SOUTH RIBBLE
BOROUGH COUNCIL
forward with South Ribble

Leyland Town Centre Retail Position Paper

October 2012

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Introduction

Despite the migration to out of town shopping Town Centres continue to have an important role to play in any district. They form a focal point for the community and provide a wide range of services that are accessible to the whole population including retail, employment, leisure, residential, education and transport.

Leyland is regarded as the main shopping centre in South Ribble. Leyland Town Centre comprises the shopping core of Hough Lane, the southern Towngate area, which features a Tesco Extra superstore, and the Churchill Retail Park. Leyland offers an extensive range of both convenience and comparison goods and services, serving a wide catchment area.

The evolving Central Lancashire Core Strategy Development Plan Document identifies Leyland Town Centre in the retail hierarchy as a second tier centre, also known as a Principal Town Centre.

It is important that Leyland retains its status within the retail hierarchy, remains competitive with its neighbours, and continues to attract shoppers, visitors and businesses to the town. Whilst it is accepted that people will go to other centres for certain products, it is important that the town builds on its strengths, recognises and alleviates its weaknesses and improves the facilities that it provides to the community.

The National Planning Policy Framework (NPPF) sets out the Government's planning policies for England and how these are expected to be applied. The purpose of the planning system is to contribute to the achievement of sustainable development which includes an economic role.

The NPPF requires that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, it requires local planning authorities to:

- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- Define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- Define the extent of town centres and primary shopping areas;
- Promote competitive town centres that provide customer choice and a diverse retail offering and which reflect the individuality of town centres;
- Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive.

It further requires Local Planning Authorities to ensure that the Local Plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. Local planning authorities should ensure that their assessment of and strategies for housing, employment and other uses are integrated, and that they take full account of relevant market and economic signals. They are required to work with partners to prepare and maintain a robust evidence base to understand both existing business needs and likely changes in the market.

This document provides a 'snapshot' in time of the current situation in Leyland, and builds on previous survey work to enable comparative analysis to be undertaken and trends to be identified. This report will feed into the evidence base of the evolving Local Development Framework and will identify early signs of change and the type of action that should be taken.

Diversity of Use Assessment

As stated above, the NPPF requires Local Planning Authorities to promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres. This document identifies the range of uses within Leyland Town Centre and the Leyland Primary Retail Frontage area. The boundaries of each are shown in Appendices 1 and 2.

Methodology

Leyland Town Centre boundary (see Appendix 1), is identified in the South Ribble Local Plan 2000 and emerging Site Allocations DPD, and is used as the survey area. Principally, it stretches from Golden Hill Lane in the north to Southern Towngate and the historic Leyland Cross area in the south.

The most recent survey was undertaken on 4th/5th October 2012, by recording the use of each unit within the survey area. Empty premises were classified as vacant thus allowing a comparison to be made against previous year's vacancy rates.

The survey identified the location of the various use classes, allowing the information to be compared to the last survey. The Town and Country Planning (Use Classes) Order 1987 and its subsequent amendments were used to identify the diversity of uses within the survey area. Details of the 1987 Use Classes Order are included in Appendix 3 – Use Classes Order.

Usage and Vacancies

The maps at Appendices 1 and 2 shows the boundaries of Leyland Town Centre (LTC) and Leyland Primary Retail Frontage (LPRF). As can be seen, the Primary Retail Frontage lies within the Town Centre.

Primary Retail Frontages define the retail heart of town centres where multiples and other national high street outlets are typically located, where levels of pedestrian activity are usually at their greatest and where concentrations of Class A1 retail uses are generally predominant.

The Leyland Town Centre Primary Retail Frontage area is identified in the South Ribble Interim Planning Policy: Retail, and shown in Appendix 2. The survey area constitutes the following properties:

- Numbers 2 (The Gables) to 60 (Leyland Lion) inclusive on the south side of Hough Lane and numbers 1 (Ladbrokes) to 69 (Antonello's) inclusive on the north side of Hough Lane.
- Numbers 175 (Asda) to 157 (JSM Furniture Superstore) on the west side of Towngate.

The introduction of significant numbers of non-retail uses into Primary Retail Frontages, such as banks, building societies and other professional activities, can introduce breaks in the continuity of retail frontages. These 'dead frontages' can be visually disruptive and may be discouraging to shoppers. They can also reduce the choice of units available to retailers, fragmenting and weakening the established shopping centres and making them less vibrant places.

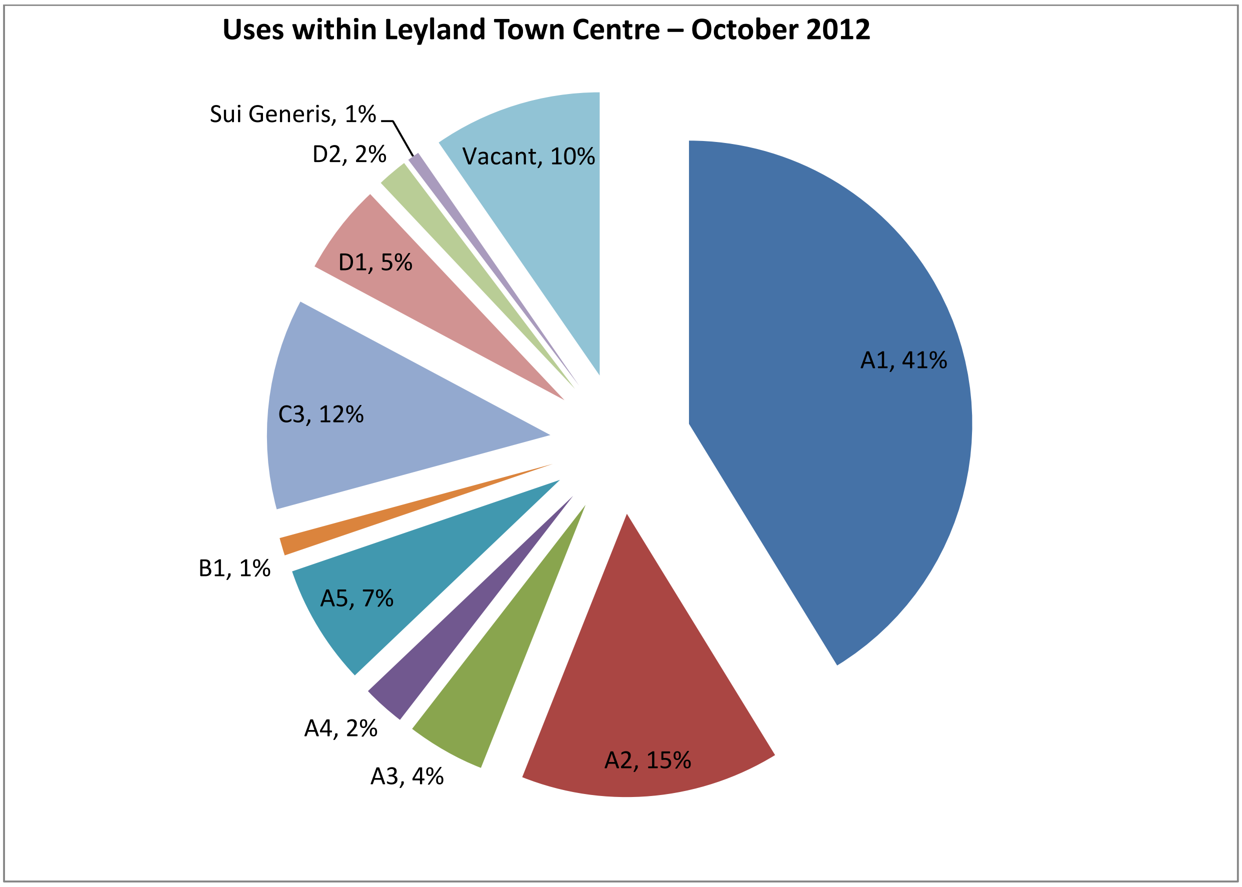
291 units were surveyed in Leyland Town Centre and a range of facilities were identified including convenience and comparison retail and other services. The following table identifies the results of

the October 2012 survey, outlining the number and percentage of units designated under each Use Class.

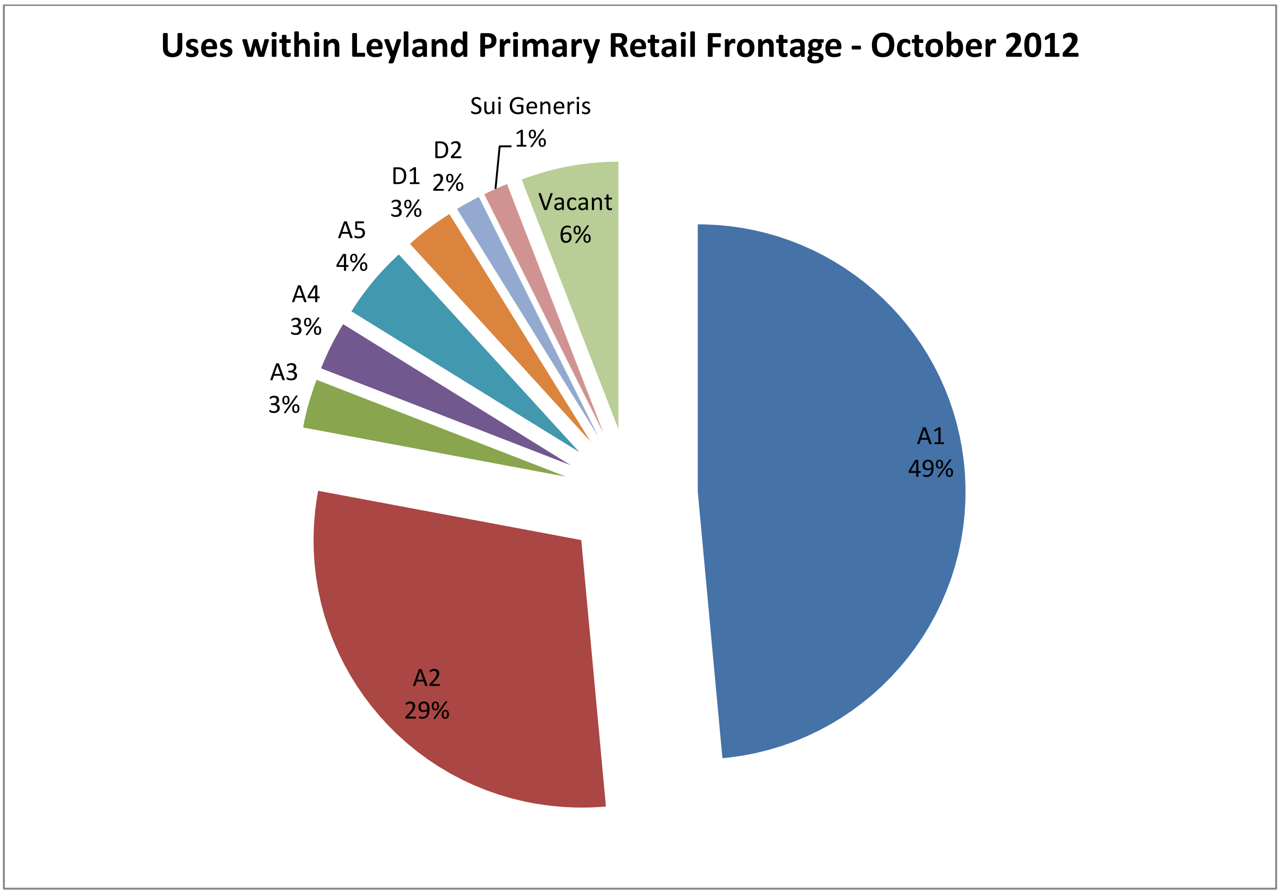
Table 1 - Range of Facilities Identified in Leyland Town Centre Survey October 2012

Use Class	Number of Units (October 2012) LTC	% of Units (October 2012) LTC	Number of Units (October 2012) LPRF	% of Units (October 2012) LPRF
A1	120	41%	33	49%
A2	43	15%	20	29%
A3	13	4%	2	3%
A4	7	2%	2	3%
A5	20	7%	3	4%
B1	3	1%		
C3	35	12%		
D1	15	5%	2	3%
D2	5	2%	1	1%
Sui Generis	2	1%	1	1%
Vacant	28	10%	4	6%
TOTAL	291	100%	68	100%

A graphic representation of the results is shown below.



As expected in a Town Centre location, A1 retail dominates the town centre with a 41% (120 units) share of units; this is followed by A2 professional and financial services (15%/43 units). A proportion of the study area is characterised by the A3, A4 and A5 Use Class (13%/40 units combined). A relatively high proportion of the survey area is composed of residential dwellings, Use Class C3 (12%/35 units).
Appendix 4 identifies the number and percentage of units, identified under the Use Classes classification represented in Leyland Town Centre from April 2007 to October 2012.

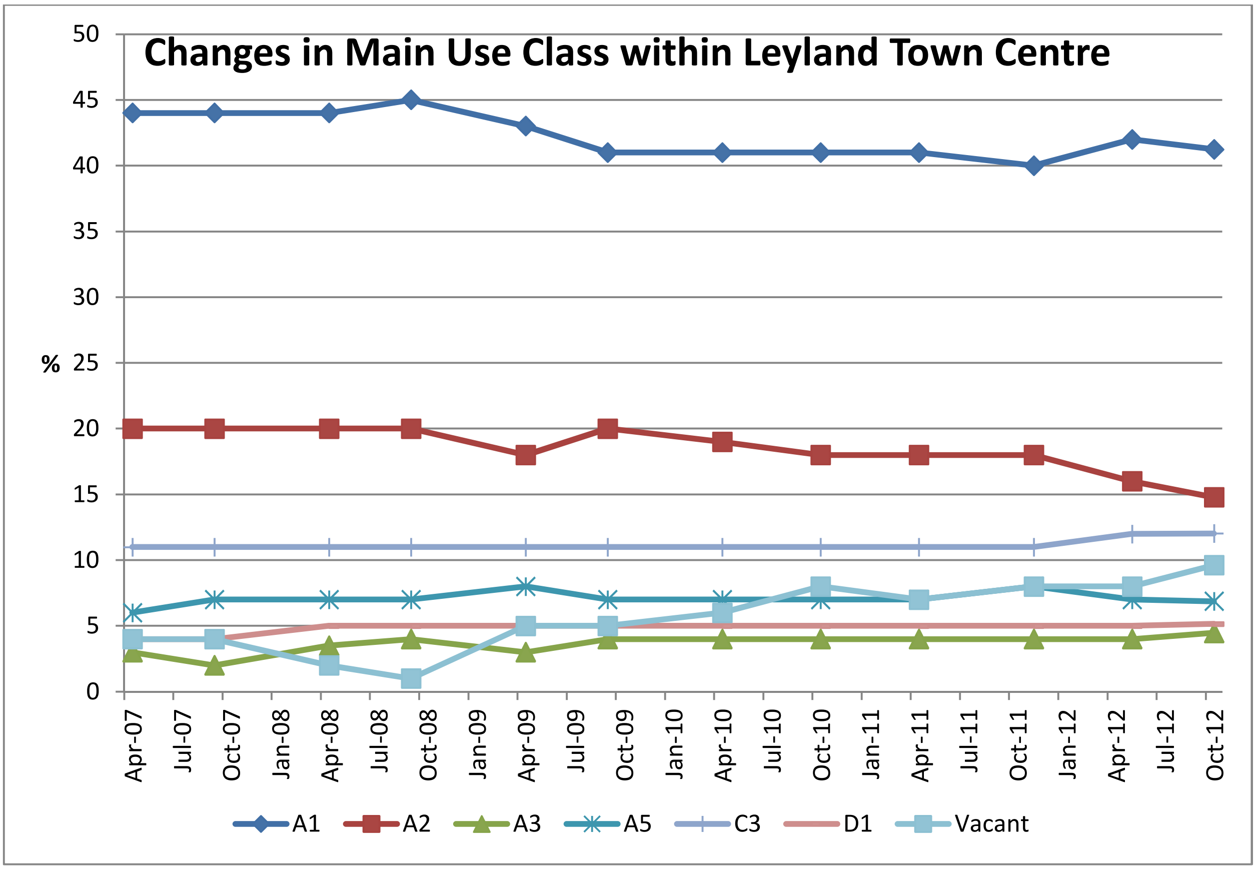


The Primary Retail Frontage Area is dominated by A1 uses (49%/33 units) however there is also a strong representation of A2 uses (29%/20 units). Vacant units represent the third largest use class representation (6%/4 units) in this area, an improvement compared to November 2011 when the figures were 12%/8 units.

Appendix 5 identifies the number and percentage of units, identified under the Use Class classification represented in Leyland Town Centre Primary Retail Frontage from April 2007 to October 2012.

Survey data from 2001 to 2006 is included in Appendix 6 for reference.

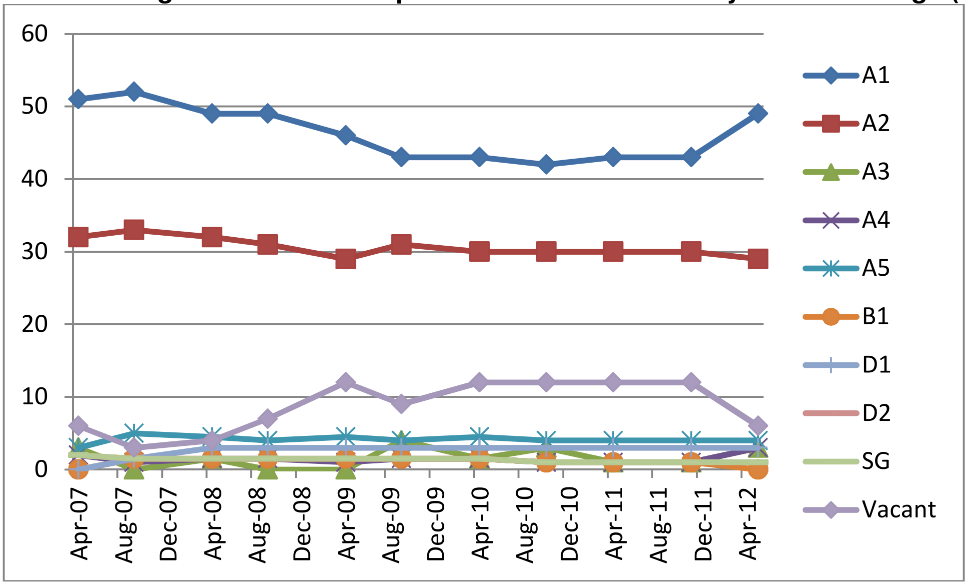
The following graph identifies the percentage change in terms of changes to the main Leyland Town Centre Use Classes over the period April 2007 to October 2012. The graph identifies A1, A2, A5, C3 and D1 uses together with vacant units.



As can be seen, the fortunes of the main Use Classes within Leyland Town Centre have varied from April 2007 to October 2012. The above graph shows that the percentage of A1 (retail) has increased by 2% (8 units) since November 2011 and the percentage of A2 (financial and professional services) have decreased by 2%. Over the same period of time there appears to be little movement in the proportion of the other main Use Classes represented within the study area.

The chart below identifies the percentage change in terms of changes to the Leyland Town Centre Primary Retail Frontages Use Classes over the period April 2007 to October 2012.

Chart 1 - Change in Use Class Representation in the Primary Retail Frontage (%)



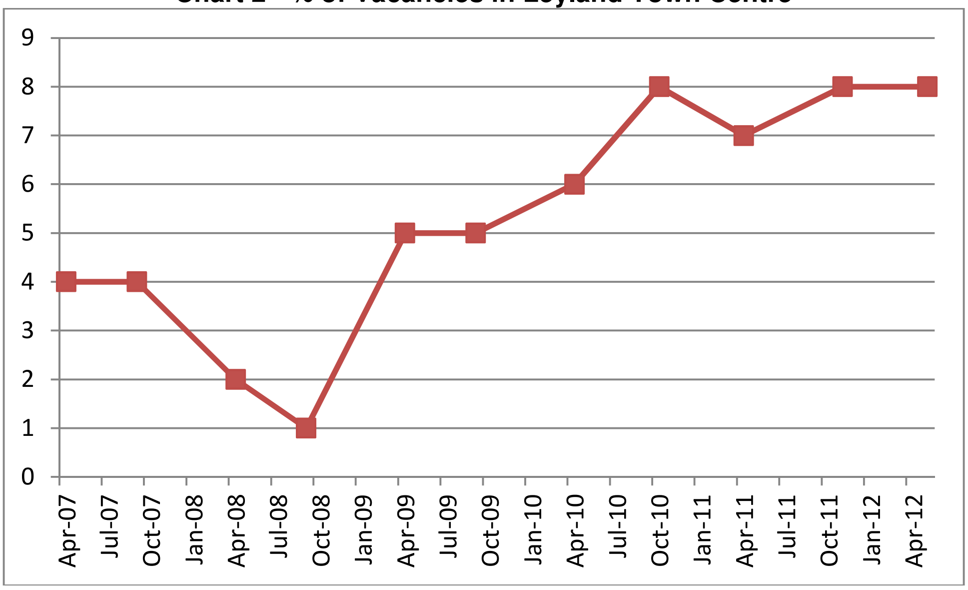
The above graph indicates that there has been a rise of 6% points in the proportion of A1 use class units from 43% in November 2011 to 49% in October 2012. Use Classes A2 to A5 have remained fairly consistent since 2007 with only minor fluctuations in terms of representation.

Vacancies

The number of vacant units in a shopping centre can suggest that the centre is not performing well or that available floorspace does not meet the demand of some retailers if, for example, units are considered to be the wrong size or inappropriately located. Vacancies can, therefore, arise even in strong centres and should not necessarily always be considered a sign of weakness. In some circumstances vacant units provide opportunities for retail transition to occur which can help to maintain the vitality and viability of a centre.

The following graph shows the percentage change in terms of vacancy rates from April 2007 to October 2012. Details of vacancy rates 2001-2006 are outlined in Appendix 6.

Chart 2 - % of Vacancies in Leyland Town Centre



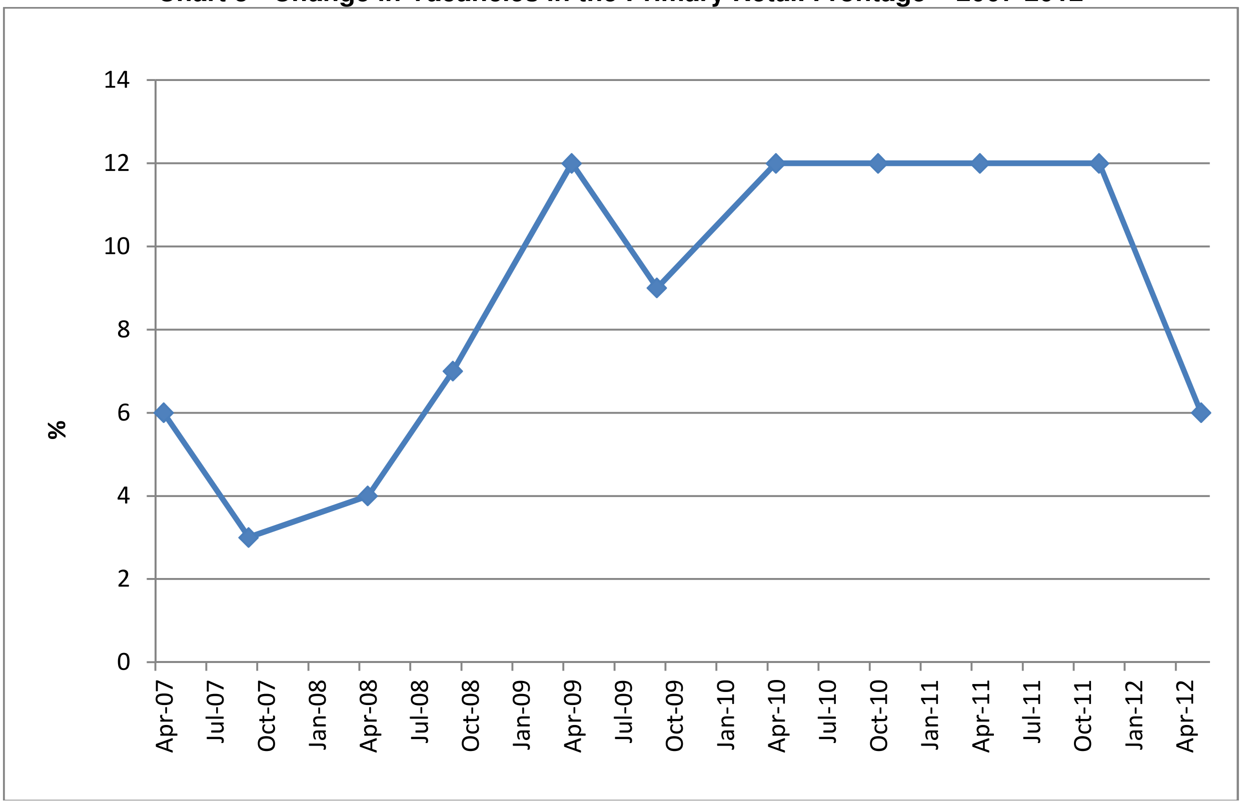
The October 2012 survey identifies a vacancy rate of 8% (24 properties), no change since the November 2010 survey. There has been a sharp rise in the proportion of vacancies, from 1% to 8%, since September 2008. The vacancy rate varies for each survey interval which suggests that the diversity of uses changes quickly within the Town Centre.

The proportion of vacancies from 2001 to 2006 (details outlined in Appendix 6) indicate that the percentage of vacancies ranged from a high of 10.9% in 2005 to low of 6.8% only one year later in 2006.

Appendix 1 shows the distribution of uses within Leyland Town Centre. The map indicates that A1 uses are distributed across the majority of the survey area apart from the far south west of the area where there is a concentration of D1 and D2. There is a concentration of C3 uses (dwellings) along the mid-section of Towngate on the east side of the street. Vacant units are peppered around the survey area. The larger units in the Town Centre are used predominantly for A1 uses.

The following graph identifies the percentage change of vacancy rates from April 2007 to October 2012.

Chart 3 - Change in Vacancies in the Primary Retail Frontage – 2007-2012



Following four consecutive surveys showing 12% of units being vacant, the figure for October 2012 result of only 6% is very pleasing. The lowest proportion of vacant units within the study period was identified in the September 2007 survey, when only 3% of surveyed units were vacant.

Appendix 2 shows the distribution of uses within the Primary Retail Frontage Area. The map clearly demonstrates that the Primary Retail Frontage Area is dominated by A1 and A2 uses. All uses identified within the Primary Retail Frontage Area are dispersed across the whole area. There are no excessive proportions of non-retail uses within the Primary Retail Frontage area, with no evidence of there being over proliferation of non-retail uses. The low number of vacant units is spread across the whole of the Primary Retail Frontage Area occupying the smaller units.

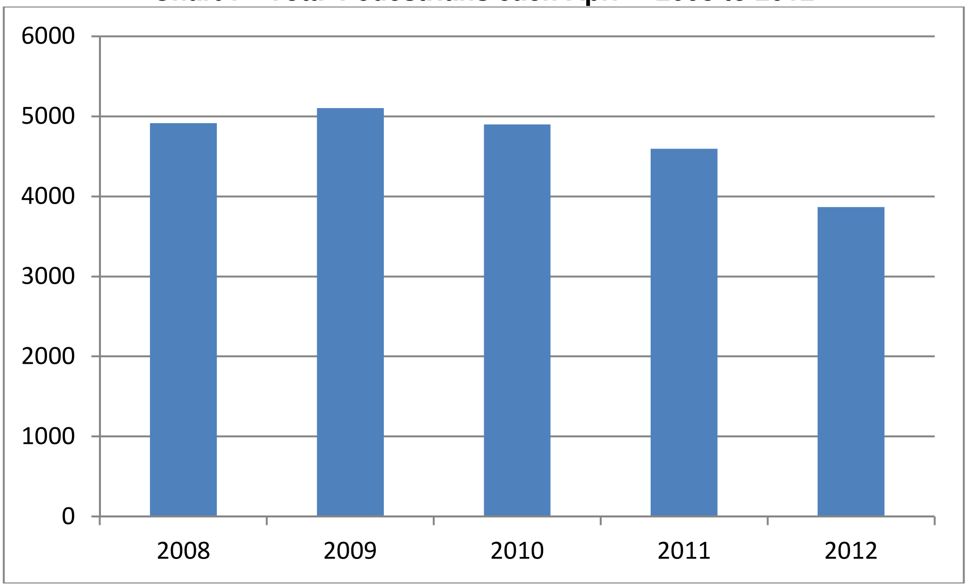
Pedestrian Footfall in Leyland Town Centre and Primary Retail Frontage Area

From April 2012 the Pedestrian Count in Leyland Town Centre has been discontinued due to a lack of resources. The results from previous counts have been included for reference only

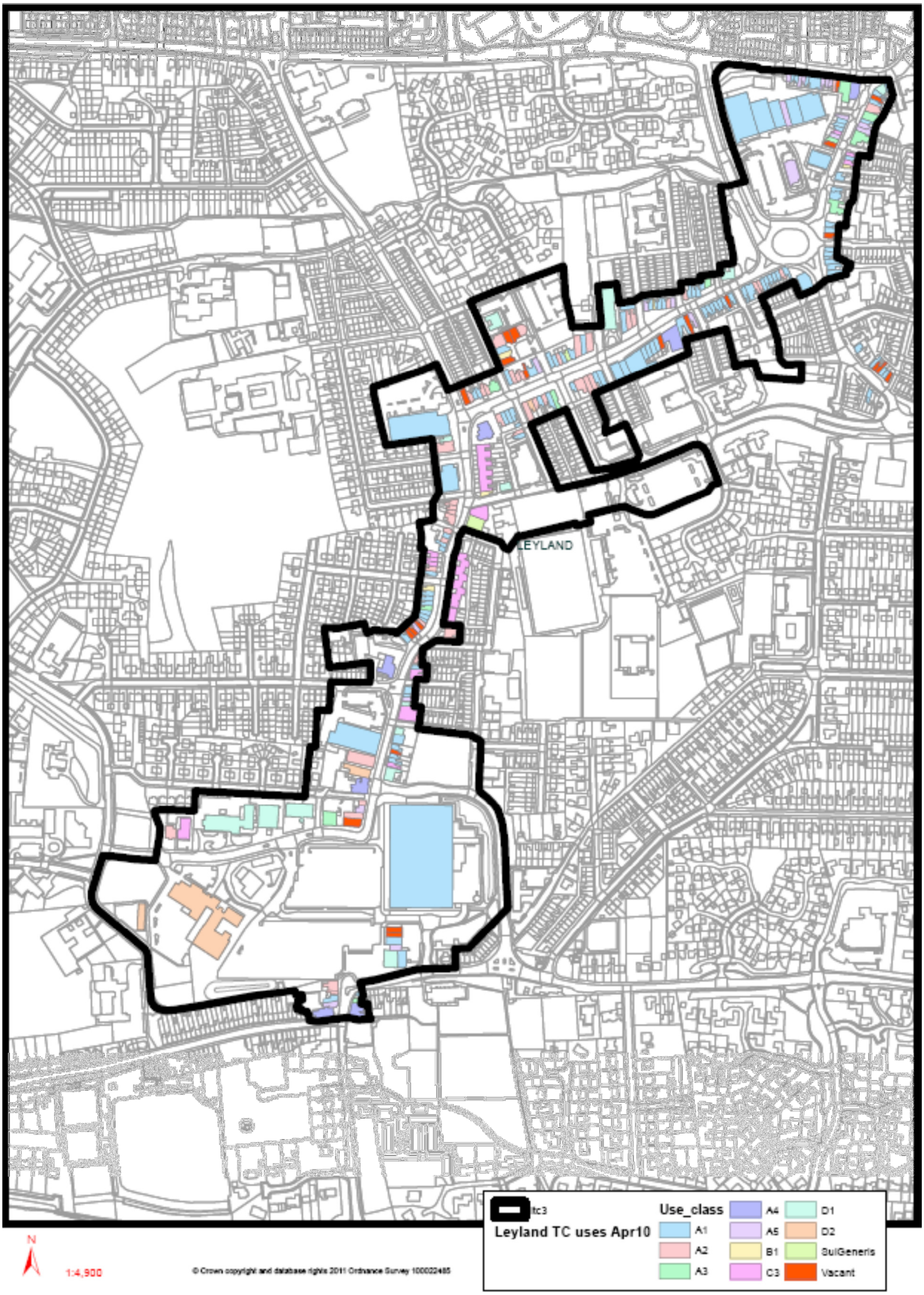
Appendix 7 shows all pedestrian survey data since October 2008.

The April 2012 survey indicated that the combined number of pedestrians for all locations in the Leyland Primary Retail Frontage area increases on Fridays compared to Wednesdays and has been the trend in previous years. This does not include Tesco which is outside the Leyland Primary Retail Frontage area. The number of pedestrians also increased on Friday afternoons when compared to Wednesday afternoons in all locations apart from at Tesco. The combined number of pedestrians identified in the April 2012 survey indicates that the total number of pedestrians counted has decreased compared to the previous April.

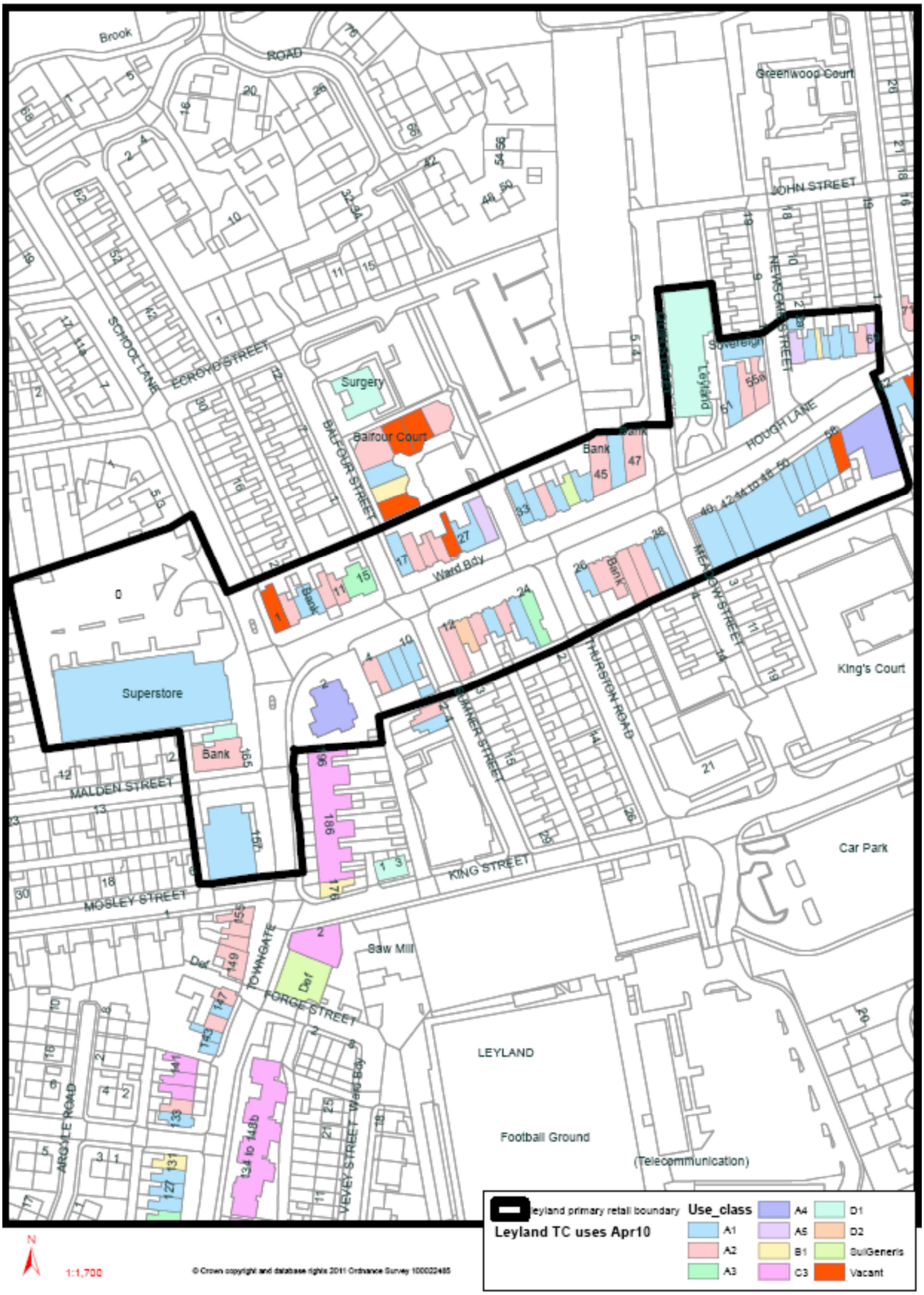
Chart 7 - Total Pedestrians each April – 2008 to 2012



Appendix 1 – Spatial Distribution of Uses within Leyland Town Centre Boundary



Appendix 2 – Spatial Distribution of Uses within Leyland Primary Retail Frontage Boundary



Appendix 3 – Town and Country Planning (Use Classes) Order 1987 (as amended) February 2012

The Town and Country Planning (Use Classes) Order 1987 and its subsequent amendments are utilised to identify the diversity of uses within the survey area. The box below outlines details of the Use Class Order.

A1 Shops - Shops, retail warehouses, post offices, travel agents, sale of cold food for consumption off the premises, hairdressers, funeral directors, hire shops, dry cleaners and internet cafes.

A2 Financial and professional services - Banks, building societies, estate and employment agencies, betting offices, and other financial and professional services.

A3 Restaurants and cafés- For the sale of food and drink for consumption on the premises - restaurants, snack bars and cafes.

A4 Drinking establishments - Public houses, wine bars or other drinking establishments (but not night clubs).

A5 Hot food takeaways - For the sale of hot food for consumption off the premises.

B1 Business - Offices, research and development, light industry appropriate in a residential area.

B2 General industrial – other than B1

B8 Storage or Distribution, - for storage or as a distribution centre including open air storage

C1 Hotels - Hotels, boarding and guest houses where no significant element of care is provided.

C2 Residential institutions - Residential care homes, hospitals, nursing homes, boarding schools, residential colleges and training centres.

C2a Secure Residential institutions – Prisons, young offender institutes, detention centres, secure hospitals, secure local authority accommodation, military barracks

C3 Dwelling houses - Family houses, or houses occupied by up to six residents living together as a single household, including a household where care is provided for residents.

C4 Houses in multiple occupation – use of a dwelling house by 3-6 residents (HMO) more than 6 residents is unclassified and therefore sui generis.

D1 Non-residential institutions - Surgeries, clinics, nurseries, crèches, day centres, non-residential schools, art galleries, museums, libraries, public halls, churches, places of worship, law courts.

D2 Assembly and leisure - Cinemas, concert halls, bingo and dance halls, casinos, swimming baths, skating rinks, gymnasiums or sports arenas (except for motor sports, or where firearms are used).

Sui Generis - theatres, large houses in multiple paying occupation (6+ residents), hostels providing no significant element of care, scrap yards, petrol filling stations and shops selling and/or displaying motor vehicles, retail warehouse clubs, nightclubs, launderettes, taxi or vehicle hire businesses, amusement centres, casinos, funfairs, waste disposal installations, garden centres.

Appendix 4 – Changes in the main Use Classes representation within Leyland Town Centre 2007 - 2012

Use	April 2007 (No)	April 2007 (%)	Sept 2007 (No)	Sept 2007 (%)	April 2008 (No)	April 2008 (%)	Sept 2008 (No)	Sept 2008 (%)	April 2009 (No)	April 2009 (%)	Sept 2009 (No)	Sept 2009 (%)	April 2010 (No)	April 2010 (%)	Oct 2010 (No)	Oct 2010 (%)	Apr 2011 (No)	Apr 2011 (%)	Nov 2011 (No)	Nov 2011 (%)	May 2012 (No)	May 2012 (%)	Oct 2012 (No)	Oct 2012(%)
A1	122	44	123	44	122	44	127	45	119	43	117	41	113	41	112	41	114	41	115	40	123	42	120	41
A2	56	20	54	20	56	20	55	20	50	18	56	20	52	19	49	18	51	18	52	18	46	16	43	15
A3	7	3	5	2	9	3.5	10	4	8	3	11	4	10	4	11	4	10	4	12	4	12	4	13	4
A4	6	2	6	2	6	2.5	7	2	5	2	6	2	6	2	6	2	6	2	6	2	7	2	7	2
A5	17	6	19	7	19	7	19	7	21	8	20	7	19	7	18	7	19	7	22	8	20	7	20	7
B1	7	3	8	3	6	2	7	2	6	2	7	2	7	2	5	2	7	3	4	1	4	1	3	1
C3	31	11	31	11	31	11	31	11	31	11	31	11	31	11	30	11	30	11	33	11	35	12	35	12
D1	11	4	12	4	13	5	13	5	13	5	15	5	13	5	13	5	14	5	13	5	14	5	15	5
D2	6	2	6	2	5	2	5	2	5	2	5	2	5	2	5	2	5	2	5	2	5	2	5	2
SG	4	1	4	1	4	1	4	1	3	1	4	1	4	1	2	1	3	1	3	1	2	1	2	1
Vacant	8	4	11	4	5	2	4	1	16	5	15	5	18	6	23	8	19	7	22	8	24	8	28	10
	275		279		276		282		277		287		278		274		278		287		292		291	100

Appendix 5 – Changes in the main Use Class representation within Leyland Town Centre Primary Retail Frontage 2007 – 2012

Use	April 2007 (No)	April 2007 (%)	Sept 2007 (No)	Sept 2007 (%)	April 2008 (No)	April 2008 (%)	Sep 2008 (No)	Sept 2008 (%)	April 2009 (No)	April 2009 (%)	Sept 2009 (No)	Sept 2009 (%)	April 2010 (No)	April 2010 (%)	Oct 2010 (No)	Oct 2010 (%)	Apr 2011 (No)	Apr 2011 (%)	Nov 2011 (No)	Nov 2011 (%)	May 2012 (No)	May 2012 (%)	Oct 2012 (No)	Oct 2012 (%)
A1	33	51	35	52	33	49	33	49	31	46	30	43	29	43	*28*	42	29	43	29	43	33	49		
A2	21	32	22	33	22	32	21	31	20	29	22	31	20	30	20	30	20	30	20	30	20	29		
A3	2	3	0	0	1	1.5	0	0	0	0	3	4	1	1.5	2	3	1	1	1	1	2	3		
A4	1	2	1	1	1	1.5	1	1.5	1	1	1	1.5	1	1.5	1	1	1	1	1	1	2	3		
A5	2	3	3	5	3	4.5	3	4	3	4.5	3	4	3	4.5	3	4	3	4	3	4	3	4		
B1	0	0	1	1.5	1	1.5	1	1.5	1	1.5	1	1.5	1	1.5	1	1	1	1	1	1	0	0		
D1	0	0	1	1.5	2	3	2	3	2	3	2	3	2	3	0	3	2	3	2	3	2	3		
D2	1	2	1	1.5	1	1.5	1	1.5	1	1.5	1	1.5	1	1.5	2	1	1	1	1	1	1	1		
SG	1	2	1	1.5	1	1.5	1	1.5	1	1.5	1	1.5	1	1.5	1	1	1	1	1	1	1	1		
Vacant	4	6	2	3	3	4	5	7	8	12	6	9	8	12	1	12	8	12	8	12	4	6		
	65		**67**		**68**		**68**		**68**		**70**		**67**		**59**		**67**		**67**		**68**			

Appendix 6 – Diversity of use statistics for all Leyland Town Centre (2001 – 2006)

	2001 (No)	2001 (%)	2002 (No)	2002 (%)	2003 (No)	2003 (%)	2004 (No)	2004 (%)	2005 (No)	2005 (%)	2006 (No)	2006 (%)
A1	121	46.2	116	41.9	120	42.9	102	41.1	109	40.8	115	43.6
A2	40	15.3	44	15.9	42	15	41	16.5	43	16.1	46	17.4
A3/A4/A5	28	10.7	29	10.5	29	10.4	28	11.3	29	10.9	29	11.0
B1	10	3.8	11	4.0	9	3.2	9	3.6	7	2.6	8	3.0
B2	1	0.38	2	0.7	2	0.7	1	0.4	0	0	0	0
C3	30	11.5	30	10.8	30	10.7	27	10.9	30	11.2	29	11.0
D1	5	1.9	11	4.0	11	3.9	9	3.6	10	3.7	10	3.8
D2	3	1.1	6	2.2	6	2.1	6	2.4	6	2.2	6	2.3
SG	4	1.5	5	1.8	5	1.8	5	2.0	4	1.5	3	1.1
Vacant	20	7.6	23	8.3	23	9.3	19	7.7	29	10.9	18	6.8
Total	**262**		**277**		**280**		**248**		**267**		**264**	

Appendix 7 – Detailed Pedestrian Count Data October 2008 to April 2012

OCTOBER

	October 2008				October 2009				October 2010				October 2011			
	Wed	Wed	Fri	Fri	Wed	Wed	Fri	Fri	Wed	Wed	Fri	Fri	Wed	Wed	Fri	Fri
Market Day?	No	No	Yes	Yes	No	No	Yes	Yes	No	No	Yes	Yes	No	No	Yes	Yes
Time	10.00-10.30	13.00-13.30	10.00-10.30	13.00-13.30	10.00-10.30	13.00-13.30	10.00-10.30	13.00-13.30	10.00-10.30	13.00-13.30	10.00-10.30	13.00-13.30	10.00-10.30	13.00-13.30	10.00-10.30	13.00-13.30
Weather Conditions	cool, damp, partly sunny	sunny, cool	cool, cloudy	cool, breezy, cloudy	dry, cold, clear	dry, cool, fairly sunny and bright	sunny, cold, dry	dry, cold, bright	dry, bright, cold	dry, bright, cold	Drizzle, cold	Cold, damp	Showery, cold	Bright, cold	Cloudy, damp	Cloudy, damp
Tesco	168	191	232	263	110	366	183	253	94	206	122	206	209	392	97	129
Gables Car Park Entrance	83	115	101	156	78	95	87	138	56	111	69	106	60	114	139	215
Bean Drinking, Hough Lane	75	87	141	131	84	81	94	174	77	118	105	91	65	94	145	120
Johnsons Cleaners	181	173	335	281	191	180	262	375	143	197	293	257	126	171	301	288
Corner 26 Thurston Rd	182	292	299	374	240	257	284	368	194	362	336	404	206	279	272	396
Lower Bank Surgery	166	205	193	223	130	159	153	220	129	219	120	118	116	167	153	180
Chapel Brow - Corner of 23 Fleetwood Street	41	77	42	45	28	53	39	71	27	53	62	87	33	44	42	62
TOTALS	896	1140	1343	1473	861	1191	1102	1599	720	1266	1107	1269	815	1261	1149	1390

APRIL/MAY

	April 09				April 10				April 11				May 12			
	Wed	Wed	Fri	Fri	Wed	Wed	Fri	Fri	Wed	Wed	Fri	Fri	Wed	Wed	Fri	Fri
Market Day?	No	No	Yes	Yes	No	No	Yes	Yes	No	No	Yes	Yes	No	No	Yes	Yes
Time	11.00-11.30	14.00-14.30	10.00-10.30	13.00-13.30	10.00-10.30	13.00-13.30	10.00-10.30	1300-13.30	10.00-10.30	13.00-13.30	10.00-10.30	13.00-13.30	10.00-10.30	13.00-13.30	10.00-10.30	13.00-13.30
Weather Conditions	Bright, dry	Bright, dry	cloudy, cool	cloudy, cool	dry, bright, chilly	dry, bright, chilly	dry, bright, mild	dry, bright warm	Sunny, mild	Sunny, mild	Sunny, warm	Sunny, warm	Cloudy, cold	Wet, windy and cold	Mild, bright	Mild, bright
Tesco	221	282	211	306	164	219	193	237	127	216	128	177	117	80	90	137
Gables Car Park Entrance	66	63	119	183	82	132	115	118	99	101	96	140	58	42	93	140
Bean Drinking, Hough Lane	130	91	95	171	112	91	157	164	169	76	152	191	58	47	142	176
Johnsons Cleaners	183	162	310	201	167	290(E)	325	259	103	136	289	337	154	89	523	326
Corner 26 Thurston Rd	281	272	304	426	249	304	337	335	249	277	360	340	221	188	248	292
Lower Bank Surgery	186	208	187	211	117	178	169	186	119	158	159	191	71	68	155	194
Chapel Brow - Corner of 23 Fleetwood Street	42	69	40	82	30(E)	48	45	75	41	29	40	93	38	26	35	60
TOTAL	1109	1147	1266	1580	5132	820	1341	1374	907	993	1224	1469	717	540	1286	1325