support the interpretation of town centre policies set out in PPS4.
- 2.14 Of most relevance to this Study is the advice directed towards assisting LPAs in adopting a more proactive approach to planning for town centres, and particularly the role of evidence in the plan making process to identify the need for new development and inform the preparation of proactive town centre strategies.
- 2.15 Central to PPS4 Policy EC1, the practice guidance sets out alternative approaches to assessing and identifying quantitative and qualitative needs for retail and other town centre uses. Building on the assessment of needs, the practice guidance explains how LPAs can plan positively and promote new retail-led and other town centre uses through their LDFs; setting out the ‘tools’ needed to prepare effective town centre strategies, including how to identify appropriate locations, and how to assess the effects of alternative policy options and specific proposals.
- 2.16 Having identified and evaluated the various policy options, LPAs should develop a clear vision and strategy for the network of centres, and strategies for individual centres where appropriate. In terms of the LDF, this is likely to include clear guidance on the appropriate scale and form of new development involving main town centre uses; allocation of sites to meet identified need; identification of the extent of key development opportunities; a clear statement of the approach to be taken to bringing forward development and the LPAs attitude to other competing developments.
- 2.17 It is added that strategies for individual centres can be prepared at any time but they should be incorporated into the LDF at the earliest opportunity. This is likely to be important where key site allocations are involved, either through strategic allocations in the Core Strategy, or through sites allocated in an Area Action Plan or other document. Promoting town centre strategies through the LDF process ensures that the evidence base which underpins the strategy will be properly tested. A strategy which has been progressed through the LDF process, and been subject to effective public and stakeholder consultation and tested through independent examination will ensure that proposals must be determined in accordance with the plan unless material considerations indicate otherwise.
- 2.18 When preparing its LDF, LPAs should identify what they regard as the Primary Shopping Area (PSA) to provide clarity to applicants about the policy status of different sites. In defining the

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PSA, it may be appropriate to take into account the anticipated future role of the centre, and in particular the scope for growth and expansion. In centres where major expansion is planned, it may be appropriate to indicate where the PSA is likely to be extended to, having regard to the potential for achieving effectively integrated new development.

- 2.19 LPAs should also identify an appropriate ‘town centre boundary’ within which they should seek to locate other main town centre uses. It may also be appropriate to define other areas within the town centre but outside the PSA where specific uses are encouraged e.g. specialist retail, offices bars/restaurants etc. In addition to defining the PSA and town centre boundary, where LPAs identify a need for new development to accommodate main town centre uses, they should allocate sites which are suitable, viable and likely to be available within a reasonable timescale to accommodate such needs.

## NORTH WEST REGIONAL SPATIAL STRATEGY (RSS13)

- 2.20 The Regional Spatial Strategy (RSS) for the North West was formally adopted in September 2008 and forms part of the statutory development plan. The RSS establishes a broad spatial vision for the region and its sub-regions, setting priorities for development and regeneration as well as policies to promote sustainability over the next fifteen to twenty years. With respect to town centre and retail policy framework, the RSS sets out the following:
- **Spatial Principles (Policies DP1-9);** promotion of sustainable economic development and reducing social exclusion through (amongst others) marrying opportunity with need, managing travel demand and promoting environmental quality. Development should follow the sequential approach which prioritises regeneration of brownfield land.
  - **Regional Spatial Framework (Policies RDF1-2);** identifies Preston as a third priority for growth behind Manchester and Liverpool and the inner areas surrounding these regional cities. Chorley and Leyland are identified as tertiary settlements in the spatial hierarchy. The policy allows for development in accessible urban centres and confirms that it will be for individual Local Development Documents (LDDs) to identify appropriate centres and indicate their role.
  - **Achieving a Sustainable Economy (Policy W5: Retail Development);** identifies Preston as one of 25 centres where comparison retailing facilities should be enhanced and encouraged to ensure a sustainable distribution of high quality retail facilities. Chorley and Leyland are not identified within the network of centres and therefore investment of an appropriate scale is encouraged so as to maintain and enhance vitality and viability, and underpin wider regeneration initiatives.

- **Central Lancashire City Region (Policies CLCR1-2);** seeks to focus investment and sustainable development in the City of Preston (and the towns of Blackburn, Burnley and Blackpool), giving priority to sites in and around the city centre and at other locations which accord with policies RDF1, DP1-9 and W2-3. The policy also seeks to support and diversify the rural economy and improve access to services in the rural areas focusing development in locations which accord with policy RDF2.

## LOCAL DEVELOPMENT FRAMEWORK

- 2.21 The Local Development Framework (LDF) for Central Lancashire is being prepared in partnership by Preston City Council and Chorley and South Ribble Borough Councils. Issues and Options papers for the Central Lancashire Core Strategy have previously been subject to public consultation in 2006 and 2007 prior to the publication of a Preferred Core for consultation in September 2008. The consultation responses to the Preferred Core Strategy are currently being considered by the Joint Authorities.
- 2.22 The Preferred Core Strategy (PCS) is the third iteration in producing a spatial strategy to guide the future development of Central Lancashire. This latest document proposes a preferred way forward as a result of the previous two Issues and Options papers. The PCS contains a set of policy approaches considered appropriate to manage change and meet the needs of the area over the next 15-20 years.
- 2.23 The retail and tourism chapter (12) of the PCS aims to maintain and improve retail and related services, as well as provide for tourism and leisure within Preston, Chorley and Leyland. The PCS identifies Preston as the main retail and service centre in Central Lancashire and Lancashire as a whole. Preferred Option PCS14 (a) seeks to provide for retailing and tourism in Preston in the following ways:
- Deliver the Tithebarn mixed-use scheme and extend the Preston Principal Retail Core area to facilitate the regeneration of the Tithebarn Regeneration Area; and
  - Encourage retail, office and leisure opportunities in Preston City Centre, so as to retain its role as the sub-regional centre in Central Lancashire and major commercial and service centre in Lancashire as a whole.
- 2.24 The PCS states that Chorley is developing as a contemporary market town with a mix of national retailers and some specialist shopping. Preferred Option PCS14 (b) seeks to maintain and improve the vitality and viability of Chorley town centre by building on the success of the Market Walk shopping centre and through further investment in additional retail

- development, supporting a range of other retailers and services, as well as improving the centre's appearance and accessibility.
- 2.25 The PCS states that Leyland requires significant investment in its quality of retail offer, environment and public spaces to become a vital and viable town centre. Preferred Option PCS14 (c) seeks to maintain and improve the vitality and viability of Leyland town centre by realising the initiatives set out in the Town Centre Masterplan in relation to improving accessibility, urban design and the environment (public realm etc.).
- 2.26 According with PPS6 and now PPS4 guidance, Preferred Option PCS14 (e) restricts the sale of traditional town centre goods at out-of-centre retail parks, including the Deepdale Shopping Park, Capitol Centre and Riversway Retail Park.
- 2.27 Whilst the PCS identifies a proposed hierarchy of centres (city, town, district and local centres) in the Central Lancashire area, a key output of this study is to advise on an appropriate centre hierarchy, having regard to market share performance (convenience and comparison) and current retail offer.

### 3. HEALTHCHECK ASSESSMENT

- 3.1 PPS4 states that comprehensive and up-to-date monitoring is essential to enable planning authorities to improve the vitality and viability of town centres and to effectively plan for the future. A healthcheck exercise has been undertaken for Chorley, Leyland and Preston.
- 3.2 The assessment draws on the performance indicators set out within PPS4 (Annex D) and informs the wider retail need assessment, particularly highlighting the existing strengths and qualitative deficiencies of the main centres (Preston, Chorley and Leyland) within the Central Lancashire area.
- 3.3 The main headline healthcheck indicators to which information should be collected and regularly monitored is summarised below:
- **Town Centre Diversity;** on-site floorspace surveys have been undertaken to understand the current balance of uses and amount of floorspace. *Experian Goad* has been utilised in order to enable a comparative assessment of the floorspace composition of the principal centres in Central Lancashire against (Goad) regional averages.
  - **Edge and Out-of-Centre Provision;** an assessment of the quantum and type of edge and out-of-centre retail and leisure provision for each principal centre has been undertaken.
  - **Retailer Representation;** a review of the existing retail offer within the principal centres and demand for representation in the main centres has been completed.
  - **Shopping Rents;** the level of rent which retailers are prepared to pay for retail floorspace is an indication of the perceived strength of that particular centre. The assessment of rental levels in the main centres is based on VOA and *Focus* commercial property database, which maintains records of retailer requirements for a particular centre.
  - **Commercial Yields;** yields are an indicator of investor confidence in a centre with lower yields indicating higher investor confidence in a centre. The Valuation Office Agency (VOA) publishes prime retail yields for the varying types of retail accommodation in particular centres; this is reviewed where available.
  - **Centre Benchmarking;** the comparative performance of the main centres relative to other centres within the sub-regional retail hierarchy is assessed by drawing upon the results of the *Venue Score Ranking Index* (prepared by the Javelin Group). The Index is

based on the total number of national non-food / comparison retail multiples located within a particular centre.

- **Accessibility;** reviews existing public transport provision, car parking availability and pedestrian routes within the main centres.
  - **Customer and Residents Behaviour;** a detailed in-centre shopper and household telephone survey exercise underpins the retail study; the results of the in-centre shopper survey are presented in detail in the proceeding chapter of this report.
  - **Perception of Safety;** a subjective assessment of town centre safety and security has been undertaken with reference to statistical data and ongoing crime reduction initiatives.
  - **Environmental Quality;** an assessment of the wider public realm within the main town centres has been completed.
- 3.4 The healthcheck assessment provides an up-to-date understanding of the current strengths and weaknesses of the principal centres. There is however a significant quantum of healthcheck research previously undertaken by the individual local authorities within the Central Lancashire area.
- 3.5 The healthcheck assessment therefore seeks to provide comparative analysis against the findings of the following previous individual retail studies, where appropriate:
- Chorley Town Centre Retail and Leisure Study (October 2005)
  - Preston Retail and Leisure Study (March 2005 and subsequent updates); and
  - South Ribble Borough-Wide Shopping Study (February 2004).
- 3.6 The healthcheck assessment of Chorley town centre is set out below prior to assessment of Preston (city) and Leyland (town) centres.

## CHORLEY

- 3.7 Chorley is a traditional market town having grown from its historic focus along Market Street. The town centre encompasses a network of pedestrianised streets with a distinctive focus around the centrally located Market Place situated between Cleveland Street and New Market Street. These shopping streets, together with nearby Chapel Street and Market Street, comprise the primary shopping area within the town centre. The Market Walk development, which opened in the mid 1990's, is well integrated within the wider town centre retail circuit.

- 3.8 With the exception of a relatively new EH Booth foodstore, the town centre retail offer is predominantly focused on comparison shopping with several national multiples located around the Market Place and with the Market Walk development. The main foodstore provision within the town is a large freestanding Morrison's foodstore which whilst located within the wider town centre occupies an out-of-centre site on Brooke Street which is physically divorced from the town centre primary shopping area.
- 3.9 The town enjoys excellent public transport accessibility with the modern bus interchange and railway station located in close proximity to the primary shopping area. The town also has good strategic connections to the regional and national road network (M61 and M6).

### A) DIVERSITY OF USES

- 3.10 The diversity of uses within Chorley town centre in 2005 and 2010 is set out in quantitative terms below. Floorspace and outlet averages for the North West are also presented (brackets) to enable a comparison of the town centre against benchmark floorspace data.

**Table 1 – Chorley Town Centre Unit Composition (2005 – 2010)**

Retail Sector	2005 No. of Units	2005 Units (%)	2010 No. of Units	2010 Units (%)	% Change (2005-2010)
Convenience	20	6.79%	20	6.13% (7.39%)	-0.66%
Comparison	114	38.64%	122	37.42% (28.32%)	-1.22%
Service	123	41.69%	147	45.09% (47.17%)	+3.40%
Vacant	38	12.88%	32	9.82% (12.93%)	-3.06%
Miscellaneous	-	-	5	1.54% (4.19%)	-
<b>TOTAL</b>	<b>295</b>	<b>100</b>	<b>326</b>	<b>100</b>	

**Table 2 – Chorley Town Centre Floorspace Composition (2005 – 2010)**

Retail Sector	2005 Floorspace (m <sup>2</sup> gross)	2005 Floorspace (%)	2010 Floorspace (m <sup>2</sup> gross)	2010 Floorspace (%)	% Change (2005-2010)
<b>Convenience</b>	<b>3,800</b>	7.96%	<b>3,940</b>	<b>6.58%</b> (13.01%)	<b>-1.38%</b>
<b>Comparison</b>	<b>21,191</b>	44.41%	<b>21,770</b>	<b>36.36%</b> (28.93%)	<b>-8.05%</b>
<b>Service</b>	<b>18,813</b>	39.43%	<b>27,520</b>	<b>45.96%</b> (42.90%)	<b>+6.53%</b>
<b>Vacant</b>	<b>3,911</b>	8.20%	<b>5,800</b>	<b>9.69%</b> (9.79%)	<b>+1.49%</b>
<b>Miscellaneous</b>	-	-	<b>850</b>	<b>1.41%</b> (5.37%)	-
<b>TOTAL</b>	<b>47,715</b>	<b>100</b>	<b>59,880</b>	<b>100</b>	

Source: Experian Category Centre Reports (2010) – GVA Update

3.11 In assessing the town centre floorspace composition against the 2005 Retail Study figures and the North West average benchmark data provided by Experian Goad, it is notable that:

- The quantum of floorspace within the town centre presently dedicated to convenience retailing is almost half the Goad centre average (6.58% to 13.01%); this is a reduction on the 7.96% floorspace figure identified in the ‘Chorley 2005 Study’ healthcheck.
- The number of units occupied by convenience uses remains unchanged from the 2005 Study (20 units); the overall number of convenience units is slightly below the North West average (6.13% to 7.39%).
- Chorley has a strong comparison retail offer with the proportion of floorspace dedicated to comparison retailing (36.36%) significantly above the North West average (28.93%).
- The number of units dedicated to comparison retailing is also significantly above the regional average (37.42% to 28.32%). The 2005 Study healthcheck identified 44.41% of the town centre floorspace to be occupied by comparison retailers in 2005.
- The number of comparison outlets in the town centre has increased by 8 since the 2005 Study to 122 comparison retail units in total.
- The number of service units in the town centre has significantly increased from 123 units in 2005 to 147 units in 2010. The current number of units (147) is as a proportion of overall town centre composition in line with the Goad average (45.09% to 47.17%).
- Associated with the increase in the number of service units in the town centre, the quantum of service floorspace has increased significantly from 18,813 m<sup>2</sup> (gross) in 2005

to 27,520 m<sup>2</sup> (gross) in 2010. The overall quantum of service floorspace in the town centre is however as a proportion only slightly above the Goad average (45.96% to 42.90% regionally).

- The number of vacant units in the town centre has decreased from 38 units in 2005 to 32 units at present; the number of vacant units as a proportion of the overall town centre is below the Goad average (9.82% to 12.93% regionally).
  - The overall quantum of vacant floorspace has increased from 3,911 m<sup>2</sup> (gross) in 2005 to 5,800 m<sup>2</sup> (gross) in 2010. The current proportion of vacant floorspace is however in line with the Goad average (9.69% to 9.79% regionally).
- 3.12 The Experian Goad Survey is however only focused on the defined town centre and does not include the large standalone out-of-centre Morrisons store (6,655 m<sup>2</sup> gross), the out-of-centre Aldi and Netto stores or Chorley Retail Park, which comprises Wickes, Blockbuster, Dominos and KFC outlets.

## B) RETAILER REPRESENTATION

- 3.13 Experian Goad originally identified 27 national chain retailers as key attractors which improve the consumer and investor appeal of a centre. As a result of difficult trading conditions at least two of the identified key high street retail attractors (Woolworth's and Zavvi) have recently closed.
- 3.14 Chorley town centre presently accommodates 10 key retailers including Argos, Boots, Dorothy Perkins, New Look and WH Smith; this is consistent with the 2005 Retail Study findings. The town centre does however (with the exception of Dorothy Perkins and Burtons) have a limited fashion retail offer which is both limited and predominantly orientated towards the discount end of the market. The attraction of mainstream high street fashion retailers such as Next, River Island and Top Shop would be required to diversify and improve the retail offer and associated quantitative performance of the town centre in the wider sub-region.

## C) RETAILER / FLOORSPACE REQUIREMENTS

- 3.15 The retailer requirements published by *Focus* are subject to a number of external factors and should only be used as an indication of commercial interest in the town and not an overall indication of a town's attractiveness to retailers or potential occupiers. It should be noted that several larger national retailers do not actively publish requirements.

- 3.16 With respect to Chorley, a full record of retailer requirements registered is available from April 2000. As the table below indicates retailer requirements for the town have more than doubled between April 2000 and April 2007 prior to falling in January 2009; this decrease in retailer requirements reflects the current economic climate.
- 3.17 In comparative terms, the table highlights that whilst Chorley has a low number of retailer requirements it is comparable to Accrington in the wider retail hierarchy.

**Table 3 – Retailer Requirements in Chorley (2000-2009)**

		Apr-00	Apr-01	Apr-02	Apr-03	Apr-04	Apr-05	Apr-06	Apr-07	Jan-09	Movement (00-09)
<b>Chorley</b>	No.	10	16	11	12	18	16	20	24	10	
	Rank	391	313	416	435	358	421	388	358	444	-53
<b>Preston</b>	No.	75	64	90	78	77	84	79	69	62	
	Rank	54	75	48	64	66	65	75	90	62	-8
<b>Leyland</b>	No.	5	3	3	6	9	12	10	10	9	
	Rank.	567	748	807	658	548	506	608	614	485	+82
<b>Accrington</b>	No.	13	12	12	10	16	20	12	17	11	
	Rank	334	373	406	483	396	361	540	472	403	-69
<b>Blackburn</b>	No.	55	58	76	59	56	59	57	52	28	
	Rank	96	88	65	99	117	125	133	144	143	-47
<b>Blackpool</b>	No.	67	69	66	57	54	59	65	49	36	
	Rank	66	63	85	107	125	125	100	155	97	-31
<b>Bolton</b>	No.	52	48	59	58	67	67	69	64	35	
	Rank	106	121	103	105	83	93	93	100	102	+4
<b>Southport</b>	No.	55	52	54	57	56	58	58	44	34	
	Rank	96	106	116	107	117	128	127	176	109	-13
<b>Wigan</b>	No.	42	41	48	44	47	55	52	48	33	
	Rank	134	141	138	142	148	137	147	158	117	+17

Source: Focus Retail Database 2010

- 3.18 The table below records current retailer requirements in Chorley town centre, as maintained by the *Focus* database.

**Table 4 – Chorley Town Centre Requirements**

Retail Category	No. of Requirements	Min. Floorspace (m <sup>2</sup> ) gross	Max. Floorspace (m <sup>2</sup> ) gross
<b>Comparison</b>	4	3,001	15,979
<b>Convenience</b>	0	0	0
<b>Service</b>	5	2,534	2,871
<b>TOTAL</b>	<b>9</b>	<b>5,535</b>	<b>18,850</b>

Source: Focus Database (February 2010)

- 3.19 There are currently nine registered retailer requirements for Chorley including The Body Shop, TJ Hughes and Poundland. Whilst the attraction of these comparison retailers would further enhance the retail mix in the town centre, higher order fashion multiples such as Next, River Island and Top Shop are required to achieve a significant enhancement in market share performance. In terms of food and drink operators actively seeking representation in the town centre, there is a notable requirement by the national chain restaurant operator EGO; this requirement may however be a blanket requirement for the Central Lancashire area however.
- 3.20 In comparison to the current published requirements, the 2005 Retail Study identified 22 requirements in total, including four convenience retailer requirements and ten comparison retailer requirements. Whilst the number of published requirements has decreased, the total minimum floorspace requirement broadly corresponds with the 2005 Retail Study levels. The total maximum floorspace requirement has however increased substantially in the same period suggesting that either blanket retailer requirements (i.e. same requirement for numerous centres) remain or that existing requirements for larger floorplates within the town centre remain unsatisfied.

## D) RENTAL LEVELS

- 3.21 An indicator of the perceived strength of a town centre can be measured through the levels of rent which retailers are prepared to pay for retail space. *Focus* data indicates that rental levels along the primary retail frontage in Chorley town centre have steadily increased to £65 per ft<sup>2</sup> since 2000. The current rental levels are comparable with Accrington yet below other comparable centres in the sub-region.

**Table 5 – Comparison of Prime Retail Rents (£/sq ft) (2000 – 2008)**

Centre	2000	2001	2002	2003	2004	2005	2006	2007	2008
<b>Chorley</b>	50	50	50	60	60	65	65	65	65
<b>Preston</b>	125	130	140	140	140	140	140	140	145
<b>Leyland</b>	-	-	-	-	-	-	-	-	-
<b>Accrington</b>	60	60	60	65	65	70	70	65	65
<b>Blackpool</b>	110	110	110	115	115	120	125	125	125
<b>Southport</b>	110	100	90	85	80	80	80	85	85
<b>Wigan</b>	75	85	85	90	90	90	105	110	110
<b>Bolton</b>	140	140	130	130	140	140	140	140	140

Source: *Focus Database 2010 (Prime Zone A)*

## E) COMPARATIVE ANALYSIS

- 3.22 It is possible to show the performance of Chorley over time relative to other centres in the sub-regional retail hierarchy by drawing upon the results of the *Venue Score* ranking index. The index is based on the total number of national non-food / comparison retail multiples located within a centre. Utilising a system of weighting, the *Venue Score* analysis reflects the range and quality of national retail multiples represented in a centre. The results for Chorley relative to competing centres and its movement over time are set out below.

**Table 6 – Comparative Retail Ranking (Chorley)**

Centre	2005 Rank	2006 Rank	2007 Rank	2008 Rank	2009 Rank	2009 Venue Score	Movement (2005-09)
<b>Chorley</b>	<b>268</b>	<b>221</b>	<b>227</b>	<b>227</b>	<b>298</b>	<b>81</b>	<b>-30</b>
Preston Central	36	37	35	35	44	243	-8
Bamber Bridge	691	667	697	697	878	27	-187
Leyland	1222	850	740	740	900	26	322
Blackburn	117	124	134	134	168	131	-51
Darwen	691	719	921	921	1111	21	-420
Accrington	303	291	307	307	298	81	5
Blackpool	78	74	90	90	50	224	28
Southport	44	64	61	61	77	195	-33
Wigan	145	154	76	76	105	168	40
Bolton	89	97	108	108	121	155	-32
Clitheroe	732	820	782	782	900	26	-168

Source: *Venue Score 2005-2009 (Javelin Group)*

- 3.23 The 2005 Retail Study identified that Chorley was 243<sup>rd</sup> in the 2003/2004 *Venue Score* centre ranking; the overall trend over the past five years has however been an incremental decline in retail ranking with the town's position declining to 298<sup>th</sup> in 2009. Given that there has been no change in the scoring criteria in the intervening period, this decrease in hierarchy ranking may be in part attributable to the loss of a key town centre comparison retailer (i.e. Woolworth's) or quantitative and qualitative improvements in the other comparable centres which has impacted on Chorley's ranking position.
- 3.24 The overall ranking assessment suggests that there is scope for improvement in Chorley's retail offer through the attraction of more national fashion-orientated multiples in particular. In terms of the wider sub-regional hierarchy, Chorley is again comparable with Accrington.

## F) ACCESSIBILITY

- 3.25 Chorley is highly accessible by car and public transport. The town occupies a strategic location in the regional highway network in close proximity to the M6, M61 and M65 motorways.
- 3.26 Chorley's public transport facilities are well related to the town centre. The railway station is situated less than 200 metres to the east of the main shopping area, whilst the main bus interchange, which has been subject to significant investment over the past few years is located adjacent to the town centre primary shopping area.

## G) PERCEPTION OF SAFETY

- 3.27 Crime data provided by Lancashire Police, as set out below, indicates that the total number of crimes (i.e. burglary, robbery, vehicle crime, violence and anti-social behaviour) in the Chorley area has fluctuated throughout 2009, with the lowest number of crimes recorded in December.

2009	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Chorley	446	430	591	509	541	497	513	530	533	518	455	413

Source: [www.maps.police.uk](http://www.maps.police.uk) (2010)

- 3.28 Lancashire Police have introduced a crime prevention initiative known as *Business Watch* in partnership with Chorley Borough Council and the Chamber of Commerce. The aim of the initiative is to maintain a safe town centre environment through the use of CCTV systems. The 'Chorley 2005 Study' found that 70.4% of on-street survey respondents considered that extra CCTV would improve safety within the town centre.

## H) QUALITY OF THE TOWN CENTRE ENVIRONMENT

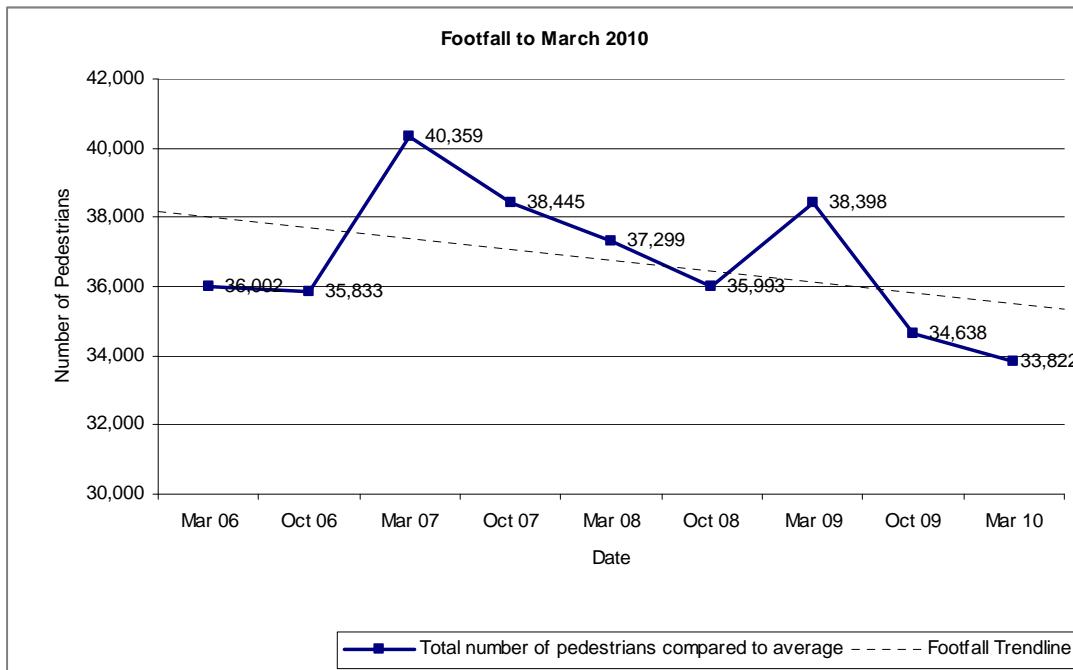
- 3.29 The primary shopping area within the town centre around Market Walk and New Market Street is pedestrianised. The town centre has been subject to ongoing investment in the public realm over recent years with shop frontages generally well maintained and attractive soft landscaping and paving. The secondary shopping areas in the town centre such as the southern end of Market Street are however of a lower quality in terms of the public realm (landscaping and surfaces), fascia mix and shop fronts. Continued investment in soft landscaping and attractive street furniture throughout the town centre would assist in maintaining and improving the quality of the overall town centre environment.

## I) PEDESTRIAN FLOWS

- 3.30 The table below indicates that the highest levels of pedestrian footfall were recorded at Market Walk shopping centre (7,393 over three days), followed by Chapel Street (6,398 over three days); this is unsurprising given that both locations comprise the main pedestrian thoroughfare and primary retail frontage within Chorley town centre.

LOCATION	TUES. 23/03/10 SURVEY	FRI. 26/03/10 SURVEY	SAT. 27/03/10 SURVEY	TOTAL PER LOCATION
1) Market Street 1	642	498	606	1,746
2) Market Street 2	460	332	537	1,329
3) Market Street 3	1,104	1,162	1,338	3,604
4) Fazakerley Street	970	834	1,074	2,878
5) Cleveland Street	859	701	978	2,538
6) New Market Street	1,620	1,324	1,848	4,792
7) Chapel Street	1,802	1,728	2,868	6,398
8) Market Walk	3,158	1,772	2,463	7,393
9) Booths	1,072	836	1,236	3,144
<b>TOTAL</b>	<b>11,687</b>	<b>9,187</b>	<b>12,948</b>	<b>33,822</b>

- 3.31 Based on the findings of footfall surveys between March 2006 and March 2010, the graph below compares total pedestrian footfall (by year) against average pedestrian footfall.



- 3.32 It is clear that the average level of pedestrian footfall has fallen slightly since March 2006, with highs in March 2007 (40,359) and lows in March 2010 (33,822).

## LEYLAND

- 3.33 Leyland is a relatively elongated linear centre focused along Hough Lane and Towngate. A large Tesco Extra is located off Towngate whilst several discount convenience operators are located along Hough Lane. The existing retail and service provision within the town centre is generally characterised by small independent provision.
- 3.34 To the north of the town centre is Churchill Way Retail Park which includes a Lidl foodstore and non-food discount operators including Brantano. A Morrison's foodstore and DIY outlet are located further north of the town centre beyond Olympian Way. The Council offices and public leisure centre are divorced from the existing primary shopping area beyond Towngate.
- 3.35 The town is well served by public transport with a railway station situated to the north of the town centre. There is good provision of surface car parking and the town centre is accessible to the nearby motorway network.

### A) DIVERSITY OF USES

- 3.36 Leyland is the smallest of the three principal centres in Central Lancashire as reflected in the number of outlets and the quantum of floorspace within the town centre. Comparative analysis against the 2004 Borough Retail Study is not possible in this instance given the lack of survey evidence.

**Table 7 – Leyland Town Centre Overall Floorspace Schedule (2010)**

Retail Sector	Floorspace (m <sup>2</sup> )	% Floorspace	No. of Units	% Units
<b>Convenience</b>	15,240	36.24% (13.01%)	21	9.33% (7.39%)
<b>Comparison</b>	7,100	16.88% (28.93%)	54	24.00% (28.32%)
<b>Service</b>	16,730	39.78% (42.90%)	128	56.90% (47.17%)
<b>Vacant</b>	2,580	6.13% (9.79%)	19	8.44% (12.93%)
<b>Miscellaneous</b>	410	0.97% (5.37%)	3	1.33% (4.19%)
<b>TOTAL</b>	<b>42,060</b>		<b>225</b>	

Source: Experian Category Centre Report (2010) – GVA Update

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- 3.37 In assessing the town centre floorspace composition against the North West average centre data provided by Experian Goad, it is notable that:
- The quantum of floorspace dedicated to convenience retailing in the town centre (36.24%) significantly exceeds the Goad centre average (13.01%); this is primarily attributable to the large Tesco Extra store within the defined town centre boundary.
  - The amount of existing comparison floorspace within the town centre as a proportion of the overall town centre floorspace (16.88%) is significantly below the Goad regional average (28.93%).
  - The number of units dedicated to comparison retailing (54 units) as a proportion of overall units in the town centre is however only slightly below the Goad regional average (28.32%); this suggests that existing comparison provision in Leyland is localised in nature (i.e. Independents) and occupies small units.
  - The town performs a significant service function; over half of the units (56.90%) in the town are dedicated to such uses. This proportion is significantly above the Goad regional average (47.17%).
  - The quantum of service floorspace within the town centre (as a proportion) is however slightly below the North West average (39.78% to 42.90%).
  - The proportion of vacant floorspace within the town centre (6.13%) is significantly below the Goad regional average (9.79%). The number of vacant units (19) is also below the Goad regional average as a proportion (8.44% to 12.93%).
- 3.38 The Experian Goad Survey corresponds to the existing defined town centre boundary and does not take account existing edge and out-of-centre provision including the 7,432 m<sup>2</sup> (gross) Morrison's store on Olympian Way.
- 3.39 With respect to wider out-of-centre provision, the Capitol Centre in Walton-le-Dale is a major sub-regional retail park destination and comprises a mix of comparison and bulky durable retailing including Comet, Currys, Next and Tesco Home Plus.

## B) RETAILER REPRESENTATION

- 3.40 Leyland town centre accommodates 2 of the 27 multiple retailers identified by *Experian Goad* as key attractors which enhance the appeal of a town centre. Multiple retailers currently present in the town centre include Boots and Tesco Extra, the latter occupying a large stand-alone store on the edge of the town centre.

- 3.41 The ‘South Ribble 2004 Study’ also identified a lack of multiple retailers present within the town centre and noted the withdrawal of JJB Sports at the time as impacting upon the overall retail offer.

## C) RETAILER / FLOORSPACE REQUIREMENTS

- 3.42 The commercial requirements published by *Focus* for Leyland indicates that retailer interest in the town centre have remained broadly constant since April 2004. This can be attributed to the limited development that has come forward in the town centre during this period and the lack of larger units that national multiples presently require.
- 3.43 Leyland’s *Focus* hierarchy ranking has improved between April 2000 and January 2009 relative to competing centres in the sub-region. Retailer requirements in Leyland are currently similar to those recorded in Chorley and Accrington.

**Table 8 – Retailer Requirements in Leyland (2000-2009)**

		Apr-00	Apr-01	Apr-02	Apr-03	Apr-04	Apr-05	Apr-06	Apr-07	Jan-09	Movement (00-09)
<b>Leyland</b>	No.	5	3	3	6	9	12	10	10	9	
	Rank.	567	748	807	658	548	506	608	614	485	+82
<b>Chorley</b>	No.	10	16	11	12	18	16	20	24	10	
	Rank	391	313	416	435	358	421	388	358	444	-53
<b>Preston</b>	No.	75	64	90	78	77	84	79	69	62	
	Rank	54	75	48	64	66	65	75	90	62	-8
<b>Accrington</b>	No.	13	12	12	10	16	20	12	17	11	
	Rank	334	373	406	483	396	361	540	472	403	-69
<b>Blackburn</b>	No.	55	58	76	59	56	59	57	52	28	
	Rank	96	88	65	99	117	125	133	144	143	-47
<b>Blackpool</b>	No.	67	69	66	57	54	59	65	49	36	
	Rank	66	63	85	107	125	125	100	155	97	-31
<b>Bolton</b>	No.	52	48	59	58	67	67	69	64	35	
	Rank	106	121	103	105	83	93	93	100	102	+4
<b>Southport</b>	No.	55	52	54	57	56	58	58	44	34	
	Rank	96	106	116	107	117	128	127	176	109	-13
<b>Wigan</b>	No.	42	41	48	44	47	55	52	48	33	
	Rank	134	141	138	142	148	137	147	158	117	+17

Source: *Focus Retail Database* 2010

- 3.44 In terms of current requirements, the *Focus* database indicates that Peacocks and Superdrug are actively seeking representation within Leyland town centre; such comparison operators would improve the town’s comparison retail offer. Costa Coffee is the sole service requirement, whilst interest in convenience floorspace (186-279 m<sup>2</sup>) is from Heron Frozen

Foods. The frozen food operator would however not materially enhance the existing town centre convenience offer which comprises a large Tesco and several discount operators.

**Table 9 – Leyland Town Centre Requirements**

Retail Category	No. of Requirements	Min. Floorspace (m <sup>2</sup> ) gross	Max. Floorspace (m <sup>2</sup> ) gross
<b>Comparison</b>	5	1,147	2,787
<b>Convenience</b>	1	186	279
<b>Service</b>	1	93	139
<b>TOTAL</b>	<b>7</b>	<b>1,426</b>	<b>3,205</b>

Source: Focus Database (February 2010)

## D) RENTAL LEVELS

- 3.45 There is no nationally published rental data available for Leyland. Local commercial property agents however confirm that rents of around £40-45 per square foot would be appropriate for retail units located on the primary shopping frontage (Towngate / Hough Lane). One local commercial agent confirmed that a transaction of £42 per square foot was recently secured for the take-up of the former Post Office building on Hough Lane by JD Wetherspoon. This compares to the 2004 Retail Study which identified Prime Zone A rents of approx. £35 / ft<sup>2</sup>.

## E) COMPARATIVE ANALYSIS

- 3.46 The performance of Leyland relative to other centres in the retail hierarchy, as measured by the *Venue Score* ranking index on national multiple retailer representation, is set out below.

**Table 10 – Comparative Retail Ranking (Leyland)**

Centre	2005 Rank	2006 Rank	2007 Rank	2008 Rank	2009 Rank	2009 Venue Score	Movement (2005-09)
<b>Leyland</b>	<b>1222</b>	<b>850</b>	<b>740</b>	<b>740</b>	<b>900</b>	<b>26</b>	<b>322</b>
<b>Chorley</b>	<b>268</b>	<b>221</b>	<b>227</b>	<b>227</b>	<b>298</b>	<b>81</b>	<b>-30</b>
<b>Preston Central</b>	<b>36</b>	<b>37</b>	<b>35</b>	<b>35</b>	<b>44</b>	<b>243</b>	<b>-8</b>
<b>Bamber Bridge</b>	<b>691</b>	<b>667</b>	<b>697</b>	<b>697</b>	<b>878</b>	<b>27</b>	<b>-187</b>
<b>Blackburn</b>	<b>117</b>	<b>124</b>	<b>134</b>	<b>134</b>	<b>168</b>	<b>131</b>	<b>-51</b>
<b>Darwen</b>	<b>691</b>	<b>719</b>	<b>921</b>	<b>921</b>	<b>1111</b>	<b>21</b>	<b>-420</b>
<b>Accrington</b>	<b>303</b>	<b>291</b>	<b>307</b>	<b>307</b>	<b>298</b>	<b>81</b>	<b>5</b>
<b>Blackpool</b>	<b>78</b>	<b>74</b>	<b>90</b>	<b>90</b>	<b>50</b>	<b>224</b>	<b>28</b>
<b>Southport</b>	<b>44</b>	<b>64</b>	<b>61</b>	<b>61</b>	<b>77</b>	<b>195</b>	<b>-33</b>
<b>Wigan</b>	<b>145</b>	<b>154</b>	<b>76</b>	<b>76</b>	<b>105</b>	<b>168</b>	<b>40</b>
<b>Bolton</b>	<b>89</b>	<b>97</b>	<b>108</b>	<b>108</b>	<b>121</b>	<b>155</b>	<b>-32</b>
<b>Clitheroe</b>	<b>732</b>	<b>820</b>	<b>782</b>	<b>782</b>	<b>900</b>	<b>26</b>	<b>-168</b>

Source: *Venue Score 2005-2009*

- 3.47 The table shows that despite improving its overall position between 2005 and 2009 (from 1,222<sup>nd</sup> to 900<sup>th</sup>), the vitality ranking of Leyland has seen a substantial decrease since the 2007 / 2008 position (740<sup>th</sup>). This decrease may in part be attributed to the loss of JJB Sports. The lack of larger floorplates in the town centre and the strength of competing provision at the Capitol Centre are also likely to be a contributing factor.
- 3.48 Relative to competing centres in the sub-region, the town is ranked by *Venue Score* alongside Clitheroe and below the smaller, district centre of Bamber Bridge (878<sup>th</sup>).

## F) ACCESSIBILITY

- 3.49 Leyland enjoys good public transport accessibility with frequent bus and rail services. The railway station serves the wider sub-region with links to Chorley, Wigan and Liverpool. Frequent bus services also connect Leyland with the surrounding hinterland (i.e. Seven Stars, Moss Side, Earnshaw Bridge and Farington) and beyond (i.e. Bamber Bridge, Chorley, Preston and Wigan).

## G) PERCEPTION OF SAFETY

- 3.50 Crime data provided by Lancashire Police, as set out below, indicates that the total number of crimes in the Leyland area has fluctuated throughout 2009 from a low in May to a high in July.

2009	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Leyland	20	21	17	25	4	16	27	16	16	13	14	25

Source: [www.maps.police.uk](http://www.maps.police.uk) (2010)

- 3.51 South Ribble Borough Council has recently invested in enhanced CCTV coverage throughout the town centre.

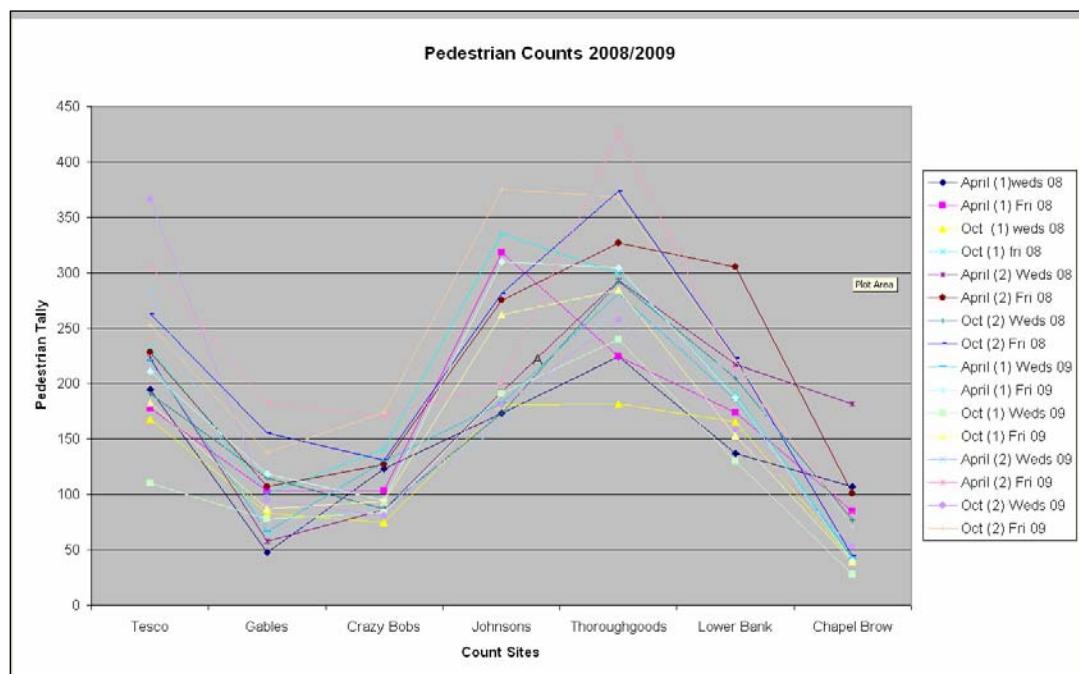
## H) QUALITY OF THE TOWN CENTRE ENVIRONMENT

- 3.52 Leyland's linear town centre is focused along Hough Lane and Towngate. The Leyland Town Centre Masterplan (February 2007) has identified that the retail circuit is elongated and that Churchill Way acts as a physical barrier to connectivity with the two mainstream foodstores (Tesco Extra and Morrison's) which are presently detached from the traditional core area along Hough Lane.
- 3.53 The town centre suffers from a lack of modern units capable of satisfying retailer requirements. The Town Centre Masterplan identifies the need for the creation of a focal

point to the town centre and investment in the quality of the public realm (street furniture, soft landscaping and enhancement of shop frontages).

## I) PEDESTRIAN FLOWS

- 3.54 Pedestrian footfall surveys have been regularly carried out by the Council at principal locations within Leyland town centre, primarily along Hough Lane and Towngate (Tesco, Thoroughgoods, Lower Bank etc.). The graph below highlights that the highest levels of pedestrian footfall were recorded within the town centre primary shopping area at Thoroughgoods at the junction of Hough Lane and Thurston Road. The secondary shopping areas to the north of the town centre (i.e. Chapel Brow) recorded the lowest level of footfall.



- 3.55 Positively, the morning and afternoon footfall survey results show that the recorded pedestrian flows in 2009 are generally higher than in 2008.

## PRESTON

- 3.56 Preston is the major retail and service centre for the Lancashire sub-region. The city centre retail offer is commensurate with its regional status. The Mall and the Fishergate Centre are the main indoor shopping centres within the primary retail area. Major retail attractions include Debenhams and Marks & Spencer. The historic covered market is also a popular attraction.

The convenience retail offer within the city centre is limited with the main provision focused on out-of-centre mainstream foodstores (Sainsbury's, Asda and Morrison's).

- 3.57 The city also has several large out-of-centre retail parks including Deepdale Shopping Park which includes a mix of high street and bulky comparison retailers. The bulky goods orientated Queens Retail Park is located on the eastern edge of the city centre and comprises a Homebase DIY store. The large out-of-centre Capitol Centre in South Ribble is also located in close proximity to the city centre and comprises a mixed comparison retail offer (Next, Tesco Homeplus) as well as mainstream leisure uses (cinema and fitness centre).

## A) DIVERSITY OF USES

- 3.58 Preston is the largest centre in Central Lancashire and performs a higher order, sub-regional role in the retail hierarchy. A comparative assessment of the city centre composition against the previous city-wide retail study (2005) is provided for reference where appropriate.

**Table 11 – Preston City Centre Overall Uses Schedule (2010)**

Retail Sector	2010 No. of Units	2010 Units (%)
Convenience	50	6.34% (7.39%)
Comparison	256	32.44% (28.32%)
Service	335	42.46% (47.17%)
Vacant	118	14.96% (12.93%)
Miscellaneous	30	3.80% (4.19%)
<b>TOTAL</b>	<b>789</b>	<b>100%</b>

**Table 12 – Preston City Centre Overall Floorspace Composition (2004 – 2010)**

Retail Sector	2004 Floorspace (m <sup>2</sup> gross)	2004 Floorspace (%)	2010 Floorspace (m <sup>2</sup> gross)	2010 Floorspace (%)	% Change (2004-2010)
Convenience	10,780	7.50%	10,480	5.22% (13.01%)	-2.28%
Comparison	93,460	65.03%	87,552	43.62% (28.93%)	-21.41%
Service	24,150	16.80%	73,440	36.59% (42.90%)	+19.79%
Vacant	15,330	10.67%	22,990	11.45%	+0.78%
Miscellaneous	-	-	6,260	3.12%	-
<b>TOTAL</b>	<b>143,720</b>	<b>100</b>	<b>200,722</b>	<b>100</b>	

- 3.59 The updated city centre floorspace survey highlights the following:

- The overall quantum of convenience floorspace in the city centre (10,480 m<sup>2</sup> gross) has remained relatively consistent since 2005 having only decreased by 300 m<sup>2</sup> (gross).

- The overall quantum of convenience floorspace in the city centre (5.22%) is however significantly below the Goad regional average (13.01%) and highlights the limited convenience shopping function that the city centre performs in the wider Preston catchment; the Queens Retail Park foodstore commitment should however significantly increase convenience floorspace in the defined city centre boundary.
  - The quantum of comparison floorspace within the city centre has decreased from 93,460 m<sup>2</sup> (gross) in 2004 to 87,552 m<sup>2</sup> (gross) in 2010. The number of comparison retail units in the city centre as proportion of the overall city centre composition (32.44%) is however above the Goad regional average (28.32%).
  - Whilst the quantum of service floorspace within the city centre has significantly increased from 24,150 m<sup>2</sup> (gross) in 2004 to 73,440 m<sup>2</sup> (gross) in 2010, the overall proportion of service floorspace is below the Goad regional average (36.59% to 42.90% regionally).
  - The quantum of vacant floorspace within the city centre has increased from 15,330 m<sup>2</sup> (gross) in 2004 to 22,990 m<sup>2</sup> (gross) in 2010; the proportion of vacant floorspace as a whole is above the Goad regional average (11.45% to 9.79% regionally).
- 3.60 As mentioned, the Experian Goad Survey does not take into account Preston's substantial out-of-centre retail offer. In addition to the large mainstream foodstores (Asda, Sainsbury's and Morrison's), the city has several major retail park destinations including:
- **Deepdale Shopping Park** (including high street fashion retailers such as Marks & Spencer, Next and the Arcadia Group);
  - **Riversway Retail Park** (bulky durable orientated and including DFS, Homebase and Mothercare); and
  - **Queens Retail Park** (anchored by Homebase).
- 3.61 The Capitol Centre, which is located in South Ribble and has a mainstream comparison retail (Next etc.) and leisure offer (cinema and gym) also provides significant competition to the city centre given its proximity, access and free car parking. The Centre also has an open Class A1 consent and it is understood that there are emerging proposals for a new foodstore. The provision of a new foodstore on the site would further enhance the Capitol Centre as a major retail destination in the sub-region.

## B) RETAILER REPRESENTATION

- 3.62 Preston City Centre presently accommodates 18 of the 27 national retail multiples identified by *Experian Goad* as key attractors which enhance the appeal of a centre. Multiple retailers present include BHS, Debenhams, Marks & Spencer, New Look, Next, River Island and Topshop / Topman.
- 3.63 Notable key retailers absent from the city centre include large department stores such as House of Fraser and John Lewis. The Tithebarn regeneration proposal in the city centre, which is to be subject to a Call-In Inquiry starting in May 2010, does however seek to provide large floorplate retail uses to attract mainstream national multiples. A John Lewis department store is proposed to anchor the mixed-use city centre scheme.

## C) RETAILER / FLOORSPACE REQUIREMENTS

- 3.64 Given the sub-regional role that the city performs in the retail hierarchy, the *Focus* database maintains a full record of retailer requirements registered for Preston since April 2000. The table below sets out the changing requirements over time.

**Table 13 – Retailer Requirements in Preston (2000-2009)**

		Apr-00	Apr-01	Apr-02	Apr-03	Apr-04	Apr-05	Apr-06	Apr-07	Jan-09	Movement (00-09)
<b>Preston</b>	No.	75	64	90	78	77	84	79	69	62	-8
	Rank	54	75	48	64	66	65	75	90	62	-53
<b>Chorley</b>	No.	10	16	11	12	18	16	20	24	10	-
	Rank	391	313	416	435	358	421	388	358	444	+53
<b>Leyland</b>	No.	5	3	3	6	9	12	10	10	9	-
	Rank.	567	748	807	658	548	506	608	614	485	+82
<b>Accrington</b>	No.	13	12	12	10	16	20	12	17	11	-
	Rank	334	373	406	483	396	361	540	472	403	-69
<b>Blackburn</b>	No.	55	58	76	59	56	59	57	52	28	-
	Rank	96	88	65	99	117	125	133	144	143	-47
<b>Blackpool</b>	No.	67	69	66	57	54	59	65	49	36	-
	Rank	66	63	85	107	125	125	100	155	97	-31
<b>Bolton</b>	No.	52	48	59	58	67	67	69	64	35	-
	Rank	106	121	103	105	83	93	93	100	102	+4
<b>Southport</b>	No.	55	52	54	57	56	58	58	44	34	-
	Rank	96	106	116	107	117	128	127	176	109	-13
<b>Wigan</b>	No.	42	41	48	44	47	55	52	48	33	-
	Rank	134	141	138	142	148	137	147	158	117	+17

Source: *Focus Retail Database* 2010

- 3.65 As the table highlights, whilst the hierarchy position of Preston relative to other centres in the sub-region is relatively positive, retailer requirements have remained relatively constant over the past decade suggesting that there is latent demand for representation in the city centre.
- 3.66 Whilst some higher order comparison (and convenience) retailers do not formally publish active requirements, it is notable that a number of fashion multiples including Monsoon, Peacocks and Zara have published requirements. Although the requirements may reflect demand associated with the planned Tithebarn scheme, the current requirements highlight the potential of the city centre as a higher order sub-regional shopping destination.

**Table 14 – Preston City Centre Requirements**

Retail Category	No. of Requirements	Min. Floorspace (m <sup>2</sup> ) gross	Max. Floorspace (m <sup>2</sup> ) gross
<b>Comparison</b>	20	4,477	8,419
<b>Convenience</b>	2	1,115	4,088
<b>Service</b>	11	4,355	7,887
<b>TOTAL</b>	<b>33</b>	<b>9,947</b>	<b>20,394</b>

*Source: Focus Database (February 2010)*

- 3.67 There is also substantial interest from food and drink operators (blanket regional requirements by Costa Coffee, Subway etc.) and other service uses. In addition, Spar is actively seeking to locate a convenience store (189-372 m<sup>2</sup>) within Preston City Centre; this requirement would however not address the quantitative and qualitative deficiency in the existing city centre convenience offer. The total number of published retailer requirements (33) for Preston City Centre at present is below the levels recorded in the 2005 Study (53 published requirements).

## D) RENTAL LEVELS

- 3.68 Rental levels in the primary retail frontage areas within Preston City Centre have risen steadily in recent years, from £125 per ft<sup>2</sup> in 2000 to £145 per ft<sup>2</sup> in 2008. The current rental levels are broadly in line with the sub-regional status of Preston in the retail hierarchy.

**Table 15 – Comparison of Prime Retail Rents (£/sq ft) (2000 – 2008)**

Centre	2000	2001	2002	2003	2004	2005	2006	2007	2008
<b>Preston</b>	125	130	140	140	140	140	140	140	145
<b>Chorley</b>	50	50	50	60	60	65	65	65	65
<b>Accrington</b>	60	60	60	65	65	70	70	65	65
<b>Blackpool</b>	110	110	110	115	115	120	125	125	125
<b>Southport</b>	110	100	90	85	80	80	80	85	85
<b>Wigan</b>	75	85	85	90	90	90	105	110	110
<b>Bolton</b>	140	140	130	130	140	140	140	140	140

Source: Focus Database 2010 (Prime Zone A)

- 3.69 Following a strong period of growth in the late 1990s, the ‘Preston 2005 Study’ found that rental levels for Prime Zone A were estimated at £145 per ft<sup>2</sup> in 2000 and £140 per ft<sup>2</sup> in 2003.

## E) COMPARATIVE ANALYSIS

- 3.70 The table below highlights the *Venue Score* ranking performance of Preston since 2005.

**Table 16 – Comparative Retail Ranking (Preston)**

Centre	2005 Rank	2006 Rank	2007 Rank	2008 Rank	2009 Rank	2009 Venue Score	Movement (2005-09)
<b>Preston Central</b>	<b>36</b>	<b>37</b>	<b>35</b>	<b>35</b>	<b>44</b>	<b>243</b>	<b>-8</b>
<b>Bamber Bridge</b>	<b>691</b>	<b>667</b>	<b>697</b>	<b>697</b>	<b>878</b>	<b>27</b>	<b>-187</b>
<b>Chorley</b>	<b>268</b>	<b>221</b>	<b>227</b>	<b>227</b>	<b>298</b>	<b>81</b>	<b>-30</b>
<b>Leyland</b>	<b>1222</b>	<b>850</b>	<b>740</b>	<b>740</b>	<b>900</b>	<b>26</b>	<b>322</b>
<b>Blackburn</b>	<b>117</b>	<b>124</b>	<b>134</b>	<b>134</b>	<b>168</b>	<b>131</b>	<b>-51</b>
<b>Darwen</b>	<b>691</b>	<b>719</b>	<b>921</b>	<b>921</b>	<b>1111</b>	<b>21</b>	<b>-420</b>
<b>Accrington</b>	<b>303</b>	<b>291</b>	<b>307</b>	<b>307</b>	<b>298</b>	<b>81</b>	<b>5</b>
<b>Blackpool</b>	<b>78</b>	<b>74</b>	<b>90</b>	<b>90</b>	<b>50</b>	<b>224</b>	<b>28</b>
<b>Southport</b>	<b>44</b>	<b>64</b>	<b>61</b>	<b>61</b>	<b>77</b>	<b>195</b>	<b>-33</b>
<b>Wigan</b>	<b>145</b>	<b>154</b>	<b>76</b>	<b>76</b>	<b>105</b>	<b>168</b>	<b>40</b>
<b>Bolton</b>	<b>89</b>	<b>97</b>	<b>108</b>	<b>108</b>	<b>121</b>	<b>155</b>	<b>-32</b>
<b>Clitheroe</b>	<b>732</b>	<b>820</b>	<b>782</b>	<b>782</b>	<b>900</b>	<b>26</b>	<b>-168</b>

Source: *Venue Score* 2005-2009

- 3.71 Overall, the centre’s vitality ranking has fallen in recent years (from 36<sup>th</sup> in 2005 to 44<sup>th</sup> in 2009); this should be viewed in the context of the 2005 Retail Study which identified Preston as 34<sup>th</sup> (2003/2004) in the hierarchy.

- 3.72 The decrease in ranking performance may be in part attributable to the relative improvement of other centres in the hierarchy through attracting new multiple retailers. The Tithebarn scheme would clearly enhance the ranking position of Preston City Centre in the wider regional retail hierarchy.

## F) ACCESSIBILITY

- 3.73 Preston City Centre is highly accessible by a choice of means of transport. The railway station is immediately adjacent to the Fishergate Centre and is a prominent interchange on the national rail network. The city centre bus station is situated to the northeast of the city centre in close proximity to St Johns Centre and Guildhall Arcade. It is however divorced from the town centre primary shopping area.
- 3.74 In terms of car access, Preston is ready accessible to the strategic motorway network (M6, M55 etc.) and has extensive car park provision within the city centre.

## G) PERCEPTION OF SAFETY

- 3.75 Crime data provided by Lancashire Police, as set out below, indicates that the total number of crimes in the Preston area has remained in excess of 1,000 each month throughout 2009.

2009	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Preston	1,109	1,183	1,292	1,273	1,134	1,205	1,125	1,225	1,132	1,199	1,086	1,038

Source: [www.maps.police.uk](http://www.maps.police.uk) (2010)

## H) QUALITY OF THE TOWN CENTRE ENVIRONMENT

- 3.76 The main indoor shopping centres in the city centre (Fishergate Centre and The Mall) are clean and well-maintained. The main entrance to the Fishergate Centre shows signs of recent investment with a glazed entrance, new frontages and modern signage.
- 3.77 Extending northwards within the city centre primary shopping area, the Corn Exchange area has been redeveloped into an attractive public square with soft landscaping, good quality paving surfaces and traditional street furniture. There is however a concentration of vacancies off the main Corn Exchange retail pitch.
- 3.78 The main shopping centre within the primary retail area (The Mall / St George's) has also been subject to recent investment to renew the external shopping facades. The older shopping malls of Lancaster Way and Guildhall Arcade, which are located in secondary areas

of the city centre, are however run-down and blighted by high vacancy rates. The environment of the St John's Centre is poor, outdated and in need of investment.

- 3.79 Overall, whilst there are attractive pockets within the city centre, the overall physical environment is disjointed and additional investment is required to improve the wider environment (landscaping, shop frontages etc.).

## I) PEDESTRIAN FLOWS

- 3.80 A comprehensive pedestrian footfall survey within the city centre was undertaken in 2007 by the Tithebarn Partnership.

LOCATION	FRI. 8 JUNE 2007 SURVEY	SAT. 9 JUNE 2007 SURVEY	WEEK TOTAL PER LOCATION
1) 58-60 Friargate	2,310	4,140	15,180
2) 38-42 Friargate	2,760	4,680	17,510
3) 40 Lune Street	4,680	5,760	24,570
4) 6 Lune Street	4,980	6,030	25,910
5) 99 Fishergate	9,180	13,800	54,070
6) 88 Fishergate	7,470	13,170	48,570
7) 49a Fishergate	10,950	17,490	66,920
8) 9 Fishergate Shopping Centre (Lower Ground)	6,870	11,130	42,350
9) 4 Fishergate Shopping Centre (Ground Level)	10,440	16,860	64,240
10) 42 Fishergate	12,600	21,090	79,270
11) 30-31 Fishergate	10,620	20,820	73,980
12) 10 Guildhall Street	3,270	3,780	16,590
13) 10-13 Fishergate	9,480	13,050	53,010
14) 144-146 Church Street	5,100	5,160	24,140
15) 12-17 Church Street	2,490	2,820	12,490
16) 6 Miller Arcade	1,260	2,040	7,760
17) 18 Lancaster Road	2,100	3,870	14,050
18) 2-6 Guildhall Arcade	6,270	10,440	39,320
19) Lancaster Way, St Johns Centre	6,810	9,270	37,840
20) 6-7 Orchard Street	12,720	23,700	85,700
21) 5 Friargate	11,430	20,580	75,320
22) 5-6 Cheapside	11,310	15,570	63,250
23) Fishergate	4,500	7,110	27,320

24) 116-122 Fishergate	11,940	21,360	78,350
25) 105-107 The Mall St George (Floor 1)	13,260	23,940	87,530
26) 20 The Mall St George (Floor 1)	8,820	14,520	54,920
27) 65-71 The Mall St George (Ground Level)	9,660	15,270	58,660
28) 101 The Mall St George (Ground Level)	12,660	18,990	74,470
29) 20-21 Friargate	8,640	13,200	51,390
30) 136-138 Friargate	2,700	4,440	16,800
<b>AVERAGE</b>	<b>7,580</b>	<b>12,140</b>	<b>46,380</b>

- 3.81 The highest levels of pedestrian footfall were recorded along Orchard Street, Fishergate and Friargate; this is unsurprising given that these locations comprise the main pedestrian thoroughfare and primary retail frontage within the city centre. Footfall within the Fishergate Centre and The Mall are also high.
- 3.82 Footfall did however begin to decrease significantly beyond the primary retail frontage. The lowest pedestrian flows were recorded along the secondary shopping areas of Friargate, Church Street and Miller Arcade, which has high vacancy rates.

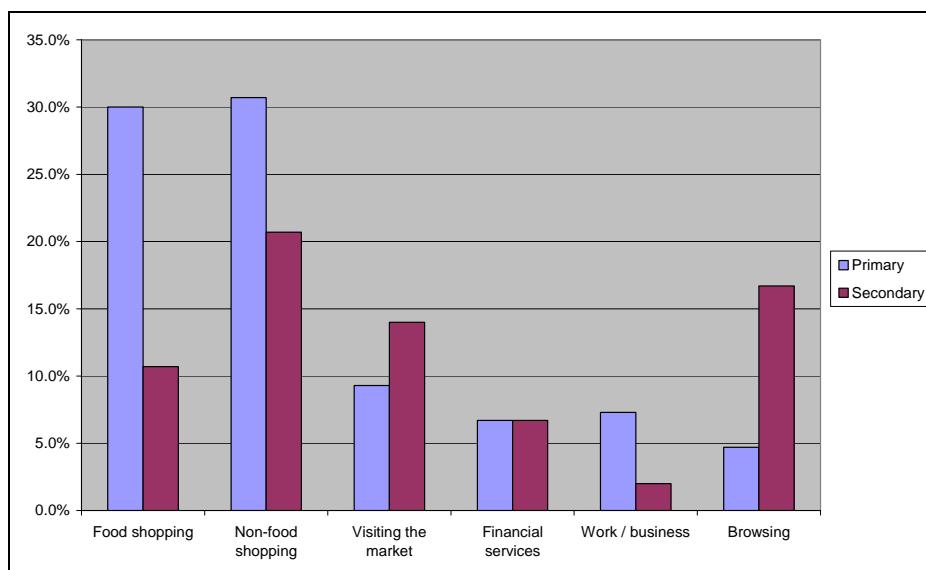
## 4. IN-CENTRE SURVEY RESULTS

- 4.1 In order to inform our wider qualitative review and to enable the preparation of an appropriate forward strategy for each respective centre, a total of 600 in-centre shopper surveys (300 in Preston; 150 in Chorley; 150 in Leyland) were commissioned to elicit town centre users' views and opinions of the main centres within Central Lancashire.
- 4.2 The surveys were undertaken in February 2010 and spread across several days (weekday and weekend; market and non-market days) so as to capture a wider cross section of regular town centre users.

### CHORLEY

#### A) PURPOSE OF VISIT

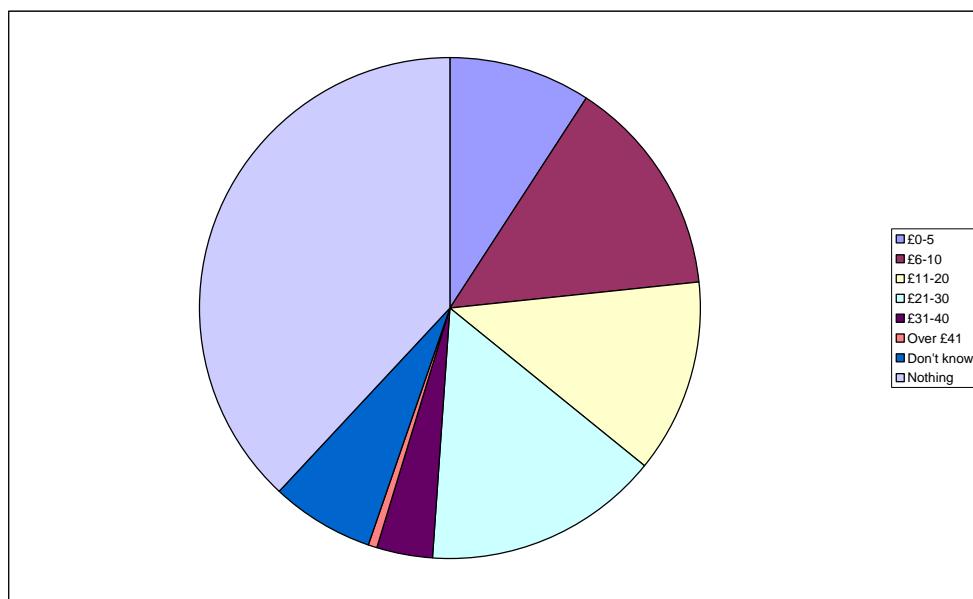
- 4.3 The table below sets out respondents primary and secondary reasons for visiting Chorley town centre. In terms of the primary purpose for visiting, almost a third of those interviewed cited non-food shopping (30.7%) and food shopping (30%) respectively. Other popular responses included visiting the market (9.3%) and using financial services (6.7%). The survey results indicate that Chorley's covered market, situated between Cleveland Street and New Market Street, is a key attraction relative to those in Leyland (2.7%) and Preston (2.3%).



- 4.4 Beyond their primary purpose for visiting, when asked what else they would be doing in Chorley town centre, a notable secondary response included shopping for non-food goods (20.7%). A further 16.7% cited browsing, whilst other popular responses were visiting the market (14%) and food shopping (10.7%). There are significant opportunities to encourage linked trips within the town centre, especially leisure-related trips.

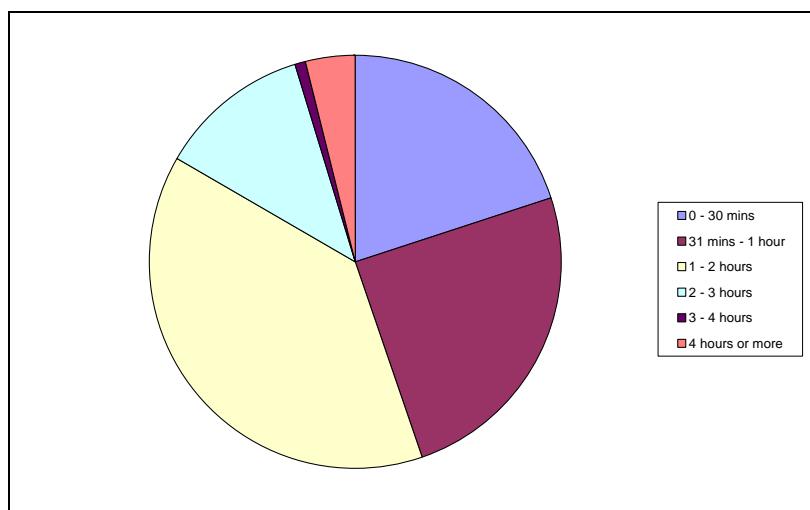
### B) EXPENDITURE

- 4.5 With regards to the amount of money that visitors were proposing to spend during their visit to Chorley, the table below highlights that most (38%) expected to spend nothing; this reflects the high proportion of those browsing in the town centre. Notwithstanding this, 15.3% of those interviewed claimed to spend £21-30 whilst a further 14% of respondents cited £6-10.



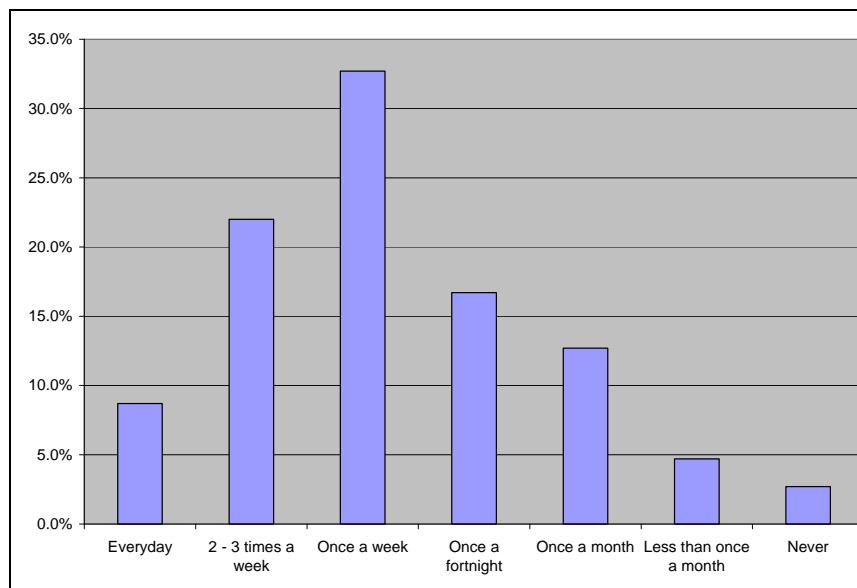
### C) DWELL TIME

- 4.6 The amount of time a person spends within a town centre is particularly important; low dwell times potentially suggest that there is a limited town centre offer with less opportunity for linked shopping or leisure trips whereas higher dwell times suggests that the wider town centre offer is successful at retaining a greater quantum of expenditure available.
- 4.7 Most respondents (38.7%) expected to spend 1-2 hours in the town centre, whilst a quarter (24.7%) indicated that they would stay for between 31 minutes and 1 hour. A comparable number (20%) expected to spend less than 30 minutes in Chorley town centre; this is less than half (proportionally) of such dwell time responses for Leyland town centre (42%).



#### D) FREQUENCY OF VISIT FOR SHOPPING

- 4.8 When asked about how regularly they visit the town centre for shopping (food and/or non-food), almost a third of respondents (32.7%) claimed to visit once a week whilst a further 22% cited between two and three times per week. The proportion of respondents visiting Chorley on a daily basis (8.7%) is low in comparison to the other main centres in Central Lancashire (Leyland 25.3%; Preston 11.7%).



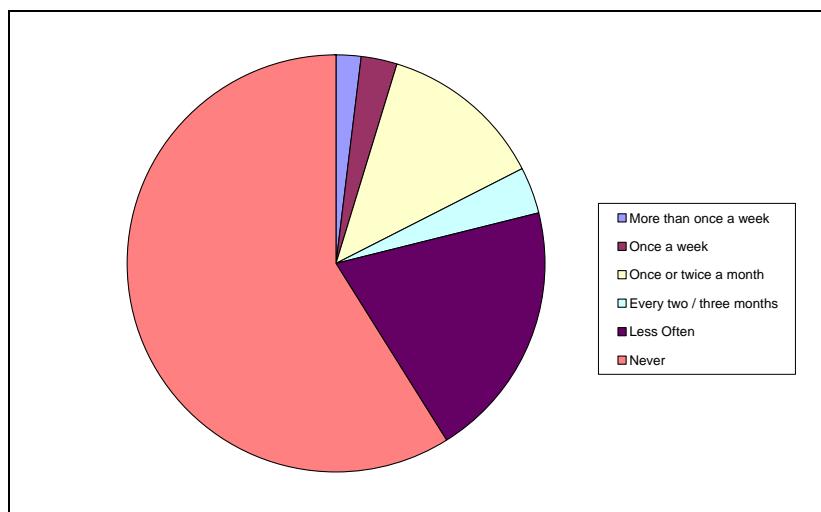
#### E) ALTERNATIVE SHOPPING DESTINATIONS

- 4.9 Respondents were then asked where they shop beyond Chorley town centre. The majority of respondents (70%) considered Preston City Centre to be their main alternative shopping

destination; the popularity of Preston is likely to be attributable to its higher order comparison retail offer. The other main centres visited by respondents included Wigan (28%), Manchester (18.7%), Bolton (13.3%), Trafford Centre (12%) and Middlebrook Retail Park (4%).

#### F) FREQUENCY OF EVENING VISITS

- 4.10 The majority of respondents (58%) never visit Chorley in the evening; this possibly reflects the current evening economy offer which is orientated towards traditional pubs and bars. The survey results indicate that evening leisure patronage in Chorley is lower (proportionally) than Preston (45%) but higher than Leyland (61.3%).

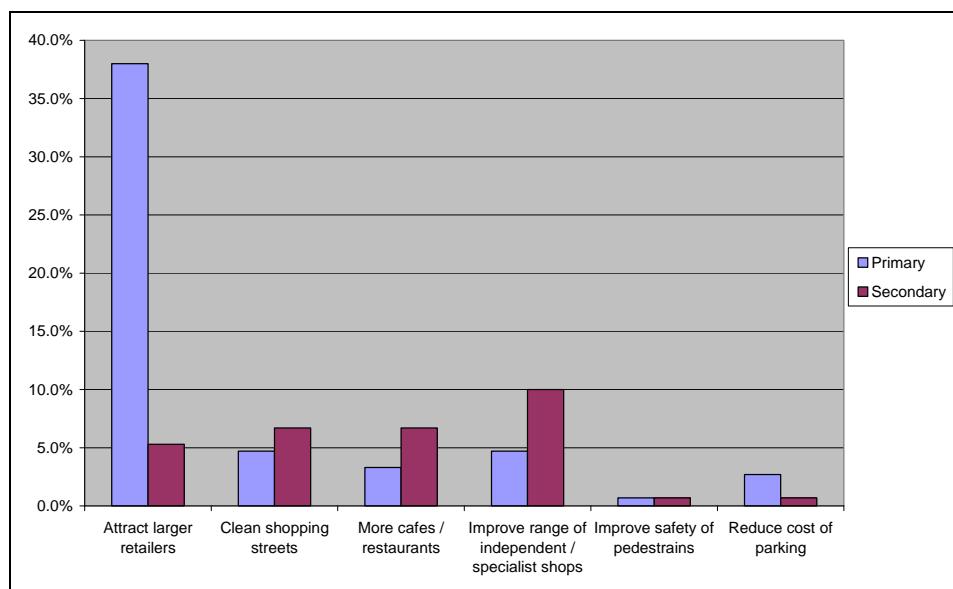


- 4.11 With respect to those who do visit the town centre in the evening, 12.7% of respondents visited once or twice a month. Only 2.7% of those interviewed claimed to visit once a week, whilst a further 2% stated that they visit more than once a week in the evening.
- 4.12 When asked what would make them visit the town centre in the evenings more often, almost a third of respondents (30%) expressed a need for more leisure facilities (i.e. cinema, bingo, bowling). Further reflective of Chorley's current evening economy offer, some 13.3% cited the need for more pubs / bars / clubs; this is more (proportionally) than Preston (5.3%) and Leyland (9.3%).

#### G) SUGGESTED QUALITATIVE IMPROVEMENTS

- 4.13 The improvements to the town centre that would persuade respondents to visit more regularly are important in formulating appropriate policy and town centre strategy responses.

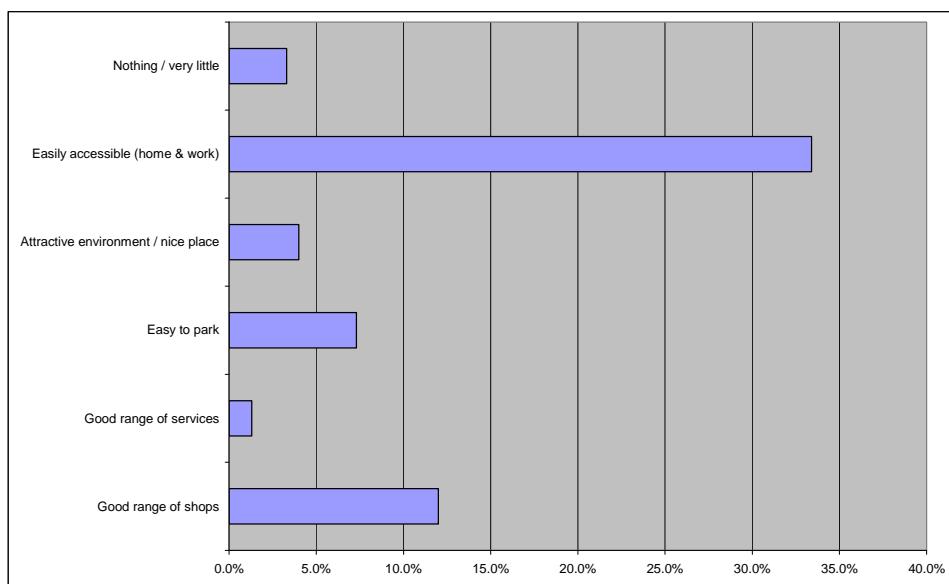
- 4.14 As the table below highlights, over a third of primary responses (38%) related to the need to attract larger retailers to the town centre as their main suggested improvement; this response possibly explains why Preston is a popular alternative shopping destination. The other notable primary responses included the need to provide an improved range of independent / specialist shops and clean shopping streets (each 4.7%), followed by more cafes / restaurants (3.3%).



- 4.15 Secondary suggested improvements largely replicate initial primary responses in terms of respondents identifying the need to provide an improved range of independent / specialist shops (10%), more cafes / restaurants and clean shopping streets (each 6.7%).

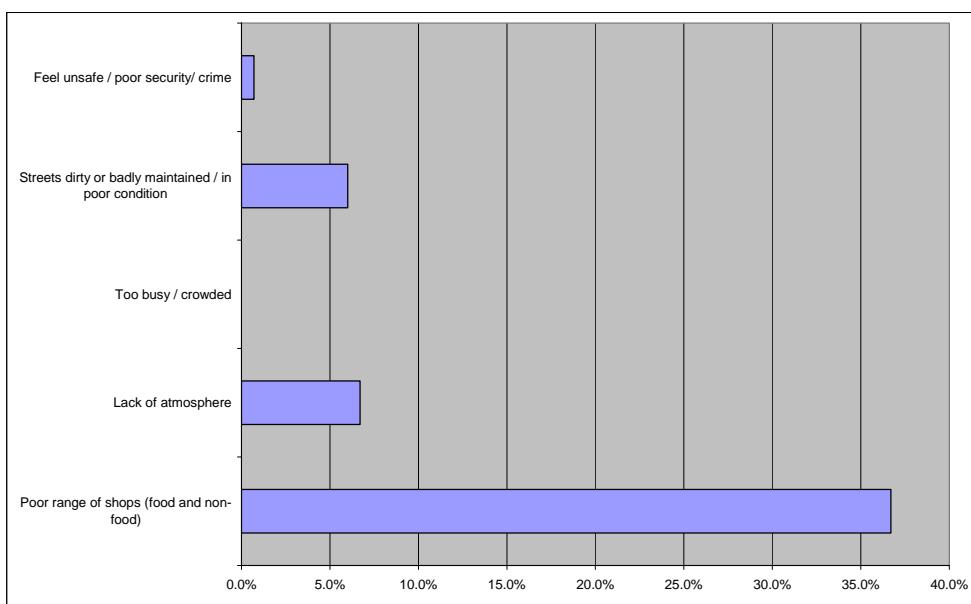
#### H) MAIN LIKES

- 4.16 The survey questionnaire then sought to establish what respondents particularly liked about Chorley town centre, as illustrated in the table below. Whilst accessibility to the town centre (33.4%) was seen as the main positive, some 12% of those interviewed 'liked' the good range of shops. From a town centre management perspective, it is positive that 7.3% cited easy to park and that a further 4% cited attractive environment / nice place.



## I) MAIN DISLIKES

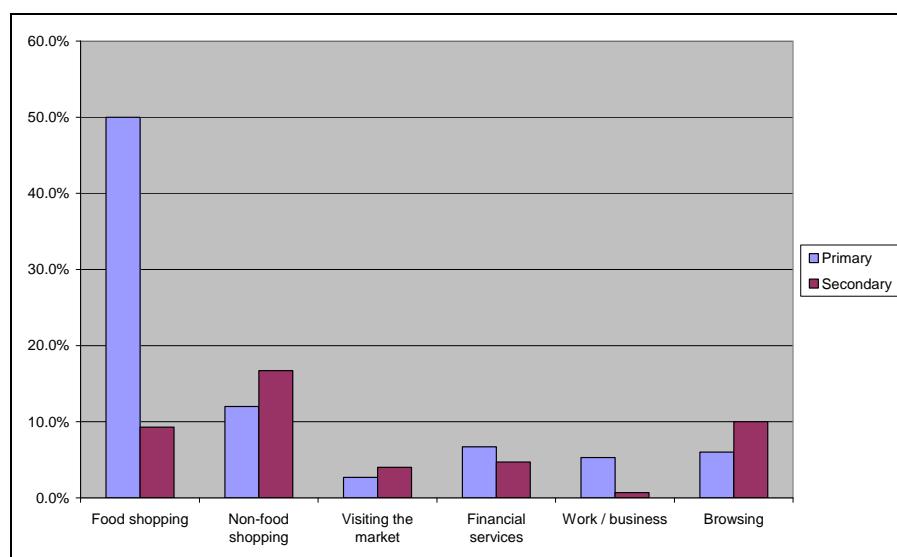
- 4.17 Of all the survey responses 42.7% of respondents do not consider there to be any significant issues with the existing town centre. Of those who cited issues, popular responses included a poor range of shops (36.7%), the lack of a town centre atmosphere (6.7%) and the condition of shopping streets (6%).



## LEYLAND

### A) PURPOSE OF VISIT

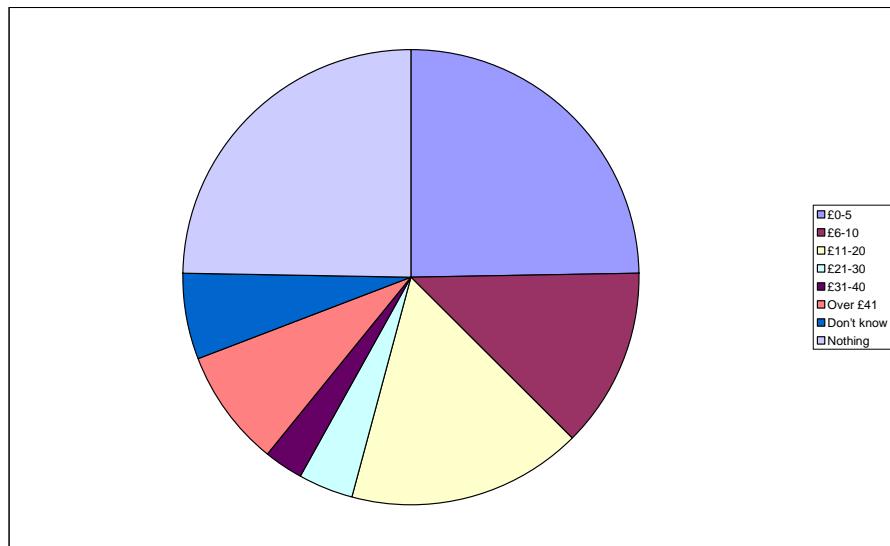
- 4.18 The primary purpose for visiting Leyland town centre was for food and grocery shopping with half (50%) of responses. This is substantially higher (proportionally) than responses recorded for Preston (15.3%) and Chorley (30%), and may reflect Leyland's relatively limited comparison goods offer. A further 12% of those interviewed visited the town centre for non-food shopping, whilst 6.7% cited the use of financial services such as banks and building societies.



- 4.19 Beyond their primary purpose for visiting, when asked what else they would be doing in Leyland, notable secondary responses included non-food shopping (16.7%), browsing (10%) and food shopping (9.3%). Some 39.3% of respondents stated that they would be doing nothing else beyond their primary purpose for visiting.

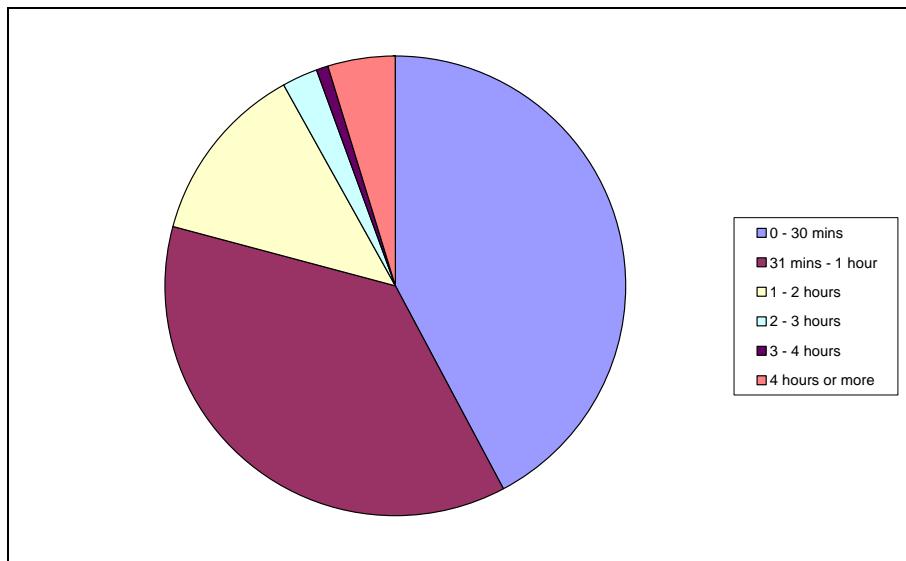
### B) EXPENDITURE

- 4.20 The localised role of Leyland in the Central Lancashire shopping hierarchy is highlighted by the fact that almost a quarter (24.7%) of respondents stated that they expected to spend less than £5 during their visit to the town centre; this proportion is significantly more than Chorley (9.3%) and Preston (12.3%). A further 24.7% intended not to spend any money in the town centre. The survey also finds that 12.7% of those interviewed claimed to spend £6-10, whilst an additional 16.7% cited between £11 and £20.



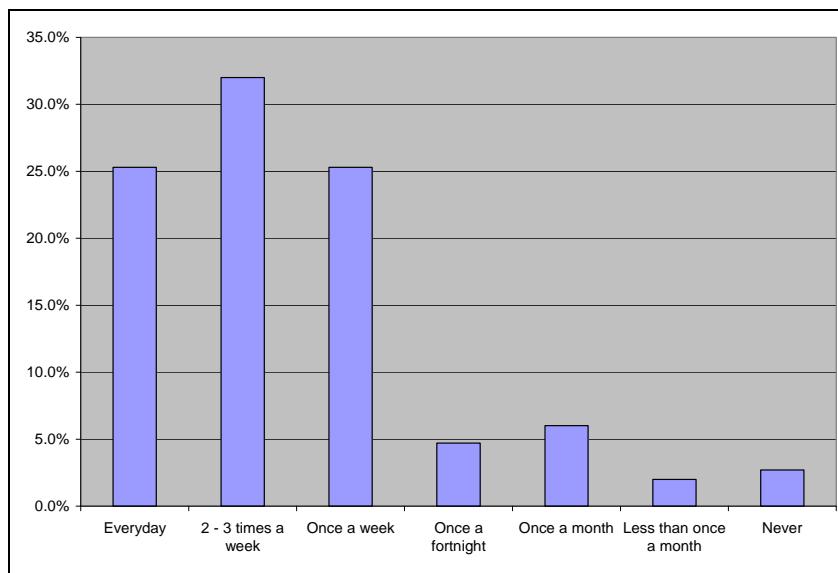
### C) DWELL TIME

- 4.21 When asked how long respondents intended to spend in the town centre during their visit, most respondents (42%) expected to spend less than 30 minutes. The table below also shows that a further 36.7% of respondents intended to stay for between 31 minutes and 1 hour. This relatively low level of dwell time suggests that Leyland town centre performs a localised role with existing qualitative deficiencies in its comparison retail offer reducing the potential for linked shopping trips.



#### D) FREQUENCY OF VISIT FOR SHOPPING

- 4.22 The survey results show that the frequency of visits to the town centre are relatively high with 32% visiting 2-3 times a week and 25.3% visiting everyday; this is higher (proportionally) than those visiting Chorley (8.7%) and Preston (11.7%) on a daily basis. Some 25.3% of respondents also claimed to visit the town centre once a week.

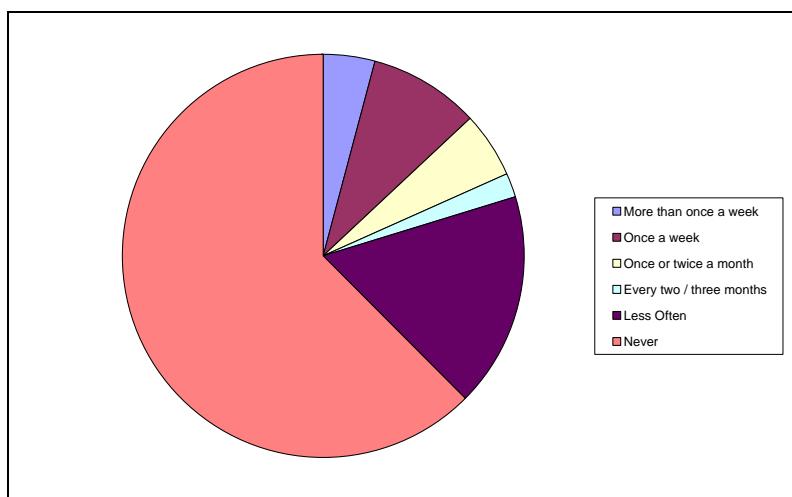


#### E) ALTERNATIVE SHOPPING DESTINATIONS

- 4.23 When asked which other shopping destinations respondents visit regularly beyond Leyland town centre, almost three-quarters (74.7%) considered Preston City Centre to be their main alternative shopping destination. Other centres visited by respondents included Chorley (26.7%), Manchester (12%) and Southport (6%), whilst popular retail parks included Manchester's Trafford Centre (9.3%), Preston's Deepdale Retail Park (7.3%) and the Capitol Centre in Walton-le-Dale (5.3%). All of these centres / retail parks have a higher order retail offer in comparison to Leyland.

#### F) FREQUENCY OF EVENING VISITS

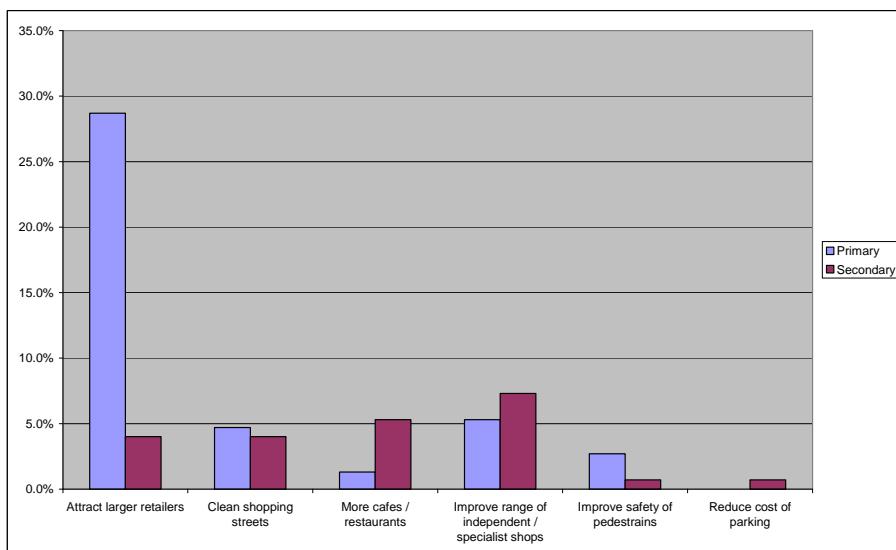
- 4.24 The survey results reveal that the majority of respondents (61.3%) never visit Leyland in the evening; this is substantially more (proportionally) than Preston (45%) and Chorley (58%). These findings possibly reflect the relatively poor evening economy offer within Leyland town centre, which is predominantly orientated towards traditional pubs and bars.



- 4.25 With respect to those who do visit, 8.7% visited once a week whilst 5.3% visited once or twice a month. Almost a quarter of respondents (24%) stated that the provision of more leisure facilities (i.e. cinema, bingo, bowling) would persuade them to visit Leyland in the evenings more often. A further 17.3% cited the need for better security and policing, whilst other notable responses included more pubs / bars / clubs and more restaurants (each 9.3%).

## G) SUGGESTED QUALITATIVE IMPROVEMENTS

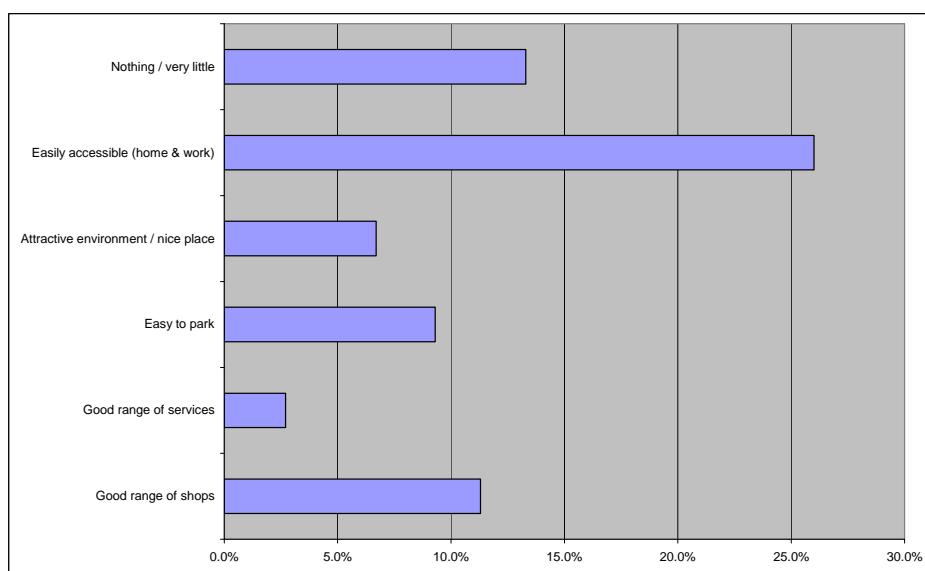
- 4.26 The main improvements suggested by respondents in Leyland are set out in the table below. Given the current deficiencies in the town centre multiple comparison retail offer, 28.7% of the primary responses concerned the need to attract larger retailers. The second most popular response also related to shopping, with 5.3% of respondents stating that an improved range of independent / specialist shops would persuade them to visit the town centre more regularly.



- 4.27 Notable secondary responses in terms of suggested qualitative improvements included improving the range of independent / specialist shops (7.3%) and more cafes / restaurants (5.3%).

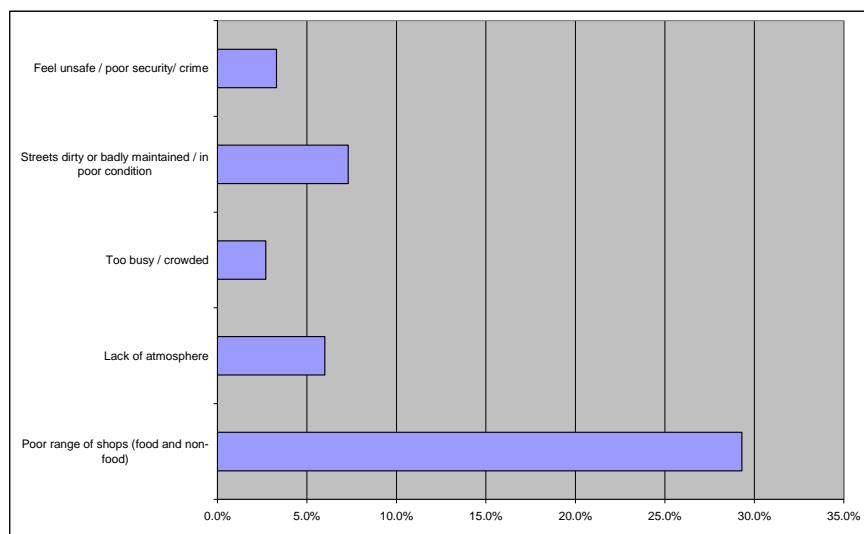
#### **H) MAIN LIKES**

- 4.28 The main reason as to why respondents liked Leyland was due to the accessibility of the town centre from home / work (26%). Whilst a small number of respondents liked Leyland town centre because it was easy to park (9.3%), the second most popular ‘positive’ response was the good shops (11.3%). Some 13.3% of those interviewed liked nothing about the centre.



#### **I) MAIN DISLIKES**

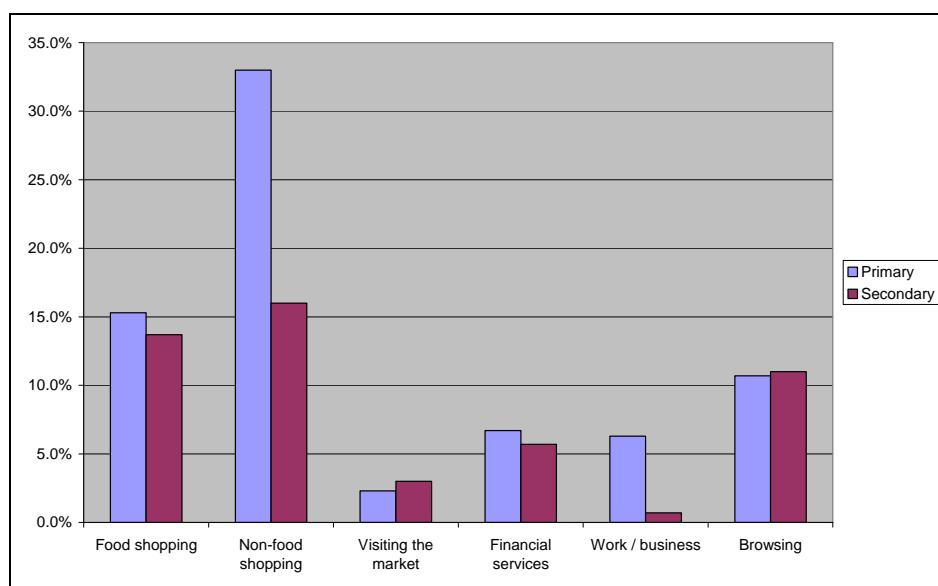
- 4.29 Almost a third of respondents (30%) do not consider there to be any significant issues with the existing town centre. However, 27.3% of those interviewed ‘disliked’ the poor range of shops. Other notable responses concerned the town centre environment, with 7.3% citing the poor condition of shopping streets and a further 6% claiming there to be a lack of atmosphere.



## PRESTON

### A) PURPOSE OF VISIT

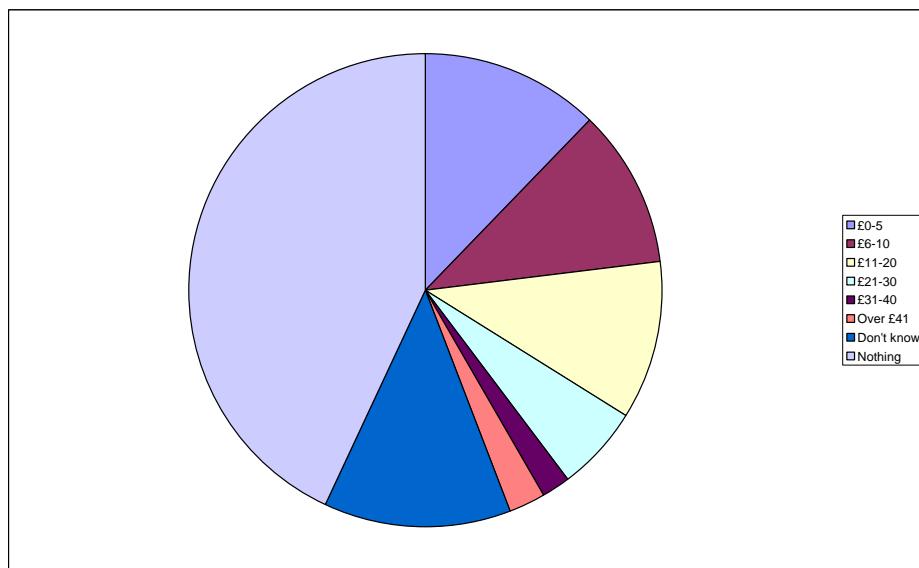
- 4.30 The table below sets out respondents' primary and secondary reasons for visiting the city centre. Preston is the principal sub-regional centre in Central Lancashire and the survey results indicate that most respondents visited for non-food shopping (33%) and then food shopping (15.3%). The number of responses for food shopping is lower (proportionally) than both Chorley (30%) and Leyland (50%), which may be attributed to the fact that Preston's main foodstores are located outside of the city centre. Alternatively, these findings may reflect the strength of Preston's comparison goods offer.



- 4.31 In terms of what else respondents would be doing in Preston beyond their primary purpose of visit, a substantial number stated that they would be non-food shopping (16%) and food shopping (13.7%). In addition, 8.7% of those interviewed were eating or drinking out whilst a further 5.7% were using financial services; these results suggest that many respondents are undertaking linked trips within the city centre. Browsing was also popular amongst city centre users, with 10.7% of primary responses and 11% of secondary responses.

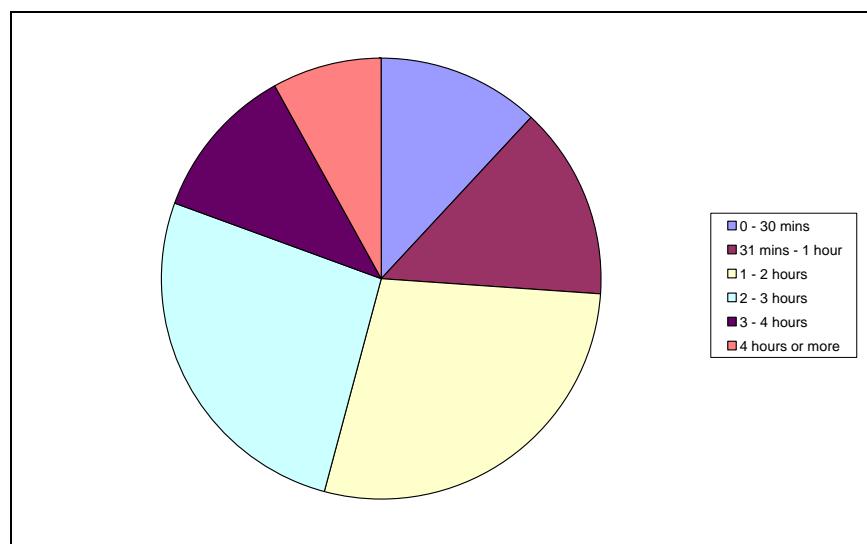
### B) EXPENDITURE

- 4.32 With regards to how much respondents were proposing to spend during their visit to Preston, the table below highlights that most (43%) expected to spend nothing; this figure may be attributed to those working or browsing in the city centre. Some 12.3% of respondents intended to spend less than £5 during their visit, whereas 11% cited between £11 and £20. These expenditure results are surprising in light of Preston's relatively higher order retail offer and the opportunities for linked trips.



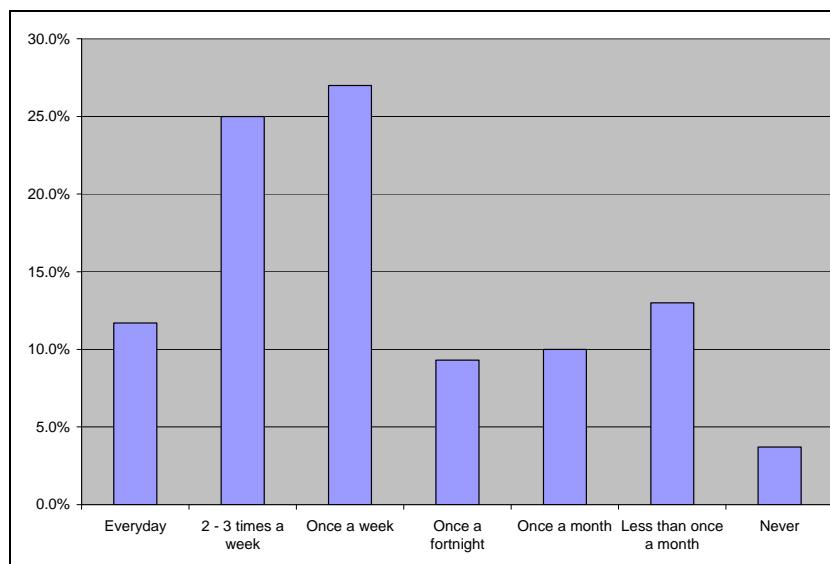
### C) DWELL TIME

- 4.33 Given the important function of the city centre and the strength of its retail, leisure and service offer, it is to be expected that dwell times are high relative to Chorley and Leyland. Most respondents (28%) expected to stay in the city centre for 1-2 hours, whilst a further 26.3% would be staying for 2-3 hours. Positively, only 12% of respondents intended to stay for less than 30 minutes, whereas 8% cited over 4 hours. Although the expenditure results indicate otherwise, the overall dwell time responses suggest that respondents are making linked trips in the centre as part of their visit



#### D) FREQUENCY OF VISIT FOR SHOPPING

- 4.34 Preston serves a large catchment and performs an important function in the sub-regional retail hierarchy. When asked about how regularly they visit the city centre, the survey found that a quarter of respondents (27%) visited once a week whilst a further 25% claimed to visit 2-3 times per week. The number of respondents visiting Preston on a daily basis (11.7%) is higher than Chorley (8.7%) yet below Leyland (25.3%).

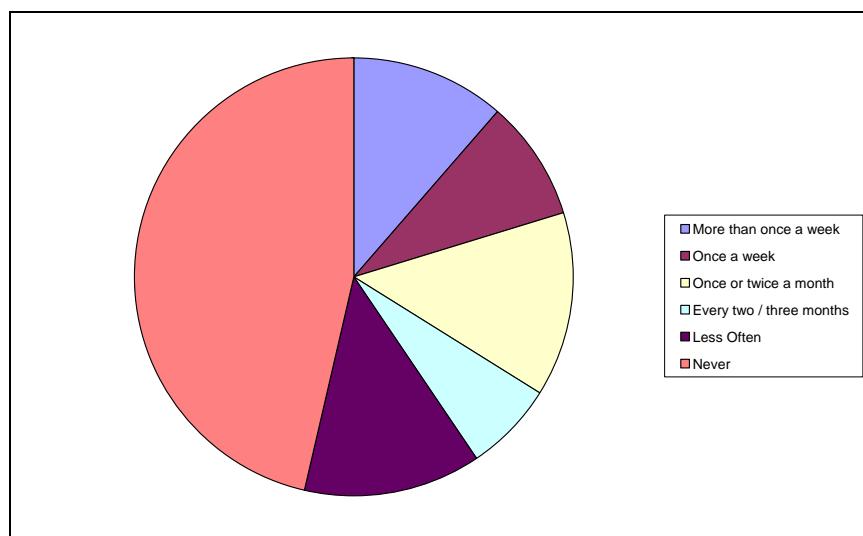


## E) ALTERNATIVE SHOPPING DESTINATIONS

- 4.35 Respondents were then asked where they shop beyond Preston City Centre. Almost a third of those interviewed regularly shop in Manchester (32%), whilst a further 18.3% cited Manchester's Trafford Centre as a popular alternative shopping destination. The other main destinations visited by respondents included Liverpool (13.7%) and Southport (11%). Preston's Deepdale Retail Park (including Marks & Spencer, New Look and River Island) recorded 11.3% of responses.

## F) FREQUENCY OF EVENING VISITS

- 4.36 The survey results indicate that a large number of respondents (45%) never visit Preston in the evening; this may be attributable to relatively large hinterland served by the centre. Positively however, this figure is lower than both Chorley (58%) and Leyland (61.3%).

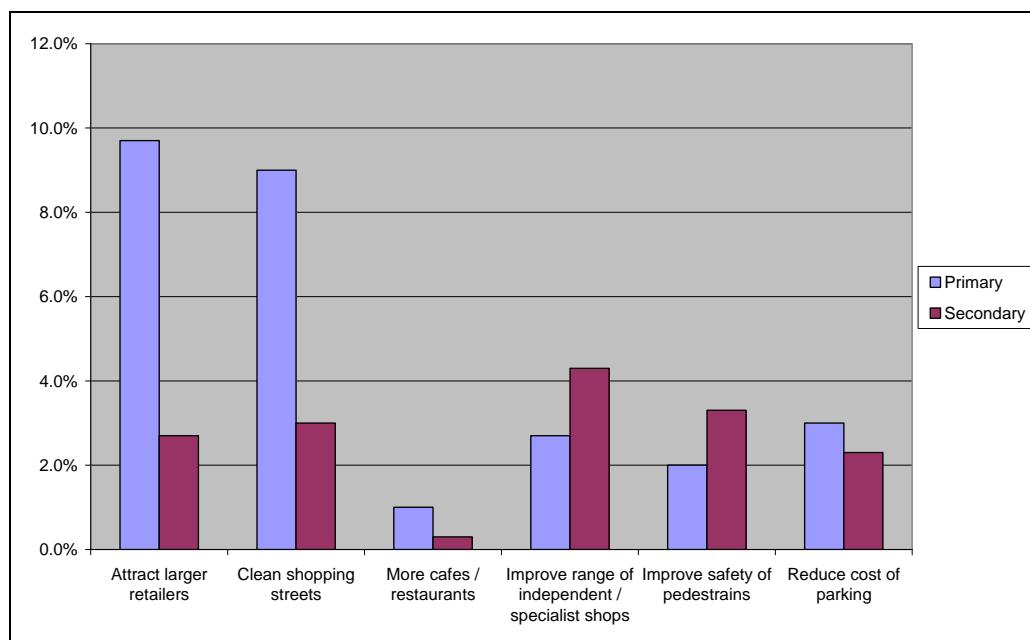


- 4.37 With respect to those who do visit in the evening, 11% visited more than once a week whilst an additional 8.7% visited once a week. It is likely that the relatively high frequency of visits can be attributed to the good leisure offer in the city centre, which includes numerous restaurants and bars spread out beyond the primary retail area.

## G) SUGGESTED QUALITATIVE IMPROVEMENTS

- 4.38 The main improvements suggested by respondents are set out in the table below. Most respondents (9.7%) cited the need to attract larger retailers as their primary suggested qualitative improvement, although this figure is significantly lower (proportionally) than both

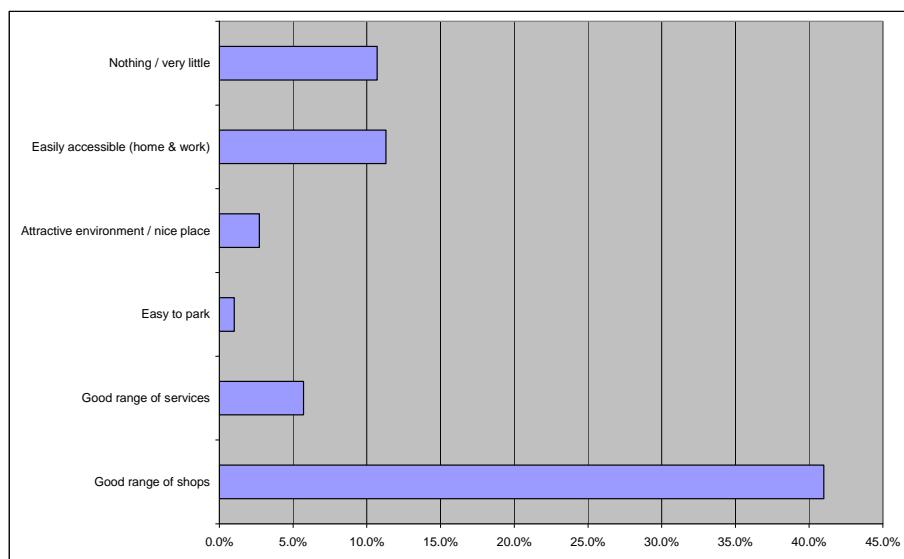
Chorley (38%) and Leyland (28.7%). The next most popular primary responses related to clean shopping street (9%) and then reduce the cost of parking (3%).



- 4.39 In terms of secondary responses, 4.3% of those interviewed claimed that improving the range of independent / specialist shops would persuade them to visit Preston City Centre more often. Other notable responses included improve the safety of pedestrians (3.3%) and clean shopping streets (3%).

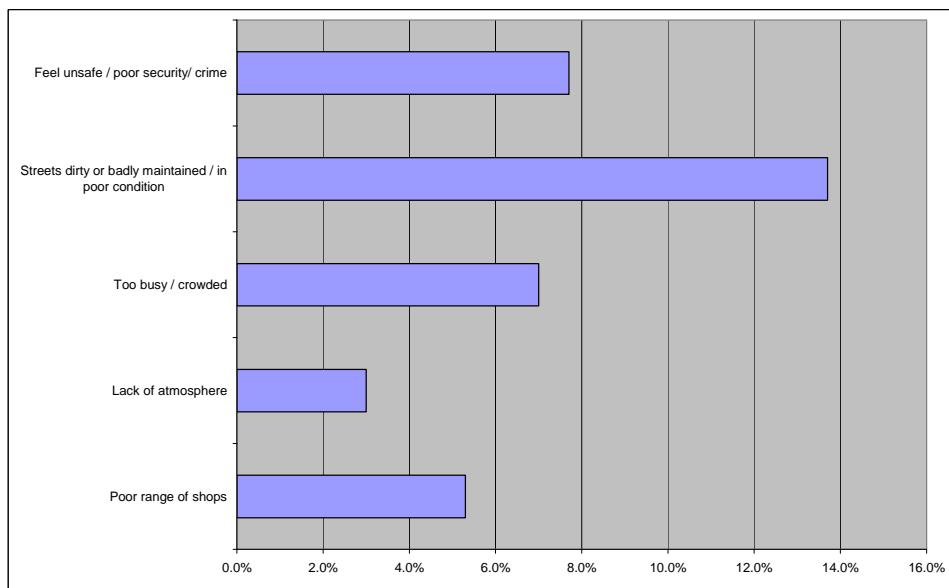
#### H) MAIN LIKES

- 4.40 The table below shows what respondents liked the most about Preston City Centre. The majority of those interviewed (41%) cited Preston's good range of shops are their main 'like', thus reflecting its broad shopping offer. Respondents also liked the city centre for its good accessibility (11.3%) and its range of services (5.7%).



## I) MAIN DISLIKES

- 4.41 Apart from 'nothing at all' (49%), the poor condition of shopping streets was the main stated dislike (13.7%). Other notable responses included a perception of feeling unsafe (7.7%) and too busy / crowded (7%). With respect to shopping-related responses, 5.3% of those interviewed cited the poor range of shops as their main dislike; this contradicts the high number of respondents claiming the good range of shops to be their main like.



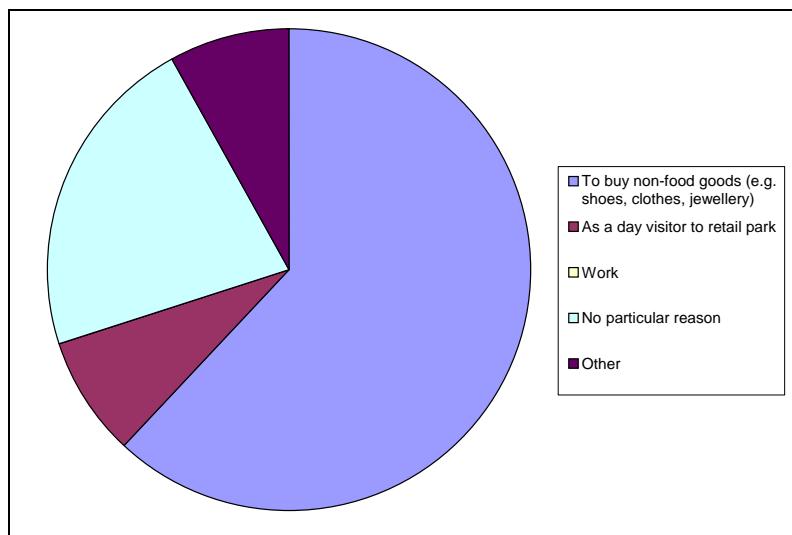
## 5. RETAIL PARK SURVEY RESULTS

- 5.1 In order to inform our wider assessment, shopper surveys were commissioned for the out-of-centre Deepdale Shopping Park (Preston) and the Capitol Centre (Walton-le-Dale). The retail parks perform an important role in the sub-regional retail hierarchy, particularly with regards to comparison goods.
- 5.2 A total of 100 retail park surveys (50 per retail park) were undertaken in February 2010 and spread across several days (weekday – weekend) so as to capture a wide cross section of regular visitors.

### DEEPDALE SHOPPING PARK

#### A) PURPOSE OF VISIT

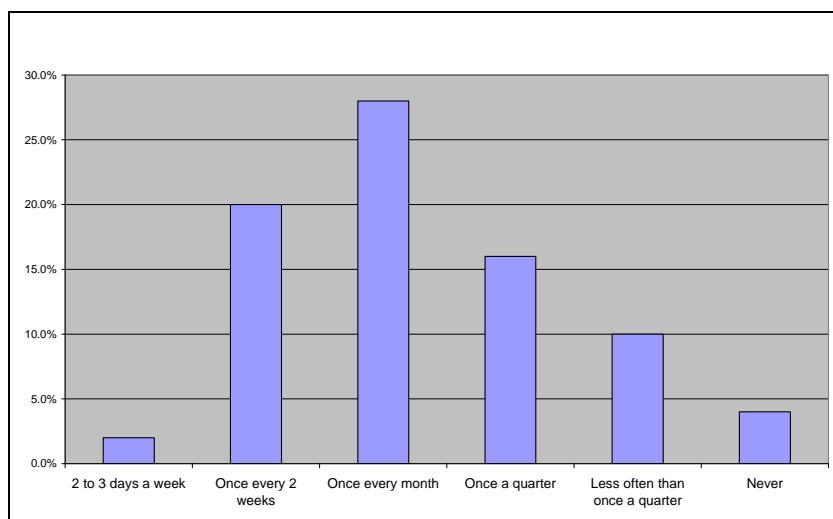
- 5.3 The majority of visitors interviewed (62%) were shopping for non-food goods such as clothes and electrical goods. Almost a quarter of visitors (22%) cited no particular reason for visiting the retail park.



- 5.4 A finer grain analysis of the survey results suggests that those aged 35-54 years are most likely to visit Deepdale Retail Park for the purpose of non-food shopping (76%), compared to 60% of respondents aged 18-34 years. The survey also shows that a higher proportion of women primarily visit the retail park to buy non-food goods (65.9%) relative to men (33.3%).

## B) FREQUENCY OF VISITS FOR NON-FOOD SHOPPING

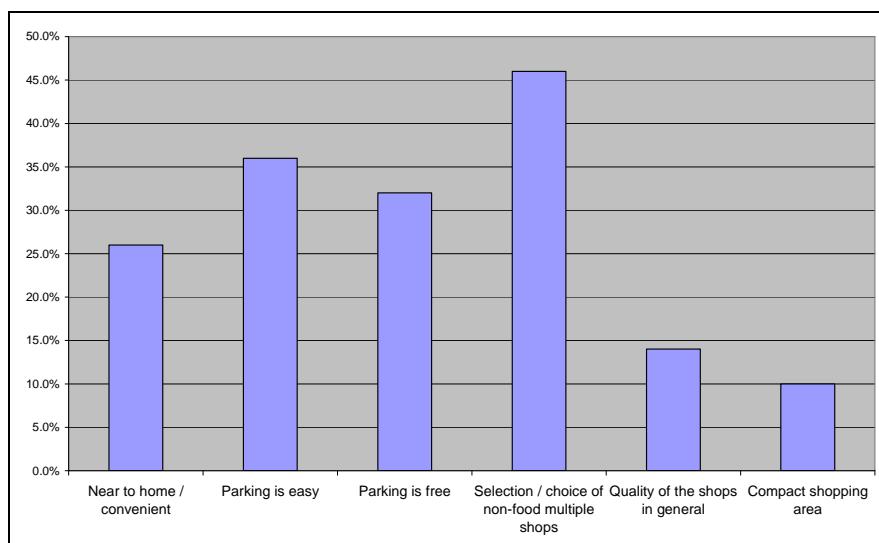
- 5.5 The table below indicates that the majority of respondents claimed to visit either once a month (28%) or once every two weeks (20%).



- 5.6 The survey results indicate that 16.7% of men visit 4-6 days per week, compared to only 2.3% of women. The over 55 years age group mostly visit between 4-6 days a week (11.1%).

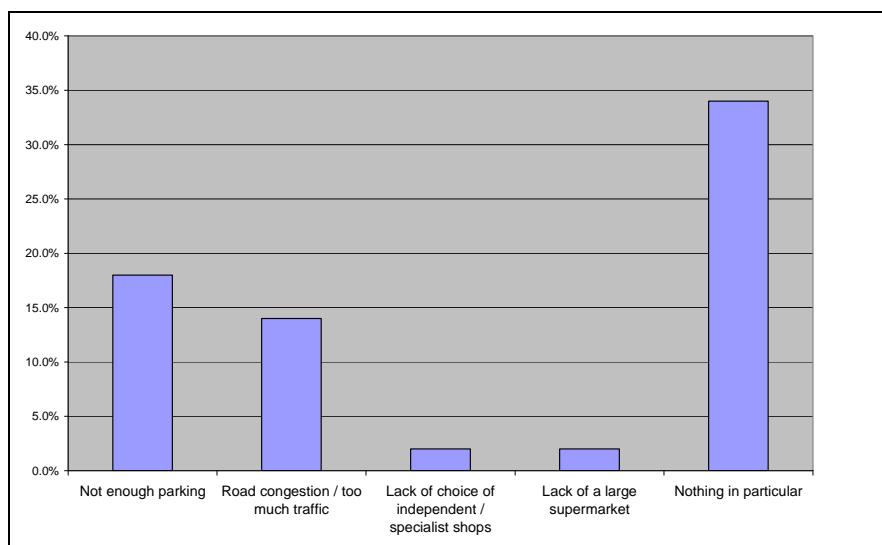
## C) MAIN LIKES

- 5.7 Almost half (46%) of respondents claimed the selection of non-food multiple retailers to be their main 'like'. A further 36% of visitors cited the ease of parking and 26% stated that the convenience of the location was their main attraction. Only 14% cited the quality of the shops.



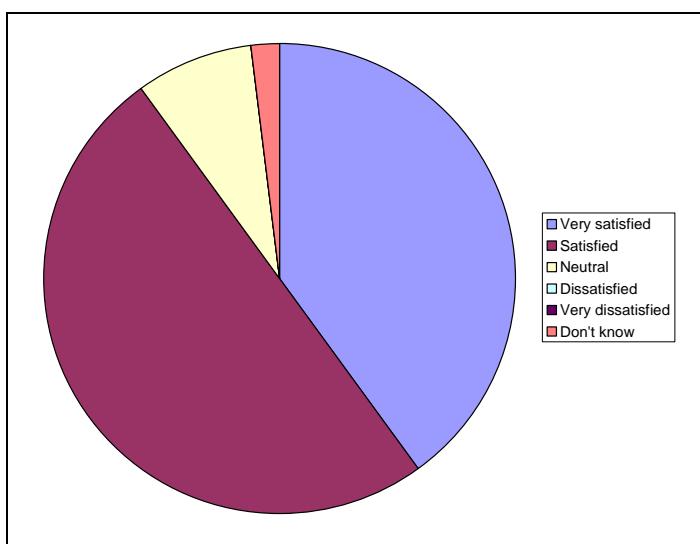
#### D) MAIN DISLIKES

- 5.8 The majority of respondents (34%) found nothing to dislike about the shopping park. The lack of parking was however cited by 18% of visitors and 14% raised concerns over the traffic congestion. Very few responses considered the lack of a supermarket or the lack of independent / specialist shops to be a main 'dislike' (each 4%).



#### E) VISITOR SATISFACTION

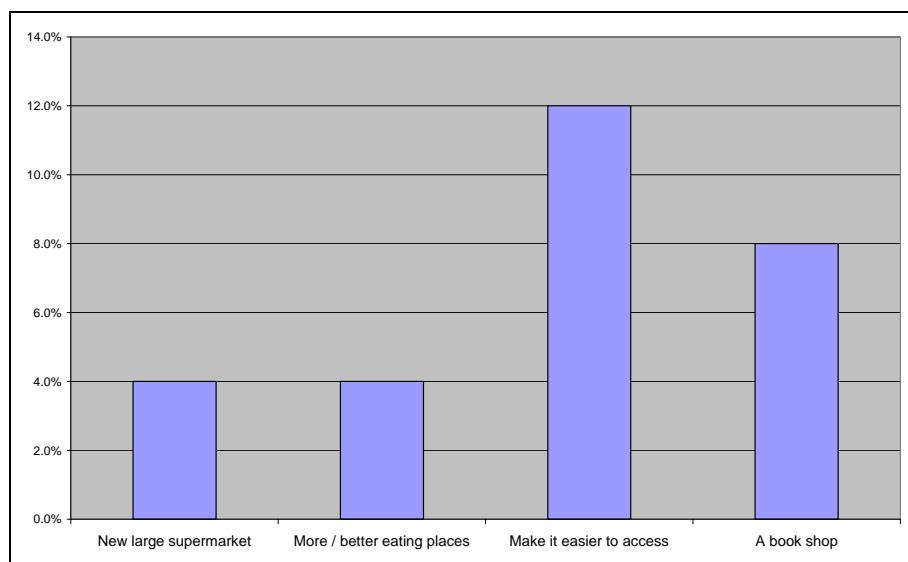
- 5.9 Half of all respondents were satisfied with the shopping park as a shopping destination and a further 40% were very satisfied. No negative responses were recorded with respect to the range and quality of shops. These results reflect the strength of retail provision at the shopping park.



- 5.10 A finer grain analysis of the survey results suggests that more women were very satisfied with the overall range and quality of shops at the retail park (43.2%) compared to men (16.7%). Nearly half (48%) of respondents aged 35-54 years were very satisfied; this is higher (proportionally) than those aged 18-34 years (33.3%) and over 55 years (22.2%).

#### F) SUGGESTED QUALITATIVE IMPROVEMENTS

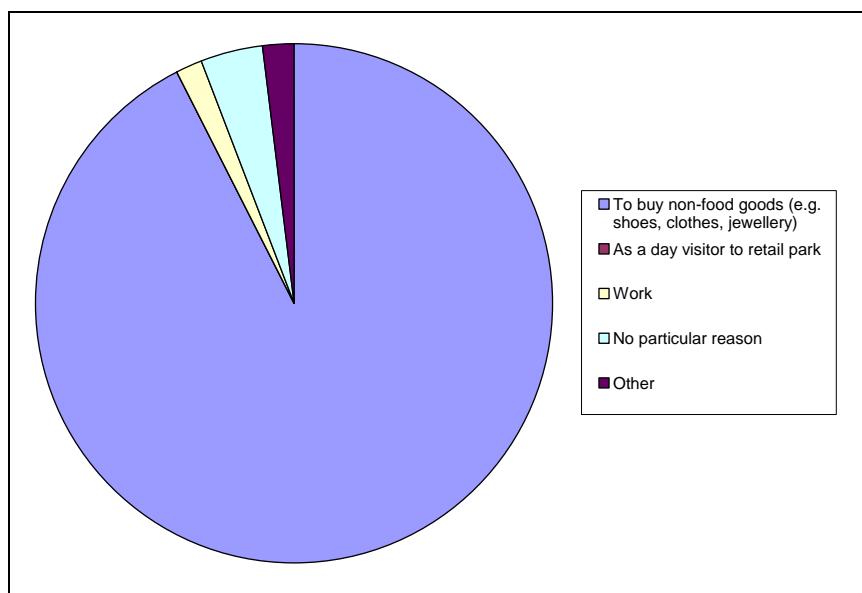
- 5.11 When asked how the shopping park could be improved, 12% of respondents considered that access to the centre could be made easier. A further 8% cited the need for a book shop. Only 4% of those questioned stated that a new large supermarket would persuade them to visit the retail park more often. Similarly, 4% of respondents commented on the need for a better range of places to eat.



## CAPITOL CENTRE

### A) PURPOSE OF VISIT

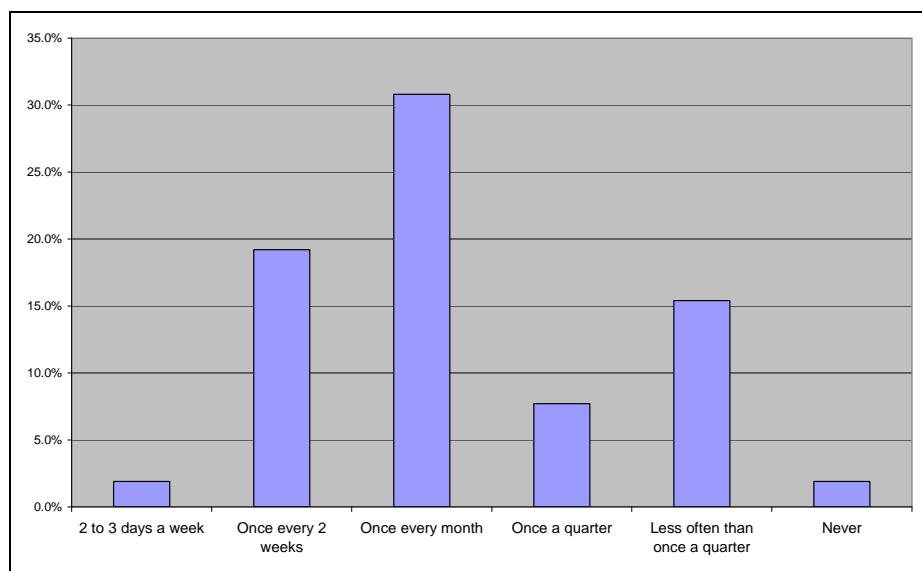
- 5.12 A large majority (92.3%) of visitors came to the Capitol Centre to shop for non-food goods; this reflects the current retail offer including Currys, Next and Tesco Home Plus.



- 5.13 A finer grain analysis of the survey results suggests that those aged 35-54 years are most likely to visit Capitol Centre for the purpose of non-food shopping (96%), compared to 87.5% of respondents aged 18-34 years. The survey also shows that a higher proportion of women primarily visit the retail park to buy non-food goods (97.1%) relative to men (82.4%).

### B) FREQUENCY OF VISITS FOR NON-FOOD SHOPPING

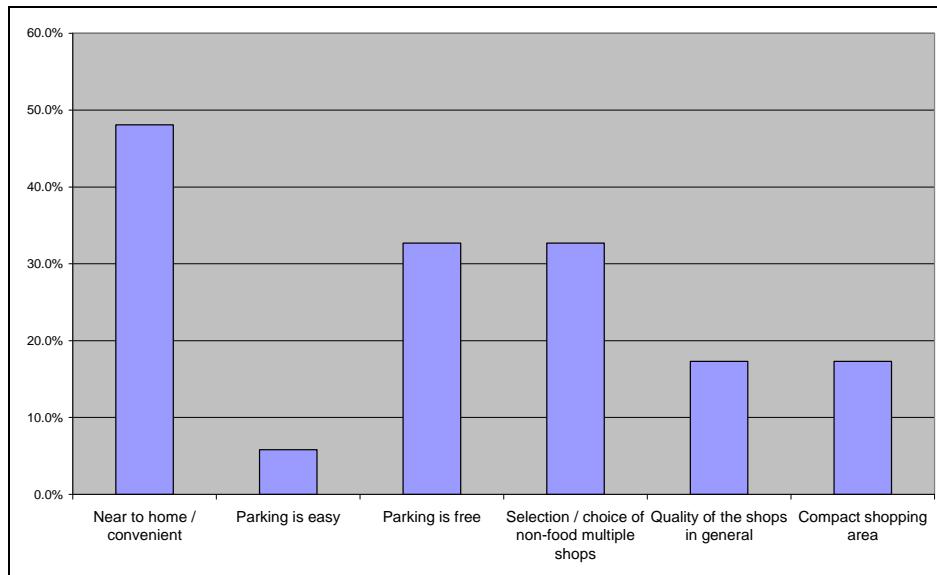
- 5.14 Almost a third (31%) of visitors to the Capitol Centre shop for non-food goods once every month, with 19% shopping for non-food goods once every two weeks. In addition, 15% of respondents stated that they shop for non-food goods less than once a quarter.



- 5.15 The survey results indicate that men visit the retail park more regularly than women for non-food shopping; 23.5% of men visiting once a fortnight compared to 17.1% of women. The 35-54 year age group was found to most likely to visit the Capitol Centre once a fortnight (20%), although 9.1% of the 'older' generation claimed to visit 2-3 days a week.

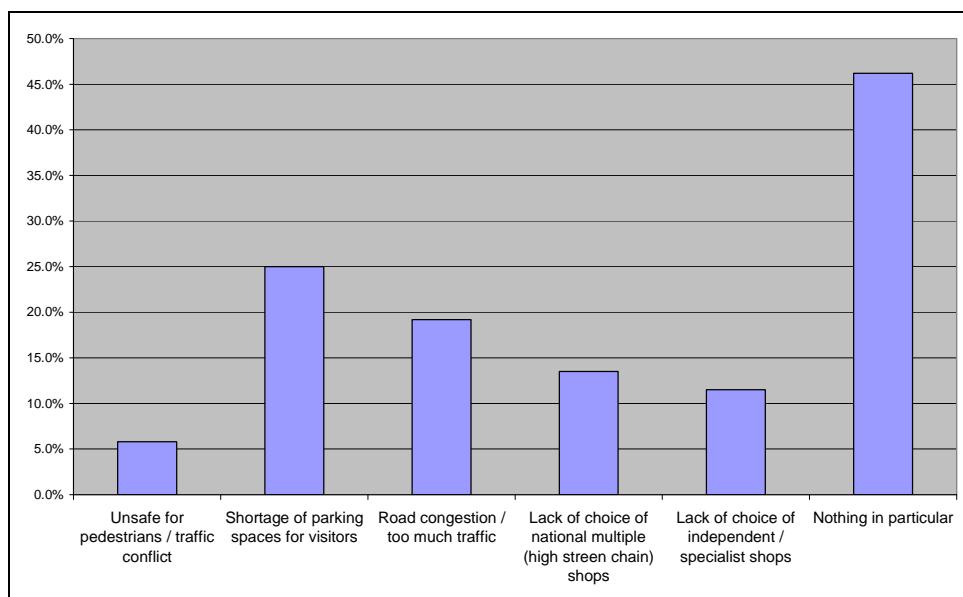
### C) MAIN LIKES

- 5.16 Almost half of all responses (48%) were attributed to the convenient location of the retail park. A third (33%) of respondents stated that free parking was their main attraction to the retail park, whilst a further 33% liked the range of non-food multiple retailers.



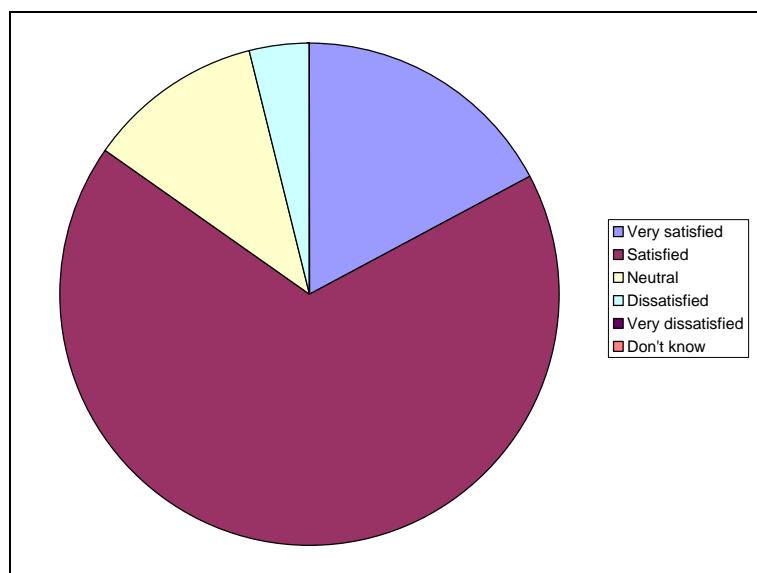
#### D) MAIN DISLIKES

- 5.17 Nearly half (46.2%) of respondents stated that there was nothing they disliked about the Capitol Centre. The main dislikes related to the shortage of parking spaces (25%) and traffic congestion (19.2%). The limited range of national multiple retailers and independent shops were also raised as particular dislikes.



#### E) VISITOR SATISFACTION

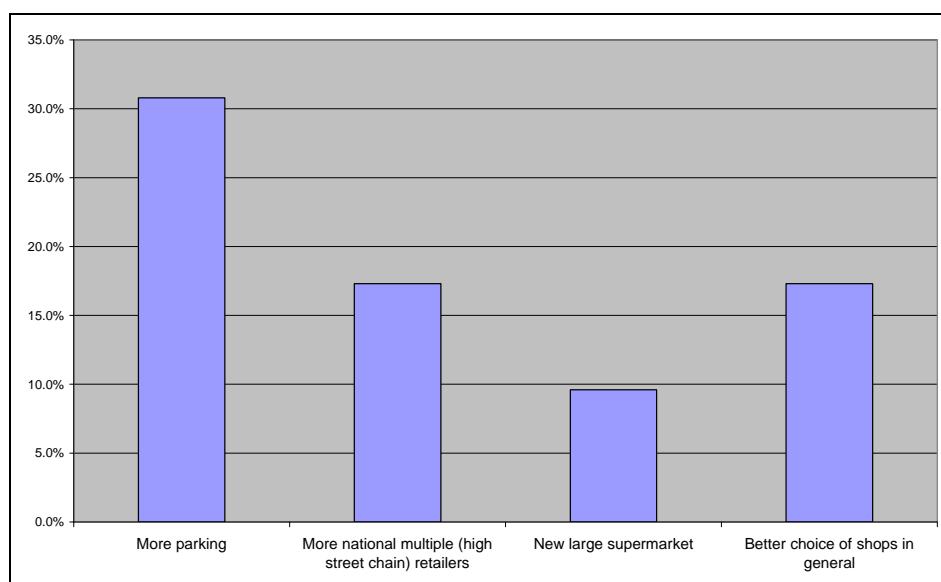
- 5.18 Most respondents (67%) were satisfied with the range and quality of shops at the Capitol Centre. Only a small minority (4%) stated they were dissatisfied with the retail provision.



- 5.19 The survey results suggest that more men were very satisfied with the overall range and quality of shops (35.3%) in comparison to women (8.6%). Over a quarter (28%) of respondents aged 35-54 years were very satisfied.

#### F) SUGGESTED QUALITATIVE IMPROVEMENTS

- 5.20 Almost a third of respondents suggested improving car parking capacity as their main improvement. Other notable responses included the need for a better range of shops and the lack of national multiple retailers (each 17.3%). A small number of respondents (9.6%) also stated that the provision of a new large supermarket would persuade them to visit more often. There are emerging proposals for a new foodstore at the Capitol Centre which is likely to further enhance the relative attraction of the retail park as a regional shopping destination.

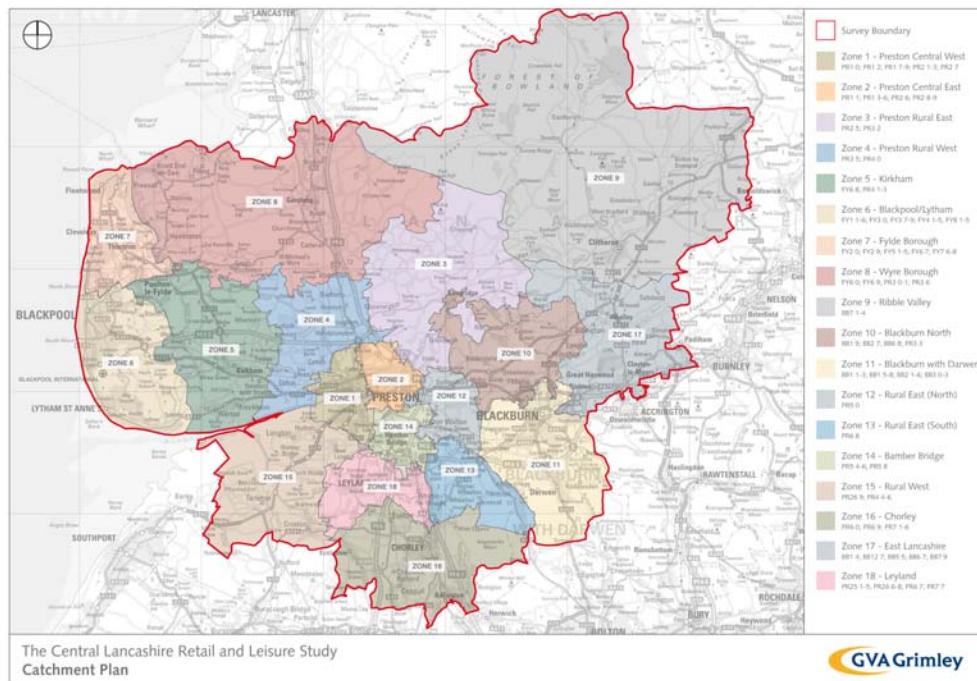


## 6. RETAIL CAPACITY METHODOLOGY

- 6.1 The capacity assessment adopts a conventional step-by-step methodology, drawing upon the results of the household telephone survey to understand existing shopping patterns and to model existing flows of available expenditure to the main retail destinations in Central Lancashire. Having established the baseline position, the quantitative capacity exercise goes on to establish the performance of the centres and their key anchor stores. The methodology, data inputs and assumptions used in the capacity assessment are set out below.

### 1) Study Area Definition

- 6.2 The study area and individual catchment zones for the principal centres across the Central Lancashire area have been defined on the basis of local geography (topography, accessibility etc.) and with reference to both the former local authority areas and catchment areas defined within their previous retail study exercises (i.e. Chorley Town Centre Retail Study). The study area has however been extended to include areas outside of the Central Lancashire area in order to capture sub-regional expenditure patterns and the wider catchment of Preston City Centre and large out-of-centre retail destinations such as Deepdale Shopping Park and the Capitol Centre at Walton-le-Dale.



- 6.3 The catchment zones are defined on the basis of individual postcode sectors, so as to generate population and expenditure data from the *Experian Micromarketer* system. A schedule of the postcodes forming the respective catchment zones is set out on the plan provided at Appendix 1.

## 2) Household Telephone Survey

- 6.4 The household telephone survey data is a key input into the expenditure, modelling and capacity elements of the exercise. A comprehensive survey of 1,600 households across the sub-region was completed by *NEMS Market Research* in 2007 in order to inform the City of Preston Retail Study update.
- 6.5 The survey sought to establish household shopping habits in terms of convenience goods (main food / top-up shopping), comparison and bulky comparison goods expenditure. In accordance with best practice, the results of the two types of food shopping questions were quantified through the application of a robust, industry standard weighting (75% main food; 25% top-up food shopping split), which reflects the estimated proportion of expenditure accounted for main (bulk) and daily top-up food shopping. This produces a composite pattern of convenience spending, enabling the identification of the market share each main centre and its main stores presently command.
- 6.6 With regards to comparison goods, the survey included the following categories of questions:

COMPARISON GOODS	BULKY DURABLE GOODS
• Clothing, Footwear and Other Fashion Goods	• Furniture, Floor Coverings and Household Textiles
• Personal Goods	• DIY and Decorating Goods
• Recreational Goods	• Major Household Appliances
	• Large Electrical Goods

- 6.7 The results of all these questions were merged using weighting to reflect the amount of per capita expenditure in the identified survey zones for each of the different categories of goods. For example, as considerably more money is spent on clothing and footwear than on DIY goods, then the former goods category has a higher weighting. The weighting exercise produces a composition pattern of comparison goods spending, expressed as a market share for each principal centre and destination in the study area.
- 6.8 In addition, the household survey also sought to understand where people presently go to pursue their main leisure activities (cinema, eating out etc). The survey also sought to determine customer / visitor profile, mode of travel, the attraction and a number of attitudinal

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questions determining what users think about the retail and leisure offer, environmental quality and their perception of safety.

### 3) Data Variables

#### a) Estimates of Population in the Survey Area

- 6.9 The population estimates and forecasts for each of the survey zones are derived from the *Experian Micromarketer* database which provides population estimates for small localised areas based on trend-line projections from the 2001 Census results. The population growth of the survey area in the period to 2026 is set out in Table 1 of the quantitative capacity tables.

#### b) Available Expenditure in the Survey Area

##### **Expenditure**

- 6.10 *Experian* data is used to provide estimates of per capita expenditure on convenience and comparison goods in 2008 prices. The current growth rates for convenience and comparison expenditure are set below:
- **CONVENIENCE;** 0.4% P.A. (2008-2010); 0.8% P.A. (2011-2016); and 1.1% P.A. (2017-2026)
  - **COMPARISON;** -1.1% P.A. (2008-2010); 3.1% P.A. (2011-2015); 4.3% P.A. (2016-2018); and 4.7% P.A. (2019-2026)

- 6.11 The adjusted expenditure figures are applied to the population forecasts to obtain the total available expenditure within each of the survey zones. The growth rates are conservative and take account of the current economic climate prior to reverting to ultra long-term trends after the initial five year period through to 2015.

##### **Special Forms of Trading**

- 6.12 Relevant deductions for special forms of trading (e.g. expenditure not available to physically spend in shops<sup>1</sup>) have been made in accordance with the latest Experian forecasts and in-house GVA Grimley research. The deductions are set out below.

	2008	2010	2015	2018-2026
<b>CONVENIENCE GOODS</b>	3%	3.75%	4.5%	5.5%
<b>COMPARISON GOODS</b>	7.5%	8.2%	11.4%	11.5%

### Sales Densities

- 6.13 In order to review the current performance of each town centre as a retail destination and also the principal foodstores within each respective centre, we have firstly modelled their existing performance and turnover through the household survey data, and secondly compared their existing turnover with estimates of trading at company average levels.
- 6.14 The company average trading levels have been calculated from average (goods-based) sales density figures obtained from *Mintel Retail Rankings* and *Verdict*. Where company average trading figures are not available, (i.e. for smaller local and independent retailers) we have estimated average trading levels on the basis of site visits and our experience.
- 6.15 In assessing the capacity for future retail floorspace we have assumed that the efficiency with which existing floorspace is being used will improve over time. The sales efficiency growth rates used in the quantitative assessment are as follows:
- **CONVENIENCE;** 0.1% P.A. (2010-2016) and 0.5% P.A (2017-2026)
  - **COMPARISON;** 1.5% P.A. (2010-2026)
- 6.16 We consider these sales density increases to be conservative and robust, reflecting the nature of the towns within Central Lancashire and the present short to medium term trading / economic conditions.

### Floorspace Data

- 6.17 The floorspace data for each principal centre (Preston, Chorley and Leyland) and retail destinations (foodstores, retail parks etc.) is drawn from Experian Goad survey reports and a combination of on-site update surveys, Institute of Grocery Distribution (IGD) reports and the measurement of individual units utilising the Promap database.
- 6.18 We have also sought to identify the proportion of any non-food floorspace within the main convenience stores through utilising the latest published data from *Verdict* on floorspace composition as well making our own store visits. The capacity assessment has also had regard to any extant planning permissions for new retail development within the main centres.

## 4) Capacity Review

- 6.19 Applying the results of the household telephone survey to population, expenditure and floorspace data inputs detailed in the previous section, it is possible to model the performance and market share of principal centres and stores within Central Lancashire
- 6.20 In accordance with the Study Brief requirements, the baseline quantitative capacity, which is generated by population and expenditure growth, is presented on several strategic dates (2010, 2015 etc.) to accord with the lifespan of the Joint Core Strategy / Local Development Framework (LDF).
- 6.21 It should be noted within this context therefore that whilst our assessment identifies quantitative capacity in the period through to 2026, the capacity identified after 2016 should be treated with particular caution (PPS4 specifies 5 year assessment periods).
- 6.22 The comparison capacity assessment (Appendix 5) is provided on an individual centre-by-centre basis in accordance with the PPS4 *town centres first approach*. Convenience capacity (Appendices 2 – 4) is identified on the basis of medium and large retailers in order to qualitatively distinguish between the two discrete convenience market sectors, as follows:
- **Medium Convenience Retailers;** the medium order retailers are considered to include Co-Op, Booth's, Iceland Somerfield, Aldi, Netto and Lidl. On the basis of published company sales data from Mintel / Verdict, an average sales density figure of £5,000 / m<sup>2</sup> has been utilised in order to identify the floorspace requirement for such retailers.
  - **Large Convenience Retailers;** the mainstream retailers are commonly accepted to comprise Asda, Morrison's, Sainsbury's and Tesco. An average sales density figure (£12,000 / m<sup>2</sup>) has been used to quantify floorspace capacity.
- 6.23 The convenience capacity assessment goes on to consider the potential for any adjustment in existing market shares or the redistribution of any overtrading surplus from existing stores which are over-performing against their company benchmark turnover.
- 6.24 It should be noted however that the potential uplift in expenditure only represents actual capacity if retail proposals and operators that emerge can genuinely qualitatively add to the existing retail offer of a town centre by strengthening its attractiveness so to achieve the envisaged improvements in market share performance.
- 6.25 Any market share enhancement assessment should be viewed against the framework provided by PPS4 which states that appropriateness of scale rather than specific quantitative

need is the key determinant. Therefore, should proposals emerge for the development of new retail facilities within the primary shopping area of the principal centres within Central Lancashire then an application should be considered on its merits, having particular regard to the qualitative uplift that proposals could potentially achieve.

## 7. CONVENIENCE RETAIL ANALYSIS

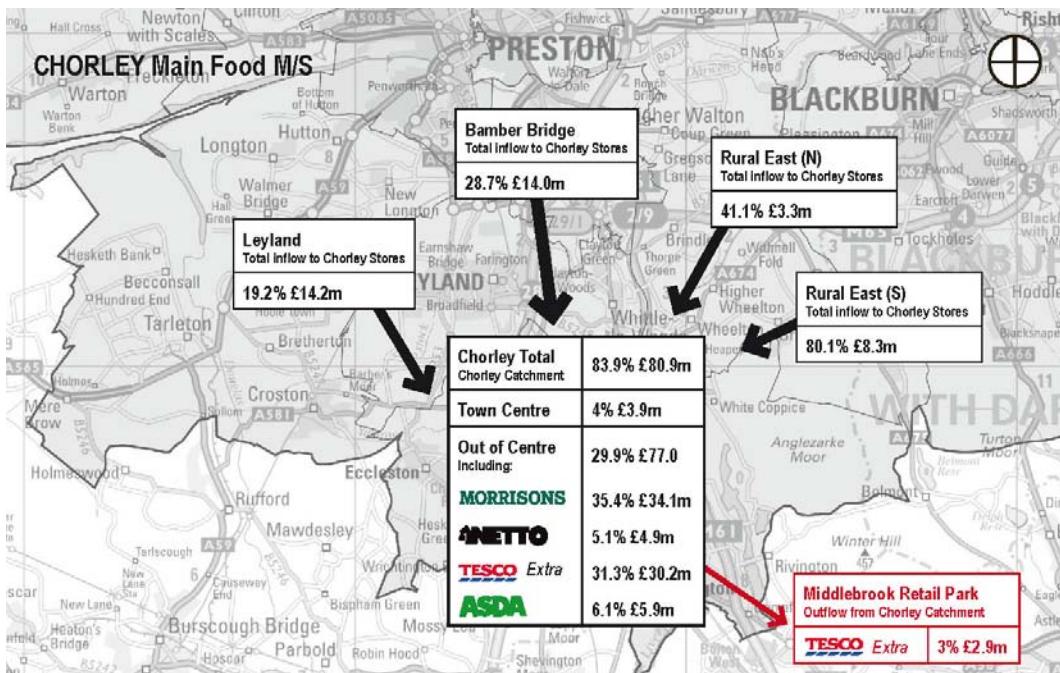
- 7.1 Main food (bulk) shopping is localised in its nature with shoppers unlikely to visit alternative stores outside of their immediate catchment unless there is a specific reason (e.g. inadequate retail offer, alternative attraction etc.). Each of the main centres in Central Lancashire has at least one large mainstream foodstore, complemented by discounters and local independents.
- 7.2 Top-up shopping for daily perishables (milk, bread etc.) is however more localised in its nature with shoppers more likely to buy daily goods from local convenience shops near to their home rather than travel to foodstores. Smaller local centres across the sub-region therefore play an important top-up function in meeting local residents' daily needs.

### CHORLEY

- 7.3 The capacity assessment identifies an overall convenience expenditure pot in the Chorley catchment (Zone 16) of £128.5 million in 2010, rising to £163.5 million in 2026; this is an increase of £35 million over the Core Strategy period.

#### MAIN FOOD SHOPPING

- 7.4 There is a total of £96.4 million of main food expenditure arising within the Chorley catchment; this is projected to rise to £122.6 million in 2026. The household survey results indicate that convenience provision within Chorley town centre presently only retains 4% (£3.9 million) of main food expenditure arising within its defined catchment. The EH Booth and Iceland each secure 1% (£1 million) main food market share.
- 7.5 A significant quantum of expenditure arising within the Chorley catchment is directed to the Morrison's store off Brooke Street which secures a 35.4% (£34.1 million) market share. This Morrison's store occupies an out-of-centre relative to the town centre primary shopping area.



- 7.6 As the above plan highlights, a further 31.3% (£30.2 million) of main food expenditure is captured by the out-of-centre Tesco Extra store (Foxhole Road). The Asda store at Clayton Green claims a 6.1% (£5.9 million) market share. The out-of-centre Netto on Water Street retains 5.1% (£4.9 million) of main food spend within the Chorley catchment.
- 7.7 Overall, convenience provision outside Chorley town centre secures a 79.9% (£77 million) market share from the Chorley catchment. When this is taken together with the in-centre market share, the total main food retention within the Chorley catchment is 83.9%. This is a relatively strong market share performance.

### MAIN FOOD EXPENDITURE INFLOWS TO CHORLEY CATCHMENT

- 7.8 The household survey identifies that convenience provision within Chorley serves a wider catchment extending beyond the borough boundaries. The out-of-centre Morrison's (Brooke Street) draws a 26.7% (£2.8 million) market share from the Rural East South catchment (Zone 13) in addition to 4.5% (£3.3 million) from the Leyland catchment (Zone 18).
- 7.9 The Asda store at Clayton Green also draws similar inflows from surrounding catchment zones including 30.8% (£2.4 million) from Rural East North (Zone 12), 10% (£1 million) from Rural East South (Zone 13), 23.6% (£11.5 million) from Bamber Bridge (Zone 14) and 10.2% (£7.6 million) from Leyland (Zone 18).

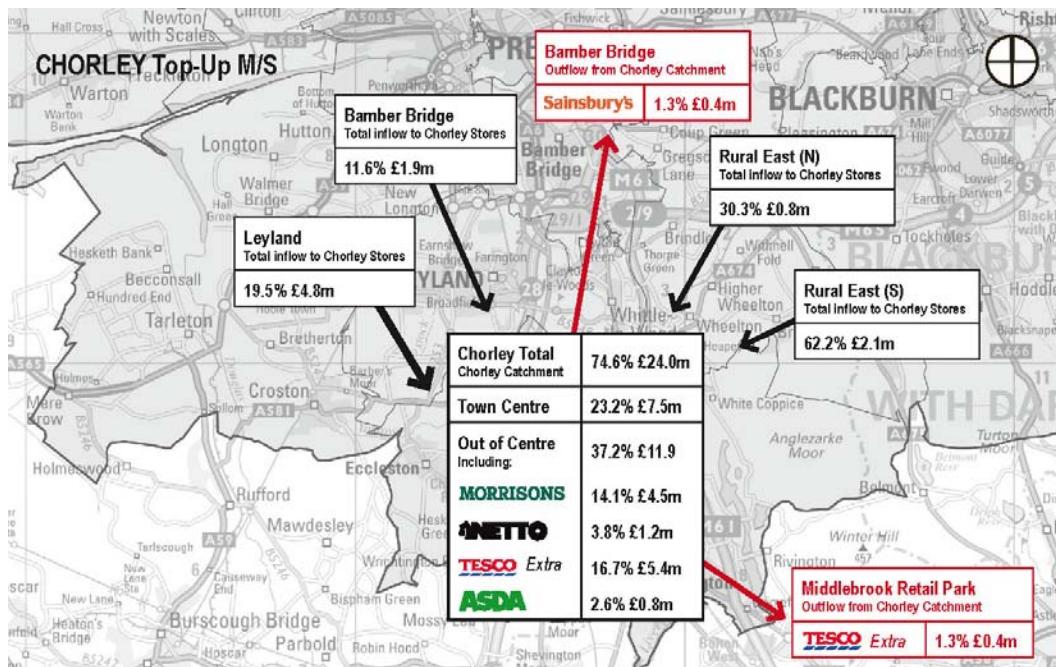
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- 7.10 The out-of-centre Tesco Extra store (Foxhole Road) serves a more limited catchment but attracts notable main food inflows from the Rural East South (26.7% / £2.8 million) and Rural West (6.8% / £2.7 million) catchment zones.

### **MAIN FOOD EXPENDITURE OUTFLOWS FROM CHORLEY CATCHMENT**

- 7.11 Given the strength of the existing convenience offer in the Chorley catchment there is limited leakage of main food shopping to destinations outside of the Borough. The household survey does however identify some minor main food expenditure leakage from the Chorley catchment to the Tesco Extra store at Middlebrook Retail Park (Horwich) which attracts a 3% (£2.9 million) main food market share.

### **TOP-UP FOOD SHOPPING**

- 7.12 There is a total of £32.1 million of top-up expenditure arising within the Chorley catchment; this is due to increase by £8.8 million to £40.9 million by 2026. The household survey results confirm that existing convenience provision within Chorley town centre presently retains 23.2% (£7.5 million) of top-up spending arising within the Chorley catchment. Whilst the EH Booth and Iceland stores in the town centre are found to perform a more limited role (2.6% / £0.8 million market shares each), local independent shops in the town centre (18% / £5.8 million) secure positive top-up market shares.
- 7.13 In terms of convenience provision outside Chorley town centre, the survey results indicate that the Tesco Extra store on Foxhole Road performs well in securing a 16.7% (£5.4 million) top-up market share from the Chorley catchment. The out-of-centre Morrison's store commands a 14.1% (£4.5 million) market share, whilst the Asda store at Clayton Green performs a lesser top-up role in claiming a 2.6% (£0.8 million) market share.



- 7.14 The localised nature of top-up shopping is however reflected by the fact that local convenience provision in surrounding settlements such as Adlington (3.9% / £1.3 million), Eccleston (6.4% / £2.1 million) and Coppull (2.6% / £0.8 million) claim small market shares.
- 7.15 Overall, when the market share of provision outside the town centre is taken together with the in-centre market share, the total top-up food retention within the Chorley catchment is 74.6% (£24 million). This again is a relatively strong market share performance given the dissipate nature of top-up shopping.

### TOP-UP FOOD EXPENDITURE INFLOWS TO CHORLEY CATCHMENT

- 7.16 The survey results indicate limited inflows of expenditure to convenience provision within the Chorley catchment. The main inflow to local independent provision within the town centre is from the Rural East South catchment (17.4% / £0.6 million).
- 7.17 Chorley's main out-of-centre foodstores command substantial inflows of top-up expenditure with Morrison's and Tesco Extra drawing 24.1% (£0.8 million) and 17.2% (£0.6 million) respectively from the Rural East South catchment. The Asda store at Clayton Green principally draws top-up trade from the Rural East North (21.2% / £0.6 million), Bamber Bridge (11.6% / £1.9 million) and Leyland (11.1% / £2.7 million) catchment zones.

## TOP-UP FOOD EXPENDITURE OUTFLOWS FROM CHORLEY CATCHMENT

- 7.18 There is limited top-up expenditure leakage from the Chorley catchment; the Tesco Extra store at Middlebrook Retail Park (Horwich) and the out-of-centre Sainsbury's on Cuerden Way (Bamber Bridge) both draw a 1.3% (£0.4 million) market share.

## OVERALL MARKET SHARE (MAIN FOOD AND TOP-UP COMBINED)

- 7.19 Taking the identified main food and top-up market shares together, the quantitative assessment identifies that existing convenience provision within Chorley town centre only secures 8.8% (£11.3 million) of convenience expenditure arising within the Chorley catchment.
- 7.20 In terms of provision outside of Chorley town centre, the principal destination is the Morrison's store on Brooke Street which claims an overall 30.1% (£38.7 million) market share from the Chorley catchment. The out-of-centre Tesco Extra store secures 27.7% (£35.5 million) and Asda Clayton Green claims 5.2% (£6.7 million) from the Chorley catchment.
- 7.21 Taking the market share of existing provision within (8.8%) and outside Chorley town centre (72.8%) together the overall retention level within the Chorley catchment zone is 81.6% (£104.8 million).
- 7.22 Existing convenience provision in the borough does however serve a wider catchment, and the quantitative assessment identifies that town centre provision secures 9.4% (£1.3 million) of overall catchment spend from the Rural East South zone in addition to minor inflow from the Leyland zone (2.4% / £2.4 million).
- 7.23 The Morrison's, Asda and Tesco Extra stores draw from a wider catchment securing 37.7% (£4 million) from the Rural East North catchment, 66.3% (£9.1 million) from the Rural East South catchment, 23.5% (£15.3 million) from the Bamber Bridge catchment and 16.9% (£16.6 million) from the Leyland catchment.

## INDIVIDUAL STORE PERFORMANCE

- 7.24 On the basis of identified expenditure flows (main-food and top-up), the capacity assessment identifies the following performance of convenience provision within Chorley:

### TOWN CENTRE

- **EH Booth (Market Street)** – the store is potentially undertrading based on its survey-derived turnover of £6.2 million which is £2.9 million under its expected company benchmark turnover of £9 million.
- **Iceland (Market Walk)** – the store secures a survey-based turnover of £2.4 million; this is £0.6 million below its expected company benchmark turnover of £3 million.

### OUT-OF-CENTRE

- **Morrison's (Brooke Street)** – significantly overtrading in quantitative terms; the survey based turnover of £49.1 million is £23.7 million above its expected company benchmark turnover of £25.5 million.
- **Tesco Extra (Foxhole)** – the survey based turnover of £46.1 million is slightly below its expected company benchmark of £46.9 million (i.e. £0.8 million undertrading).
- **Asda (Clayton Green)** – the survey based turnover of £40.5 million is £6.7 million above its expected company benchmark of £33.8 million.
- **Netto (Water Street)** – secures a survey-based turnover of £7.2 million; this is £5.6 million above its expected benchmark of £1.5 million.

- 7.25 The survey-based assessment also finds that existing local independent provision within Chorley town centre (£8.5 million survey turnover) is performing strongly relative to an estimated benchmark turnover of £3.3 million. However, the overtrading position of local independents should be treated with extreme caution and should not be used to justify any quantitative need for new convenience provision given that it is based on a hypothetical sales density figure (£2,000 / m<sup>2</sup>) for independent convenience retailers.
- 7.26 It is not possible to accurately estimate the 'expected' sales performance of local independents and in any event PPS4 guidance acknowledges that sustaining high levels of turnover needs to be balanced against new provision coming forward. It is our view that high levels of turnover for local independent retailers are beneficial to the wider vitality and viability of the town centre.
- 7.27 The dominant trading position of the out-of-centre Morrison's store (Brooke Street) does however generate material quantitative and qualitative concerns in terms of consumer choice and competition within Chorley town centre; visits to the store at peak times has indicated that the store is particularly busy with queues at the checkouts and car park entrances. The level of overtrading identified for the Asda at Clayton Green also offers additional support for new sequentially compliant mainstream foodstore provision in Chorley to address

- 7.28 In terms of the trading performance of other provision outside of the town centre, the assessment finds that the Netto is trading £5.6 million above its expected company benchmark turnover whilst the Tesco Extra store (Foxhole Road) is trading slightly below (£0.8 million) its expected benchmark.

### **a) Forward Position – Constant Market Share**

#### **BASELINE CAPACITY – NO COMMITMENTS**

- 7.29 The capacity modelling exercise, which is based on a constant market share and takes account of forward population, expenditure growth and trading efficiency increases, generates the following floorspace requirement:

	2015	2018	2021	2026
<b>MEDIUM RETAILER<sup>ii</sup></b>	<b>1,502 m<sup>2</sup> (gross)</b>	<b>2,429 m<sup>2</sup> (gross)</b>	<b>3,237 m<sup>2</sup> (gross)</b>	<b>4,615 m<sup>2</sup> (gross)</b>
<b>LARGE RETAILER<sup>iii</sup></b>	<b>715 m<sup>2</sup> (gross)</b>	<b>1,157 m<sup>2</sup> (gross)</b>	<b>1,541 m<sup>2</sup> (gross)</b>	<b>2,197 m<sup>2</sup> (gross)</b>

- 7.30 As detailed in the last chapter, the floorspace capacity for medium and large retailers is distinguished separately for comparative purposes. The floorspace capacity for medium retailers should however be treated with caution; the retailers are unlikely to significantly alter current expenditure patterns or meet local residents identified needs. The capacity is therefore presented on a hypothetical basis and there is no requirement for the Council to proactively plan to meet the identified needs given the existing medium retail offer in Chorley (albeit out-of-centre Netto and Aldi stores).
- 7.31 The capacity identified above does however not take account of formal planning commitments within the Chorley catchment and the revised capacity position is set out below for reference.

#### **BASELINE CAPACITY – WITH COMMITMENTS**

- 7.32 This baseline capacity position does however not take into account the quantitative claims that recently approved Tesco foodstore development at Buckshaw Village (LPA ref: 09/00933/FUL) would make on available expenditure in the wider Chorley catchment. Assuming that the foodstore would achieve a benchmark turnover of £22.1 million and that 40% of its turnover (£8.9 million) would be derived from the Chorley Zone (reflecting its close proximity to the Leyland and Rural East South catchments), the expenditure capacity within the Chorley catchment is reduced in the early phases of the emerging Core Strategy, as follows:

	2015	2018	2021	2026
MEDIUM RETAILER	-712 m <sup>2</sup> (gross)	215 m <sup>2</sup> (gross)	1,022 m <sup>2</sup> (gross)	2,400 m <sup>2</sup> (gross)
LARGE RETAILER	-339 m <sup>2</sup> (gross)	102 m <sup>2</sup> (gross)	487 m <sup>2</sup> (gross)	1,143 m <sup>2</sup> (gross)

- 7.33 The baseline capacity position does however ignore the potential quantitative and qualitative need arising from the overtrading performance of the existing Morrison's store in Chorley and this is considered below.

### b) Forward Capacity – Market Share Improvement

- 7.34 Given the strong main food (83.9%) and top-up (74.6%) expenditure retention levels of existing convenience provision (within and outside town centre) within the Chorley catchment, the scope for further substantial market share enhancement is in our view limited. The expenditure retention levels are sustainable and current outflows / leakage (Tesco Extra Middlebrook, Sainsbury's Cuerden Way etc.) may reflect travel to work patterns rather than any clear quantitative or qualitative deficiency in the existing convenience offer in Chorley.
- 7.35 The survey-based exercise identifies that the out-of-centre Morrison's foodstore in Chorley is significantly overtrading in quantitative terms (£23.6 million) above its expected company benchmark; this level of overtrading has also been confirmed through separate visits to the store which has found it to be very busy at peak shopping times (checkouts and car parks). Local Shops in Chorley (£5.2 million), Netto (£5.6 million), Asda Clayton Green (£6.7 million) and Local Shops in Eccleston (£2.9 million) are also identified through the survey-based exercise to be overtrading.
- 7.36 On the basis of the identified overtrading levels, there is a quantitative and qualitative need for a new centrally located mainstream foodstore in Chorley town centre to rebalance the trading performance of existing mainstream stores.
- 7.37 The capacity assessment therefore sets out the floorspace requirement on the basis of 75% the current Morrison's overtrading surplus being available to support new convenience provision within the Chorley catchment. This is a conservative estimate given that the trading performance of the store is likely to be reduced by the new Tesco at Buckshaw Village (i.e. local residents in the northern area of the Chorley catchment likely to change convenience shopping habits). The store is not afforded any policy protection in PPS4 given its out-of-centre location.

7.38 The diversion of the overtrading surplus from the other convenience facilities in the Chorley catchment is not considered to be realistic to support a new mainstream store in the town centre given that:

- The turnover of independent shops must be treated with extreme caution due to the lack of published data on sales performance / turnover; it is beneficial in PPS4 terms that local shops are trading strongly given their particular contribution to centre vitality and viability.
- The Asda store is located within a district centre and benefits from its location to the north of Chorley. The store attracts a significant quantum of trade from the Rural East North and Leyland catchment zones due to its accessible location; a new store in Chorley town centre is unlikely to reverse any of these inflows as shoppers are highly unlikely to travel past a full range store to visit another comparable store.

7.39 Therefore, after taking account of the quantitative claims of the new Tesco store at Buckshaw Village, our assessment identifies the following capacity / need on the basis of conservative clawback of Morrison's current overtrading surplus:

#### **FORWARD CAPACITY – COMMITMENTS / OVERTRADING CLAWBACK**

	2015	2018	2021	2026
<b>MEDIUM RETAILER</b>	<b>3,723 m<sup>2</sup> (gross)</b>	<b>4,704 m<sup>2</sup> (gross)</b>	<b>5,511 m<sup>2</sup> (gross)</b>	<b>6,889 m<sup>2</sup> (gross)</b>
<b>LARGE RETAILER</b>	<b>1,773 m<sup>2</sup> (gross)</b>	<b>2,240 m<sup>2</sup> (gross)</b>	<b>2,624 m<sup>2</sup> (gross)</b>	<b>3,280 m<sup>2</sup> (gross)</b>

7.40 Clearly, the re-assignment of the Morrison's overtrading surplus to a sequentially compliant location which encourages linked shopping trips with the town centre will deliver significant PPS4 benefits. The diversion of the Morrison's trade to another out-of-centre foodstore which is poorly located relative to the town centre primary shopping area would deliver less material regeneration and PPS4 benefits.

7.41 The clawback of the Morrison's overtrading surplus will however only be realised through provision of a new mainstream foodstore which is of a comparable scale (full range convenience offer) in order to enable it compete on a like-for-like basis in terms of product range, pricing and facilities. Whilst capacity is therefore identified above for medium / discount retailers, any new provision is unlikely to be able to materially compete on a like-for-like basis with the existing Morrison's store. There is no realistic prospect of a medium retailer genuinely clawing-back from Morrison's.

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- 7.42 We therefore conclude that there is quantitative and qualitative support for a new mainstream foodstore in Chorley and it is recommend that the Council proactively plans through the LDF process to identify a suitable, sequentially compliant site to accommodate a new foodstore. It will be important however that the emerging Core Strategy / LDF policy builds in sufficient flexibility in capacity terms so as to enable commercially responsive proposals to come forward on a sequentially compliant site which can genuinely facilitate linked shopping trips with the town centre.

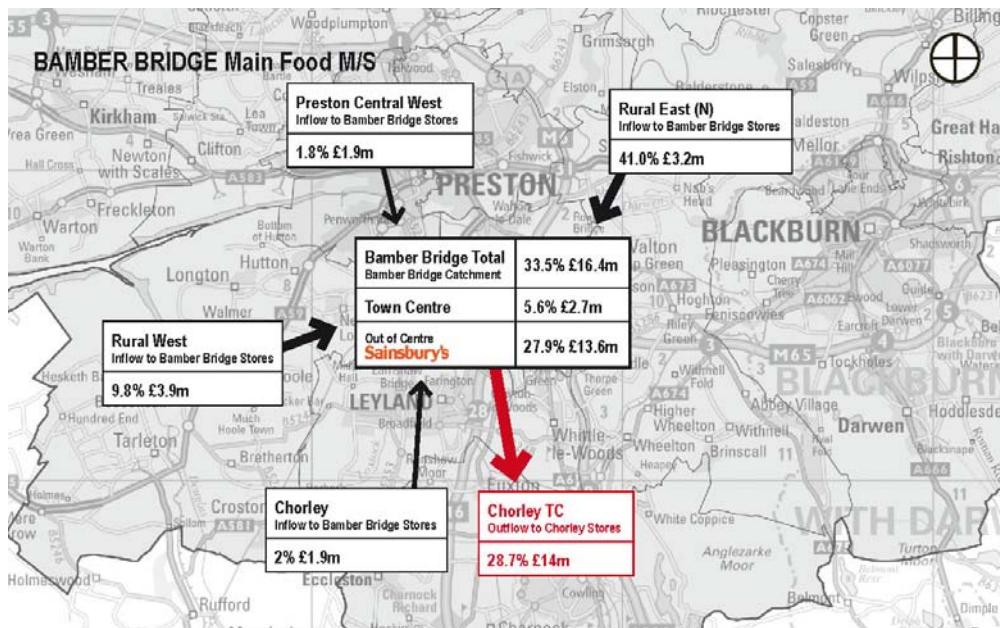
## SOUTH RIBBLE

- 7.43 South Ribble Borough is largely split into two separate catchment zones (Bamber Bridge and Leyland). A small area to the north of the borough (Penwortham) is however included in the Preston Central West zone.
- 7.44 The quantitative assessment identifies an overall convenience expenditure total of £65.1 million in the Bamber Bridge zone in 2010, rising to £84.9 million in 2026 (Core Strategy proposed end-date). The overall expenditure capacity within the Leyland catchment zone is projected to increase from £98.7 million to £129 million (£30.3 million) in the same period.

## MAIN FOOD SHOPPING

### BAMBER BRIDGE – MAIN FOOD

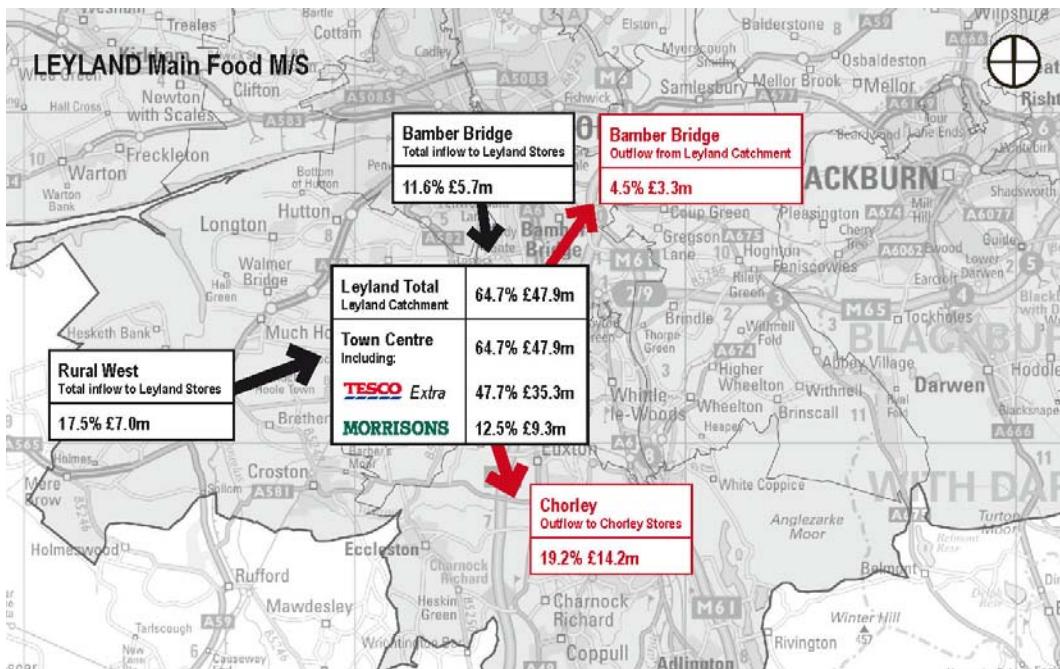
- 7.45 There is a total of £48.7 million of main food expenditure arising within the Bamber Bridge catchment. The survey results indicate that existing convenience within Bamber Bridge (both in-centre and out-of-centre) presently secures 33.5% (£16.4 million) of main food expenditure arising within the catchment.
- 7.46 The out-of-centre Sainsbury's foodstore at Cuerden Way dominates main food shopping patterns in Bamber Bridge and secures a 27.9% (£13.6 million) market share; this compares to the in-centre Somerfield store (5.6% / £2.7 million). The Sainsbury's store also draws a notable quantum of inflow trade from the Rural East North zone (33.3% / £2.6 million) and both the Rural West (7.5% / £3 million) and Leyland (3.4% / £2.5 million) catchments.



- 7.47 Whilst existing provision in Bamber Bridge retains just one third of main food spend arising within its catchment, an addition 13.1% (£6.3 million) of expenditure is retained within South Ribble Borough; the majority of spend is directed to the Tesco Extra (7.6% / £3.7 million) and Morrison's (2.5% / £1.2 million) stores in Leyland.
- 7.48 In terms of inflows from outside the Bamber Bridge catchment, existing convenience provision most notably draws from the Rural East North (33.3% / £2.6 million) and Rural West (7.5% / £3 million) catchment zones. With respect to leakage, the survey results indicate that local residents visit foodstores in Preston (11.3% / £5.5 million) and Chorley (Asda Clayton Green 23.6% / £11.5 million).

### LEYLAND – MAIN FOOD

- 7.49 There is £74 million of main food expenditure arising within the Leyland catchment. Existing convenience provision in Leyland (in-centre and out-of-centre) presently retains 64.7% (£47.9 million) of this available expenditure.
- 7.50 Most of the locally arising expenditure (47.7% / £35.3 million) is directed to the large Tesco Extra store within the town centre. The edge-of-centre Morrison's store on Olympian Way is the second most popular main food shopping destination (12.5% / £9.3 million). Given the extent of mainstream foodstore provision within the town, local independent shops presently secure a limited main food market share (2.2% / £1.6 million).



- 7.51 Whilst the discount operators (Lidl, Netto etc.) clearly perform a main food shopping function, the survey identifies that they do not secure any main food market share; this potentially reflects the over-recording of the larger foodstores in the survey exercise and the fact that discount operators traditionally seek to locate near to larger stores in order to secure linked shopping trips (i.e. discount operators seek to compete on daily essentials rather than bulk food shopping).
- 7.52 Outside of the town, existing convenience provision in Bamber Bridge attracts £3.3 million (4.5%) of Leyland catchment spend whilst a further 4.5% (£3.3 million) and 10.2% (£7.6 million) are directed to the Morrison's (Chorley) and Asda (Clayton Green) stores.
- 7.53 In terms of inflows from adjacent catchments, the household survey results show that Tesco Extra at Towngate draws a significant amount of expenditure from Rural West (14.1% / £5.6 million) and Bamber Bridge (7.6% / £3.7 million). The Morrison's store on Olympian Way also commands limited inflows from the same catchments (Rural West 3.4% / £1.4 million; Bamber Bridge 2.5% / £1.2 million). Outflows of main food expenditure are negligible.

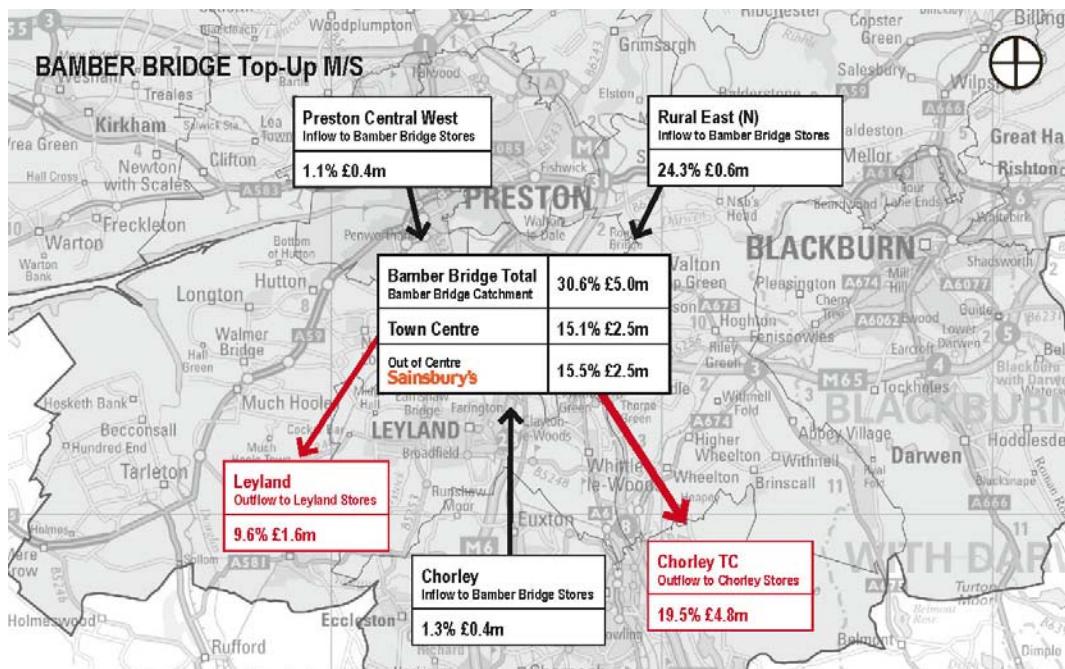
### PENWORTHAM – MAIN FOOD

- 7.54 Whilst in South Ribble Borough, Penwortham is included within the Preston Central West catchment zone. The survey results do however identify that the EH Booth foodstore in Penwortham secures 7.3% (£7.5 million) of main food spend arising within the catchment.

## TOP-UP FOOD SHOPPING

### BAMBER BRIDGE TOP-UP

- 7.55 There is £16.3 million of top-up expenditure arising within the Bamber Bridge catchment; this is projected to rise to £21.2 million by 2026. The survey identifies that 30.6% (£5 million) is retained by existing facilities in Bamber Bridge; this is predominantly directed to the out-of-centre Sainsbury's (15.5% / £2.5 million) at Cuerden Way. The in-centre Somerfield in Bamber Bridge secures a 10.3% (£1.7 million) top-up market share.

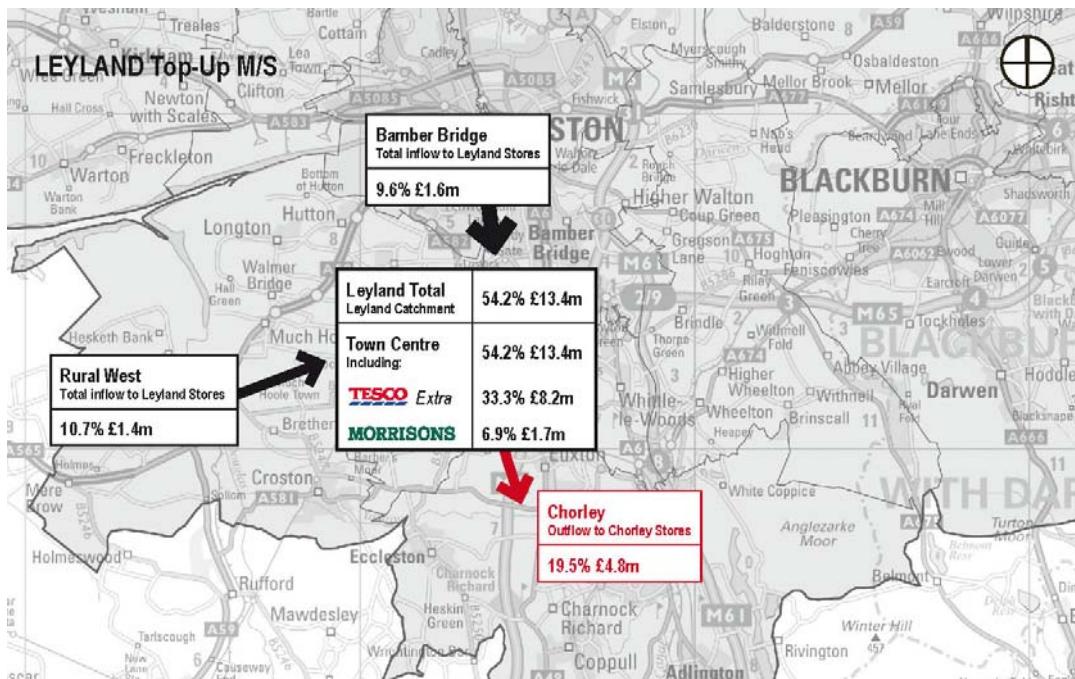


- 7.56 In terms of outflows, the plan above highlights that some local residents in the Bamber Bridge catchment look towards Leyland for the top-up shopping needs; existing facilities including the large Tesco Extra store in Leyland town centre secure 9.6% (£1.6 million) of top-up spend . Local shops in Walton-le-Dale perform a localised top-up role in securing a 5.7% (£0.9 million) market share from the Bamber Bridge catchment.
- 7.57 In terms of top-up expenditure flows outside of South Ribble, the Asda Clayton Green store secures 11.6% (£1.9 million) of top-up spending arising within the Bamber Bridge catchment whilst shops in Preston City Centre claim 10.6% (£1.7 million) market share.

### LEYLAND TOP-UP

- 7.58 There is £24.2 million of top-up expenditure available within the Leyland catchment. The survey identifies that Leyland town centre retains over half (54.2% / £13.4 million) of this

spend; the majority is directed to Tesco Extra at Towngate (33.3% / £8.2 million). The second most popular top-up destination in the town centre is the Morrison's store on Olympian Way (6.9% / £1.7 million).



- 7.59 Other smaller centres in South Ribble perform a minor role with respect to top-up expenditure retention; the EH Booth store in Longton secures a top-up market share of 1.4% (£0.3 million) from the Leyland catchment.
- 7.60 In terms of inflows to existing convenience provision within the Leyland catchment, the survey shows that Leyland draws 10.7% (£1.4 million) from the Rural West and Bamber Bridge (9.6% / £1.6 million) catchments.
- 7.61 As the plan above highlights, Chorley is the main alternative destination for top-up spend outside of the Leyland catchment; Asda Clayton Green commands an 11.1% (£2.7 million) market share whilst the EH Booth in the town centre and Tesco Extra (out-of-centre) secure 2.8% (£0.7 million) and 1.4% (£0.3 million) top-up market shares respectively.

### PENWORTHAM TOP-UP

- 7.62 Existing convenience provision within Penwortham presently secures 19.1% (£6.6 million) of top-up expenditure arising within the Preston Central West catchment; EH Booth claims 11.7% (£4 million) whilst local independent shops and the Co-Op secure 7.4% (£2.5 million) in total.

## OVERALL MARKET SHARE (MAIN FOOD AND TOP-UP COMBINED)

- 7.63 Taking main food and top-up spend patterns together, the quantitative assessment finds the following:
- **Bamber Bridge** – existing provision retains 32.8% of overall convenience spending arising within the Bamber Bridge catchment; there is also notable inflow from the Rural East North catchment (36.8%).
  - **Leyland** – existing provision retains 62.1% from the immediate Leyland catchment in addition to 11.1% of overall spend from Bamber Bridge and 15.8% from Rural West.
  - **Penwortham** – existing provision retains 10.9% of overall convenience spend arising in the Preston Central West zone.
- 7.64 Taking the expenditure claims of the three respective centres together, the assessment finds that convenience provision in South Ribble as a whole secures 13.8% (£18.9 million) of overall convenience spend from the Preston Central West zone; 46.8% (£30.5 million) from Bamber Bridge; and 66.6% (£65.7 million) from Leyland. The borough also attracts inflows from Rural East North (38.8% / £4.1 million) and Rural West (44.8% / £23.7 million) zones.

## INDIVIDUAL STORE PERFORMANCE

### BAMBER BRIDGE

- 7.65 The survey-based assessment identifies the following trading performance of existing convenience provision in Bamber Bridge, as follows:
- **Somerfield (Station Road)** – the store secures a survey-based turnover of £8.1 million; this is £1.2 million below its expected company benchmark of £9.3 million.
  - **Sainsbury's (Cuerden Way)** – the out-of-centre store presently secures a survey-based turnover of £32.1 million; this is broadly in line with its expected company benchmark of £31.9 million.
- 7.66 Whilst we anticipate that the Sainsbury's store is likely to capture additional drive-by trade by virtue of its prominent and accessible location on London Way (A6), which is one of the main arterial (commuter) routes in the Central Lancashire area, the current trading performance of the two principal stores within the Bamber Bridge catchment does not in our view generate any material quantitative and particularly qualitative concerns relating to overtrading.

## **LEYLAND**

- 7.67 The survey results identify a mixed trading performance for the existing convenience provision within the Leyland catchment. All stores in Leyland with the exception of the Tesco Extra store which is identified to be overtrading by £6.1 million above its company benchmark turnover of £50.5 million.
- 7.68 The trading performance of the out-of-centre Morrison's store on Olympian Way, which is identified to be undertrading by £16 million against its expected company turnover (£31.4 million), is however considered to be anomalous given that visits to the store has identified that it is particularly busy during peak and off-peak periods.
- 7.69 It is our view that in reality the Morrison's store is likely to be trading close to company benchmark and that the identified overtrading position of the Tesco Extra store is likely to be reduced from the existing survey-based position. The two stores are likely to compete on a like-for-like basis and provide effective choice and competition for local residents. On this basis, whilst the retail survey results identify the Morrison's as under-performing, it is considered that there is no overriding need for new provision to enhance competition and choice for local residents; Leyland catchment has a good range of mainstream and discount foodstore provision with no obvious deficiencies.

## **PENWORTHAM**

- 7.70 The EH Booth store is identified to achieve a survey-based turnover of £13.7 million; this is £2.2 million above its expected company turnover of £11.5 million.

### **a) Forward Capacity Position – Constant Market Share**

- 7.71 The capacity modelling exercise is presented on a borough-wide basis and is based on a constant market share approach which takes account of forward population, expenditure growth and trading efficiency increases. The capacity assessment generates the following floorspace (gross) floorspace requirement, depending on store format / operator:

#### **BASELINE CAPACITY – NO COMMITMENTS**

	2015	2018	2021	2026
<b>MEDIUM RETAILER</b>	<b>2,002 m<sup>2</sup> (gross)</b>	<b>3,269 m<sup>2</sup> (gross)</b>	<b>4,356 m<sup>2</sup> (gross)</b>	<b>5,898 m<sup>2</sup> (gross)</b>
<b>LARGE RETAILER</b>	<b>963 m<sup>2</sup> (gross)</b>	<b>1,557 m<sup>2</sup> (gross)</b>	<b>2,074 m<sup>2</sup> (gross)</b>	<b>2,808 m<sup>2</sup> (gross)</b>

- 7.72 The baseline capacity assessment identifies a need for a new mainstream foodstore in the latter period of the emerging Core Strategy. It is considered that on quantitative and particularly qualitative grounds that Bamber Bridge district centre would be the appropriate location for a new store to meet the identified need.
- 7.73 The assessment does however not make appropriate allowance for the market share changes that foodstore commitments in Preston (Queens Retail Park) and Chorley (Tesco Buckshaw Village) are likely to generate within both the Bamber Bridge and Leyland catchments respectively; this is set out below.

### **BASELINE CAPACITY – WITH COMMITMENTS**

- 7.74 Our capacity exercise estimates that the proposed foodstores would claim in the order of £10.6 million from the Leyland and Bamber Bridge catchments between them. When this expenditure is accounted for in the capacity tables then a slight negative capacity is identified in the early phase of the LDF (i.e. to 2015).

	2015	2018	2021	2026
<b>MEDIUM RETAILER</b>	<b>-617 m<sup>2</sup> (gross)</b>	<b>630 m<sup>2</sup> (gross)</b>	<b>1,717 m<sup>2</sup> (gross)</b>	<b>3,571 m<sup>2</sup> (gross)</b>
<b>LARGE RETAILER</b>	<b>-294 m<sup>2</sup> (gross)</b>	<b>300 m<sup>2</sup> (gross)</b>	<b>817 m<sup>2</sup> (gross)</b>	<b>1,700 m<sup>2</sup> (gross)</b>

### **b) Forward Capacity – Market Share Improvement**

- 7.75 The capacity modelling assessment identifies some quantitative capacity for new convenience provision in the latter phases of the emerging LDF on the basis of forward population and expenditure growth.
- 7.76 It is considered that there is no overriding requirement for the Council to plan for new convenience provision in Leyland at this time given that the town centre has no obvious quantitative and qualitative deficiencies in its convenience retail offer with large mainstream foodstores (Tesco Extra and Morrison's) complemented by a range of discount operators and local independents. There is also limited realistic opportunity in our view for Leyland to also substantially increase its current main food market share retention levels (70%) from its own immediate catchment. The current main food outflows from the Leyland catchment are to a variety of foodstore locations within the wider Central Lancashire area including Asda Clayton Green (10.2%) which is located in close proximity to the southern extent of the catchment and Morrison's Chorley (4.5%).

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- 7.77 Leyland sits within a dynamic urban catchment and any new convenience provision in the town is more likely to generate a redistribution of existing expenditure between current provision rather than generate any economic or sustainability benefits to the town centre.
- 7.78 With respect to Bamber Bridge, the quantitative assessment clearly identifies that the district centre performs a secondary role to surrounding large out-of-centre foodstore provision (Sainsbury's Cuerden Way). The limited performance of the district centre (5.6% main food market share from immediate catchment) reflects the limitations of the existing Somerfield store which predominantly caters for local resident's top-up food shopping needs. The store lacks a full range of goods in comparison to Sainsbury's.
- 7.79 The market share performance of the district centre may further reduce if a new foodstore is brought forward at the Capitol Centre which presently benefits from an open Class A1 planning permission.
- 7.80 It is considered that there is quantitative and particularly qualitative scope for a new centrally located (sequentially compliant) mainstream foodstore in Bamber Bridge in order to clawback expenditure presently flowing to existing and potential out-of-centre provision. A new centrally located store would deliver significant material benefits to the district centre by assisting in regeneration, promoting linked trips within the centre and increasing footfall. The district centre is also highly accessible by public transport.
- 7.81 The Council should therefore seek to identify an appropriate centrally located site within Bamber Bridge district centre through the LDF to accommodate a new mainstream foodstore of sufficient scale to compete on with the existing (Sainsbury's Cuerden Way) and potential out-of-centre provision (Capitol Centre) in the locality.

## PRESTON

- 7.82 The catchment for Inner Preston urban area has been split into Central West and East catchment. The Preston Rural West and Preston Rural East catchment largely extends beyond the built area (M55 and M6 boundaries) but forms part of the wider Preston City Council administrative area.
- 7.83 The modelling exercise identifies a significant quantum of convenience expenditure arising within the respective catchments, as follows:
- **Preston Central West – convenience expenditure available is projected to rise from £137.4 million at present to £170.3 million in 2026 (£32.8 million increase).**

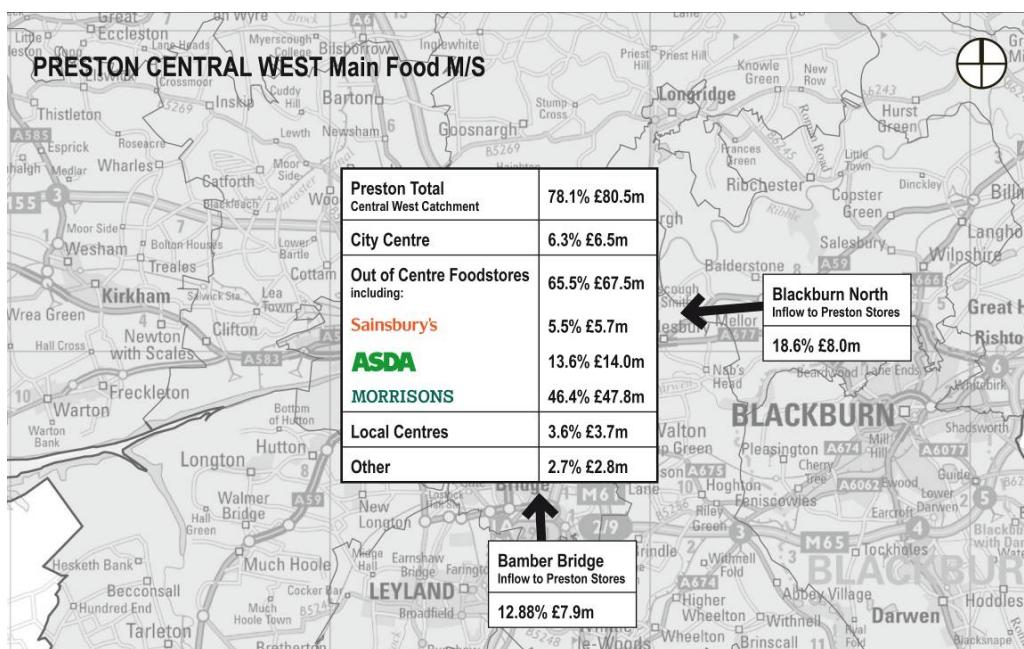
- **Preston Central East** – convenience expenditure available is projected to rise from £109.4 million in 2010 to £136.6 million in 2026 (£27.1 million increase).
- **Preston Rural West** - convenience expenditure available is projected to rise from £16.5 million in 2010 to £20.1 million in 2026 (£3.6 million increase).
- **Preston Rural East** - convenience expenditure available is projected to rise from £19.4 million in 2010 to £24.1 million in 2026 (£4.7 million increase).

7.84 The market shares identified by the survey exercise are therefore set out below.

## MAIN FOOD SHOPPING

### PRESTON CENTRAL WEST

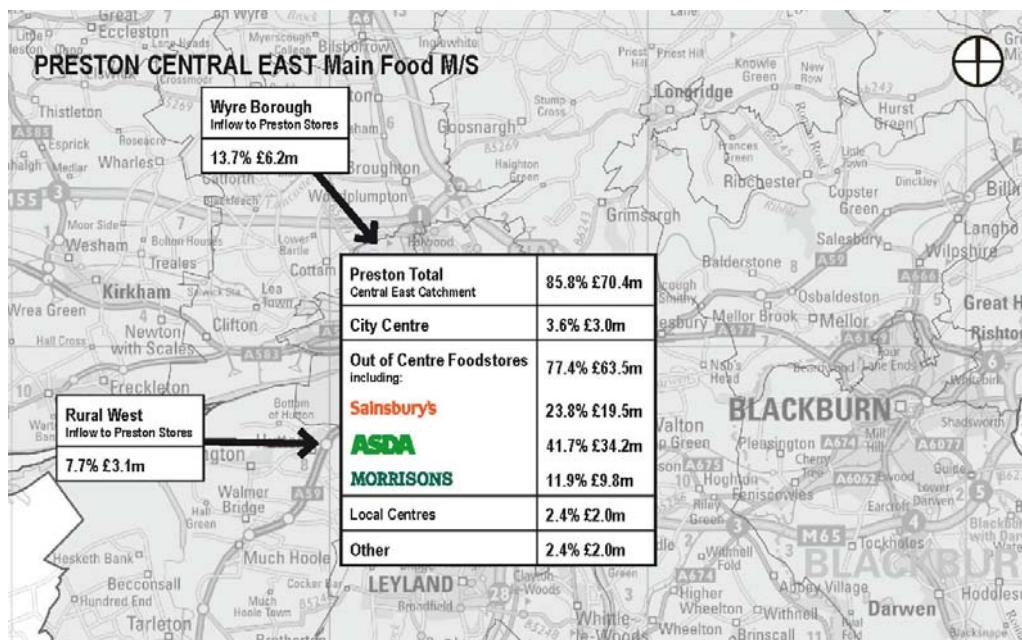
- 7.85 There is £103.1 million of main food expenditure available within the Preston Central West catchment. The survey results indicate that convenience provision within the city centre retain 6.3% (£6.5 million) of this spend.
- 7.86 The large out-of-centre mainstream foodstores dominate main food shopping patterns, commanding a market share of 65.5% (£67.5 million) between the Morrison's, Asda and Sainsbury's. The Morrison's Mariners Way store is the most popular destination (46.4% / £47.8 million), followed by Asda Fulwood (13.6% / £14 million) and Sainsbury's Deepdale (5.5% / £5.7 million).



- 7.87 The three mainstream foodstores also draw substantial main food inflows from surrounding catchments, including Preston Rural West (64.3% / £9.4 million), Preston Rural East (57.4% / £7.1 million) and Blackburn North (18.6% / £8 million). Asda is the dominant foodstore, securing £6.7 million (15.7%) from Blackburn North, £5.8 million (47.1%) from Preston Rural East and £3.7 million (25.7%) from Preston Rural West.
- 7.88 As the above table indicates, local centres perform a minor main food shopping role with the EH Booth foodstores in Lane Ends and Sharoe Green both securing 1.8% (£1.9 million) of available spend. Given that the Central West catchment slightly extends into South Ribble, the EH Booth store in Penwortham secures a 7.3% (£7.5 million) market share.

## PRESTON CENTRAL EAST

- 7.89 There is £82.1 million of main food expenditure arising within the Preston Central East catchment. Similar to the main food shopping patterns in the Central West zone, the city centre performs a minor shopping role (3.6% / £3 million) with the large out-of-centre foodstores dominating (overall 77.4% / £63.5 million market share).
- 7.90 Given its central location within the catchment, Asda Fulwood is the principal destination (41.7% / £34.2 million) followed by Sainsbury's Deepdale (23.8% / £19.5 million) and Morrison's Mariners Way (11.9% / £9.8 million).

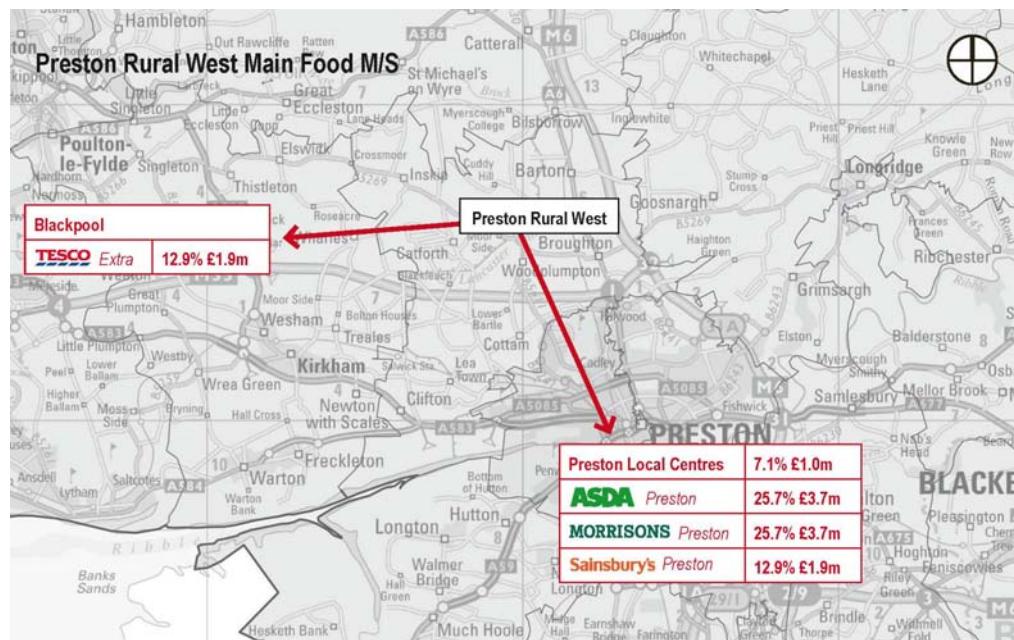


- 7.91 Smaller stores outside of the city centre perform a supporting role with Aldi (Blackpool Road) and Somerfield (Deepdale Road) securing a small 1.2% (£1 million) main food market share

each. Ribbleton Lane and Sharoe Green local centres each also command 1.2% (£ 1 million) of main food expenditure; this is attributable to Tesco Express and EH Booth stores.

## PRESTON RURAL WEST

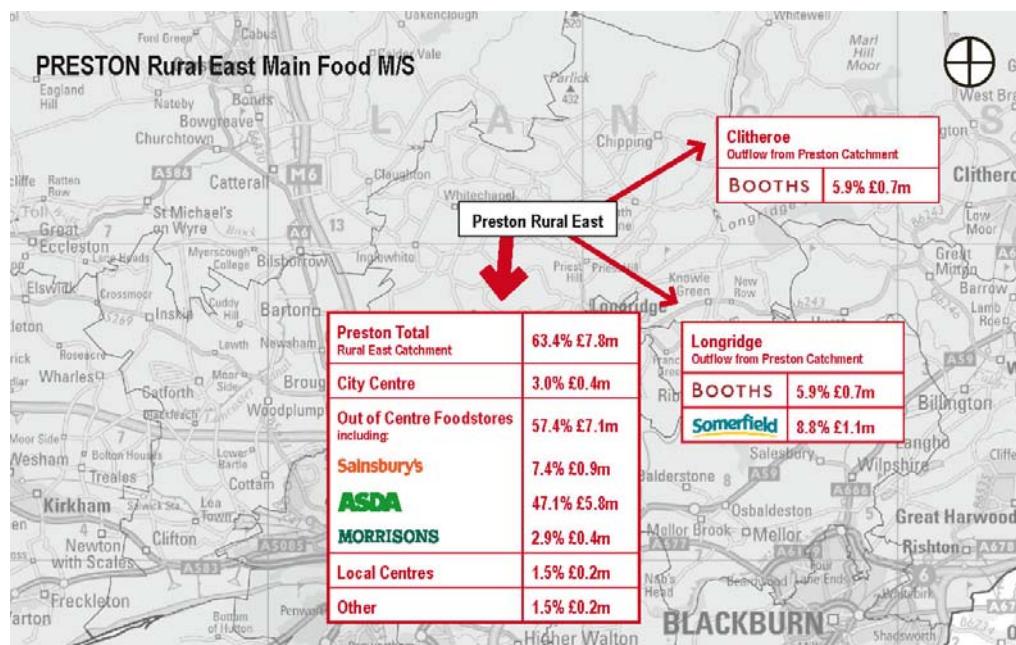
- 7.92 There is £14.6 million of main food expenditure available within the catchment; most expenditure is directed to the large mainstream foodstores in Preston (64.3% / £9.4 million) with Sainsbury's Deepdale claiming 12.9% (£1.9 million), Asda Fulwood 25.7% (£3.7 million) and Morrison's Mariners Way 25.7% (£3.7 million).



- 7.93 Local centres in Preston claim 7.1% (£1 million) of main food spend; this expenditure flow solely relates to the EH Booth store at Sharoe Green.

## PRESTON RURAL EAST

- 7.94 There is £12.4 million of main food expenditure available within the catchment. As with the Rural West catchment, the majority of expenditure (57.4% / £7.1 million) is directed to foodstores in Preston with Sainsbury's Deepdale claiming 7.4% (£0.9 million), Asda Fulwood 47.1% (£5.8 million) and Morrison's Mariners Way 2.9% (£0.4 million).



- 7.95 The plan highlights that the city centre claims 3% (£0.4 million) whilst local centres secure 1.5% (£0.2 million). Given the topography of the Rural East catchment, the survey results also find that local residents look towards convenience provision in both Longridge and Clitheroe to meet their main food shopping needs.

### INFLOW OF MAIN FOOD EXPENDITURE TO PRESTON

- 7.96 The mainstream foodstores in Preston (Asda, Morrison's and Sainsbury's) perform a wider sub-regional role and draw a quantum of main food expenditure from surrounding catchments outside of the city including Kirkham (6% / £2.8 million), Wyre Borough (10.7% / £4.8 million), Blackburn North (£8 million) and Bamber Bridge (11.3% / £5.5 million).

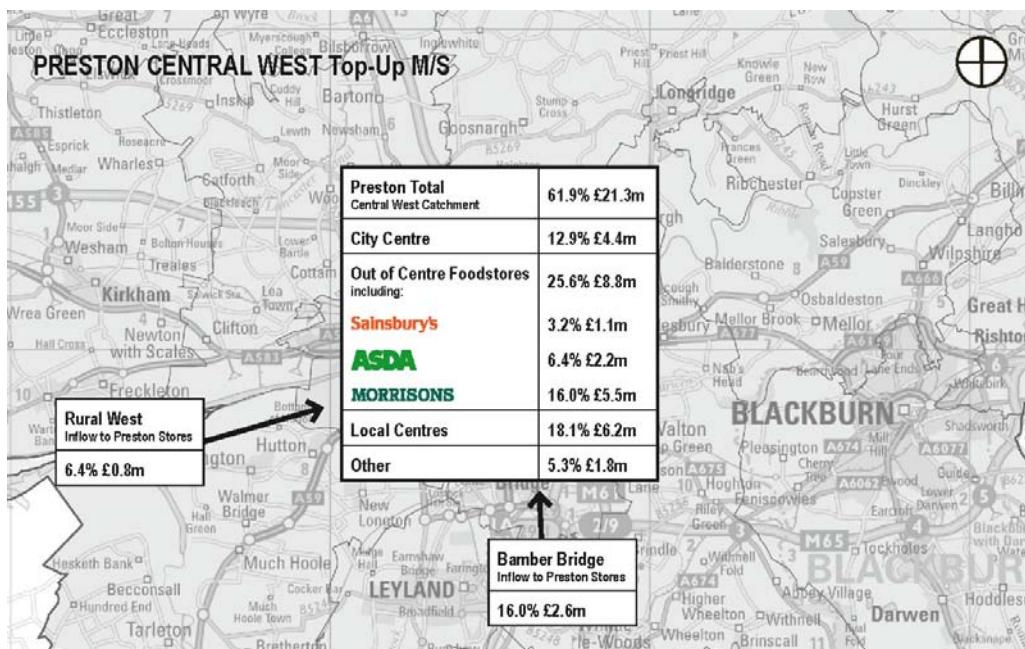
### OUTFLOW OF MAIN FOOD EXPENDITURE FROM PRESTON

- 7.97 The survey results identify high levels of expenditure retention by existing convenience provision within Preston. However, the most popular destination outside of Preston is the Asda Clayton Green store (2.4% / £1.9 million) and Tesco Extra stores in Blackpool and Leyland (1.2% / £1 million) respectively. These expenditure outflows are considered to be related to travel-to-work patterns rather than reflect any major quantitative or qualitative deficiency in the convenience retail offer.

## TOP-UP FOOD SHOPPING

### PRESTON CENTRAL WEST

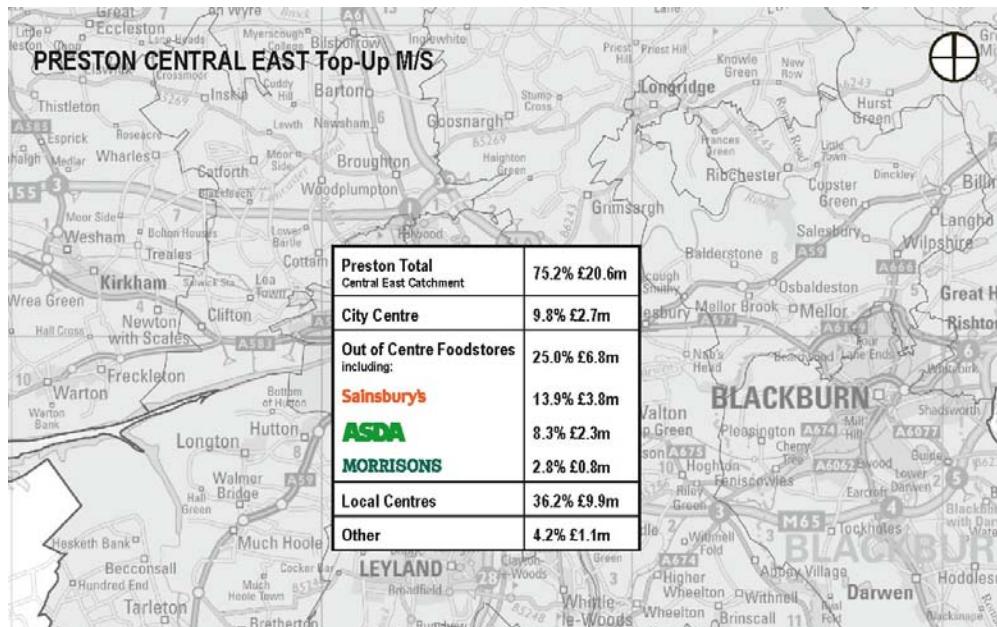
- 7.98 There is £34.4 million of top-up expenditure arising within the Preston Central West catchment. The survey results identify that existing convenience provision within the city centre secures 12.9% (£4.4 million) of top-up expenditure available.



- 7.99 Whilst the mainstream out-of-centre foodstores dominate main food spend, top-up shopping patterns are more localised with the mainstream foodstores presently retaining only 25.6% (£8.8 million) of top-up spending arising within the catchment. The Morrison's Mariners Way store is the most popular mainstream foodstore top-up destination (16% / £5.5 million).
- 7.100 Local centres in Preston claim 18.1% (£6.2 million) of top-up expenditure arising within the catchment. The EH Booth store at Lane Ends in particular performs an important local function claiming a 7.4% (£2.5 million) market share. Local shops in Ingol secure 2.2% (£0.8 million) of top-up spend whilst the EH Booth at Sharoe Green claims 2.1% (£0.7 million).

## PRESTON CENTRAL EAST

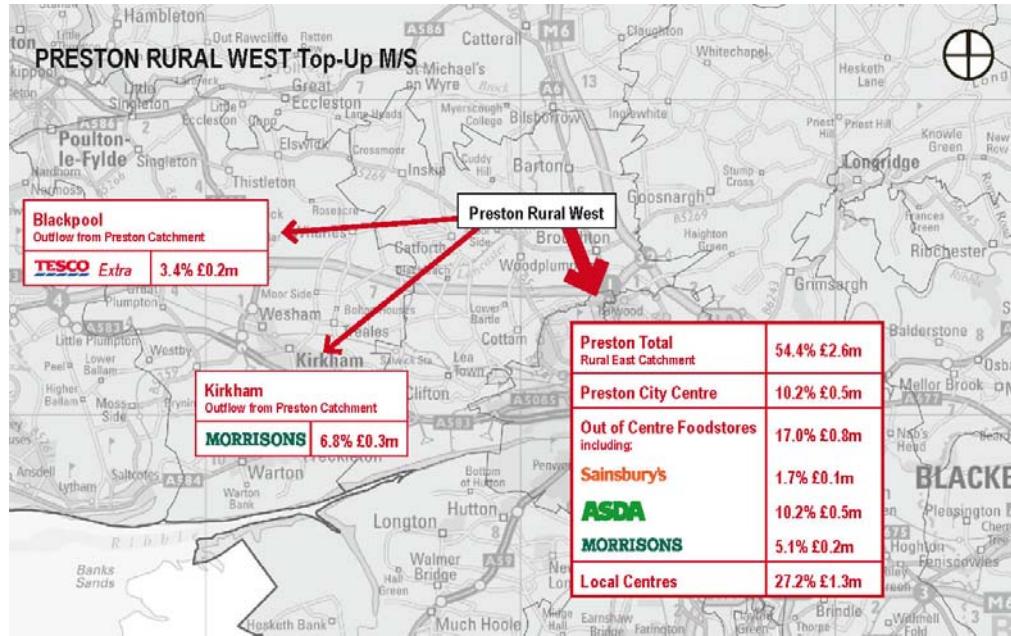
- 7.101 There is £27.4 million of top-up expenditure available within the Preston Central East catchment; existing provision in the city centre currently retains 9.8% (£2.7 million). The main foodstores claim a 25% (£6.8 million) market share with Sainsbury's Deepdale claiming 13.9% (£3.8 million), Asda Fulwood 8.3% (£2.3 million) and Morrison's 2.8% (£0.8 million).



- 7.102 Most of top-up shopping is undertaken in local centres (36.2% / £9.9 million) with Tesco Express at Longsands Lane claiming 16.7% (£4.6 million). The Tesco Express at Ribbleton Lane secures 8.4% (£2.3 million) whilst EH Booth at Sharoe Green claims 6.9% (£1.9 million).

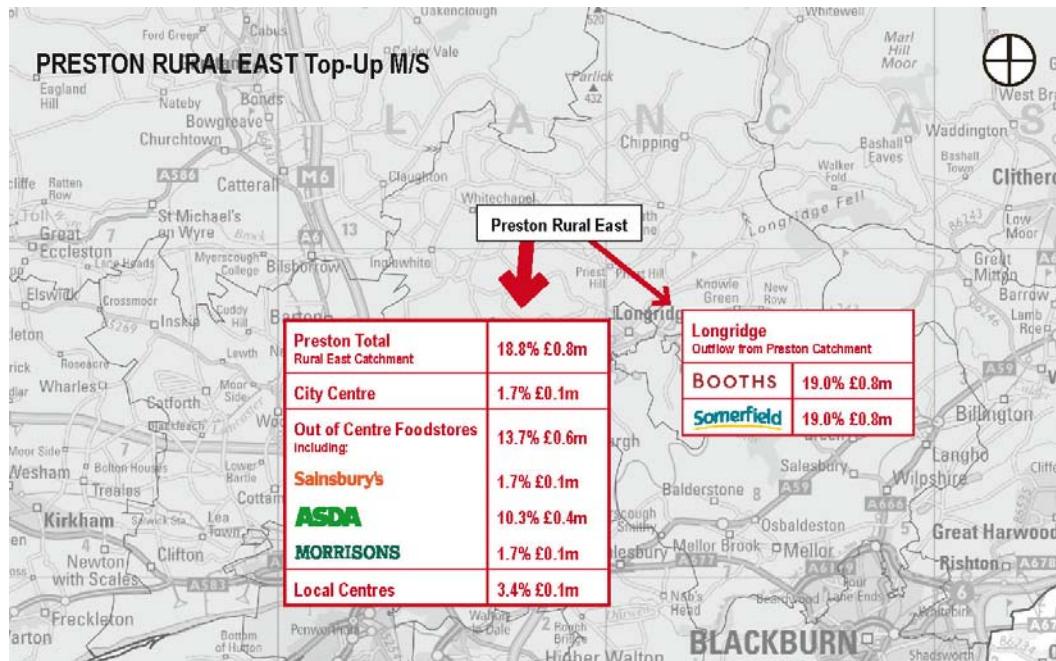
## PRESTON RURAL WEST

- 7.103 There is £4.9 million of top-up expenditure arising within the catchment. Whilst the mainstream out-of-centre foodstores claim 17% (£0.8 million), city centre shops (10.2% / £0.5 million) and local centres (27.2% / £1.3 million) perform notable top-up functions. EH Booth at Sharoe Green (11.9% / £0.6 million) is the principal local centre destination.



## PRESTON RURAL EAST

- 7.104 There is £4.1 million of top-up expenditure arising within the catchment. Mainstream out-of-centre foodstores claim 13.7% (£0.6 million) of top-up spend. The market share (10.3% / £0.4 million) secured by the Asda Fulwood store reflects its prominent location on the main arterial route running out of the city to the north east.



7.105 As the plan highlights, local centres in Preston only claim 3.4% (£0.1 million) of expenditure arising within the Rural East catchment. The majority of expenditure is directed to local provision in Grimsargh, Goosnargh and Longridge (Booths and Somerfield) in particular.

### **INFLOW OF TOP-UP FOOD EXPENDITURE TO PRESTON**

7.106 Given the localised nature of top-up food shopping patterns, inflows from outside the Inner and Outer (rural) Preston catchment areas are extremely limited; existing convenience provision within Preston City Centre does however secure 9.1% (£0.2 million) and 10.6% (£1.7 million) of top-up spend arising in the Rural East North and Bamber Bridge catchment zones. This primarily reflects travel-to-work patterns.

### **OUTFLOW OF TOP-UP FOOD EXPENDITURE FROM PRESTON**

7.107 There are limited outflows of top-up expenditure; the Asda Clayton Green store does however draw 2.8% (£0.8 million) from the Preston Central East catchment; this again reflects travel-to-work patterns. The EH Booth store in Penwortham (South Ribble) secures 11.7% (£4 million) of top-up expenditure available in the Preston Central West catchment.

### **OVERALL MARKET SHARE**

7.108 Taking main food and top-up spend patterns together, the quantitative assessment identifies the following overall market share from the Preston catchment zones:

- **Preston Central West** – existing provision within Preston retains 74.1% (£101.8 million) of overall convenience spending arising within the catchment; this is split between city centre provision (8%), mainstream out-of-centre foodstores (55.5%), out-of-centre smaller stores (3.4%) and local centres (7.2%).
- **Preston Central East** – existing provision within Preston retains 83.2% (£91 million) of overall convenience spending arising within the catchment; this is split between city centre provision (5.2%), mainstream out-of-centre foodstores (64.3%), out-of-centre smaller stores (2.9%) and local centres (10.9%).
- **Preston Rural West** – existing provision within Preston retains 67.2% (£13 million) of overall convenience spending arising within the catchment; this is split between city centre provision (2.6%), mainstream out-of-centre foodstores (52.5%) and local centres (12.1%).
- **Preston Rural East** – existing provision within Preston retains 52.3% (£8.6 million) of overall convenience spending arising within the catchment; this is split between city

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centre provision (2.7%), mainstream out-of-centre foodstores (46.5%), out-of-centre smaller stores (1.1%) and local centres (2%).

- 7.109 Existing convenience provision within Preston also secures 6.8% (£4.2 million) of overall convenience spend from the Kirkham catchment (Zone 5); 11.1% (£6.7 million) from Wyre Borough (Zone 8); 15.2% (£8.7 million) from Blackburn North (Zone 10) and notably 85.9% (£10.5 million) from Bamber Bridge (predominantly to mainstream out-of-centre foodstores).

## INDIVIDUAL STORE PERFORMANCE

- 7.110 The survey-based assessment identifies the following trading performance of the principal mainstream foodstores in Preston:
- **Asda Fulwood** secures a survey-based turnover of £80.4 million; this is £32.6 million above its expected company benchmark turnover of £47.8 million.
  - **Morrison's Mariners Way** achieves a survey-based turnover of £76.3 million; this is £38.9 million above its expected company benchmark of £37.4 million.
  - **Sainsbury's Deepdale** claims a £37.5 million survey-based turnover; this is £6 million above its expected company benchmark of £31.5 million.
- 7.111 Whilst the survey exercise identifies that other smaller stores in the Preston area are also performing well relative to expected company benchmarks (i.e. Lidl West Strand overtrading by £3.5 million), it is our view that there are no immediate quantitative or qualitative deficiencies arising in relation to existing provision and the network of local centres.
- 7.112 Site visits to the three mainstream out-of-centre foodstores in Preston (Asda, Morrison's and Sainsbury's) have however identified that the overtrading identified by the quantitative modelling exercise is translated on the ground with all three stores significantly busy at peak trading times with associated car park and checkout queues.
- 7.113 The level of overtrading of all three mainstream foodstores would ordinarily generate significant quantitative and qualitative needs for the Council to proactively plan for new mainstream foodstore provision in Preston. However, the trading performance of the existing stores is likely to be significantly reduced towards company benchmark (i.e. trading equilibrium) given existing foodstore planning commitments. This is considered below.

## a) Forward Capacity Position – Constant Market Share

- 7.114 The baseline capacity modelling exercise is presented on a borough-wide basis and is based on a constant market share approach which takes account of forward population, expenditure growth and trading efficiency increases.
- 7.115 The capacity assessment generates the following floorspace (gross) floorspace requirement, depending on store format / operator:

### **BASELINE CAPACITY – NO COMMITMENTS**

	2015	2018	2021	2026
MEDIUM RETAILER	2,216 m <sup>2</sup> (gross)	3,584 m <sup>2</sup> (gross)	4,775 m <sup>2</sup> (gross)	6,807 m <sup>2</sup> (gross)
LARGE RETAILER	1,055 m <sup>2</sup> (gross)	1,707 m <sup>2</sup> (gross)	2,274 m <sup>2</sup> (gross)	3,241 m <sup>2</sup> (gross)

- 7.116 This quantitative capacity would on the basis of current market shares ordinarily generate a requirement for the Council to proactively plan through the emerging LDF process for a new mainstream foodstore. However, as detailed above, the baseline capacity assessment does not make allowance for the quantitative claims that foodstore planning commitments will make on existing identified capacity.

### **BASELINE CAPACITY – WITH COMMITMENTS**

- 7.117 There are presently two foodstore planning commitments in Preston:
- **Sainsbury's Extension (Deepdale)** - planning permission (LPA ref. 06/2008/0991) approved for a large extension to the existing out-of-centre Sainsbury's store to bring forward 690 m<sup>2</sup> of net additional convenience retail floorspace.
  - **Queens Retail Park (City Centre)** – planning permission (LPA ref. 06/2003/0881) approved for a 6,735 m<sup>2</sup> (gross) foodstore (2,829 m<sup>2</sup> net convenience floorspace).
- 7.118 In addition to the two approved schemes, there is also a formal application for a Tesco foodstore at the former Cottam Brickworks site in the North West of Preston. The application responds to a wider s7 New Town Act allocation for new commercial development (including new foodstore) as part of a new local centre for Cottam. It is therefore considered to be a formal commitment for the purposes of the capacity assessment.
- 7.119 The capacity exercise estimates that the respective commitments would derive a total turnover in the order of £45 million and ultimately rebalance identified expenditure flows within the

wider Preston catchment. When the foodstore planning commitments are therefore taken into account in the capacity assessment then there is a significant negative capacity for new foodstore provision in Preston through the Core Strategy period, as set out in the table below.

	2015	2018	2021	2026
MEDIUM RETAILER	-9,035 m <sup>2</sup> (gross)	-7,667 m <sup>2</sup> (gross)	-6,476 m <sup>2</sup> (gross)	-4,444 m <sup>2</sup> (gross)
LARGE RETAILER	-4,302 m <sup>2</sup> (gross)	-3,651 m <sup>2</sup> (gross)	-3,084 m <sup>2</sup> (gross)	-2,116 m <sup>2</sup> (gross)

- 7.120 As the table identifies, the extension of the existing Sainsbury's in addition to two foodstores at Queens Retail Park and Cottam will alleviate existing overtrading conditions in the existing Morrison's and Asda stores in particular and provide enhanced choice and competition for local residents in the wider Preston catchment.

### b) Forward Capacity – Market Share Improvement

- 7.121 The quantitative assessment identifies strong overall convenience retention levels in the Preston Central West and East catchments (74.1% and 83.2% retention). Given the existing high retention levels allied to foodstore commitments, the potential for further market share enhancement in our view is limited.
- 7.122 Given the existing foodstore commitments, we do not consider that there is any overriding need for the Council to proactively plan for new convenience provision through the emerging Core Strategy. If however the Cottam foodstore proposal which accords with the s7 New Town allocation does not come forward then the Council should plan for a new foodstore in the North West Preston area through the emerging Core Strategy to balance the network of foodstores in the city and reduce overtrading.
- 7.123 The Council should continue to monitor the performance of the main centres and individual stores (as per PPS4 guidance). The potential need for new convenience provision in the latter phases of the emerging Core Strategy should be identified through a future update to this study in order to accurately assess the market share impacts of the foodstore commitments on existing provision.

## 8. COMPARISON RETAIL ANALYSIS

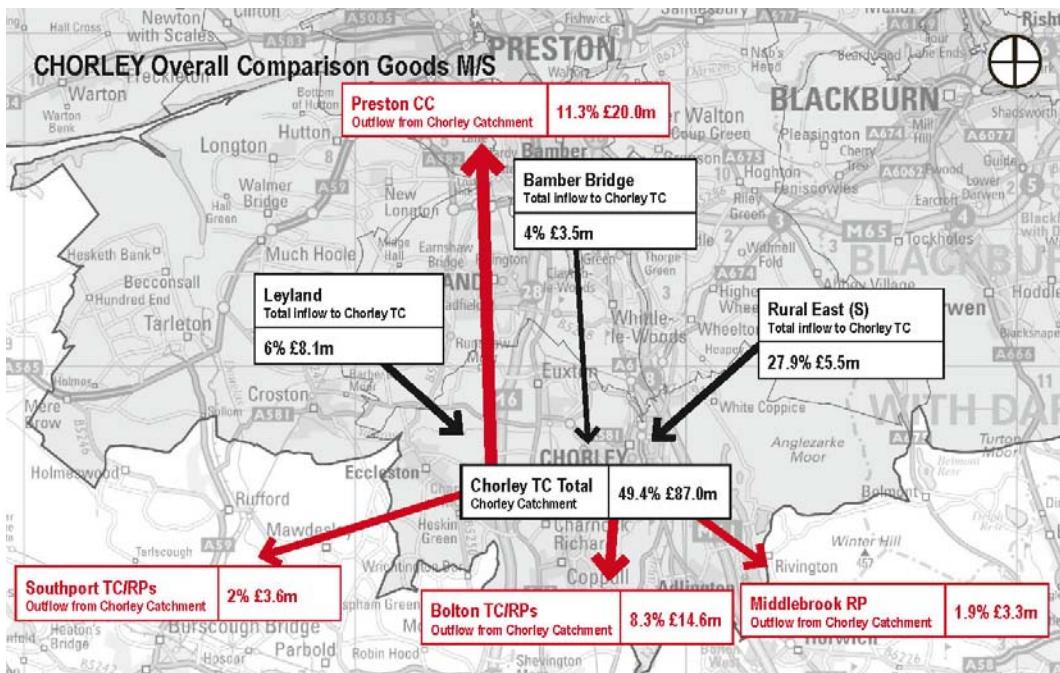
- 8.1 In contrast to convenience shopping patterns which tend to be more localised in nature, comparison shopping is destination-based with shoppers prepared to travel further to undertake shopping for clothing, fashion and personal items; these sectors are the key drivers and are main determinants in consumers choice of destination. Expenditure is therefore more mobile and less restricted to a local catchment or a particular centre.
- 8.2 The increased mobility in spending has partially contributed to the relative decline in performance of smaller centres relative to larger centres as high street retailers have begun to concentrate provision within fewer centres where they can benefit from critical mass of fellow retailers and higher pedestrian flows.
- 8.3 We therefore set out the current market share performance on a centre-by-centre basis, identifying an overall market share for comparison goods and also market shares for individual comparison goods items. As detailed in our methodology assessment, having established the baseline trading position for each centre we go on to consider the potential for improvement.
- 8.4 Our strategic advice takes account of the existing network of centres, the strength of competing provision from higher order centres and is also reflects the market realism in terms of where provision is likely to come forward.

### CHORLEY

- 8.5 There is £176.1 million of comparison expenditure available within the Chorley catchment; this is an overall expenditure figure and includes (amongst others) the individual expenditure capacity for clothing (£43.5 million), personal goods (£32.5 million) and recreational goods (£20.4 million). Bulky durable goods expenditure includes DIY goods (£12.2 million) and major household appliances (£22.4 million).

#### A) OVERALL COMPARISON GOODS MARKET SHARE

- 8.6 The survey exercise identifies that Chorley town centre presently retains almost half (49.4% / £87 million) of all comparison goods expenditure (£176.1 million) arising within its immediate catchment. The town centre also performs a wider sub-regional role, drawing inflows from the surrounding Leyland (6% / £8.1 million), Rural East South (27.9% / £5.5 million), Bamber Bridge (4% / £3.5 million) and Rural West (2.6% / £2 million) catchment zones.



- 8.7 However, as the above plan highlights, the survey results indicate that there are substantial outflows of expenditure to larger regional centres in the hierarchy; Preston City Centre claims an overall 11.3% (£20 million) market share whilst there are also notable outflows to Bolton (8.3% / £14.6 million) and Middlebrook Retail Park (1.9% / £3.3 million).
- 8.8 On the basis of current market share performance and associated inflows from surrounding catchments, the town achieves an overall comparison turnover in the order of £108.7 million.

## B) INDIVIDUAL COMPARISON GOODS MARKET SHARES

- 8.9 Although Chorley secures almost half of total comparison spend arising within its catchment, the survey results indicate that this overall retention figure masks variations in market share performance in relation to particular comparison goods. The town for example secures a low market share for clothing but a higher retention level of DIY goods (less propensity to travel at distance for such goods).

Comparison Goods	Town Centre MS from Immediate Catchment	Inflow from adjacent Catchments	Outflows (Competing Destinations)
Clothing / Fashion	Chorley 35.1% (£15.3m)	Leyland 5.1% (£1.7m) Bamber Bridge 5.5% (£1.2m) Rural East (South) 17.2% (£0.8m)	Preston City Centre 20.2% (£8.8m) Bolton 17.1% (£7.4m) Southport 6.4% (£2.8m)
Personal Goods	Chorley 48.7% (£15.8m)	Leyland 5.9% (£1.5m) Rural East (South) 28.6% (£1.1m) Bamber Bridge 5.2% (£0.8m)	Preston City Centre 11.8% (£3.8m) Bolton 5.3% (£1.7m) Manchester CC 5.3% (£1.7m)
Recreational Goods	Chorley 55.8% (£11.4m)	Leyland 11.1% (£1.7m) Bamber Bridge 6.1% (£0.6m) Rural East (South) 25% (£0.5m)	Preston City Centre 3.8% (£0.8m) Deepdale SP 3.8% (£0.8m) Bolton 3.8% (£0.8m)
Furniture Goods	Chorley 41.3% (£9.5m)	Rural East (South) 29.2% (£0.8m) Leyland 3% (£0.5m)	Preston City Centre 10.7% (£2.5m) Middlebrook RP 6.7% (£1.5m)

<b>DIY Goods</b>	Chorley 70.9% (£8.7m)	Leyland 8.9% (£0.8m) Rural East (South) 42.9% (£0.6m)	Bolton 6.6% (£1.5m) Leyland TC 5.8% (£0.7m) Preston City Centre 3.5% (£0.4m) Bolton 3.5% (£0.4m)
<b>Major Household Appliances</b>	Chorley 62% (£13.9m)	Leyland 7.8% (£1.4m) Rural East (South) 32% (£0.8m) Rural West 5.4% (£0.5m)	Preston City Centre 7.6% (£1.7m) Middlebrook RP 5.4% (£1.2m) Bolton 4.4% (£1.1m)
<b>Large Electrical Goods</b>	Chorley 56.4% (£12.4m)	Rural East (South) 36% (£0.9m) Leyland 3% (£0.5m)	Preston City Centre 9% (£2m) Bolton 7.7% (£1.7m) Middlebrook RP 2.6% (£0.6m)

- 8.10 Whilst Preston is identified as the major centre for Chorley residents, the large mixed retail Middlebrook Retail Park in Horwich (high street comparison and bulky durable retail) is a significant draw in relation to bulky durable goods (furniture, DIY goods, major household appliances and large electrical goods).

## C) FORWARD CAPACITY – BASELINE POSITION

### BASELINE CAPACITY – NO COMMITMENTS

- 8.11 On the basis of forward population and expenditure growth, assuming that the current overall comparison market share is projected forward, the quantitative assessment identifies the following capacity through the emerging Core Strategy:

YEAR	2015	2018	2021	2026
<b>CAPACITY</b>	<b>16,067 m<sup>2</sup> (gross)</b>	<b>19,243 m<sup>2</sup> (gross)</b>	<b>23,196 m<sup>2</sup> (gross)</b>	<b>30,660 m<sup>2</sup> (gross)</b>

- 8.12 This floorspace capacity represents a baseline position and does not take into account the quantitative claims of existing retail planning commitments in Chorley which include the small quantum of non-food floorspace (573 m<sup>2</sup> net) within the approved Tesco store at Buckshaw Village. When the turnover of the non-food Tesco floorspace is taken into account then there is a resultant small decrease in the quantitative capacity available, as follows:

### BASELINE CAPACITY – WITH COMMITMENTS

YEAR	2015	2018	2021	2026
<b>CAPACITY</b>	<b>14,886 m<sup>2</sup> (gross)</b>	<b>18,062 m<sup>2</sup> (gross)</b>	<b>22,015 m<sup>2</sup> (gross)</b>	<b>29,479 m<sup>2</sup> (gross)</b>

- 8.13 The capacity identified should be directed towards suitable sequentially compliant development sites within the town centre and should not be used as a justification to support

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additional out-of-centre comparison retailing which may materially impact on town centre market share performance (and associated vitality and viability).

- 8.14 The capacity position however reflects a constant market share position and does not consider the potential for Chorley town centre to further increase its market share performance from both its immediate catchment and surrounding hinterland. This is considered below.

#### **D) FORWARD CAPACITY – POTENTIAL FOR IMPROVEMENT**

- 8.15 The survey-based assessment shows that Chorley town centre presently retains 49.4% (£87 million) of all comparison expenditure arising within its immediate catchment; the town also performs a wider sub-regional role, attracting local residents from adjacent catchment zones (Rural East South in particular).
- 8.16 Whilst we consider that Chorley is performing reasonably well, the survey results do however indicate that the overall comparison market share (49.4%) is inflated by strong expenditure retention for bulky comparison goods. The town centre performs less well in respect to high street comparison goods such as clothing, where it secures only 35.1% (£15.3 million) of clothing expenditure arising within its catchment. This compares to a 48.7% (£15.8 million) and 55.8% (£11.4 million) market shares for personal and also recreational goods.
- 8.17 The clothing / fashion offer within a town centre are particularly important determinants in a residents' choice of shopping destination. Whilst the town has small Burton and Dorothy Perkins stores, the existing fashion offer is orientated to the value end of the market and lacks sufficient concentration of national fashion multiples (M&S, TopShop, River Island etc.)
- 8.18 Therefore, in order for Chorley to further improve its market share performance and offer in both quantitative and important qualitative terms, the town centre would need to build upon its existing fashion offer and attract higher order mainstream fashion multiples which are presently located in larger centres or retail parks which serve regionally-based catchments (i.e. Preston City Centre or Middlebrook Retail Park).
- 8.19 The existing town centre is relatively well defined and there are relatively few immediately obvious development site opportunities available. The north eastern area of the town centre around the Market Walk shopping centre and EH Booth foodstore could however potentially provide a logical extension to the existing primary shopping area to accommodate new retail provision. This area of the town centre presently comprises surface car park sites which could accommodate new development.

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- 8.20 It is our view that the north eastern area of the town centre offers a major opportunity to provide new modern retail units which can be integrated into the existing town centre retail circuit. It is therefore recommended, subject to appropriate review of the availability and suitability of the potential sites (car park strategy review etc.), that the Council proactively plans for additional comparison retail development through the emerging LDF.
- 8.21 The quantitative capacity identified through the modelling exercise should however not be viewed as a restrictive position and if sequentially preferable developer-led proposals for new comparison retail development emerge outside of the LDF process, which would complement and qualitatively enhance the retail offer within Chorley, then additional comparison retail provision could be supported in quantitative terms.
- 8.22 The Council should however be satisfied that proposals are of an appropriate scale and will not adversely impact on the wider town centre (PPS4 tests). Any new scheme which emerges should also be of sufficient quality in terms of design and prospective retail anchors so as to genuinely facilitate an improvement in retail provision and clawback expenditure presently leaking to other competing centres.
- 8.23 With respect to bulky durable retailing, whilst existing provision is predominantly located outside the town centre, Chorley is relatively well served by the standalone B&Q store in addition to a Curry's Electrical store and Wickes DIY store at Chorley Retail Park. Whilst there is potential to further enhance existing bulky goods market shares, the allocation of new sites through the emerging LDF is not considered to be an overriding priority for the Council.
- 8.24 Any developer-led proposals could be supported outside of the LDF process so long as the new provision enhances the existing offer. We recommend that the Council seeks to update this capacity assessment prior to formalising the retail strategy for the latter phases of the emerging Core Strategy (i.e. post 2016).

## SOUTH RIBBLE

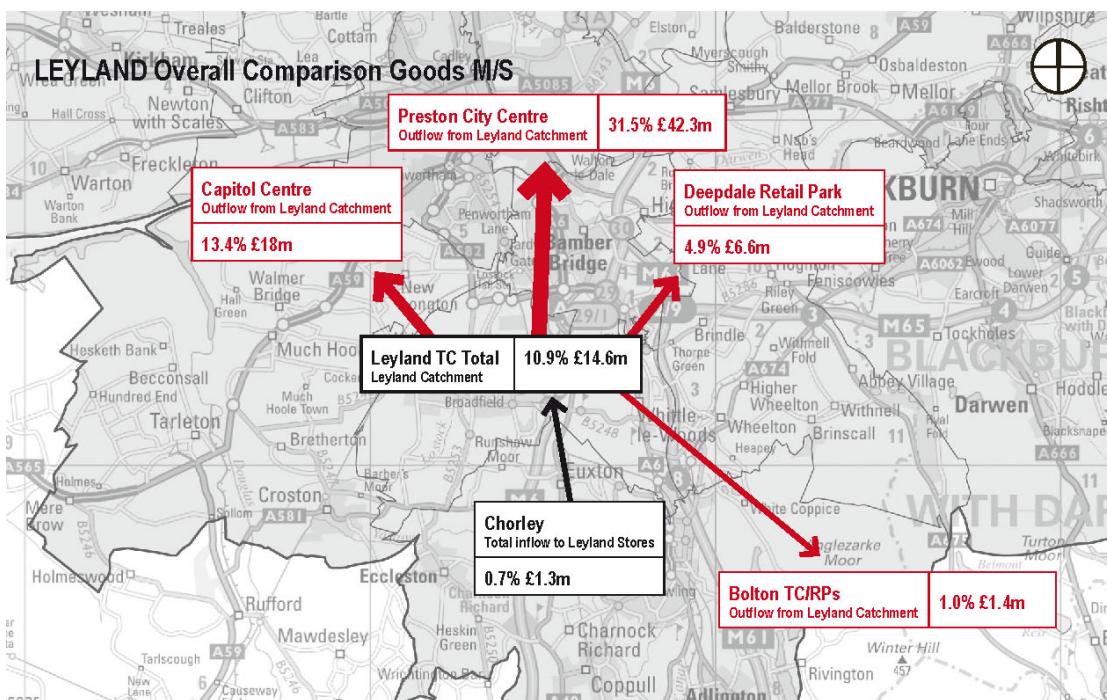
- 8.25 There is £134.2 million of comparison expenditure available within the Leyland catchment; this overall expenditure figure and includes (amongst others) the individual expenditure capacity for clothing (£33.7 million), personal goods (£24.9 million) and recreational goods (£16.3 million). The bulky goods expenditure pot includes DIY goods (£9 million) and major household appliances (£17.3 million).

- 8.26 In terms of the Bamber Bridge catchment, there is £87.9 million of comparison expenditure available; this comprises (amongst others) clothing (£22.1 million), personal goods (£16.1 million), DIY goods (£5.9 million) and major household appliances (£11.4 million).

## A) OVERALL COMPARISON GOODS MARKET SHARE

### LEYLAND TOWN CENTRE

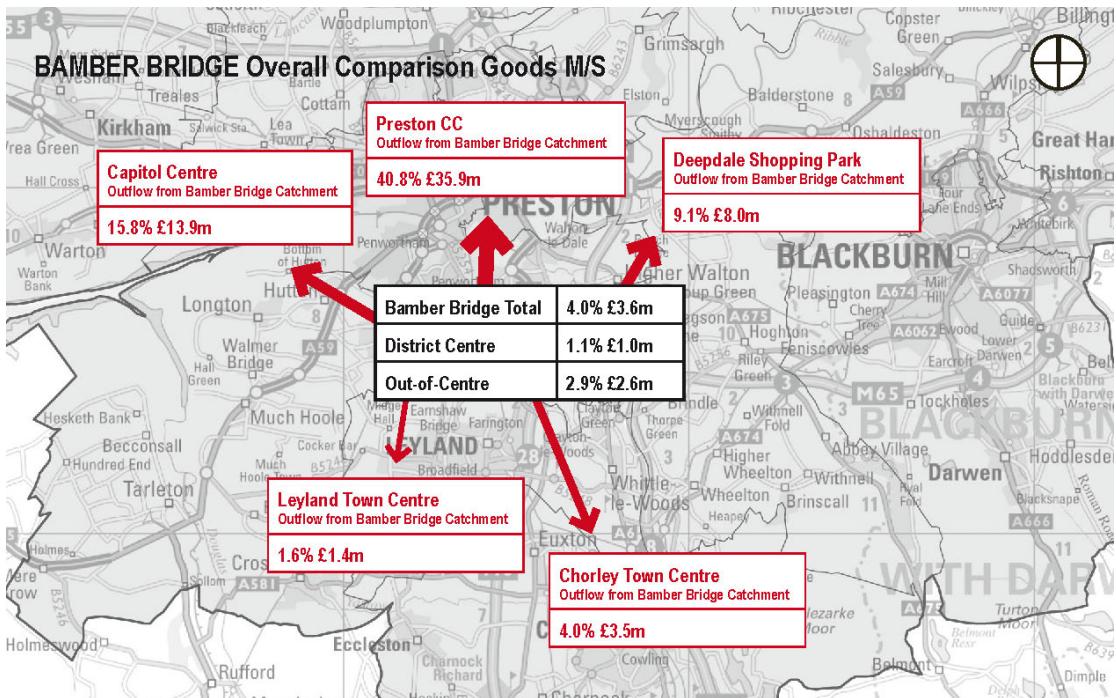
- 8.27 Leyland town centre has a relatively limited comparison retail offer with few national multiples. The limitations of the town centre offer are reflected in the survey results which highlight that the town only retains 10.9% (£14.6 million) of overall comparison spend (£134.2 million) arising within its immediate catchment. Inflows from surrounding catchments are relatively small (Bamber Bridge £1.4 million; Chorley £1.3 million).



- 8.28 In terms of expenditure leakage from the Leyland catchment, our assessment finds that Preston City Centre is the principal alternative destination for local residents, securing an overall 31.5% (£42.3 million) market share. Other notable outflows are to the Deepdale Shopping Park in Preston (4.9% / £6.6 million) and the Trafford Centre (1.3% / £1.7 million).
- 8.29 The overall survey-based turnover of Leyland, based on existing market share and inflows, is in the order of £19 million.

## BAMBER BRIDGE

- 8.30 The comparison retail offer in Bamber Bridge is even more limited than Leyland town centre and predominantly serves daily comparison shopping needs. The survey results indicate that the centre only retains 1.1% (£1 million) of expenditure arising within its catchment.



- 8.31 As the plan above shows, the principal retail destinations for residents in the Bamber Bridge catchment are higher order destinations such as Preston City Centre (40.8% / £35.9 million), the Capitol Centre (15.8% / £13.9 million) and Deepdale Shopping Park (9.1% / £8 million).

## CAPITOL CENTRE

- 8.32 The Capitol Centre retains 13.4% (£18 million) of overall comparison goods spend available in the Leyland catchment; this is in addition to a 15.8% (£13.9 million) market share from the Bamber Bridge catchment.
- 8.33 As a large out-of-centre retail park destination, the Capitol Centre serves a large sub-regional catchment including Preston Central West (6% / £11.5 million), Rural East North (17.4% / £2.6 million) and Rural West (6.8% / £5.2 million) catchment zones. On the basis of existing market share retention from the catchment zones within South Ribble allied to inflows from surrounding catchments, the overall (survey-based) turnover of the Capitol Centre is in the order of £69.7 million.

## B) INDIVIDUAL COMPARISON GOODS MARKET SHARES

### LEYLAND

- 8.34 The overall market share identified through the survey exercise masks varying retention levels in respect of individual comparison goods. The table below sets out the individual market share.

Comparison Goods	Town Centre MS from Immediate Catchment	Inflow from adjacent Catchments	Outflows (Competing Destinations)
<b>Clothing / Fashion</b>	Leyland 10.3% (£3.5m)	Bamber Bridge 2.8% (£0.6m) Blackburn 0.6% (£0.4m)	Preston CC 56.4% (£19m) Deepdale SP 5.1% (£1.7m) Chorley TC 5.1% (£1.7m)
<b>Personal Goods</b>	Leyland 7.4% (£1.8m)	N/A	Preston CC 47.1% (£11.7m) Chorley TC 5.9% (£1.5m) Deepdale SP 2.9% (£0.7m)
<b>Recreational Goods</b>	Leyland 11.1% (£1.7m)	N/A	Preston CC 25% (£3.9m) Deepdale SP 13.9% (£2.2m) Chorley TC 11.1% (£1.7m)
<b>Furniture Goods</b>	Leyland 10.4% (£1.8m)	Chorley 1.3% (£0.3m) Rural West 2.6% (£0.3m)	Preston CC 14.9% (£2.6m) Riversway RP 3% (£0.5m) Chorley TC 3% (£0.5m) Bolton 3% (£0.5m)
<b>DIY Goods</b>	Leyland 17.7% (£1.6m)	Chorley 5.8% (£0.7m) Rural West 3.4% (£0.2m)	Chorley 8.9% (£0.8m) Preston CC 7.6% (£0.7m) Chorley [Out-of-Centre] 3.8% (£0.3m)
<b>Major Household Appliances</b>	Leyland 14.1% (£2.4m)	Preston Central West 1% (£0.2m)	Preston CC 10.9% (£1.9m) Chorley TC 7.8% (£1.4m) Deepdale SP 6.3% (£1.1m)
<b>Large Electrical Goods</b>	Leyland 10.6% (£1.7m)	Bamber Bridge 5.4% (£0.6m) Chorley 1.3% (£0.3m) East Lancashire 1.5% (£0.2m)	Preston CC 15.2% (£2.5m) Chorley TC 3% (£0.5m) Deepdale SP 3% (£0.5m)

- 8.35 As the table details, Leyland retains only a small proportion of expenditure arising in respect of both high street comparison and bulky durable retail goods; this reflects the current weakness of the town's comparison offer which predominantly comprises a large non-food element within the Tesco Extra store on Towngate and discount operators (Poundstretcher, Brantano etc.) at Churchill Retail Park.

### BAMBER BRIDGE

- 8.36 Given that the centre only secures an overall 1.1% (£1 million) comparison goods market share from its immediate catchment, the survey results only identify individual market shares in respect of major household appliances (1.4% / £0.2 million), DIY goods (6.1% / £0.4 million), furniture (1.6% / £0.2 million) and personal goods (1.7% / £0.3 million). The predominant destination for high street comparison goods is Preston City Centre whilst local residents visit the Capitol Centre for bulky durable goods.

## CAPITAL CENTRE

- 8.37 The out-of-centre retail park has an open Class A1 retail consent and the composition of the park has changed over recent years with high street comparison retailers such as Boots and Next occupying units at the expense of more traditional retail warehouse operators. The relatively new Tesco Homeplus store includes a large comparison and bulky durable offer.
- 8.38 Whilst the retail composition of the Capitol Centre is evolving, the survey results identify that it secures a relatively weak market share for high street comparison goods but remains strong in respect of bulky durable goods, as follows:

Comparison Goods	Bamber Bridge Catchment	Leyland Catchment
Clothing	1.7% (£0.4 million)	1.3% (£0.4 million)
Personal Goods	1.7% (£0.3 million)	0%
Recreational Goods	0%	2.8% (£0.4 million)
Furniture	13.8% (£1.5 million)	11.9% (£2.1 million)
DIY Goods	7.2% (£0.4 million)	12.7% (£1.1 million)
Major Household Appliances	52.7% (£6 million)	40.6% (£7 million)
Large Electrical Goods	49% (£5.3 million)	42.4% (£6.9 million)

## C) FORWARD CAPACITY – BASELINE POSITION

- 8.39 On the basis of the town centres first approach articulated in PPS4 guidance, we set out the quantitative need for new provision within Leyland town centre below. The study does not seek to identify any formal need for new retail provision at the Capitol Centre given its out-of-centre status; any new development proposals at the Capitol Centre should be subject to the appropriate PPS4 planning tests in relation to impact (EC10 and EC16) and sequential compliance (EC15).

### LEYLAND

- 8.40 On the basis of forward population and expenditure growth, assuming that the current overall comparison market share is projected forward on a constant basis, the quantitative assessment identifies the following quantitative capacity for comparison goods:

YEAR	2015	2018	2021	2026
CAPACITY	805 m <sup>2</sup> (gross)	1,715 m <sup>2</sup> (gross)	2,848 m <sup>2</sup> (gross)	4,988 m <sup>2</sup> (gross)

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- 8.41 The capacity exercise identifies a quantitative requirement for new comparison floorspace in Leyland town centre during the mid to latter phases of the emerging Core Strategy. However, it is considered that there is no formal need for the Council to allocate any suitable sequentially compliant sites to meet the identified capacity at this present time given existing vacancies within the town centre which could readily meet any short-term retailer requirements. The potential for further improvement in market share performance is considered below.

### **BAMBER BRIDGE**

- 8.42 The survey results show that Bamber Bridge performs a minor comparison shopping role in the wider retail hierarchy. The majority of local residents look towards higher order comparison provision in Leyland town centre, Preston city centre or the Capitol Centre. Whilst there is quantitative and qualitative scope for the district centre to enhance its market share performance, it is considered that there is limited potential for the centre to attract the national comparison retailers required to secure improvements.
- 8.43 There is no formal need for the Council to proactively plan for quantitative expansion through the emerging Core Strategy; the policy focus should be on continuing to protect and enhance wherever possible the centre vitality and viability.

### **D) FORWARD CAPACITY – POTENTIAL FOR IMPROVEMENT**

- 8.44 Leyland presently secures just 10.9% (£14.6 million) of comparison goods expenditure arising within its immediate catchment (Zone 18). Whilst the survey results indicate that the town adequately meets local residents' day-to-day comparison shopping needs, the relatively weak overall market share performance is reflective of the higher order competition that Leyland faces from both Preston City Centre and the Capitol Centre.
- 8.45 Leyland has a limited comparison offer at present (Tesco Extra non-food offer complemented by a few discount multiples) and will continue in our view perform a secondary function in the Central Lancashire retail hierarchy.
- 8.46 Whilst there is quantitative scope to enhance the town's existing comparison market share and overall comparison goods retention level, given the proximity of the town to the higher order destinations, Leyland is unlikely in market terms to attract the national multiples required to increase its market share and address existing quantitative and qualitative deficiencies.

- 8.47 We therefore do not consider that there is an overriding need for the Council to plan for new comparison provision in Leyland through the emerging LDF. With respect to developer-led proposals which may emerge outside of the development plan process, consistent with our advice elsewhere, new provision could be supported within the catchment if of a sufficient quality to genuinely enhance the existing offer and clawback expenditure leaking to competing higher order destinations.
- 8.48 The emerging LDF policy focus for Leyland should therefore be on securing qualitative improvements to the town centre as identified in the Town Centre Masterplan rather than major quantitative expansion at this time. There is no overriding need for the Council to formally allocate any sites in the early phase of the Core Strategy.
- 8.49 The Council should however in accordance with PPS4 requirements continue to monitor the health of the centre and any future update to this retail study should enable the development of an informed forward strategy for the town centre through the latter phases of the LDF.

## PRESTON

- 8.50 As set out in the convenience retail analysis, both the city urban area and the rural area to the north are divided into separate west and east catchment zones. The modelling exercise identifies the following expenditure capacity within the wider Preston catchment:
- **Preston Central West;** £189.4 million of comparison goods expenditure arising within the catchment zone; this overall expenditure figure includes (amongst others) clothing (£47.9 million); personal goods (£35.6 million); recreational goods (£21.2 million); major household appliances (£24 million) and large electrical goods (£24 million).
  - **Preston Central East;** £144.6 million of comparison goods expenditure arising within the catchment zone; this overall expenditure figure includes (amongst others) clothing (£36.3 million); personal goods (£26.9 million); recreational goods (£17.3 million); major household appliances (£18.4 million) and large electrical goods (£18.4 million).
  - **Preston Rural West;** £28.4 million of comparison goods expenditure arising within the catchment zone; this overall expenditure figure includes (amongst others) clothing (£7 million); personal goods (£5.4 million); recreational goods (£3 million); major household appliances (£3.4 million) and large electrical goods (£3.3 million).
  - **Preston Rural East;** £23.4 million of comparison goods expenditure arising within the catchment zone; this overall expenditure figure includes (amongst others) clothing (£5.4

million); personal goods (£4.5 million); recreational goods (£2.7 million); major household appliances (£2.9 million) and large electrical goods (£2.7 million).

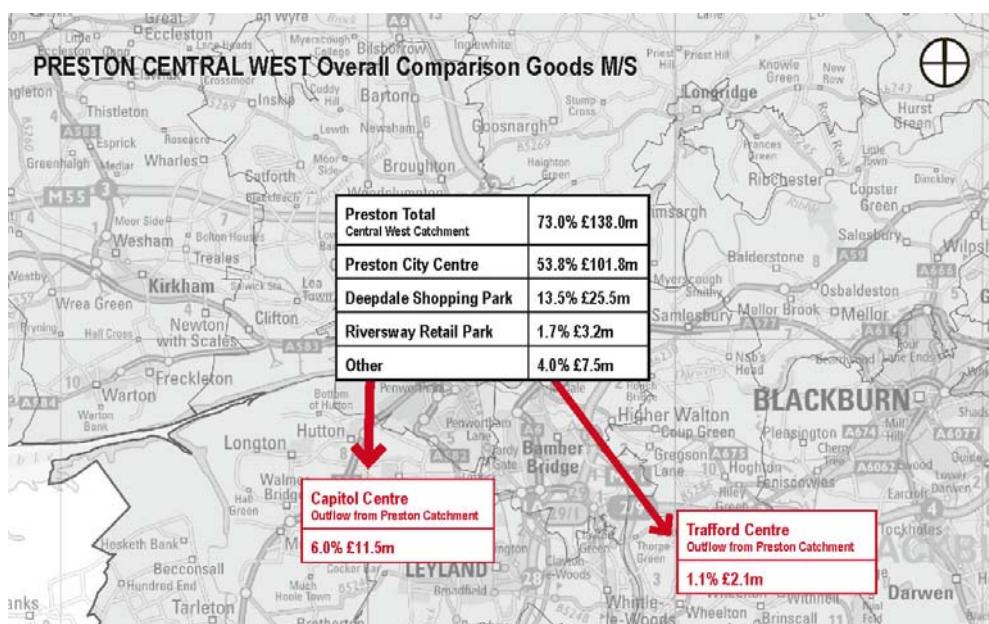
- 8.51 The overall expenditure capacity within the four individual catchment zones is therefore in the order of £385.8 million. The City Centre does however clearly serve a wider regional catchment and the market share / expenditure retention levels are set out below.

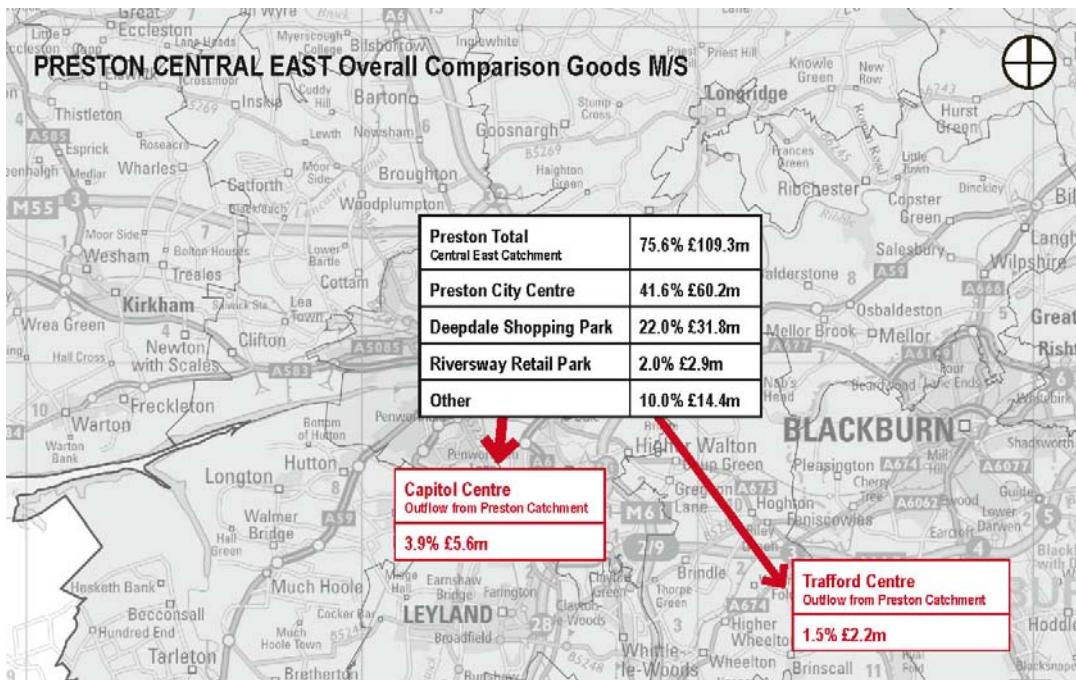
## A) OVERALL COMPARISON GOODS MARKET SHARE

- 8.52 On the basis of population and expenditure data, there is some £334 million of comparison goods expenditure available within Preston Central West and Preston Central East overall. The market share performance of each catchment is summarised below.

### PRESTON CITY CENTRE

- 8.53 Preston City Centre presently retains just over half (53.8% / £101.8 million) of all comparison goods expenditure (£189.4 million) arising within the Preston Central West catchment. The city centre does however retain a lower market share from the Preston Central East zone (41.6% / £60.2 million). The market share from the Preston Rural East (44.1% / £10.3 million) and Rural West (41.4% / £11.8 million) catchment zones are broadly the same.
- 8.54 The survey identifies major inflows from surrounding catchments including Kirkham (27.8% / £24 million); Wyre Borough (28.7% / £24.1 million); Blackburn North (20.5% / £16.6 million); Rural East North (33.8% / £5 million), Bamber Bridge (40.8% / £35.9 million) and Leyland (31.5% / £42.3 million). This reflects the regional draw of Preston as a centre.





- 8.55 On the basis of existing market share and inflows, the city centre generates a comparison goods turnover in the order of £448.8 million.

### DEEPDALE SHOPPING PARK

- 8.56 The shopping park has a strong mix of high street comparison and bulky goods retail operators present. The survey results indicate that the shopping park secures an overall 13.5% (£25.5 million) market share from the Preston Central West catchment; this is in addition to a 22% (£31.8 million) market share from Preston Central East, 18.6% (£4.4 million) from Preston Rural East and 15.6% (£4.4 million) from Preston Rural West.
- 8.57 The sub-regional catchment that the shopping park serves is highlighted by the large expenditure inflows from the Blackburn North (10.8% / £8.8 million), Wyre Borough (9.6% / £8 million) and Bamber Bridge (9.1% / £8 million) catchments. On the basis of existing market share and inflows, the shopping park secures an comparison goods turnover of £125.8 million.

### B INDIVIDUAL COMPARISON GOODS MARKET SHARES

- 8.58 The household survey identifies that the city centre secures a varied market share performance in respect to individual comparison goods sectors; this is to be broadly expected, particularly in relation to bulky durable goods which, notwithstanding the *town centres first* approach, are traditionally located in out-of-centre retail warehouse parks.

- 8.59 The individual market share levels that the city centre achieves from both the Preston Central West and Preston Central East catchment zones is set out below. The main competing destinations and principal inflow sources are also set out for ease of reference.

	Preston Central West		Preston Central East		OVERALL
	Market Share	Leakage	Market Share	Leakage	Inflow
<b>Clothing</b>	76.5% (£36.6m)	Deepdale SP 9.8% (£4.7m)	55.1% (£20m)	Deepdale SP 30.8% (£11.2m)	Leyland 56.4% (£19 m) Blackpool 15.9% (£15.3 m) Bamber B 63.6% (£14.1 m)
<b>Personal Goods</b>	71.3% (£25.4m)	Deepdale SP 11.3% (£4m)	59.7% (£16.1m)	Deepdale SP 12.9% (£3.5m)	Leyland 47.1% (£11.7m) Bamber B 69.6% (£11.2m) Kirkham 48.9% (£8m)
<b>Recreational Goods</b>	48% (£10.2m)	Deepdale SP 22% (£4.7m)	41.7% (£7.2m)	Deepdale SP 31.3% (£5.4m)	Blackpool 13.5% (£6m) Leyland 25% (£3.9m)
<b>Furniture</b>	44% (£10.7m)	Capitol Centre 6.6% (£1.6m)	35.5% (£6.3m)	Riversway RP 6.4% (£1.1m)	Rural West 35.8% (£3.8m) Wyre Borough 30.2% (£3.6m) Bamber Bridge 28.9% (£3.2m)
<b>DIY Goods</b>	36.5% (£4.5m)	North Road 22.9% (£2.8m)	29.2% (£2.7m)	North Road 37.5% (£3.6m)	Wyre Borough 25.4% (£1.7m) Rural West 18.6% (£1.1m)
<b>Hsehold Apps.</b>	30.9% (£7.4m)	Capitol Centre 20.6% (£5m)	21.4% (£3.9m)	Deepdale SP 31.4% (£5.8m)	Wyre Borough 25.9% (£2.7m) Rural West 20.7% (£2m)
<b>Large Electrical Goods</b>	29.1% (£7m)	Deepdale SP 30.2% (£7.2m)	21.1% (£3.9m)	Deepdale SP 29.6% (£5.4m)	Leyland 15.2% (£2.5m) Bamber Bridge 20.3% (£2.2m) Wyre Borough 20.7% (£2.1m)

- 8.60 The table clearly highlights that the town centre performs relatively strongly in respect of high street comparison goods but achieves lower market shares for bulky durable goods given the extent and nature of out-of-centre retail warehouse competition.
- 8.61 Whilst the town centre market share for clothing, personal and recreational goods is relatively high, it is considered that there is additional quantitative scope to further enhance city centre market share performance and expenditure retention levels for high street comparison goods; this is discussed in detail below.

## DEEPDALE SHOPPING PARK

- 8.62 The shopping park has a mix of high street comparison and bulky durable retailers. The table below highlights a distinct split in catchment spending patterns from local residents in the Central West and Central East catchment zones.

Comparison Goods	Preston Central West Catchment	Preston Central East Catchment
Clothing	9.8% (£4.7 million)	30.8% (£11.2 million)
Personal Goods	11.3% (£4 million)	12.9% (£3.5 million)
Recreational Goods	22% (£4.7 million)	31.3% (£5.4 million)
Furniture	2.2% (£0.5 million)	3.2% (£0.6 million)
DIY Goods	1% (£0.1 million)	0%
Major Household Appliances	17.5% (£4.2 million)	31.4% (£5.8 million)
Large Electrical Goods	30.2% (£7.2 million)	29.6% (£5.4 million)

## C) FORWARD CAPACITY – BASELINE POSITION

- 8.63 On the basis of the *town centres first* approach articulated in PPS4 guidance, the study does not seek to identify any formal need for new retail provision in out-of-centre locations (i.e. Deepdale Shopping Park). Any new out-of-centre development proposals should be subject to the appropriate PPS4 planning tests in relation to impact (EC10 and EC16) and sequential compliance (EC15).
- 8.64 With respect to Preston City Centre, on the basis of the sub-regional inflows that it secures, allied to robust forward population and expenditure growth, the capacity assessment identifies the following capacity for comparison goods through the emerging Core Strategy period:

YEAR	2015	2018	2021	2026
CAPACITY	63,911 m <sup>2</sup> (gross)	76,294 m <sup>2</sup> (gross)	91,710 m <sup>2</sup> (gross)	120,819 m <sup>2</sup> (gross)

- 8.65 As the table highlights, the capacity assessment identifies a significant comparison floorspace requirement through the emerging Core Strategy process. The baseline capacity is however reduced when the quantitative claims of retail planning commitments such as the long-standing proposal to extend the Fishergate Shopping Centre are taken into account; the revised capacity position once commitments are accounted for is reflected below:

YEAR	2015	2018	2021	2026
CAPACITY	55,238 m <sup>2</sup> (gross)	67,621 m <sup>2</sup> (gross)	82,140 m <sup>2</sup> (gross)	110,964 m <sup>2</sup> (gross)

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- 8.66 The revised baseline position clearly identifies that even when the quantitative claims of existing commitments are taken into account, there is an overriding quantitative requirement for the Council to proactively plan through the emerging Core Strategy process to accommodate the identified need.

## D) FORWARD CAPACITY – POTENTIAL FOR IMPROVEMENT

- 8.67 The baseline capacity position is presented on a constant market share basis and does not consider the potential for the city centre to enhance its overall market on either a global (i.e. overall comparison market share) or individual goods basis (clothing etc.) from its immediate core catchment (Preston urban and rural zones). The household survey for example only identifies that the city centre secures 76.5% and 55.1% market shares for clothes and fashion goods from the Preston Central West and Central East catchments.
- 8.68 Whilst some expenditure leakage is inevitable given the dynamic hierarchy within which Preston operates, it is important to note that the capacity assessment does not rely on any market share uplift from competing centres; it is assumed that Preston will continue to draw from the wider sub-region on a constant market share basis.
- 8.69 Any potential enhancement of market share from the city's immediate core catchments (i.e. Zones 1 – 4) and the wider Central Lancashire area (South Ribble in particular) would however be fully justified in PPS4 terms given the material economic benefits (increased expenditure retention; encouragement of increased footfall and linked trips potential) and sustainability benefits (trade clawback from out-of-centre retail parks, promoting linked shopping trips and reducing the need to travel) that new provision would deliver.
- 8.70 To this extent, the proposed Tithebarn regeneration scheme in the city centre, which proposes a mix of uses including c. 52,000 m<sup>2</sup> (net) of new comparison retail floorspace and a new evening economy quarter (multiplex cinema, bars and restaurants) would meet the overriding need identified in the assessment. The Tithebarn scheme has been promoted by Preston City Council through firstly its own LDF process (adopted SPD) and then by the Joint Authorities in the emerging Central Lancashire Core Strategy (Preferred Option September 2008).
- 8.71 It is understood that the Call-In Inquiry into the Tithebarn proposal will commence in May 2010. Clearly it is not for this study to assess the acceptability of the proposals in PPS4 terms (need not relevant in the development management context). The Tithebarn regeneration scheme would however clearly meet the overriding quantitative need identified in the capacity assessment and also address existing qualitative deficiencies (i.e. lack of department store

provision and modern retail units) by significantly enhancing the existing retail and leisure offer in the city centre.

- 8.72 It is our view therefore that the Council should therefore maintain its current and emerging LDF policy support for a significant quantitative expansion of the city centre comparison retail offer. A '*do nothing*' scenario is likely to lead to a further erosion in the market share and overall competitiveness of the city centre in light of significant competition from larger regional centre destinations (Manchester and Liverpool City Centres; Trafford Centre) and local out-of-centre retail park destinations (Capitol Centre and Deepdale Shopping Park) which benefit from open Class A1 planning consents and include several high street comparison retailers such as Next and M&S.
- 8.73 If the Tithebarn scheme is approved following the Call-In Inquiry then there is no overriding need for the Core Strategy to identify any additional in-centre sites for comparison retail and leisure development.

## 9. LEISURE ASSESSMENT

- 9.1 This section reviews the distribution of existing leisure facilities within the main centres of Central Lancashire; the assessment focuses on cinema, bingo, health and fitness, and the evening economy. In order to inform the assessment, we have drawn upon the results of the household telephone survey, which was designed to establish where local residents regularly visit for specific leisure activities.
- 9.2 As with non-food retailing, the recent trend in the leisure market has been the preference for national leisure chains to locate in larger centres in the hierarchy in order to serve larger catchment zones and benefit from higher footfall and linked trips. Whilst the leisure industry has enjoyed buoyant market conditions over the last decade as a result of a number of factors (primarily growing levels of disposable income), the current economic downturn has brought many challenges with declining patronage levels and spending on leisure activities.
- 9.3 We therefore summarise the underlying trends in the various leisure sectors below prior to establishing the principal leisure destinations for local residents on an individual centre basis. The main suggested improvements to leisure provision in the individual centres inform a wider qualitative-based assessment of forward need.

### EXISTING LEISURE MARKET CONTEXT

#### CINEMA

- 9.4 The growth in cinema audiences increased significantly during the 1990s but recent research by Dodona (Cinemagoing 18) has indicated that the market has now stagnated. However, despite the current economic climate, investment in new cinemas is continuing but the primary focus of operators has been on upgrading existing facilities and developing smaller format multiplexes<sup>iv</sup> in sub-regional centres to serve large catchments and maximise occupancy rates. The rate of cinema expansion is however anticipated to significantly decrease in the short term (3-5 years), mainly due to the lack of capital to finance town centre mixed-use development projects.
- 9.5 The concentration of cinema provision towards larger centres is evident in the Lancashire region with several multiplexes in the Preston area (Odeon at Riversway Retail Park, Vue at the Capitol Centre), Bolton (Vue, UCI) and Blackburn (Apollo, Vue). Chorley and Leyland do not have mainstream cinema provision.

## BINGO

- 9.6 The bingo industry has experienced a significant fall in revenues and admissions as a result of recent legislative changes (smoking ban) and the increase in online gambling. The current recession has also impacted on the market and although operators have attempted to diversify the appeal of their offer away from the traditional core market (older demographic), participation rates continue to fall and operators are struggling.
- 9.7 Whilst bingo is identified in PPS4 as a main town centre use, it is of declining importance to the vitality and viability of a centre. We have however included an assessment of bingo provision across the main centres in Central Lancashire for completeness.
- 9.8 Bingo provision is generally concentrated towards the main centres in the hierarchy, with large-scale bingo halls located in Preston (Gala Club, The Buckingham Bingo Club) and Chorley (Gala Club). There are a number of local clubs which complement the mainstream offer in Central Lancashire.

## RESTAURANT AND BARS

- 9.9 The drinks leisure industry continues to suffer from the recession with a significant number of pub closures due to the decline in both drinks sales and rental revenues. Competition from supermarkets, changes to licensing legislation and the smoking ban have further compounded the problems faced by many operators. Several large national pub chains face continued difficult trading conditions although value-led brands such as JD Wetherspoon have achieved significant sales growth and continue to expand.
- 9.10 With respect to the restaurant sector, the current economic climate has had a mixed impact with both high-end and smaller less established brands closing. Whilst national chain restaurants have announced stable trading results, many operators have had to run heavy promotions and discount offers. The reduction in family spending on leisure activities has also led to a significant increase in home dining and takeaway meals.
- 9.11 In terms of the locational strategy of national chain bars and restaurants, consistent with the wider retail and commercial leisure sectors, the current market preference is for prominent high street locations adjacent to major shopping and leisure attractions (cinemas etc.) in larger centres so as to benefit from increased footfall and linked trips.

## CHORLEY

- 9.12 The *Experian* database indicates that the average spend by local residents in the Chorley catchment on leisure activities (cultural services, restaurants etc.) is below the UK average.

CHORLEY	Average Spend (£) per person	Available Expenditure (£)	UK Average Spend (£) per person
Recreational and sporting services	£99	£6.8m	£119
Restaurants, cafes etc.	£1,034	£71.1m	£1,106

## CINEMA

- 9.13 Whilst the town does not presently have a cinema facility, the household survey results indicate that just under half (47%) of local residents regularly visit the cinema. Most local residents visit mainstream cinema provision in Bolton (48.9% visit Vue Cinema and 8.5% UCI). Whilst Preston is the dominant location for higher order comparison shopping trips, existing provision within the city only attracts 8.5% of residents from the Chorley catchment. The provision of a new city centre multiplex as part of the Tithebarn regeneration proposals would clearly derive positive benefits in the wider Central Lancashire context by drawing local residents to Preston instead of outside the sub-region.
- 9.14 In terms of forward need for new cinema provision in Chorley, whilst the town could readily accommodate new provision, it is our view that there is limited prospect of new provision coming forward in commercial terms due to the limited residential catchment it serves and the competition from existing facilities in nearby higher order centres. If however any developer-led proposals do however emerge outside of the LDF process then subject to assessment against relevant PPS4 policy tests, the town could support new cinema provision.

## GYM / HEALTH & FITNESS

- 9.15 The household survey identifies that 19% of local residents within the Chorley catchment regularly visit health and fitness facilities. Over a fifth (21.1%) of local residents visit the private membership David Lloyd (Next Generation) facility, which has a full range of facilities including indoor and outdoor swimming pools, indoor and outdoor racquet courts, fitness studio and a spa. Only 5.3% visit Chorley Fitness Centre, whilst some 21.1% of residents use other health and fitness facilities.
- 9.16 Given the existing public and private leisure centre facilities in Chorley, we consider that there is no overriding quantitative or qualitative requirement for the Council to proactively plan for

additional gym provision through LDF process. If any private operator-led health and fitness proposals do however emerge outside of the LDF process, it should be assessed against the relevant PPS4 policy tests.

## BINGO

- 9.17 The household survey results find that 14% of local residents in the Chorley catchment regularly play bingo in local clubs. Given the current difficulties facing the bingo sector since the public smoking ban and the expansion of internet gaming, we do not consider that the Council needs to proactively plan for new provision through the LDF process. Any developer-led proposals should be subject to the relevant policy tests.

## RESTAURANTS AND BARS

- 9.18 Chorley has a relatively small evening economy offer which is focused on traditional independent pubs and restaurants predominantly focused along Market Street. The household survey results indicate that 71% of local residents within the Chorley catchment regularly visit restaurants. The majority (53.5%) visit restaurants in the town centre although Preston and Wigan (each 4.2%) are also popular destinations.
- 9.19 With respect to social drinking, the survey results indicate that under half (48%) of local residents in the Chorley catchment regularly go out to drink in pubs / nightclubs; the majority do however go out visit Chorley (64.6%) although some local residents travel to Preston City Centre (6.2%).
- 9.20 In terms of forward policy and town centre strategy for Chorley, in addition to continuing to actively manage the evening economy, which is predominantly orientated towards social drinking, the Council should seek to promote in conjunction with its town centre partners the diversification of the evening leisure offer towards more family-orientated establishments in order to increase dwell-times within the town centre.

## LEYLAND

- 9.21 The *Experian* database indicates that average expenditure on leisure activities by local residents within the Leyland and Bamber Bridge catchments is below the UK average.

LEYLAND	Average Spend (£) per person	Available Expenditure (£)	UK Average Spend (£) per person
Recreational and sporting services	£95	£5.1m	£119
Restaurants, cafes etc.	£1,014	£54.6m	£1,106

- 9.22 The leisure expenditure capacity within the Bamber Bridge catchment is set out below.

BAMBER BRIDGE	Average Spend (£) per person	Available Expenditure (£)	UK Average Spend (£) per person
Recreational and sporting services	£92	£3.3m	£119
Restaurants, cafes etc.	£1,016	£36.2m	£1,106

### CINEMA

- 9.23 The household survey results indicate that 44.9% of residents within the Leyland catchment regularly visit the cinema; this is slightly higher than the Bamber Bridge catchment (41.5%). The Vue cinema at the Capitol Centre is the principal cinema destination, attracting 52.5% from Leyland and 62.7% from Bamber Bridge. The second most popular facility is the Vue cinema in Bolton, which is visited by 17.5% of Leyland residents and 9.6% of Bamber Bridge residents. There are also limited trips to the UCLAN Independent Cinema (Leyland 7.5%, Bamber Bridge 3%), and the Odeon at Riversway Retail Park in Preston (Leyland 5%, Bamber Bridge 3%).
- 9.24 Given the existing provision at the out-of-centre Capitol Centre, we consider that there is limited prospect of new provision coming forward on commercial grounds in either Leyland or Bamber Bridge due to the respective centres limited catchment and competition from existing facilities in nearby higher order centres and out-of-centre retail park destinations. The planned new multiplex cinema within the Tithebarn regeneration scheme would further undermine commercial demand for new provision.
- 9.25 On this basis, it is considered that there is no overriding need for the Council to proactively plan for new cinema provision in South Ribble through the LDF process. If however any developer-led proposals emerge outside of the LDF process then subject to assessment against relevant PPS4 policy tests, new cinema provision could be supported.

### GYM / HEALTH & FITNESS

- 9.26 The household survey results confirm that 20.2% of Leyland residents visit the gym on a regular basis. Nearly a quarter (23.3%) of local residents within the Bamber Bridge catchment visits the gym regularly. Most local residents (Leyland 22.2%, Bamber Bridge 40.9%) visit the Virgin Active facility at the Capitol Centre; this private members gym includes a full range of facilities including a 25-metre swimming pool, modern fitness suite and sauna.

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- 9.27 The next most popular destinations for Leyland residents are Fitness First in Preston and David Lloyd in Chorley (each 11.1%). The survey results do not however capture local resident patronage to the public leisure centre facility on the edge of Leyland which has a 50 station fitness suite, 25 metre (6 lane) swimming pool and multi-purpose sports hall.
  - 9.28 The public Bamber Bridge Leisure Centre is however popular with local residents within the Bamber Bridge catchment (12.9%).
  - 9.29 On the basis of the existing public and private gym provision within both the Leyland and Bamber Bridge, it is considered that there is no overriding need for the Council to proactively plan for additional gym development during the LDF process. Proposals for private health and fitness facilities are normally promoted by developers and any application for new provision which comes forward outside of the LDF process should be subject to detailed assessment in accordance with the relevant PPS4 policy tests.

### BINGO

- 9.30 The household survey results confirm that 11.2% of local residents within the Leyland catchment and 16.3% of local residents in the Bamber Bridge catchment regularly play bingo. Given the current difficulties facing the bingo sector since the public smoking ban and the expansion of internet gaming, it is considered that the Council does not need to proactively plan for new provision through the LDF process. Any developer-led proposals should be subject to the relevant PPS4 policy tests.

### RESTAURANTS AND BARS

- 9.31 The evening economy in Leyland comprises a limited number of traditional pubs and high street restaurants. The main provision is predominantly located in the secondary areas of the town centre around Chapel Brow and Golden Hill Lane.
- 9.32 The household survey results confirm that 71.9% of local residents in the Leyland catchment regularly eat out in restaurants with 15.6% visiting restaurants in Leyland town centre. Most local residents eating out visit Preston City Centre (21.9%).
- 9.33 With respect to Bamber Bridge, whilst 57.2% of Bamber Bridge residents claim to regularly eat out in restaurants, only 2.2% visit restaurants in Leyland and Bamber Bridge respectively. Most local residents (57.6%) visit Preston City Centre, which has a broader range of chain and independent high street restaurants.

- 9.34 In terms of social drinking, the survey finds that just over half of local residents in Leyland and Bamber Bridge (53.9% and 51.5% respectively) regularly go out to socialise. The majority of residents from the Leyland catchment go out to drink in the town centre (35.4%) with outflows to Chorley (20.8%) and Preston (18.8%); the outflows from the catchment potentially reflect the higher order leisure offer in the two larger centres (national chains etc.).
- 9.35 Bamber Bridge residents primarily socialise in Preston City Centre (52%). No local residents from Bamber Bridge socialise in Leyland town centre.
- 9.36 The forward strategy for Leyland and Bamber Bridge should seek to promote the diversification of the evening economy offer towards more family-orientated establishments; this would encourage linked trips within the town centre and in turn longer dwell times. The prospect of attracting national chain restaurant operators for example may however be difficult given the proximity of both Leyland and Bamber Bridge to larger centres such as Preston.

## PRESTON

- 9.37 Whilst the *Experian* data finds that local residents in Preston spend below the UK average on leisure activities, the city serves a large sub-regional catchment and there is a significant quantum of spending available to support leisure provision.

PRESTON CENTRAL WEST	Average Spend (£) per person	Available Expenditure (£)	UK Average Spend (£) per person
Recreational and sporting services	£93	£7.1m	£119
Restaurants, cafes etc.	£1,035	£79.1m	£1,106

PRESTON CENTRAL EAST	Average Spend (£) per person	Available Expenditure (£)	UK Average Spend (£) per person
Recreational and sporting services	£83	£5.4m	£119
Restaurants, cafes etc.	£927	£59.8m	£1,106

## CINEMA

- 9.38 The household survey results highlight that 55.5% of local residents within the Preston Central West catchment regularly visit the cinema; a total of 44.7% of local residents within the Preston Central East catchment also visit.
- 9.39 The primary cinema destinations are the out-of-centre Odeon multiplex (10 screen) at Riversway Retail Park which attracts 54.1% and 31.6% of local residents from the Preston

Central West and Preston Central East catchments and the Vue cinema (7 screens) at the Capitol Centre in South Ribble (Preston Central West 18%; Preston Central East 39.5%). The Vue cinema in Bolton attracts a small number of residents (Preston Central West 4.9%, Preston Central East 7.9%).

- 9.40 Cinema provision within a centre can be a major attraction (increased dwell times, support food & drink uses etc.) and the lack of provision within Preston City Centre undermines its role as a sub-regional centre in the retail hierarchy. The planned multiplex as part of the Tithebarn regeneration proposals will therefore deliver significant qualitative benefits by drawing local residents back into the city centre that are presently visiting out-of-centre cinema provision on surrounding retail parks.
- 9.41 On this basis, the Council should seek to proactively plan through the LDF process for new cinema provision within Preston City Centre. If the Tithebarn regeneration proposals are approved after the Call-In Inquiry then there will be no overriding need for additional provision within the wider Preston catchment.

### **GYM / HEALTH & FITNESS**

- 9.42 The household survey confirms that just under a quarter of local residents within the Preston catchments regularly visit health and fitness facilities (Preston Central West 22.7%, Preston Central East 21.2%).
- 9.43 Most of these residents visit the public leisure centres at West View (Preston Central West 28%, Preston Central East 22.2%) and Fulwood (Preston Central West 12%, Preston Central East 22.2%). Popular private members gyms include Virgin Active at the Capitol Centre and the Motorcise gym in Preston.
- 9.44 In the light of existing modern public gym facilities in Preston and the limited patronage of private health club facilities by local residents, we do not consider that there is any overriding need for the Council to proactively plan through the LDF process for any new health and fitness provision. As the health and fitness sector is dynamic and generally operator-led, any proposals which emerge outside of the LDF process should be assessed in accordance with the relevant PPS4 policy tests.

### **BINGO**

- 9.45 The household survey results indicate that 8.2% of Preston Central West residents and 10.6% of Preston Central East residents regularly playing bingo. The main destination is the out-of-centre Buckingham Bingo at West Strand. Given the current difficulties facing the bingo sector

since the public smoking ban and the expansion of internet gaming, we do not consider that the Council needs to proactively plan for new provision through the LDF process. Any developer-led proposals should be subject to the relevant PPS4 policy tests.

## **RESTAURANTS AND BARS**

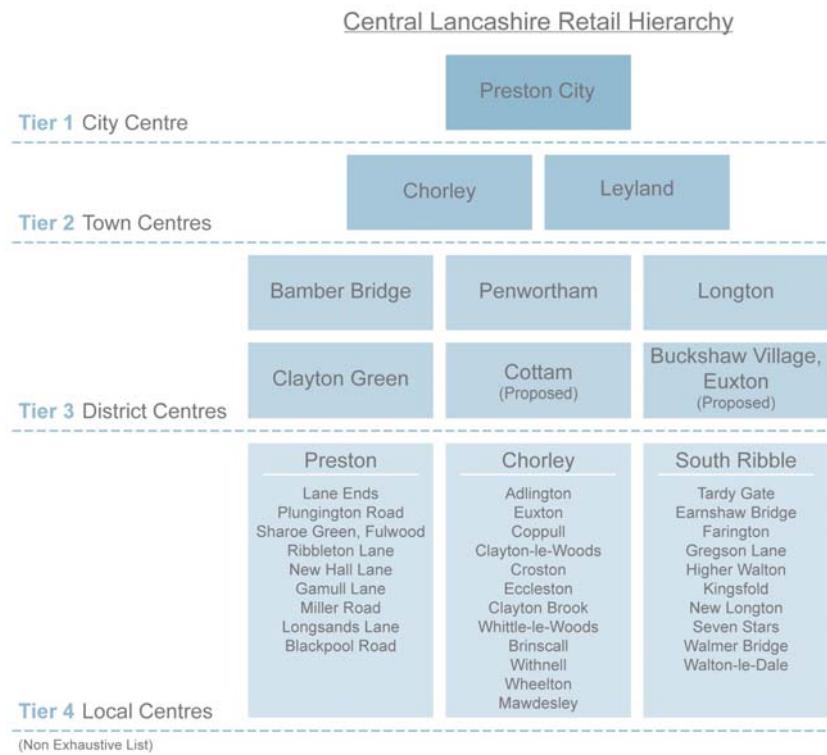
- 9.46 The evening economy offer in Preston City Centre is primarily concentrated around the Church Street, Avenham Street and Cannon Street areas.
- 9.47 The survey results confirm that 62.7% of residents within the Preston Central West and 69.4% of the Preston Central East catchment regularly visit restaurants to eat out. The vast majority of these local residents (Preston Central West 63.8%, Preston Central East 76.3%) visit restaurants in the city centre. A limited number visit Manchester (Preston Central West 4.3%, Preston Central East 1.7%).
- 9.48 With regards to socialising, over half of local residents (Preston Central West 50.9%, Preston Central East 55.3%) regularly go out in the evening. Preston City Centre is the most popular destination, attracting 73.2% from Preston Central West and 78.7% from Preston Central East.
- 9.49 Whilst the city centre has a large evening economy offer, it is our view that the existing offer lacks any qualitative depth. As recognised in the Tithebarn SPD, the Council should proactively plan to improve the evening leisure offer and provide a more family orientated offer in order to attract a wider range of local residents and visitors to the city centre in the evening.
- 9.50 As a city centre serving a wider sub-region, it is notable that Preston lacks representation of national chain restaurant operators such as Zizzi, Wagamama and Strada (amongst others). The Tithebarn regeneration proposals do however provide significant opportunity to create a new leisure quarter within the city centre in conjunction with the proposed multiplex cinema.

## 10. CENTRAL LANCASHIRE CENTRE HIERARCHY

- 10.1 PPS4 advises local planning authorities (LPAs) to consider the network of centres and their relationship in the hierarchy. In defining the objectives of their spatial strategies, LPAs are required to consider whether there is a need to rebalance the network of centres to ensure that the largest centres do not overly dominate and that there is a more even distribution of town centre uses. PPS4 requires everyday needs are met at the local level due to economic and sustainability benefits such as reducing the need to travel.
- 10.2 Within this context, a key requirement of the Study is to define the hierarchy of centres across the Central Lancashire area and to consider an appropriate spatial response in terms of locating new retail provision.
- 10.3 Having regard to the existing hierarchy and taking into account the PPS4 typology of centres (Annex B) and the findings of this study we set out below the proposed retail centre hierarchy option for the Joint Core Strategy. The proposed centre hierarchy option is based on a range of criteria, primary amongst which is the quantitative and qualitative assessment of each respective centre, the size of the centre, its wider function in terms of its overall shopping and service offer and the number of national multiples represented.
- 10.4 The proposed hierarchy option does however not preclude the promotion of any centre or a further rationalisation of the hierarchy. The forward planning policy process may identify local issues which could materially influence the hierarchy definition.

### PROPOSED CENTRE HIERARCHY

- 10.5 The Central Lancashire retail hierarchy proposes that major retail and leisure development is focused in Preston City Centre and Chorley and Leyland town centres. Retail and leisure developments of an appropriate scale in district centres will also be promoted in order to adequately meet local shopping needs. The smaller local centres will primarily meet local residents daily convenience (top-up) shopping and service (banks etc.) needs.



## **TIER 1 – PRESTON CITY CENTRE**

- 10.6 Preston is the principal centre in the Central Lancashire area in terms of size and market share influence. The city centre has over 85,000 m<sup>2</sup> of existing comparison floorspace and accommodates several higher multiple comparison retailers.
- 10.7 The quantitative capacity analysis clearly indicates that Preston draws from a significant sub-regional catchment extending well into Lancashire County for comparison shopping (particularly clothing). The city centre achieves a survey-based turnover in the order of £448.8 million which is significantly above other centres in the Joint Authority area (Chorley £108.7 million).
- 10.8 Preston also has a substantial employment and service function and is recognised within the adopted RSS regional spatial framework as a third priority for growth behind Manchester and Liverpool and the inner areas surrounding the regional cities. This is also reflected in the Central Lancashire City Region Policies which seek to focus investment and sustainable development in Preston City Centre (amongst others).
- 10.9 In terms of the future role for Preston in the sub-region, whilst the current Tithebarn proposals for the comprehensive regeneration of the city centre are subject to a Call-In Inquiry, it is clear given that the city centre, in terms of its scale and extent of its catchment, affords the only

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realistic opportunity for significant quantitative and qualitative enhancement of the comparison retail offer in the Central Lancashire area.

## **TIER 2 - MAIN TOWN CENTRES**

- 10.10 Chorley and Leyland town centres are the principal centres for both Chorley Borough and South Ribble local authority areas. Whilst both towns have major foodstores and have a full range of local services and employment uses, the quantitative and qualitative assessment identifies that Leyland and to a lesser extent Chorley performs a secondary role in the Central Lancashire sub-region. Although the existing retail offer within both town centres adequately meets local resident's day-to-day comparison shopping needs, the survey results indicate that most local residents look towards higher order retail destinations such as Preston, the Capitol Centre and Deepdale Shopping Park to meet their higher order comparison shopping needs.
- 10.11 This outflow of expenditure to surrounding higher order centres reflects the existing deficiencies in both centres retail offer. As previously detailed, the clothing and fashion offer in Leyland is extremely limited (principally Tesco Extra non-food) whilst the offer in Chorley lacks a concentration of national fashion multiples and with notable exceptions is orientated towards the discount end of the fashion market.
- 10.12 The quantitative assessment in particular has identified significant scope to enhance market share performance of both centres although given the increasing gravitation of national fashion multiples to larger retail centres, it may be difficult to significantly enhance overall market share performance.
- 10.13 The study does however recognise the potential of the north eastern area of Chorley town centre as a logical extension to the existing primary shopping area. This area has previously been subject to retail-led proposals although a formal planning application was never submitted to the Council. Any new scheme within this area of the town centre provides a significant opportunity to provide new modern retail accommodation attractive to mainstream national multiple retailers.
- 10.14 Any quantitative expansion in the retail offer in Chorley and Leyland town centres should however be matched by qualitative improvements in order to distinguish the centres from the larger centres such as Preston. The realisation of the opportunities and improvements identified in the respective Town Centre Masterplan exercises will therefore be particularly important in order to maintain and enhance vitality and viability, and underpin wider regeneration initiatives. Additional family orientated leisure development should also be

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supported given the relatively limited evening economy offer in the respective towns at present.

- 10.15 Within the emerging Joint Core Strategy, the key emphasis should be on promoting additional retail development of an appropriate scale (i.e. relative to its catchment) in the main town centres in order to better meet local residents' comparison shopping needs.

### **TIER 3 - DISTRICT CENTRES**

- 10.16 On the basis of the market share analysis and having regard to emerging provision the following network of district centres is proposed:
- **CHORLEY**– Clayton Green and Buckshaw Village (proposed);
  - **PRESTON** – Cottam (proposed); and
  - **SOUTH RIBBLE** – Bamber Bridge, Longton and Penwortham.
- 10.17 The quantitative and qualitative assessment has identified that the existing centres (Bamber Bridge, Clayton Green, Penwortham and Longton) predominantly perform a localised supporting role in the retail hierarchy and meet main food shopping needs by virtue of respective foodstore anchors (Asda at Clayton Green, EH Booth at Penwortham and Longton etc.). The healthcheck exercise found that the existing centres had a range of non-retail services, restaurants and public facilities (library etc.) which accord the PPS4 district centre definition. The comparison retail offer is however extremely limited (local independents).
- 10.18 With respect to Cottam and Buckshaw Village, we would propose that both are designated as district centres in the retail hierarchy given the prospective retail offer and local service uses that both are likely to support. The Buckshaw Village commitment includes a medium sized Tesco foodstore in addition to twelve commercial units of varying sizes which will be suitable for Class A1 retail, Class A2 professional services, Class A3 – A5 food and drink uses and Class D1 non-residential uses (medical centre etc.).
- 10.19 In terms of Cottam, whilst a formal application for a mixed-use development including a Tesco foodstore, commercial units (Class A1 – A5 and D1), a public house and Class B1a office development is presently undetermined given technical issues, the site benefits from both a s7 New Town Act allocation for new commercial development (including new foodstore). Whilst the proposed Tesco-led development is not a formal planning commitment at this stage it is our view that the wider development would function as a district centre in terms of the foodstore anchor and mix of supporting commercial uses.

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- 10.20 In terms of emerging Core Strategy, policy should seek to protect key retail and service uses within the respective district centres and new retail provision should be of an appropriate scale to the centre's local catchment and not materially undermine the primacy of the town centres.

## **TIER 4 - LOCAL CENTRES**

- 10.21 There are a large number of local centres in the Central Lancashire area which support a number of local shops and basic services, meeting local residents' daily (top-up) shopping needs. The following list of local centres is not exhaustive and has been based on the adopted Local Plans for the three local authority areas:
- **CHORLEY** – Adlington; Euxton; Coppull; Clayton-le-Woods; Croston; Eccleston; Clayton Brook; Whittle-le-Woods; Brinscall; Withnell; Wheelton; and Mawdesley
  - **PRESTON** – Lane Ends; Plungington Road; Sharoe Green (Fulwood); Ribbleton Lane; New Hall Lane; Gamull Lane; Miller Road; Longsands Lane; and Blackpool Road.
  - **SOUTH RIBBLE** – Tardy Gate; Earnshaw Bridge; Farington; Gregson Lane; Higher Walton; Kingsfold; New Longton; Seven Stars; Walmer Bridge; and Walton-le-Dale.
- 10.22 Detailed survey plans showing the retail composition of the district and local centres is provided at Volume 2 of this report. The surveys show that the centres typically include a small range of shops (small supermarket) and basic facilities (post-office, newsagent etc.) serving a small localised catchment
- 10.23 Whilst it is recommended in some instances to rationalise local centre boundaries for development management purposes, it is particularly important that Class A1 retail uses and particularly convenience shops, in local centres continue to be recognised as essential services and protected where possible. The loss of essential local shops and services, particularly in rural areas, should be resisted in policy terms.
- 10.24 In addition to protecting existing local centre facilities, the Joint Core Strategy identifies housing growth options across the Central Lancashire area. In areas subject to potential major new residential developments, the respective local authorities should seek to enhance the existing network of local centres (i.e. potential expansion) or proactively plan for new local centres, which include basic retail and service facilities, to meet enhanced local needs.
- 10.25 The Council should be genuinely satisfied that the scale and type of retail provision is local in nature (scale) and will not perform a wider retail function (i.e. main food shopping) or become a retail destination in its own right, potentially undermining existing / planned district and town

centre provision. Any new provision as part of residential-led mixed-use scheme should be subject to the appropriate PPS4 planning policy tests.

## 11. STUDY CONCLUSIONS

- 11.1 The study has been commissioned to assess the future quantitative capacity and qualitative need for new retail and commercial leisure provision within the principal centres in Central Lancashire. The study is informed by a PPS4 compliant healthcheck assessment and comprehensive household and in-centre shopper surveys.
- 11.2 On the basis of the outputs of the healthcheck assessment and survey results, and with the aim of proactively planning for the enhancement of the principal centres in Central Lancashire, we set out specific recommendations for each centre.
- 11.3 In formulating a strategy for the principal centres, the recommendations of this study should be read in conjunction with the emerging suite of LDF documents and non-statutory (town) centre masterplans which will fully address matters of accessibility, urban renewal / regeneration and environmental improvements.

### CHORLEY

#### CONVENIENCE

- 11.4 On the basis of the quantitative assessment, there is limited scope for significant market enhancement within the Chorley catchment. The existing out-of-centre Morrison's store in Chorley is however significantly overtrading to the extent that there is a material need for a new sequentially compliant foodstore in the town centre. A new mainstream foodstore, of comparable scale to the existing Morrison's store, would enhance choice and provide effective competition for local residents on a like-for-like basis. The emerging LDF should therefore identify the need for a sequentially preferable site.

#### COMPARISON

- 11.5 Whilst the town centre retains just under half of all comparison expenditure arising within the Chorley catchment, the survey-based exercise finds that it secures only 35% of clothing and fashion spend. A qualitative review of the town centre fashion offer indicates that the existing provision, with the exception of two mainstream fashion multiples is orientated towards the value end of the market.
- 11.6 There is a quantitative and qualitative need to plan for new comparison retail provision within the town centre through the emerging LDF process. The north eastern area of the town

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centre around the Market Walk shopping centre, which includes surface car parks, would provide a logical extension to the town centre primary shopping core. There is no need to plan for new bulky goods provision given the existing out-of-centre offer which includes a DIY store and mainstream electrical retailer.

## **DEVELOPMENT MANAGEMENT**

- 11.7 The adopted Local Plan has various retail boundary designations; it is recommended that the existing designations are rationalised in accordance with PPS4 guidance. The emerging Core Strategy should identify the north eastern area of the town centre as an extension to the defined primary shopping area to meet the quantitative and qualitative need for new retail development in the town centre.
- 11.8 Appropriate boundaries for existing local centres have been defined and it is recommended that the emerging Core Strategy maintains policies to prevent the loss of local retailing to non-retail uses.

## **SOUTH RIBBLE**

### **CONVENIENCE**

- 11.9 There is no need to plan for new convenience provision in Leyland through the Core Strategy process. The town has a strong convenience offer including Tesco, Morrison's and three discount multiples (Aldi etc.).
- 11.10 The survey-based exercise however shows that Bamber Bridge district centre is not performing its intended shopping function within the local area. The limited market share performance reflects the limitations of the existing district centre convenience offer (Somerfield store) in comparison to the large full-range out-of-centre Sainsbury's store.
- 11.11 There is quantitative and qualitative scope for a new centrally located (sequentially compliant) mainstream foodstore in Bamber Bridge in order to clawback expenditure presently flowing to out-of-centre provision. A new centrally located store of comparable scale to the Sainsbury's store would deliver significant material benefits to the district centre by assisting in regeneration, promoting linked trips within the centre and increasing footfall. The emerging Core Strategy should therefore seek to identify an appropriate site.

## COMPARISON

- 11.12 Leyland has a limited comparison retail offer (Tesco non-food etc.) and the survey results indicate that most local residents visit the Capitol Centre (Walton-le-Dale) or Preston city centre for their main comparison shopping needs (clothing etc.). Whilst the capacity assessment identifies a quantitative need for new comparison provision in Leyland, the town performs a secondary role in the Central Lancashire retail hierarchy and it is considered that there are limited commercial prospects of securing the mainstream retailers required to deliver a qualitative uplift in market share performance. The primary focus for Leyland through the emerging Core Strategy should be on enhancing town centre vitality and viability through continued investment in the primary shopping area in accordance with the Town Centre Masterplan priorities.
- 11.13 Bamber Bridge serves localised day-to-day comparison shopping needs and there is no requirement to proactively plan for new provision through the emerging LDF.

## DEVELOPMENT MANAGEMENT

- 11.14 Appropriate primary and secondary retail frontages have been identified in accordance with PPS4 guidance and on the basis of visits to Leyland town centre.
- 11.15 Appropriate boundaries for existing local and district centres have been defined and it is recommended that emerging Core Strategy maintains policies which seek to prevent the loss of Class A1 retail outlets to non-retail uses; maintaining existing fascia / frontage policies which prevent the loss of Class A1 uses should be retained and enhanced where appropriate.

## PRESTON

### CONVENIENCE

- 11.16 There is a formal need for new mainstream foodstore provision in Preston in order to address the significant overtrading position of the existing out-of-centre Morrison's and Asda stores. The existing foodstore planning commitment at Queens Retail Park (city centre) should rebalance the overtrading position of the existing Morrison's store in particular.
- 11.17 There is also a proposal for a new Tesco foodstore at Cottam which is presently undetermined; the locality does however benefit from an s7 New Town allocation for a foodstore as part of a new centre. If the Tesco proposal does not come forward in its present

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scheme, then the Council should plan for a new foodstore in the North West Preston area through the emerging LDF.

## COMPARISON

- 11.18 Preston city centre serves a significant catchment extending beyond the Central Lancashire area into the wider region. The survey-based exercise identifies a significant requirement for new comparison retail floorspace within the city centre in order to enhance the existing offer and enable the centre to better perform its intended sub-regional role for the wider Central Lancashire area.
- 11.19 The capacity identified in the quantitative assessment is not reliant on any market share increase or any trade diversion from surrounding centres in the sub region. Any potential enhancement of the city centre retail offer would be in full accordance with PPS4 given the material economic benefits (increased expenditure retention; encouragement of increased footfall and linked trips potential) and sustainability benefits (trade clawback from out-of-centre retail parks, promoting linked shopping trips and reducing the need to travel) that new provision would deliver.
- 11.20 There is also an overriding qualitative need for new retail development in the city centre given the existing deficiencies in its offer. There is limited consumer choice and competition within Preston city centre and it presently lacks modern retail units (department stores and large floorplates) and family orientated leisure uses, which would enhance vitality and viability.
- 11.21 It is recommended therefore that the Council should therefore maintain its current and emerging LDF policy support for a significant quantitative expansion of the city centre comparison retail offer. As previously detailed, a '*do nothing*' scenario is likely to lead to a further erosion in the market share and overall competitiveness of the city centre in light of significant competition from larger regional centre destinations (Manchester and Liverpool City Centres; Trafford Centre) and local out-of-centre retail park destinations (Capitol Centre and Deepdale Shopping Park).
- 11.22 A significant enhancement in the city centre comparison retail offer would deliver significant local benefits by recapturing expenditure which is presently flowing to sequentially inferior out-of-centre retail park locations which offer no opportunities for linked shopping trips. On the basis of the overriding need for enhancement of the city centre retail offer, there is no formal need or PPS4 justification for the Council to proactively plan for additional out-of-centre comparison retail provision through the emerging LDF.

## DEVELOPMENT MANAGEMENT

- 11.23 It is recommended that the existing primary shopping area (PSA) identified in the adopted Local Plan should be extended to reflect the extant planning permission to extend the Fishergate Centre and to include the Tithebarn regeneration area (as per the adopted SPD). The Tithebarn regeneration area provides a significant opportunity to effectively integrate new retail development with the existing primary shopping area and meet the identified need for new comparison retailing in the city centre. The wider city centre boundary defined in the adopted Local Plan should be retained for other main PPS4 uses (offices etc).
- 11.24 The primary retail frontages identified in the existing adopted Local Plan should be broadly retained with some minor revisions.
- 11.25 Appropriate boundaries for existing local centres have been defined and it is recommended that the emerging LDF maintains policies to prevent the loss of local retailing to non-retail uses (i.e. adopted Local Plan policy S8). There is no PPS4 justification for identifying existing freestanding foodstores (Sainsbury's Deepdale, Asda Fulwood etc.) as formal centres in the city-wide retail hierarchy / network.

## OUT-OF-CENTRE RETAIL PARKS

- 11.26 The quantitative and qualitative assessments show that the existing out-of-centre retail parks in Central Lancashire (Deepdale, Preston and Capitol Centre, South Ribble) account for a significant share of available comparison retail expenditure. The out-of-centre retail parks have a mix of high street comparison retailers (clothing and fashion) and bulky goods provision. The retail parks therefore compete on a like-for-like basis with Preston city centre and have a comparative advantage in terms of free car parking provision.
- 11.27 In light of the centre-by-centre recommendations set out above and reflecting the 'centres first' approach set out in PPS4, it is recommended that the Joint Authorities do not proactively plan for new out-of-centre retail provision during the emerging LDF period to 2026.
- 11.28 It is understood however that the Capitol Centre benefits from an open Class A1 planning permission and that there are emerging proposals for a new foodstore on the site. Whilst the further strengthening of the Capitol Centre as a retail destination is likely to impact upon surrounding centres, given the unrestricted planning permission, the Council should seek to work with the retail park owners to ensure that future development is managed.